



In partnership with Health Share of Oregon, welcome to

Health Related Social Needs (HRSN) Capacity Building for Community Based Organizations

we'll get started shortly.

For now, enjoy the music...





Session #1:

Agency Readiness and Business Planning

March 20, 2024

Your CSH Training Team



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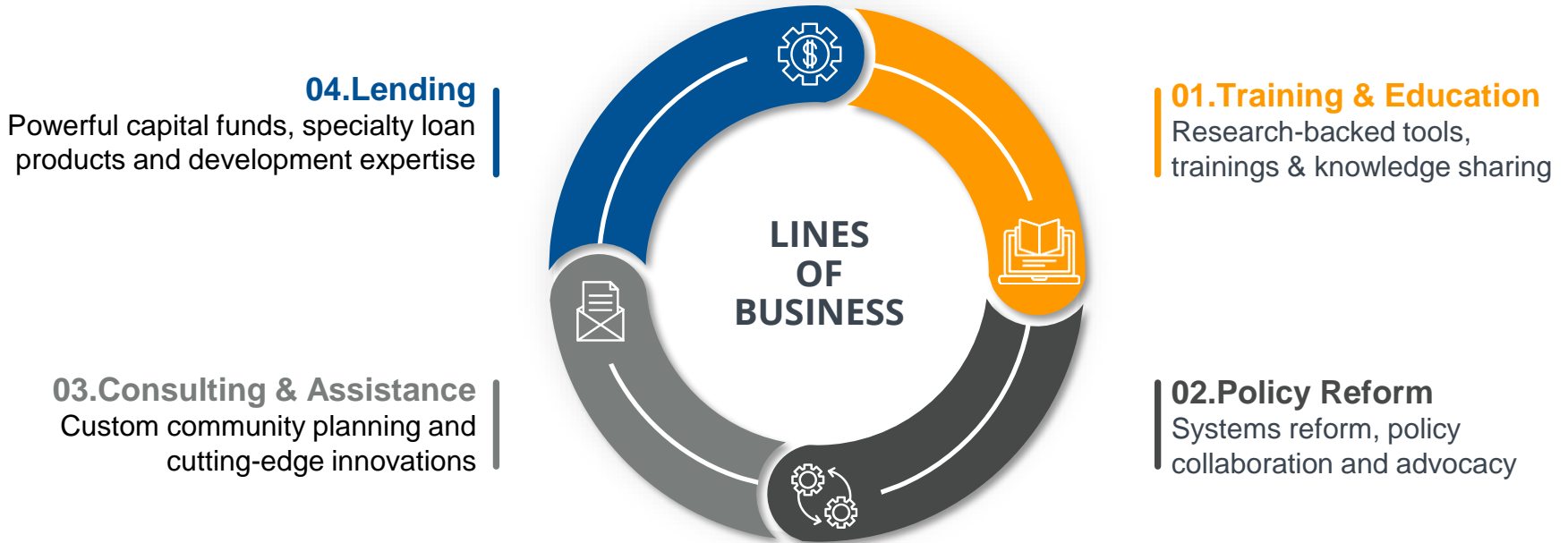
About CSH

CSH collaborates to advance solutions that build equity in our communities by linking services, housing, and healthcare to improve the lives of vulnerable people, maximize public resources, and build healthy communities.



What We Do

CSH is a touchstone for new ideas and best practices, a collaborative and pragmatic community partner, and an influential advocate for supportive housing.



Iron Tribe Network
 Oregon Public Health Institute
 Community Partners for Affordable
 Northwest Pilot Project Housing Health Share of Oregon
 Oregon Community Health Workers
 Familias en Accion Association Reach CDC
 Rockwood CDC-East County Community
 Oregon Change Clinic Health Lasko Refuge
 Immigrant and Refugee Community
 Organization (IRCO)
 Another Chance Drug and Alcohol
 Rehab of Portland
 African Refugee and Immigrant
 Organization
 Oregon Spinal Cord Injury
 Connection
 Cultivate Initiatives
 Center for Outcomes Research and
 Education (CORE)
 African Refugee Immigrant
 Organization
 Afro Village PDX
 Meals on Wheels People
 CSH
 Metropolitan Family Service
 Micronesian Islander Community
 Project Access NOW Latino Network
 Catholic Charities of Oregon
 JOIN
 OHSU
 IRCO

Who's In The Room Today?

