

Engaging Community-Based Organizations with Connect Oregon and Unite Washington: Lessons Learned by Kaiser Permanente NW Community Health

Commissioned by Kaiser Permanente NW and produced by Insight for Action
March 2022



Overview

Background

In 2018, Kaiser Permanente began working with Unite Us, a technology company building community information exchanges. KP was one of the first funders of Unite Us in the NW region, eventually leading to the creation of Connect Oregon and Unite Washington.

Purpose

This brief shares the lessons **Kaiser Permanente NW Community Health** learned about how to engage community-based organizations (CBOs) to join and become co-owners of Connect Oregon and Unite Washington in three distinct geographies in Portland Metro, Mid-South Valley, and SW Washington.

Methods

These lessons about community engagement were compiled from 2019-2022 by:

- Gathering CBOs' experiences through interviews, convenings, and grant reports.
- Interviewing Unite Us and health systems' community-facing staff.
- Reviewing documents produced by Unite Us and evaluations commissioned by Kaiser Permanente.

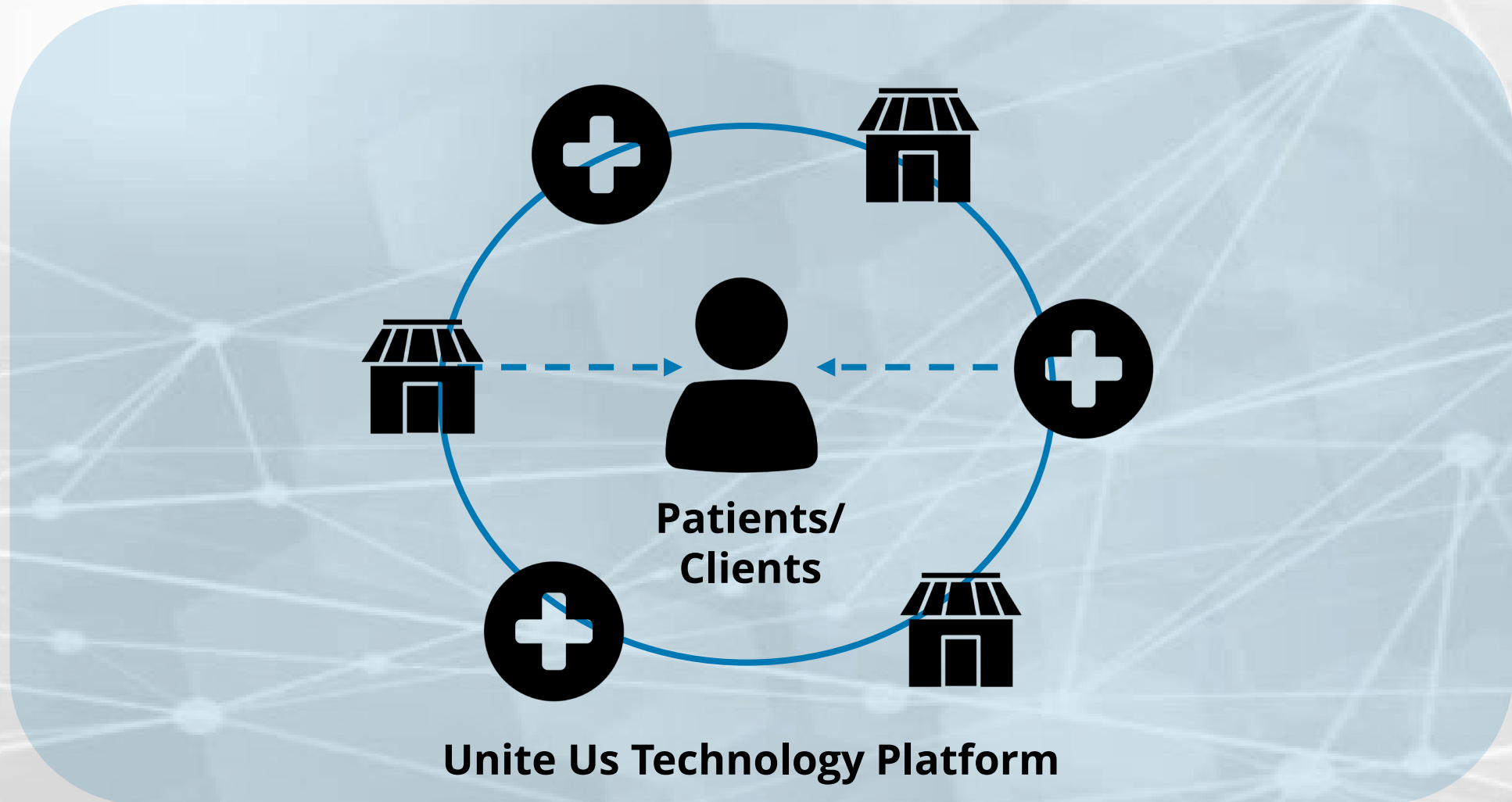
Connect Oregon and Unite Washington¹

Connect Oregon and **Unite Washington** are coordinated care networks of health and social care providers. Partners in the networks are connected through a shared technology platform, Unite Us, which enables them to send and receive electronic referrals, address people's social needs and improve health across communities.



