

The logo features a large, stylized red 'R' on the left. The year '2018' is written vertically in light blue to the left of the 'R'. The word 'NATIONAL' is in light blue above the 'RYAN WHITE' text. 'RYAN WHITE' is in large, bold, white letters. Below it, 'CONFERENCE ON HIV CARE & TREATMENT' is in light blue. The background is dark blue with a vertical red bar on the left and a horizontal red bar at the bottom.

2018 NATIONAL
RYAN WHITE
CONFERENCE ON HIV CARE & TREATMENT

Leveraging Business Models to Advance HIV Program Sustainability in ASOs and CBOs

Marissa Tonelli

Director of Health Systems Capacity Building, HealthHIV

Disclosures

No financial interest to disclose.

PESG, HRSA, and LRG staff has no financial interest to disclose.

Learning Objectives

At the conclusion of this workshop, participants will be able to:

- Understand strategies to assess organizational and program sustainability in the changing HIV and healthcare landscape.
- Identify opportunities to leverage business models for HIV program sustainability.
- Describe existing tools for assessing organizational capacity, internal and external opportunities and threats, and assumed risk to determine business model adoption.

Who is in the workshop session?

- Name
- Name and type of organization
- Role in organization
- Biggest HIV program sustainability concern in **ONE** word (internal & external)

Major Shifts in Healthcare 2017 - 2018

- Consolidation (mergers) of insurers and providers, e.g. CVS and Aetna, DaVita and United HealthGroup, Amazon?
- Opioid crisis & increase in drug overdose deaths
- Patient experience is more important than ever (continued transition from volume-based to value-based)
- Health reforms (post “Repeal and Replace”)
 - Reduced spending on Medicaid
 - Delayed Health Insurance Tax (HIT) and other ACA tax
 - Medicare Reform



Healthcare Sector Changes Impacting ASO/CBOs

- Reduction in federal and state funding for public health services is forcing the non-profit sector to change
- Enhanced integration of medical and public health systems (biomedical prevention)
- Focus on quality, collaborative, and/or accountable care models
- New payment models, e.g. fee-for-service
- Healthcare reform changes

Public Health Funding

- Discretionary government money is changing at all levels for HIV prevention and care programs
- Realignment of funding to address sector changes (e.g. CDC PS18-1802, opioid crises)
- Most state and territorial health agencies have reported budget cuts for prevention services
- Uncertainty of Ryan White HIV/AIDS Program funding