....and more!

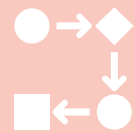
HRSN Capacity Building Series

Session	Topic	Audience	Date
Session 1	Agency Readiness and Business Planning	Leadership, Program	March 20, 2024
TA 1	Completing the Readiness Assessment for HRSN Services 9:00am – 10:00am Group TA 10:00am – 11:00am Individual TA	Leadership, Program	March 27, 2024
Session 2	Budgeting, Services Costs and Funding HRSN Services	Leadership, Fiscal, Program, IT	April 3, 2024
TA 2	Using the Budget Tool for Startup Costs 9:00am – 10:00am Group TA 10:00am – 11:00am Individual TA	Leadership, Fiscal, Program	April 10, 2024
Session 3	Participant Enrollment in HRSN, Referral and Workflow Adaptation and the Role of the Community Information Exchange (CIE)	Program, IT	April 17, 2024
TA 3	Examining Workflow Adaptions and the Role of the CIE 9:00am – 10:00am Group TA 10:00am – 11:00am Individual TA	Program, IT	April 24, 2024
Session 4	Common Policies, Documentation and Invoicing	Fiscal, Program, IT	May 1, 2024
TA 4	Developing Policies, Documentation and Invoicing for HRSN Services 9:00am 10:00am Group TA 10:00am – 11:00am Individual TA	Fiscal, Program, IT	May 8, 2024

Today's Learning Objectives



How to use the CSH Provider
Readiness Assessment



How to set up a Business Plan



The benefits of becoming an HRSN
Service Provider



**Just
Breathe...**

CCBF Funding Categories



Technology



Development of
business or
operational
practices



Workforce
development



Outreach,
education and
convening

CCBF Application Process

- CCOs will manage the majority of CCBF funding.
- Organizations interested and eligible for CCBF should apply directly to the CCO(s) operating in the counties they intend to provide HRSN services within.
- Organizations can apply to more than one CCO, if the funding requests are different.

CCBF Timeline

2024



Applications open:
March 1 – May 31



Notices to awardees:
July - September



Funding disbursement:
August - October

2025



More funding available
in **2025**

2024 Community Capacity Building Funds (CCBF) – Health Share of Oregon Supplemental Applicant Guidance
Oregon Health Authority (OHA) Allocated Funding for 2024 \$10.77M – *additional resources available in 2025*

In addition to the [scoring rubric](#) and requirements outlined by the OHA, Health Share of Oregon will prioritize funding for organizations based on their role and capacity to serve members within Clackamas, Multnomah and Washington counties.