¹Taken from Unite Us Connect Oregon Network Packet

Networks are built by health systems and community-based organizations to serve their patients/clients



Unite Us Technology Platform



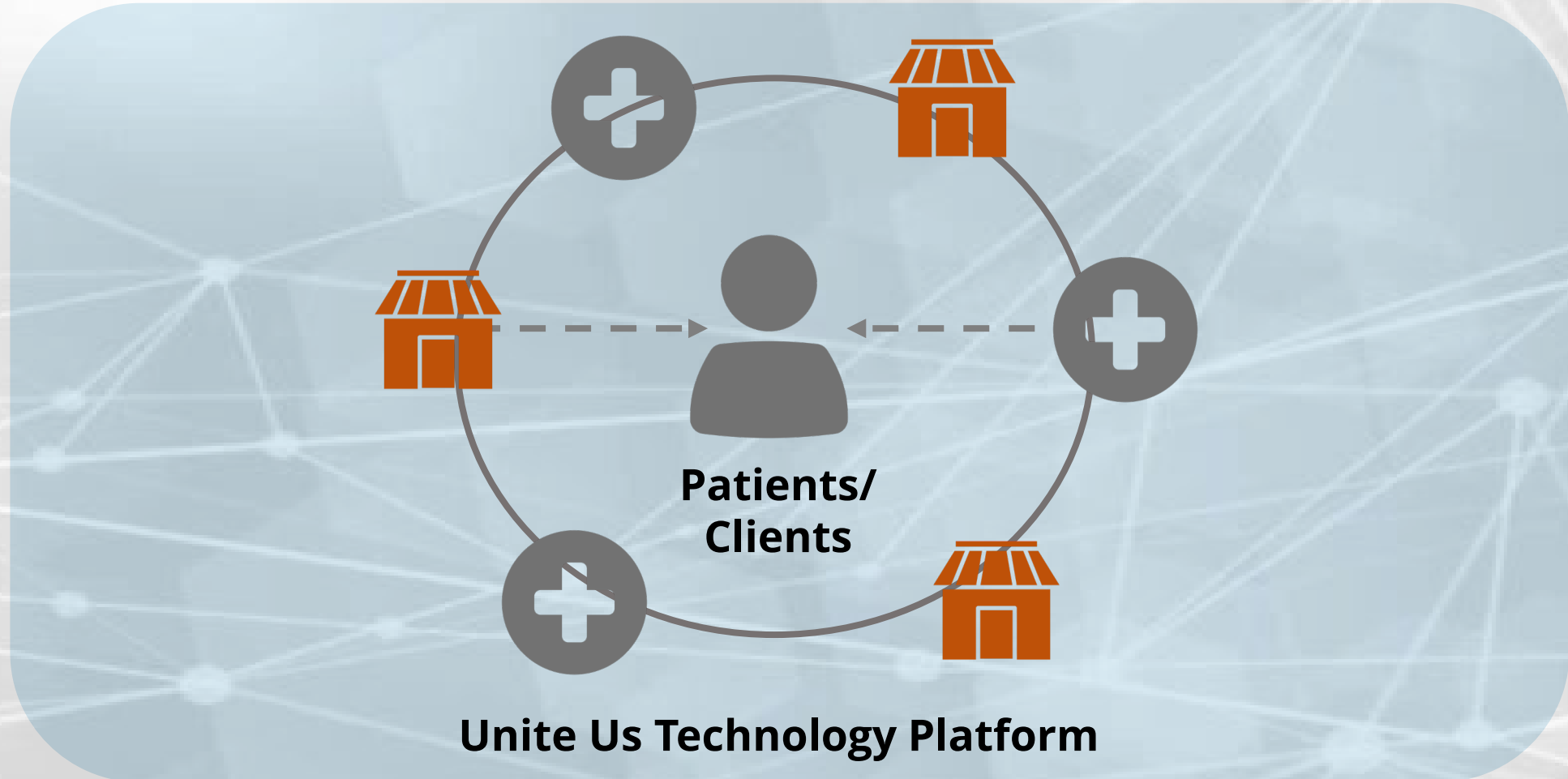
Health systems= hospitals, health plans, CCOs



=Community-based organizations

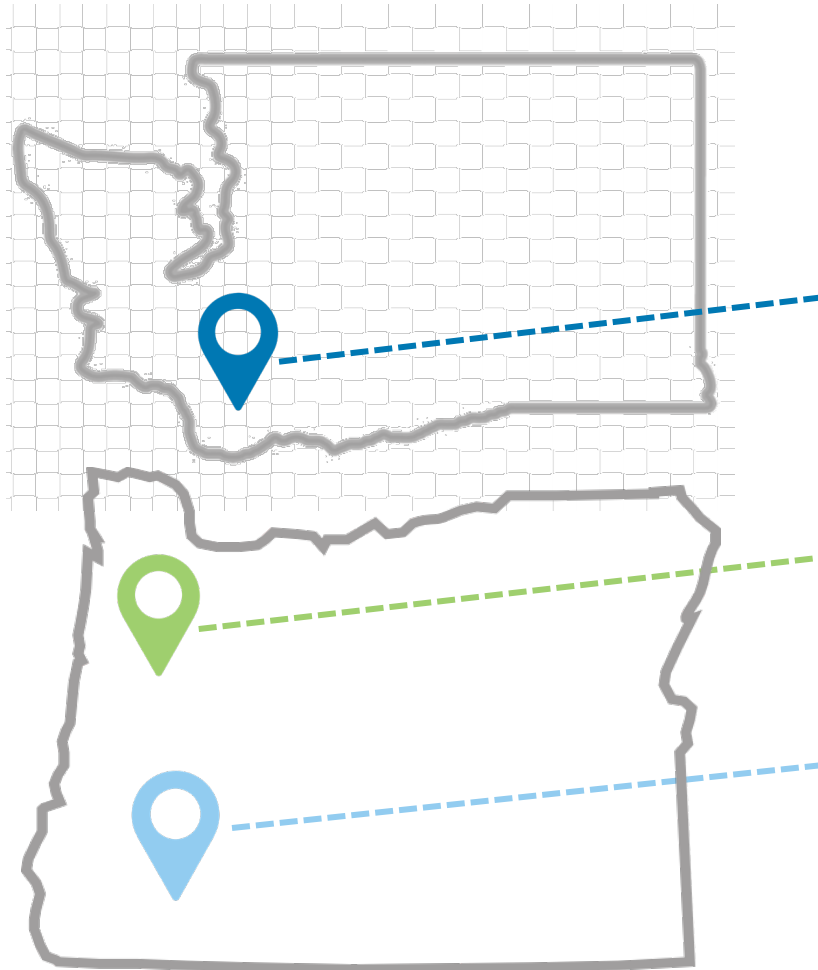
The Essential Role of Community-Based Organizations