Models for Care Coordination/Integration

- Screening

- Clinical and Non-Clinical Shared Role

- Diagnosis

- Clinical

- Linkage to Care

- Clinical and Non-Clinical Shared Role

- Retention in Care

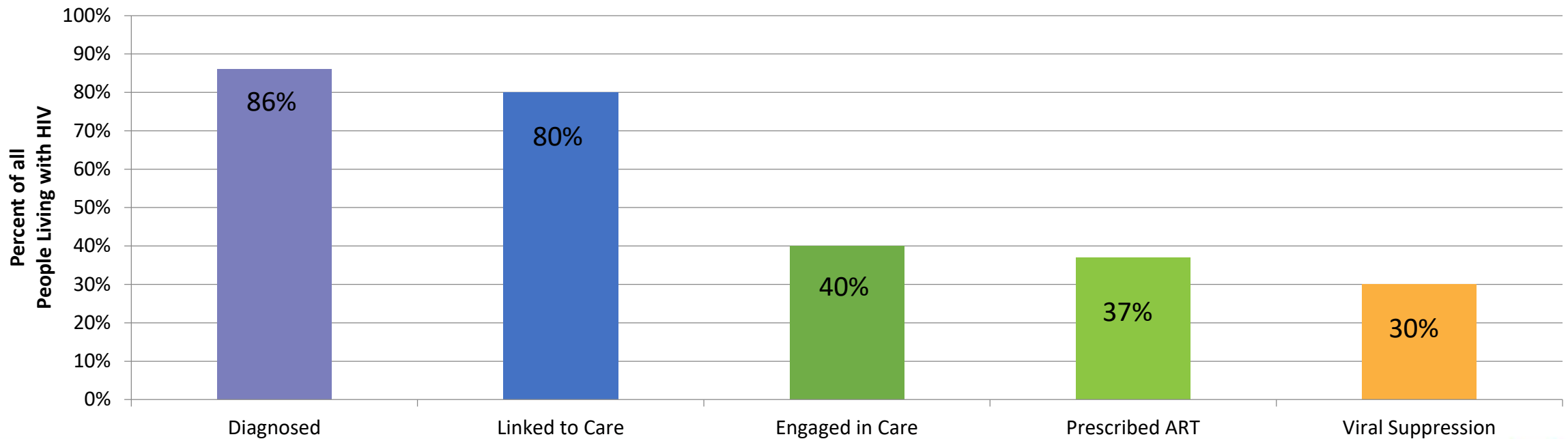
- Clinical and Non-Clinical Shared Role

- Treatment

- Clinical and Non-Clinical Shared Role

- Viral Suppression

- Clinical and Non-Clinical Shared Role



Care Coordination & Integrated Healthcare Models

- Community health workers & peer navigators
- Community HUB (identify at-risk, tailor pathways, document outcomes)
- Health homes
- Telehealth
- Co-locations
- Mergers/acquisitions
- Service expansion

HIV non-profits must assess effectiveness and relevance of organization business model to ensure sustainability.

Sustainability - DEFINED

What does program sustainability mean to you?

Sustainability - DEFINED

The ability of an organization or program to maintain (and grow!) its operations, services and benefits during its projected life time.

Business sustainability is often defined as assessing and managing the triple bottom line – an organization's **financial, social and environmental** risks, obligations and opportunities.

ASO/CBO Landscape

- Diversifying funding streams
- Developing health care services
- Forming strategic partnerships
- Exploring business models, e.g. expanding services, integrating third-party billing, developing contractual relationships with healthcare organizations (HCOs), becoming HCOs/FQHCs/Look-Alikes

Challenges to Sustainability

- **Financial**

- Inadequate funding
- Cash flow/ delays in payment
- Revenue cycle quality assistance
- Policy climate (uncertainty)

- **Leadership & Staffing**

- Hiring and retaining qualified staff
- Insufficient Leadership
- Ineffective Leadership styles

- **Systems**

- Agencies are growing and the systems need to catch up
- Policies and procedures are not in place for growth
- IT systems do not keep up with demand for client data input needs
- EMR does not connect to government systems

Sustainability Planning Questions

- What happens when funding gets redirected, reduced, cut?
- How do you maintain services for your constituents?
- How do you maintain core operations?
- If you lost one of your larger grants today how will you sustain the services and your agency?

Stay on Mission

- Strategic funding pursuits
- Assess alignment with mission
- Determine relevance to staff capacity/skills
- Does the opportunity address identified need?

Sustainability is Everyone's Business

- Board of Directors
- Executive Director
- Management
- Front Line/Direct Service Staff
- Constituents/Consumers/Patients

CBOs /ASOs should consider the business model that is best for their organization, and **MOST importantly, the communities it serves.**

- How you will create ongoing value for your clients?
- How is your business model first and foremost based in community need?

Lessons From For-Profit Sector

When faced with a loss in revenue, most for-profit businesses would implement two strategies:

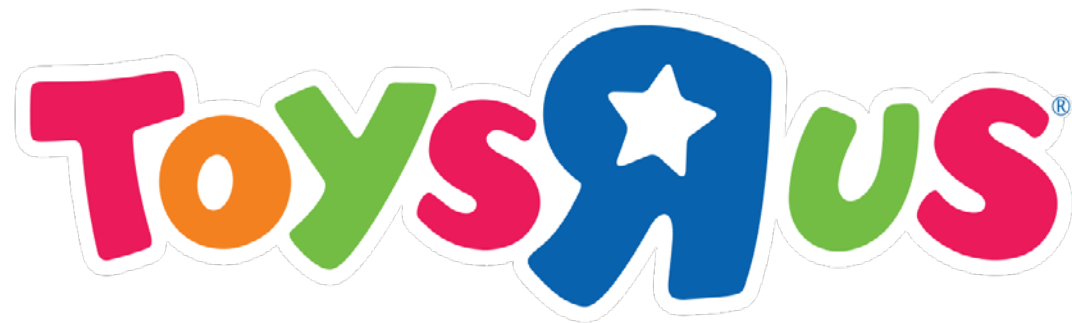
1. Reduce costs- where can we save money?
2. Generate new business- increase sales/services, where might we expand, are there new business opportunities for our agency?