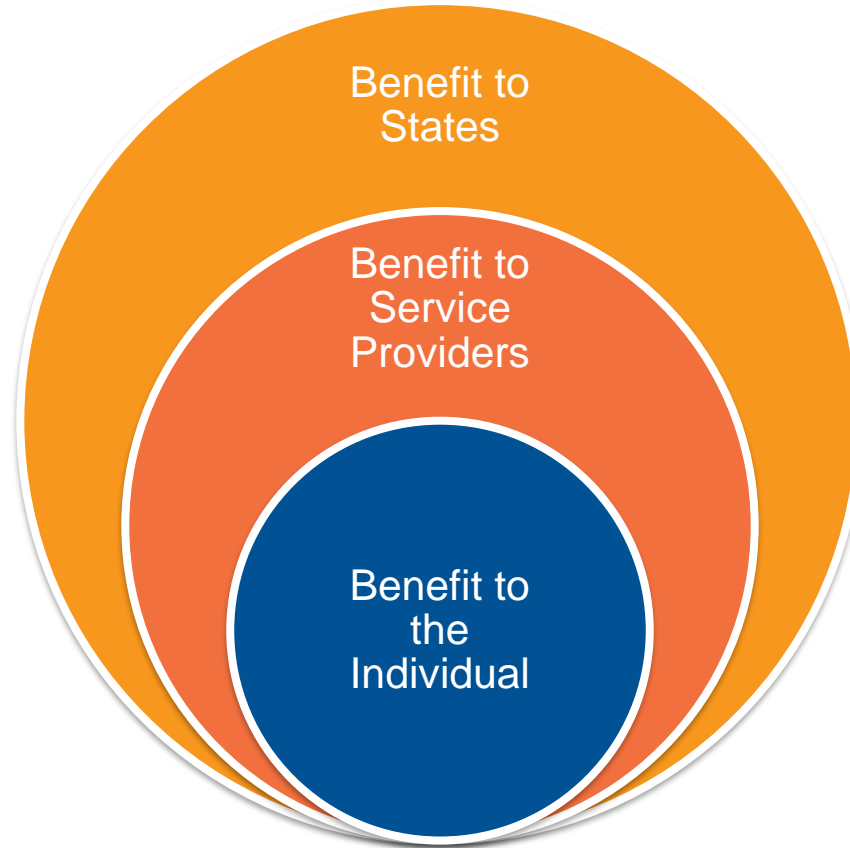


Applicant Type	Role	Description	Anticipated Awards/Funding
Hubs/Network Managers	Foundational infrastructure	<ul style="list-style-type: none"> Currently support access to Housing and Nutrition services for clients/other organizations; primary role is not direct provision of services Provide support (e.g. technical assistance) and central infrastructure (e.g. billing platforms, contracting resources) to smaller organizations that connect clients to social health resources Could be a lead entity that is supporting multiple organizations 	<p>Anticipated Total Funding: \$4M-\$5M</p> <p>Anticipated # of awards: 5-7</p> <p><i>Recommended request for Year 1: ~\$500k-\$1M</i></p>
Housing	Direct Service	<ul style="list-style-type: none"> Established organizations that currently provide eviction/ homelessness prevention services as key part of organizational mission Have an understanding of what is needed to work in a Medicaid environment Serve 100+ clients annually 	<p>Anticipated Total Funding: \$2M</p> <p>Anticipated # of awards: 8-12</p> <p><i>Recommended request for Year 1: ~\$200K</i></p>
Nutrition	Direct Service	<ul style="list-style-type: none"> Established organizations currently provide food and nutrition services as key component of organizational mission Have an understanding of what is needed to work in a Medicaid environment Serve 100+ clients annually 	<p>Anticipated Total Funding: \$1M</p> <p>Anticipated # of awards: 6-10</p> <p><i>Recommended request for Year 1: Less than \$200K</i></p>
Organizations interested in building capacity to be direct service providers	Readiness for expansion	<ul style="list-style-type: none"> Currently provide housing, food, and/or nutrition services as key component of organizational mission Interested in building/deepening partnership with CCOs/Medicaid Willing to invest in infrastructure needed to support use of Medicaid funds Willing to participate in technical assistance trainings through Corporation for Supportive Housing (CSH) 	<p>Anticipated Total Funding: \$1M</p> <p>Anticipated # of awards: 10-12</p> <p><i>Recommended request for Year 1: Less than \$50K</i></p>

* Health Share has non- CCBF dollars to support smaller organizations; timeline and application process for these funds will be forthcoming

In addition to the CCBF allocated from the OHA, Health Share has committed resources to provide technical assistance and central infrastructure to support readiness, including a community-based care management platform and web-based billing infrastructure. All contracted organizations will have access to these tools at no cost.

Why Become an HRSN Service Provider?



- ✓ Federal Financial Partnership (federal \$\$)
- ✓ Growing service needs of participants and need to fund services
- ✓ Fiscal sustainability for service models – Medicaid is an entitlement
- ✓ Ability to customize services based on specific needs and levels of acuity
- ✓ More money = more individuals served

What are Health Related Social Needs (HRSN) Services?