A network is only as strong as **community-based organizations** engagement in it.



Three Geographic Regions

We focused on community engagement efforts in Connect Oregon and Unite Washington that align with Kaiser Permanente NW's regional service areas.



SW Washington Region

Counties: Clark, Cowlitz, Klickitat, Skamania, Wahkiakum

Launch Date: 12/17/2019

Orgs in Network: 27

Clients Served*: 345

Funders: KPNW

Portland Metro Region

Counties: Multnomah, Clackamas, Washington

Launch Date: 12/17/2019

Orgs in Network: 129

Clients Served*: 3,081

Funders: KPNW, Health Share of Oregon (Care Oregon, Legacy, Providence, OHSU and counties represented by HSO)

Mid-South Valley Region

Counties: Marion, Polk, Lane, Yamhill, Linn, Benton

Launch Date: 04/28/2020

Orgs in Network*: 112

Clients Served: 2,466

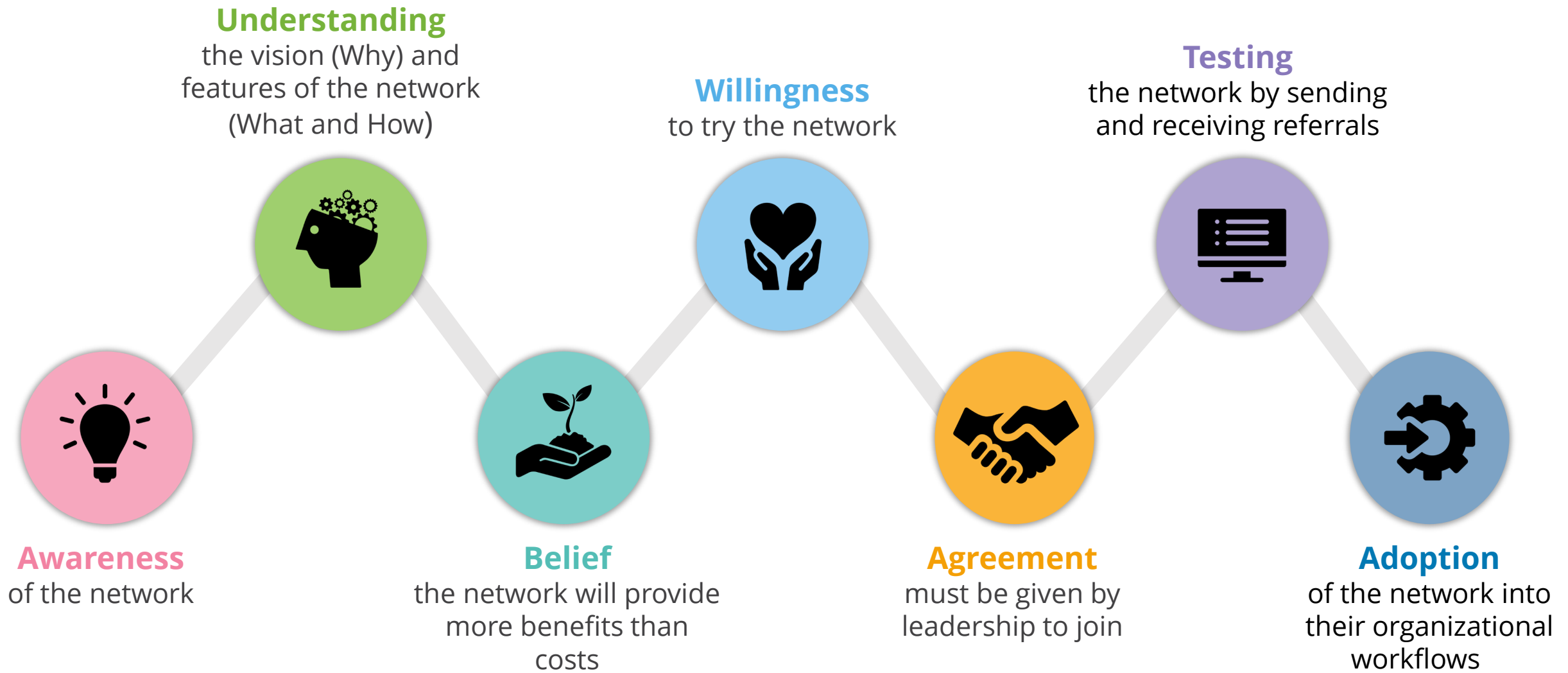
Funders: KPNW, PacificSource, InterCommunity Health Network CCO

What Do We Mean by Community Engagement?

The intentional process of making contact, recruiting, and supporting community-based organizations to use and become co-owners of the network.