Lessons From For-Profit Sector: What do these companies have in common?



Brookstone®

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Organizational Capacity: Unwillingness to Innovate

Started in 1985.

At it's peak in 2004, Blockbuster had 9,000 stores and 60,000 employees.

In 2000, Blockbuster turned down the chance to purchase **Netflix for \$50 million.**

In 2 years (2003-2005), Blockbuster **lost 75% of its market value.**

In 2014, **only 50 stores remained.**

The very last Blockbuster store closed in October 2018.



Lessons From For-Profit Sector: What do these companies have in common?



NETFLIX

crocsTM
COME AS YOU ARETM

GROUPON

Organizational Capacity: Willing to Change

Started in 1971 and sold only whole roasted beans
(they bought their green beans from Peets)

In 1987-89, Starbucks expanded to 46 stores in
Northwest and Midwest.

In July 2013, over 10% of in-store purchases were with the Starbucks app.

In 2017-2018, first new espresso (Blonde) in expanded transgender health policies,
environmentally friendly policies (straws)

Today, Starbucks is valued at over \$30 Billion dollars with over 28,000+ locations
worldwide.



ASO/CBO Re-Brand



PRISM HEALTH



MAO



CrescentCare
A Partnership for Life



ACTION WELLNESS
Putting good health into motion

Why are Innovation & Change Important?

Continuity: To ensure we continue to provide services to the clients we have been serving.

Expand: To apply our experience and expertise to be able to serve thousands more.

Diversify: To engage new funding sources that improve funding diversity in a changing healthcare landscape.

Sustainability: To ensure organization, programmatic, and service sustainability long-term.

Lesson Learned: Strategic Thinking & Innovation Are Essential

“Having seen the future that we want to create, what must we...
...keep from our past,
...lose from that past and
...create in the present to get there?”

Dr. Jeanne Liedtka

Assessing Organizational Capacity, Risk & Return

Guidelines for Assessing Capacity (from a “change manager”)

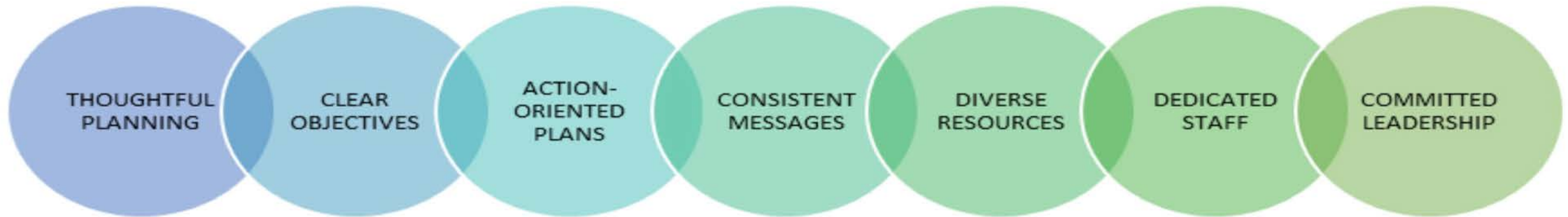
- Don't get overwhelmed
- Use a team approach
- Everyone/every organization has a different starting pace
- The goal is improving your organization, as well as access to quality, competent services for your clients
- There are many resources available!

Ways to Determine Organizational/ Programmatic Sustainability

- Benchmarking
- Strategic thinking/planning (SWOT analysis)
- Stakeholder focus groups
- Risk assessment
- Financial profiling
- Organizational capacity assessment tools



Sustainability Success Factors



**HIV non-profits should identify opportunities
for new business model implementation to
ensure and enhance sustainability**

Assess the External Environment -- Market Analysis

Where are there gaps in resources/services? (community/client needs assessment)

- Examples: HCV services, LGBT health, transportation, job training, etc.

Where are there (or is there likely to be) new funding opportunities

- Care coordination services, including linkage to care, retention in care services
- Any service that removes/addresses a barrier to medical care, i.e. mental health services, substance abuse services, medical transportation
- Primary medical care

Potential Opportunities

→ Population Health Management

→ Disease Management

→ Care Management

→ Treating Multiple Chronic Conditions

→ Treating other Chronic Conditions

(non-HIV)

→ Bi-Directional/ Co-Located Services

→ Telemedicine/Telehealth

→ Veterans

→ Substance Use/ Harm Reduction

→ Behavioral Health

Assess the Internal Environment– Build on Your Strengths

What do we do really well?