Housing

- Pre-Tenancy and Housing Transition Navigation Services
- Tenancy Sustaining Services
- Temporary Rental Assistance
- Utility Costs
- One-time Transition Costs
- Medically necessary home modifications



Nutrition

- Nutrition education
- Assessment for medically tailored meals
- Medically tailored meals
- Meals
- Pantry stocking
- Fruit and vegetable Rx



Climate

- Devices such as air conditioners, air filtration, and refrigeration, as medically necessary



Outreach, Engagement & Linkage

- Outreach to individuals eligible for HRSN services
- Sharing information necessary for HRSN assessment
- Assisting in Medicaid enrollment
- Completing HRSN referrals
- Providing support with benefits navigation and enrollment

HRSN Service Provider Requirements

Each CCO will develop a network of **HRSN Service Providers** to directly provide housing, food, and/or climate support to individuals experiencing eligible transitions. OHA has established minimum requirements for HRSN Service Providers, which include:

Have strong
community
relationships

Able to provide
trauma-informed,
culturally and
linguistically
responsive services

Able to invoice for
services provided

Can receive closed-
loop referrals for
services

History of financial
stewardship and
integrity

Able to comply with
all reporting and
oversight
requirements



Provider Readiness: What You Need to Know

The Four Lenses to Transition to Medicaid

Programmatic

- Service provision
- Staffing & Supervision
- Staff Training
- Compliance Requirements



Strategic

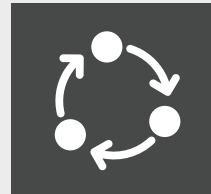
- Business partnerships
- Strategic long-term planning
- Braided funding streams
- Board Governance



- Data management
- Quality Improvement
- Finance
- Operations
- Legal Guidance



- Financial operations, billing
- Legal agreements
- HR
- Information Technology



Analytical

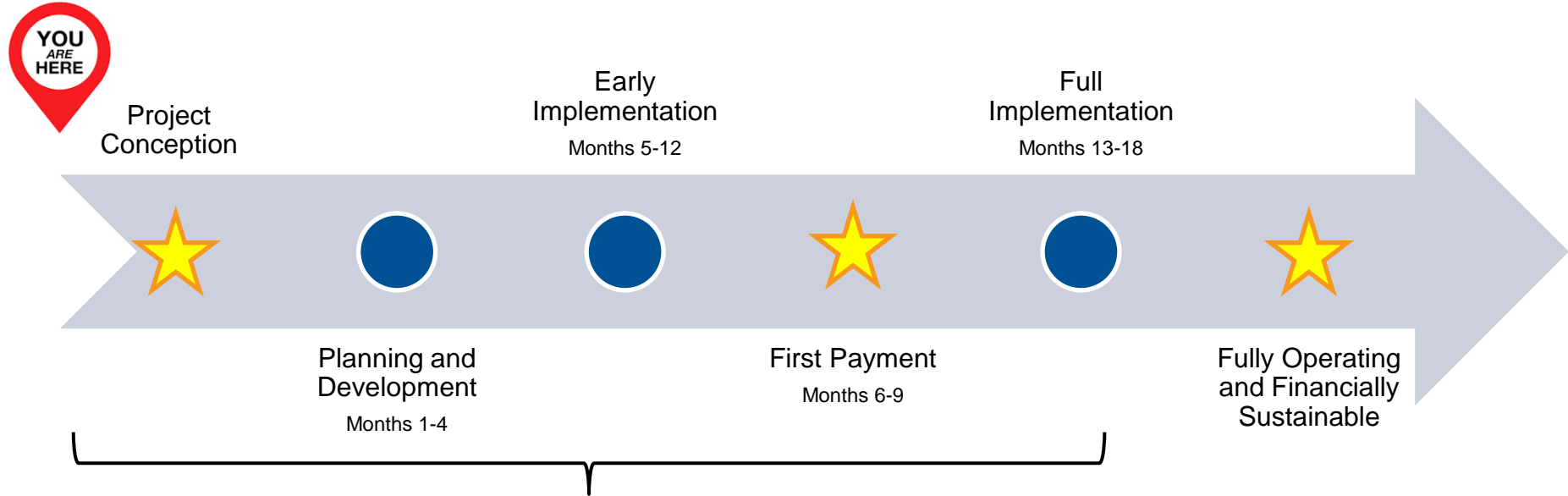
Logistical

HRSN Invoicing Readiness: Do you have...