Stages CBOs may go through as they become co-owners of the network

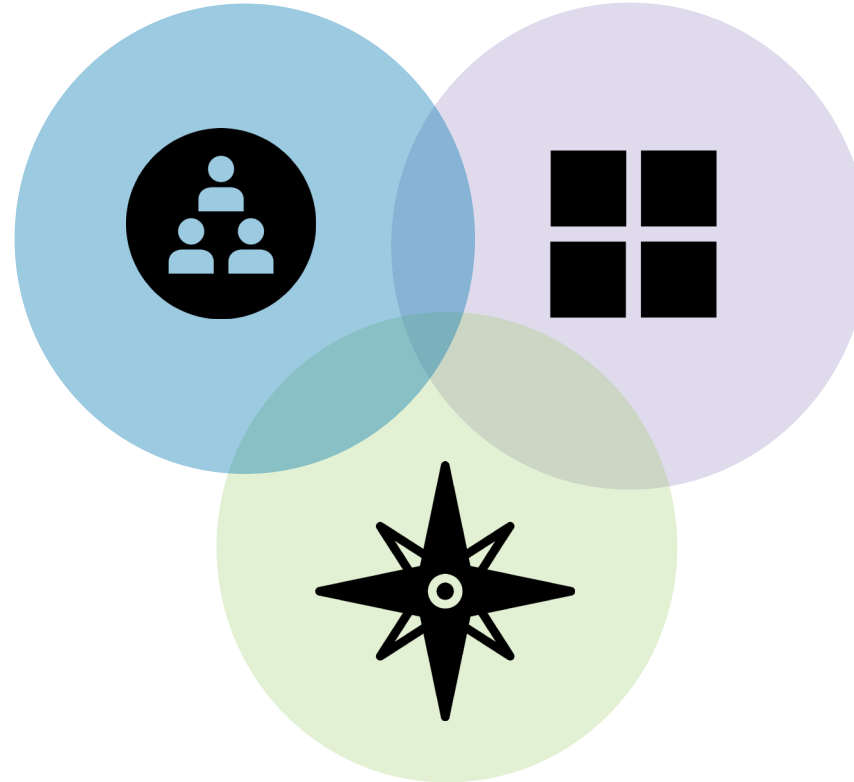


Stages can be long or short

What did we learn about community engagement in NW?

3 Actors

- Health systems' community-facing staff
- Unite Us community engagement managers
- Community service providers staff



4 Building Blocks

- Unite Us community engagement playbook
- Learning opportunities about the network
- Network work groups*
- Network health data

5 Principles

- Build trusting relationships.
- Showcase the big community information exchange vision and “What’s In It for Me” at the same time.
- Turn influencers into champions.
- Adapt to meet regional and CBO needs.
- Incentivize CBOs to engage.

* Formerly called Regional Network Implementation Groups

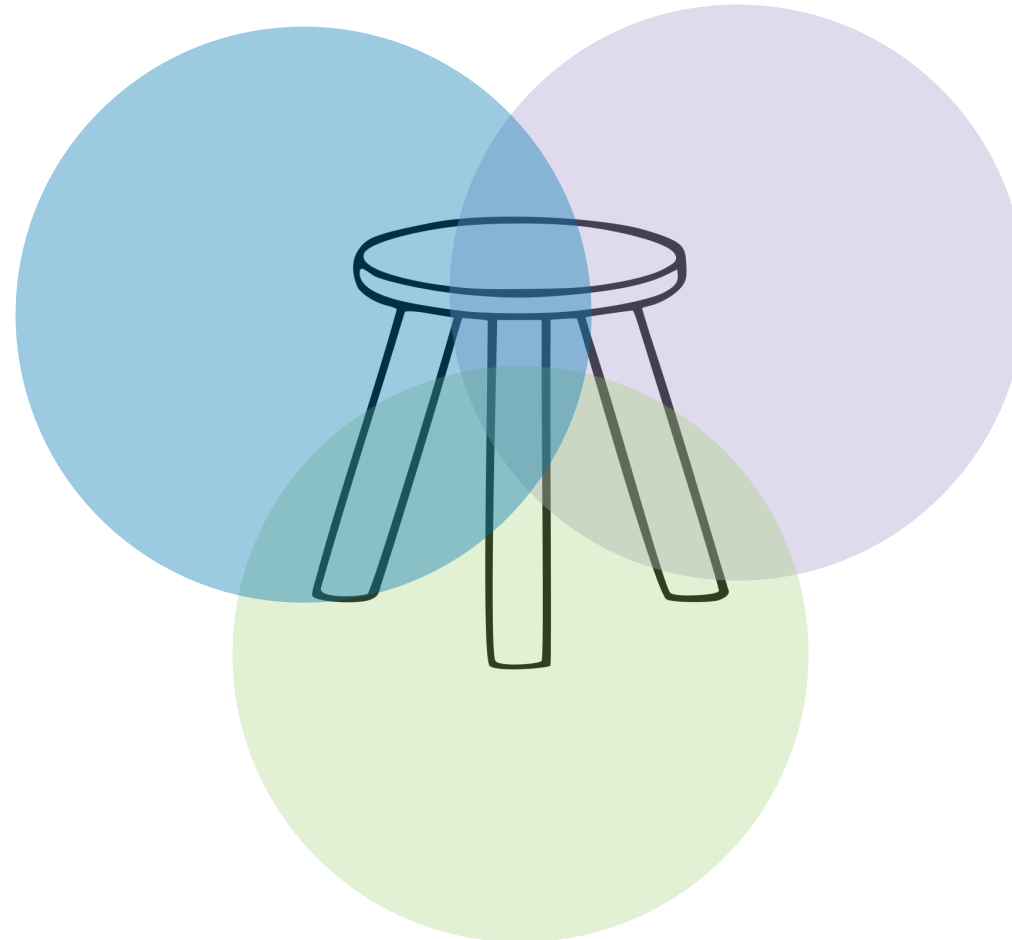


Three Interacting Actors Carry Out the Work of Community Engagement

The Promoters

Health systems' community-facing staff

- Share knowledge of region's history & culture of the region.
- Make connections between CBOs & CEMs.
- Propose ways to modify community engagement to better meet regional needs.
- Serve as ambassadors for the networks.
- Incentivize CBOs to engage.