Are your services exportable to other chronic conditions?

Can you demonstrate the expertise or outcomes?

Are the services we provide cost-effective to our agency?

- Is there a sustainable funding source for the service(s)?

What do we do that needs improvement, and what shouldn't we do?

HealthHIV Service Collaboration Matrix

Organization Name:	Services									Organizational Development		
	A	B	C	D	E	F	G	H	I	J	K	L
	Do you currently provide this service?	How are you funded to provide it?	How is this service marketed to the community, clients, and other agencies?	How do you evaluate the effectiveness of the service?	If the service is not provided by your agency, how do you link or refer clients to other agencies?	How do you track service attainment following linkage and referral?	How do you outreach to re-engage clients in this service?	Do you have a contractual relationship that addresses sharing of client data?	Which agencies do you want to develop a contractual relationship with?	Do you have access to technical and subject matter experts in this area?	Have you sought technical assistance in this service area within the last 12-24 months?	Is this area an organizational priority now or in the future?
Primary Medical Care												
Primary HIV Care												
Medical Case Management (PLWH)												
Case Management (Non-Medical - PLWH)												
Substance Abuse Services												
Mental Health Services												
Nutritional Services/Food Bank												
Emergency Financial Assistance												
Housing Services												
Prevention for PLWH												
Support Groups												

Assess Duplication/Efficiencies

How are services and activities organized?

- Funding vs. function

How are services and activities related to the continuum of care?

Assess Staff Capacity

Do the staff have the capacity and/or credentials to take on new activities?

- I.e. Expanding roles for community health workers

Considering the duration of a funding stream, do you have the capacity to hire and train staff in that time, and keep them on afterwards?

Assess Internal Environment & Organizational Culture

Is there space available for new staff?

Are there facilities for service delivery?

Will adding a new service require staff culture change?

Key Steps to Assessing a Successful Business Model

1. Identify your (specific) audience.
2. Ensure you have processes/procedures/policies to make your business model work.
3. Develop a strong value proposition.
4. Determine key business partners.
5. Create a marketing and promotion strategy (client generation).
6. Leave room for innovations!

Identify Your Value

ASO Case Study

Core Competencies: Systems Integration & Advocacy

Proven track-record:

- ➔ Coordinate service networks: HIV prevention & care;
housing, transportation, social services
- ➔ Coordinate and braid multiple funding streams to maximize services
 - Manage quality and data systems
 - Administer grants and contracts
 - Educate providers, community stakeholders
 - Demonstrated commitment to high-quality, culturally competent care coordination and care delivery
 - Shape and lead advocacy and public relations campaigns

Your Value is NOT:

1. Your services
2. Your mission
3. Your tagline
4. A headline

Identify Your Unique Selling Proposition

- Provide services with low overhead
- Address consequences of non-adherence to ART and barriers to ART (care management)
- Demonstrated program impact on HIV viral load suppression (disease management)

Marketing Exercise – In 60 seconds...

How would you describe your organization's services to a potential funder/partner?

What are some considerations for my organization?

Assessing Opportunities for Change/Adaptation

Strategic Considerations

If your agency is a clinical provider:

- Maximize third-party reimbursement
- Service expansion consistent with mission and community needs
- Medical home/ health home models (PCMH, FQHC, etc.)
- 340B Pharmacy
- Geographic expansion

If your agency is a behavioral health provider:

- Maximize third-party reimbursement
- Or establish third party reimbursement
- Service expansion consistent with mission and community needs

Strategic Considerations

If ASO/CBO or a clinical/behavioral provider

- Assess capacity for third party reimbursement
- Service expansion consistent with mission and community needs
- Establish partnerships and contracts with other service providers including PCMH, FQHCs, other ASO/CBOs
- Fee-for-service opportunities
- Consider opportunities for strategic alliances, mergers/acquisitions
- Wind down?