- ✓ Computer systems that can accommodate reporting requirements?
- ✓ Systems and policies to protect electronic and written documentation including applicable privacy requirements?
- ✓ Enough qualified staff to deliver services that are potentially eligible for payment?
- ✓ A quality improvement plan that includes, at a minimum, program outcomes and goals?
- ✓ Executive Team and Board who are thoroughly aware and supportive of investment into HRSN transition?
- ✓ Software to document and invoice for unit cost services?
- ✓ Financial audits at least every two years?

HRSN Invoicing Implementation:

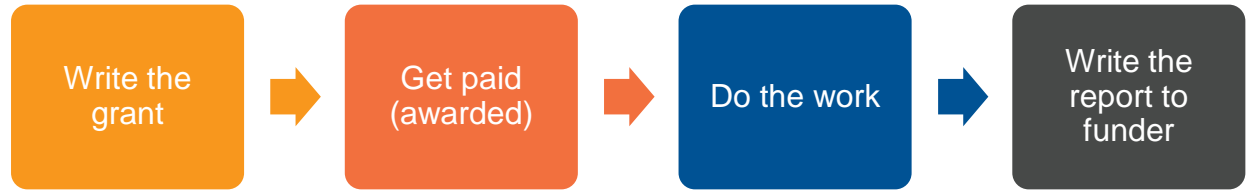
Common Financial Planning Timeline



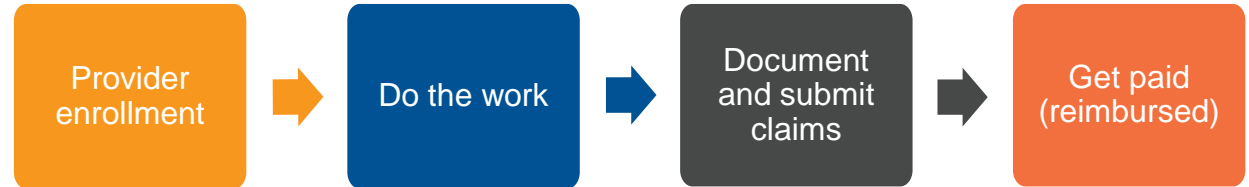
HRSN Community Capacity Building Funds (CCBF) are designed to help you fund the early stages

Administrative Differences in Funding Models

The grant world administratively...



The healthcare world administratively...



Health Related Social Needs Readiness Assessment Tool



<https://forms.office.com/r/H33HWgAw02>



Best Practices in Business Planning

Business Planning Discussion Topics:

- ✓ Why Business Planning?
- ✓ Elements of a Business Plan
- ✓ Communicating your Business Plan
- ✓ Business Planning Resources
- ✓ Participant Evaluations

Poll:

Do you have...



✓ Mission and Vision Statement



✓ Strategic Plan



✓ Business Plan



✓ Diversity, Equity, and Inclusion

Why Business Plan?

Ask yourself:

- ✓ What opportunity exists for your agency with HRSN services?
- ✓ How does your agency plan and partner to achieve your mission?
- ✓ Within your mission, how do you achieve fiscal sustainability?

Becoming an HRSN Service Provider and transitioning to an invoicing model **impacts cash flow projections and revenue**. Changes should be shared with:

- Your board
- Staff who will implement the changes
- People with lived experience and folks receiving services



Key Elements for Your Business Plan

Executive Summary

Provider Agency Overview

Qualifications and Capacity

Program, Staffing & Operations Plan

Financial Plan

Risk Mitigating Milestones





Executive Summary

Market your plan!

1. Introduce your agency
2. Identify your target population served
3. Summarize how your agency will be successful at meeting its new goals (invoicing for HRSN Services)

Write your Executive Summary last!

HRSN Service Provider (Your Agency) Goals



✓ Mission, Vision, and Values



✓ Business Description Overview

- History
- Strengths
- Current Funding Streams
- Governance Structure
- Key Staff
- Current Affiliations/
Networks



✓ Future Goals

- Develop new services
- Attract new referrals
- Enter a niche market
- Fill a community gap



BREAK
TIME!