The Operators

Unite Us Community Engagement Managers (CEMs)

- Learn about the region and CBOs.
- Outreach to CBOs.
- Host learning opportunities about the network.
- Connect CBOs to technical support.
- Keep looping back – checking on CBOs.
- Facilitate Regional Implementation Groups and share network health data.

The Experimenters

Community-based organization (CBO) staff

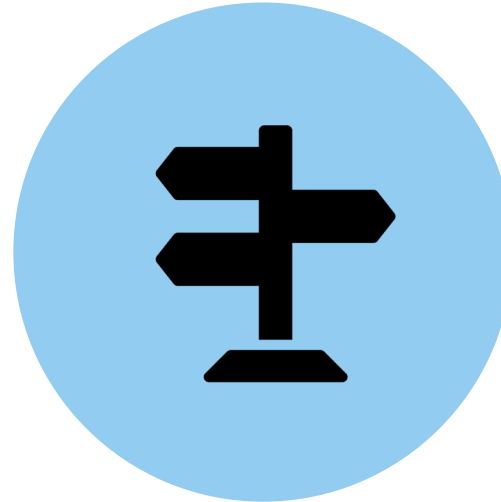
- Listen, ask questions, and learn about the network.
- Experiment with the network.

Health System Early Adopters Help Pave the Way

Kaiser Permanente NW was one of the first health systems to invest heavily in building statewide networks with Unite Us. From CBOs and other health systems, we learned three roles that early adopter health systems can play when forming networks.



Share early learnings about successes *and* pitfalls.



Help guide the way by offering ideas to consider based on past learnings.



Serve as ambassador to both CBOs and health systems by championing the networks.

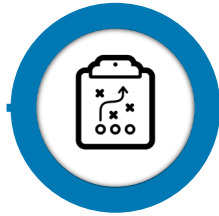
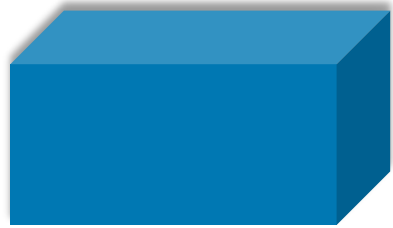
Oregon Health Leadership Council

Oregon Health Leadership Council plays an essential ambassador role in encouraging health systems to join and invest in the network.



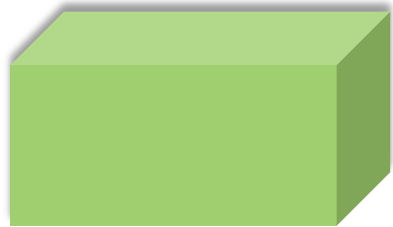


Four Building Blocks Support Actors to Engage CBOs



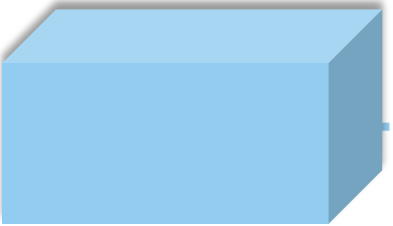
Unite Us Community Engagement Playbook

Guides a “best-practice” approach for engaging CBOs based on Unite Us’ extensive experience with networks across the country.



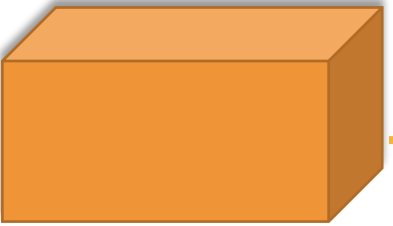
Learning opportunities about the network

Unite Us hosts venues for CBOs to learn about and engage with the network through one-on-one meetings, Lunch & Learn, community information sessions, workflow sessions, and newsletters.



Network Workgroups*

Unite Us and health systems’ staff strategize development, launch, community engagement, and network health optimization.



Network Health Data

Unite Us and health systems’ staff use Unite Us network data - number of organizations, clients served, % of organizations making/ sending referrals, and % of cases closed – to identify service gaps by sector and region and make improvements.

* Formerly called Regional Network Implementation Groups

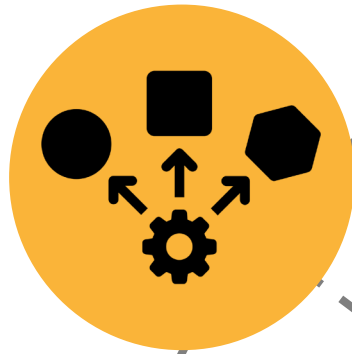
Unite Us Connect Oregon Success Stories

“As I was serving a client, he shared his concerns over his diabetic care and how he feared he would not be able to pay for his medication because of his COVID isolation. I remembered that a couple of days prior in the Partner Spotlight Zoom I attended, I had learned about the Borland Free Clinic. I shared the information with him and **he was just so thankful** for it and especially about the fact that they were very Latino/Hispanic friendly.”¹

- Maria Morales, YWCA Program Staff

Five Principles to Guide Regional Community Engagement Strategy

One size does not fit all:
Adapt to meet regional and CBO needs.



Zoom Out and Zoom In:
Showcase the big community information exchange vision and “What’s In It for Me” at the same time.