Real-World Examples

Strategic expansion of services/mission

- Housing Works – NYC
- AIDS Foundation Chicago
- NO/AIDS Taskforce = CrescentCare community clinic

Strategic alliances

- Whitman-Walker Health/Metro Teen AIDS
- Fenway Health/AIDS Action Committee of Massachusetts

Mergers

- AIDS Resource Center of Wisconsin
- Citiwide Harm Reduction/ Bronx AIDS Services = BOOM!Health

Resources & Technical Assistance

Tools for Organizational Capacity Assessment

HealthHIV's "ASO/CBO Sustainability Assessment Guide"

- ✓ Governance & Leadership
- ✓ Planning & Visioning
- ✓ Financial Management & Resource Development
- ✓ Human Resource Management

HealthHIV's "Risk Assessment & Consequence Management Tool"

www.HealthHIV.org

HealthHIV's ASO/CBO Leadership Training and Certificate Program™

First-of-its-kind online training & certificate program for ASO/CBO leaders and emerging leaders

Includes six, self-paced, one-hour modules that address strategic planning, change management, biomedical and strategic advances in HIV/AIDS, funding diversification, impact of Medicaid and health care exchanges, and partnerships, mergers, and acquisitions

Participants receive a Certificate of Proficiency in ASO/CBO Leadership upon completion

FIRST OF ITS KIND!

HealthHIV
ASO/CBO Leadership
Training & Certificate
Program™

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HealthHIV
ENGAGEMENT ARCHITECTS

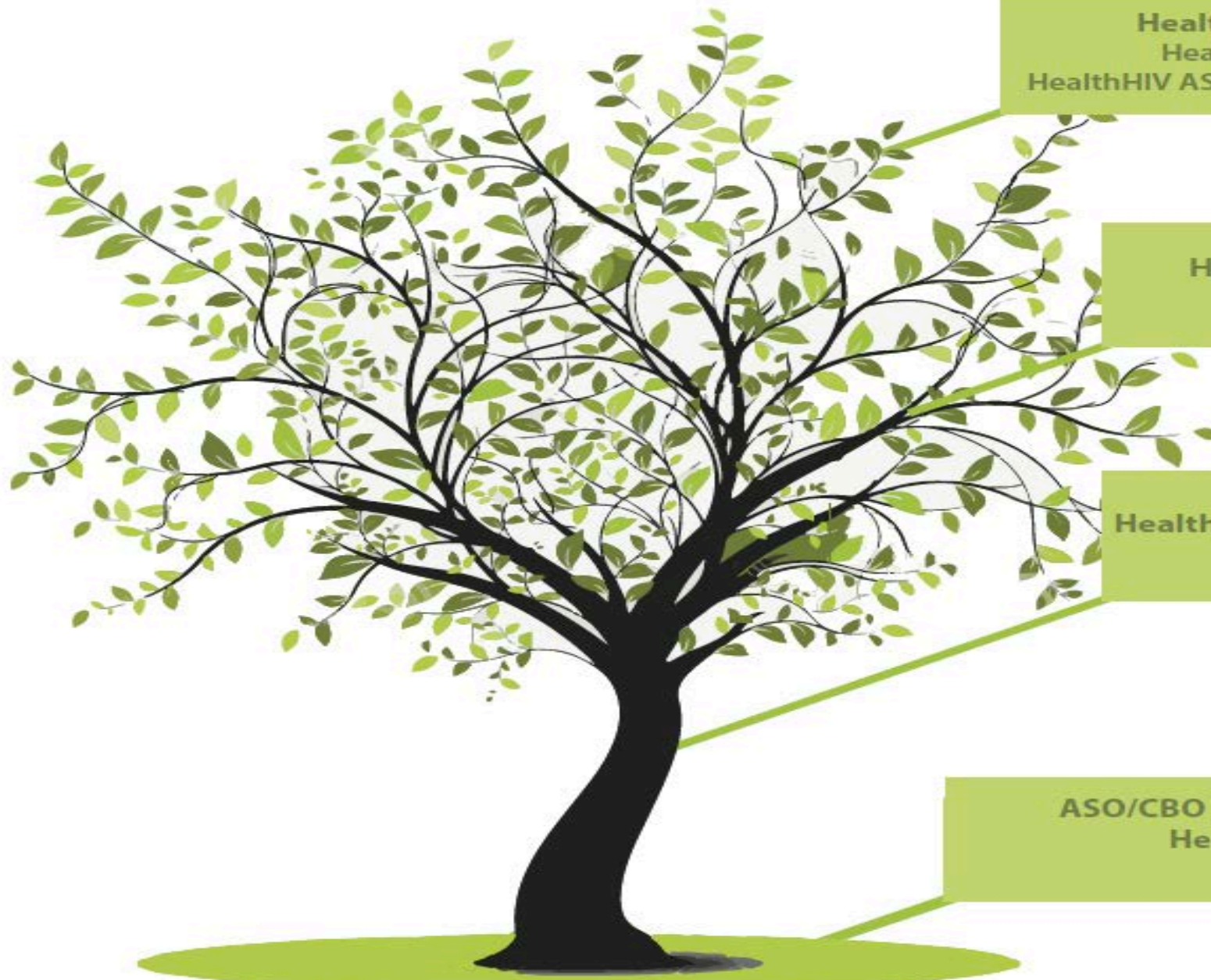
Online training program for ASO/CBO Board of Directors with self-paced courses:

- **Nonprofit Board Basics: Roles, Recruitment and Routines**
- **Board Membership: Identification, Recruitment and Engagement**
- Governance and Management: Who Are We and What Are We Accomplishing?
- Strategic Thinking: Developing Strategies to Ensure Organizational Relevance and Program Sustainability
- Understanding Finances and Planning for Fiscal Sustainability
- Community Engagement for Resource Development: Fundraising Best Practices

More courses launching through December 2018

Register at <http://healthhiv.org/blt/>

GROWING SUSTAINABLE ASO_s/CBO_s



HealthHIV ASO/CBO Leadership Initiative™
HealthHIV ASO/CBO Mentorship Program™
HealthHIV ASO/CBO "Link & Learn" Leadership Webinar Series™

HealthHIV's ASO/CBO Leadership Training
and Certificate Program™

HealthHIV's Remaining Relevant in the New Reality™
Regional Training

ASO/CBO Leadership Program Needs Assessment
Health Department Key Informants
Grassroots Mobilization



National Center for Healthcare Capacity Building

Syncing Innovative Approaches with Successful Outcomes
An Initiative of HealthHIV



HIV Prevention Technical Assistance



Transforming from HIV Prevention Practice to Prevention Innovation



ASO/CBO Capacity Building



Medication Therapy Management



ASO/CBO Leadership Initiative



Fiscal Health Professional Services



The BLT: Board Leadership Training



Telehealth: Building HIV Retention in Care Among Minority Communities



HealthHIV's *Fiscal Health Professional Services*TM helps Ryan White programs build fiscal management capacity, improve organizational sustainability, and maintain compliance with federal guidelines. Content areas include:

- Managing 340B Pharmacy Programs
- Budgeting and Projecting Program Income
- Understanding Uniform Guidance for Federal Grants
- Budgeting for the Non-Financial Manager
- Responding to Audit/Site Visit Findings
- Implementing Sliding Fee Scales and Caps on Charges
- Complying with HRSA/HAB Fiscal Monitoring Standards
- Diversifying Income
- Maximizing Third-Party Billing
- Overseeing Federal Grants

Contact Shayna Linov, Fiscal Health Manager, Shayna@HealthHIV.org, 202-507-4739



HIV Primary Care Training & Certificate Program



- Online, self-paced, staged CME curriculum
- Features five courses on:
 - HIV Management in Primary Care - Foundations Course
 - Core Skills for HIV Management in the Primary Care Setting
 - Assessment and Treatment Decisions in HIV-HCV Co-infection
 - Considerations in the Management of HIV in Older Adults
 - Improving Communication in the Clinical Setting
- Based on a proven model of HIV primary care integration
- For MDs, DOs, NPs, and/or PAs interested in and/or care for patients infected with, or at-risk for, HIV
- Offers a certificate of proficiency in HIV primary care

Visit <https://www.mycme.com/healthhiv/section/8086/>



SYNChronicity

The National Conference for HIV, HCV, STIs, and LGBT Health 2019

April 14-16, 2019

JW Marriott, Washington, DC

SYNC2019.ORG

To register and for more information visit www.SYNC2019.com

Abstracts Due: Monday, December 17, 2018

For More Information & Technical Assistance

HealthHIV
2000 S ST NW
Washington, DC 20009
202.507.4730
www.HealthHIV.org

Michael D. Shankle, MPH
Michael@HealthHIV.org

Marissa Tonelli
Marissa@HealthHIV.org

Samantha Ritter, MPH
Samantha@HealthHIV.org