Mission, Vision, Purpose: The Core of Your Business Plan

Vision Statement

Your “WHAT”

If your purpose is your WHY, your vision is what you hope to achieve over the long term.

A view of the future that gets others excited and inspired.



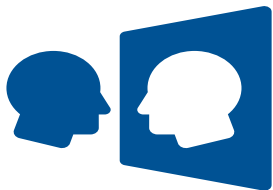


Mission Statement

Your “HOW”

What will you/your organization be doing **on a daily basis** that contributes towards the vision?

Diversity, Equity and Inclusion Plan



Internally Facing

- Who are your staff? Who are your leadership?
- How does your organization reflect (or not) the community you are serving?
- How do you create pathways for professional development and growing leadership?
- When you find inequalities what is the plan to address?



Externally Facing

- What social Issues are you addressing?
- What inequities are present around these issues?
- What is the history that created these inequities? What harm has been done?
- How will your agency work to strategically address what you have found?

Program Staffing and Operations Plan: Highlight Staff, Board, and Partners



Internally

- Expertise and skill level
- Licensures
- Caseload size
- Supervisors
- Training
- Board of Directors, Founders
- Data and Analytics Plan and staff to support

External Partnerships

Creating your HRSN Implementation Team

Which Organization Members:

- ✓ Executive Director / CEO
- ✓ Finance Team
- ✓ Operations
- ✓ Direct Service Staff
- ✓ Supervisors / Managers

Who Else:

- ✓ People with Lived Experience
- ✓ Trusted Partners
- ✓ Board Members



Program, Staffing and Operations Plan

Proposed new business or services approach

Proposed new or modified programs, contracts and/or affiliations

Internal changes to support programs, contracts and affiliations

Changes to meet staffing and operational requirements

Workflows and work plan



Program Operations Plan: Service Delivery



What services are currently being delivered?

- Type
- Volume
- Frequency
- Location
- Can the services be certified or assessed for high quality?

Who are you currently serving?

- Demographics
- Eligibility & Enrollment in OHA
- Levels of need
- Number of people served by service type and fund source
- What are the gaps?



Financial Plan: What is your Total Cost of Care?

Your financial plan will include one-time costs and assumptions for revenues and costs over time





Communicating about your Future Direction

Communication is *Everything*

How and **When** do you communicate with key leadership, frontline staff and clients about how we better serve our mission and what that means for each person's role?

- **Why** is your agency exploring HRSN?
- **What** is your messaging on this topic?

Tailoring Key Elements of Your Plan to Provide HRSN Services

Who do you serve? Who's eligible for these services in your county?

What are the shared goals between your agency and Health Share of Oregon?

Does your program model and staffing patterns align with Evidenced-Based Practices?

What is your Total Cost of Providing a HRSN Service?

SWOT Analysis to mitigate risks

Tracking Outcomes, Data Systems and Processes

What is your current system for data collection? What regular data collection and reporting is already in place?

Who executes this system? Who monitors this system for compliance?

How is this process linked into supervision of staff who use the system? How do you train staff on this system?

Is your current system HIPAA compliant? Does the system have that potential? For what cost?

What documentation is required for invoicing? For Compliance? Can your system meet those requirements? In the short term? In the long term?

Business Planning Documents Checklist



Business Planning Checklist for Homeless and Supportive Housing Agencies

Documents for Review	Checklist	Notes
1. Board Governance Policies and Procedures	<input checked="" type="checkbox"/>	
2. Organizational Chart	<input type="checkbox"/>	
3. Agency Policies and Procedures Manual	<input checked="" type="checkbox"/>	
4. List of all programs and departments if not in org chart	<input checked="" type="checkbox"/>	
5. Most recent Strategic Plan	<input type="checkbox"/>	
6. Most recent Business Plan	<input type="checkbox"/>	
7. Most Recent Diversity, Equity, Inclusion and Belonging Plan	<input checked="" type="checkbox"/>	
8. List of current national accreditations	<input checked="" type="checkbox"/>	
9. Current budget	<input checked="" type="checkbox"/>	
10. Services Budget Tool for projecting new Start Up and Ongoing Program Costs	<input type="checkbox"/>	
11. Most recent financial audit	<input type="checkbox"/>	
12. List of electronic data systems used by staff and programs	<input checked="" type="checkbox"/>	
13. List of formal partner agencies with existing MOUs	<input type="checkbox"/>	
14. List of licensed staff - if HR is tracking license renewals include license #s	<input checked="" type="checkbox"/>	
15. Quality Assurance Plan	<input type="checkbox"/>	