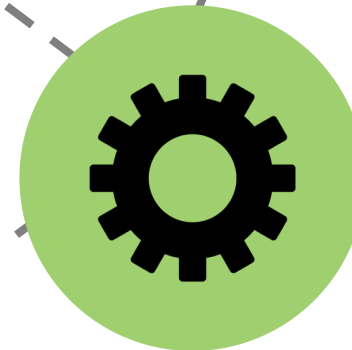
Lessen the burden:
Incentivize CBOs to engage.



Go slow to go fast:
Build trusting relationships.



The Flywheel:
Turn influencers into champions.





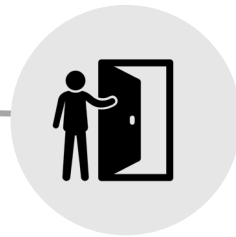
Principle #1: Go Slow to Go Fast – Build Trusting Relationships

Building the network is about building trust within a community.

Lack of
Trusting Relationship



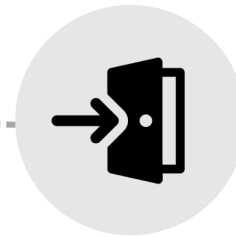
Salesperson
rings bell



CBO opens
door to listen



Salesperson
pitches product

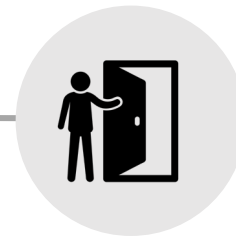


CBO closes door

Trusting Relationship



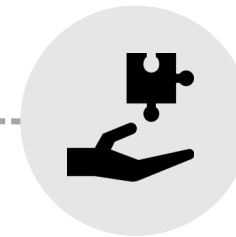
Collaborator
rings bell



CBO opens
door to listen



Collaborator asks
questions, listens,
and spends time
to understand
CBO



Collaborator then
shares how
network can
address CBO pain
points



CBO more willing
to engage



Ways to build trusting relationships with CBOs



Show up with humility: Acknowledge CBO's expertise and use of existing information/referral systems.



Communicate shared goals of wanting to help people meet their social and health needs.



Share the vision and features of the network organically when engaging in conversation around other topics.



Assess readiness to engage. Pause when not ready. Loop back at another time.



Acknowledge if/when the network is not a good fit for the CBO.



A Way to Pause and Dialogue: Kaiser Permanente NW's investment in relationship building among SW Washington regional hubs

1 Concern

SW Washington service hubs concerned Unite Washington wasn't aligning or supporting existing regional infrastructure.



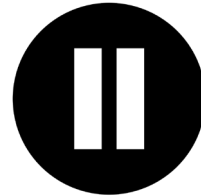
SWACH

AREA AGENCY ON
Aging & Disabilities
OF SOUTHWEST WASHINGTON



2 Pause

Kaiser Permanente NW requested Unite Us to pause on recruitment in that region.



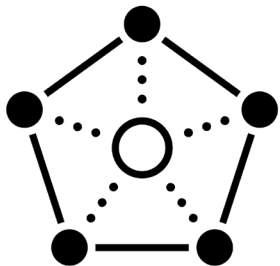
3 Invest

Kaiser Permanente NW awarded one-year, \$40K grants (\$120K total) to each hub to engage in dialogue and learning about the network.



4 Dialogue

Hubs, Unite Us, and Kaiser Permanente NW met monthly for 1 year to get to know each other, learn about each other's models, and identify ways to partner.



5 Understanding

Partners developed trust and a shared vision & values, understood similarities and differences in models, and experimented with the platform.



6 Engagement

Hubs became engaged partners.





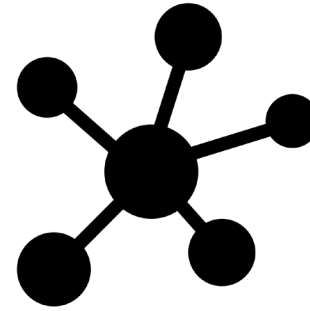
Principle #2: Zoom Out and Zoom In

Zoom Out:
The CIE Vision



Address both simultaneously

Zoom In:
What's In It For Me





Ways to Zoom Out and Zoom In

Zoom Out: The CIE Vision

Spreading the vision through multiple venues

Aligning, coordinating, and communicating a shared statewide vision among multiple influencers (*coalitions, state health agencies, health systems*) using multiple channels (*meetings, e-mails, videos*).



Zoom In: What's In It For Me

Sitting down with one CBO during a Workflow Meeting

Unite Us community engagement manager asks many questions about CBO pain points and then identifies ways to customize the user experience to help resolve those pain points.





Principle #3: The Flywheel – Turn Influencers into Champions

When influencers aren't engaged, fewer people engage with or invest in the network.



When influencers are engaged, they become champions who can spread the word to their members, who in turn spread the word to their members – creating a ripple effect.