Materials such as a sample business plan will be posted here: [Health Share of Oregon | CCBF Technical Assistance \(healthshareoregon.org\)](https://healthshareoregon.org)



Resources

Business Plan Writing Tools:

[Business Plan Guide](#)

[Business Plan Sample](#)

[Business Planning Documents Checklist](#)

[Services Budget Tool](#)

Self-Assessments:

[Outcome Planning Assessment](#)

[CSH Quality Supportive Housing Assessment](#)

[Health Share Provider Readiness Tool and Agency TA Needs Assessment](#)

Next Steps: R.E.A.C.H.

Read

- [A Look at Recent Medicaid Guidance to Address Social Determinants of Health and Health-Related Social Needs | KFF](#)
- [Social Determinants of Health - Healthy People 2030 | health.gov](#)

Explore

- [Health Share of Oregon | HRSN Benefits \(healthshareoregon.org\)](#)

Attend

- Group TA on this topic or others as needed – March 27
- Session 2: Budgeting Services Costs and HRSN Funding – April 3rd 9:00am – 11:00am (Register here: [Health Share of Oregon | CCBF Technical Assistance \(healthshareoregon.org\)](#))

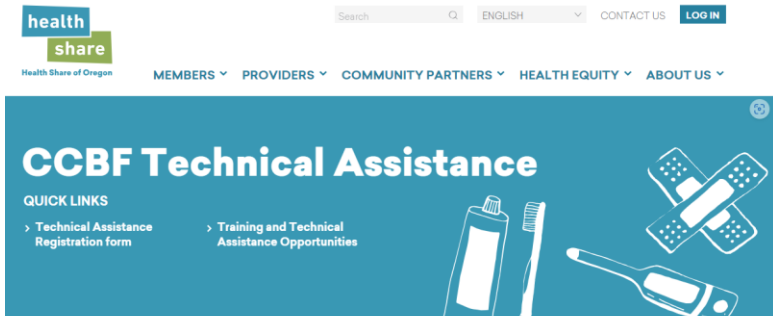
Complete

- Course Evaluation (Link is on next slide)

Have Ready

- Who will be on your team for this project?
- Program costs including benefits, overhead and staffing costs.

Health Share of Oregon



The screenshot shows the top navigation bar with the "health share" logo, a search bar, and links for "ENGLISH", "CONTACT US", and "LOG IN". Below the navigation bar are dropdown menus for "MEMBERS", "PROVIDERS", "COMMUNITY PARTNERS", "HEALTH EQUITY", and "ABOUT US". The main content area features a blue banner with the heading "CCBF Technical Assistance" and a sub-heading "QUICK LINKS". Two links are listed: "Technical Assistance Registration form" and "Training and Technical Assistance Opportunities". The banner also includes illustrations of a toothbrush, a dental mirror, and band-aids.

Guidance through the application process

Technical Assistance (TA) will be made available for all interested CCBF applicants during the application submission window. There will be a series of webinars, group TA based on webinar topics and opportunities for organizations to request one-on-one technical assistance based on their specific needs.

Please register at the link below and indicate your organization's needs and desired date/time options:
[HRSN Capacity Building for Community Based Organizations.](#)

All training materials will be linked here:
[Health Share of Oregon | CCBF Technical Assistance \(healthshareoregon.org\)](https://healthshareoregon.org/CCBF-Technical-Assistance)

Feedback Survey:

<https://forms.office.com/r/7GjQuv8vJF>



The graphic has a dark blue background with a geometric pattern of overlapping shapes in shades of blue and green. The text "Evaluation Form HRSN CCBF for CBOs" is centered at the top in white. Below the text is a large white square containing a black and white QR code.



Thank you!

csh.org