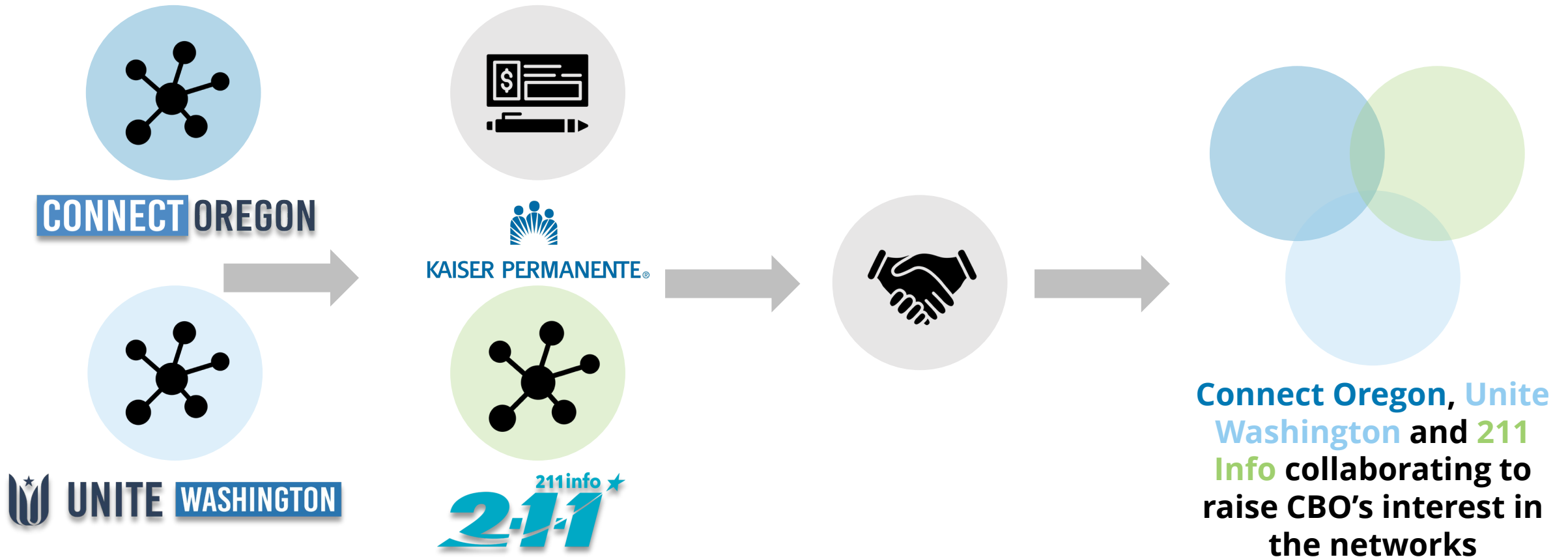




Ways to Turn Influencers Into Champions

Partner with a trusted, well-known statewide entity

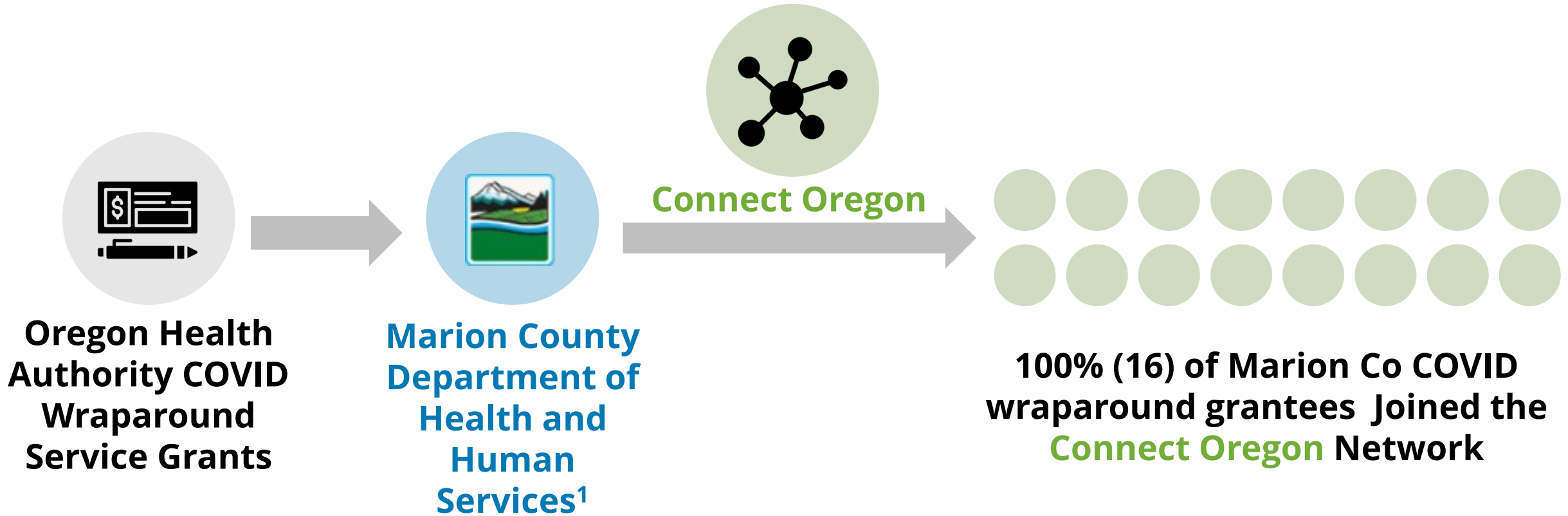
Kaiser Permanente tapped 211info to serve as a [Coordination Center](#) for Connect Oregon and Unite Washington through 2.5 year, \$400K+ grant. 211info became a champion for Connect OR and Unite WA by reaching out to CBOs in its resource directory and lending its credibility to raise CBO interest in the networks.





Ways to Turn Influencers Into Champions

Target program funders

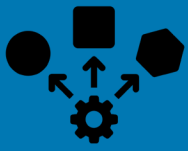


¹=Other counties in Oregon requested COVID Wraparound Service grantees to join Connect Oregon as well.

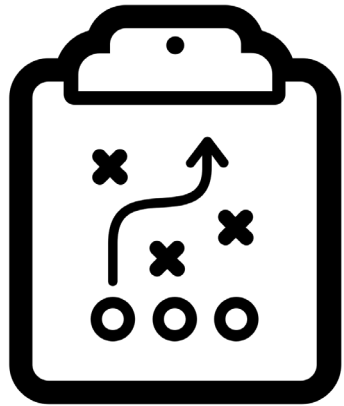
Unite Us Connect Oregon Success Stories

“A family all tested positive for COVID-19 while their father was on a long-haul truck job. He was unable to return home because he was the sole provider for the family and they could not risk exposing him to COVID-19. **We were able to refer this family for wrap-around support through Unite Us,** and we were also able to temporarily house the father in a free shelter with food provided until the family was through their isolation period.”¹

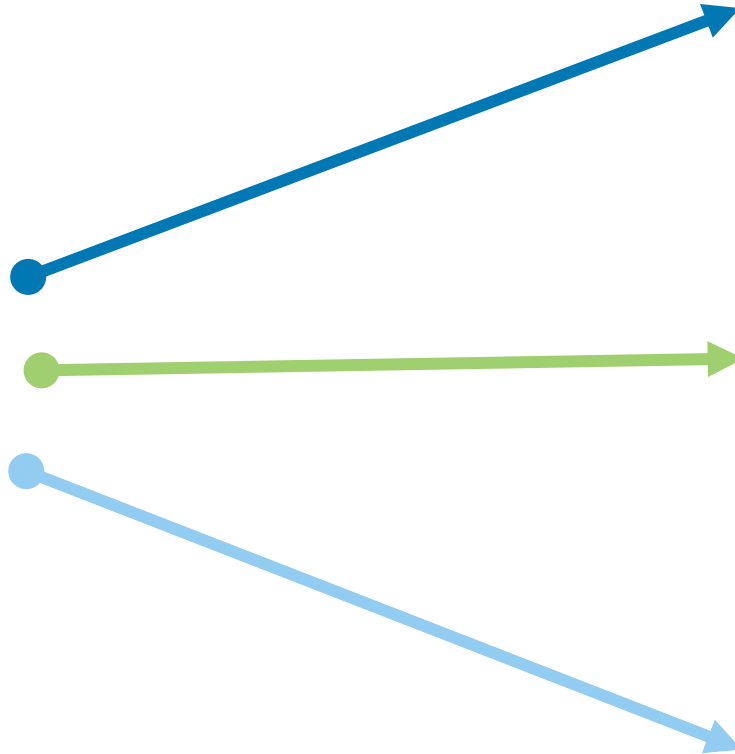
- Isabel Dreyfus, Human Services Coordinator, Clackamas County Public Health Department



Principle #4: One Size Does Not Fit All: Adapt to Meet Local Needs



**Unite Us
Playbook**



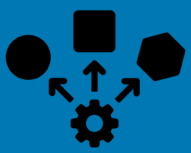
**Portland Metro
Region Playbook**



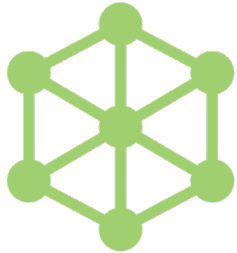
**Mid-South
Valley Region
Playbook**



**SW Washington
Region
Playbook**



Ways to adapt to meet local needs



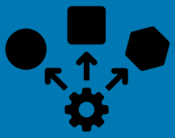
Offer multiple engagement touchpoints: one-on-one conversations (i.e., socializing meetings), community information sessions, workflow meetings, e-mail outreach, warm handoff introduction from a trusted colleague.



Learn about the CBO's needs: Ask questions about the CBO's services, clients, existing information and referral systems, and pain points.



Pilot new ways to better meet CBO's needs and then share innovations with other regions.



Adapting to Meet Local Needs: Food For Lane County and Self-Referral



*Reducing hunger by engaging
our community to create
access to food.*

español ▾

[Home](#) » [Get Help](#)

Get Help

[Request Help Online](#)

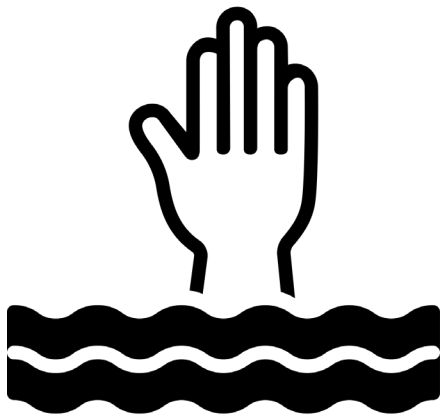
FOOD For Lane County's hunger relief efforts are focused on providing food assistance and increasing self-sufficiency for our neighbors living on limited resources.



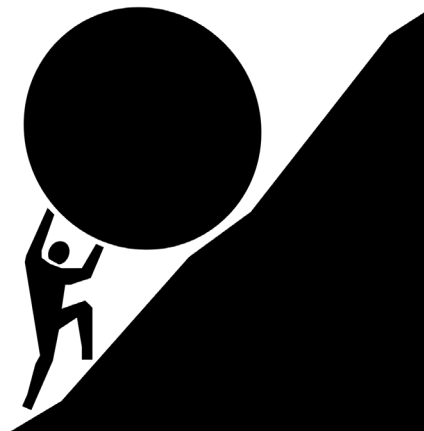


Principle #5: Lessen the Burden – Incentivize CBOs to Engage

CBOs under resourced to meet demands for service



Asking CBOs to adopt another “shiny thing” is too overwhelming.



Receiving resources makes it easier for CBOs to try something they haven't asked for.





Ways to Incentive CBOs to Engage With the Network



Award grants to CBOs to learn about and provide feedback on the network and experiment with it.



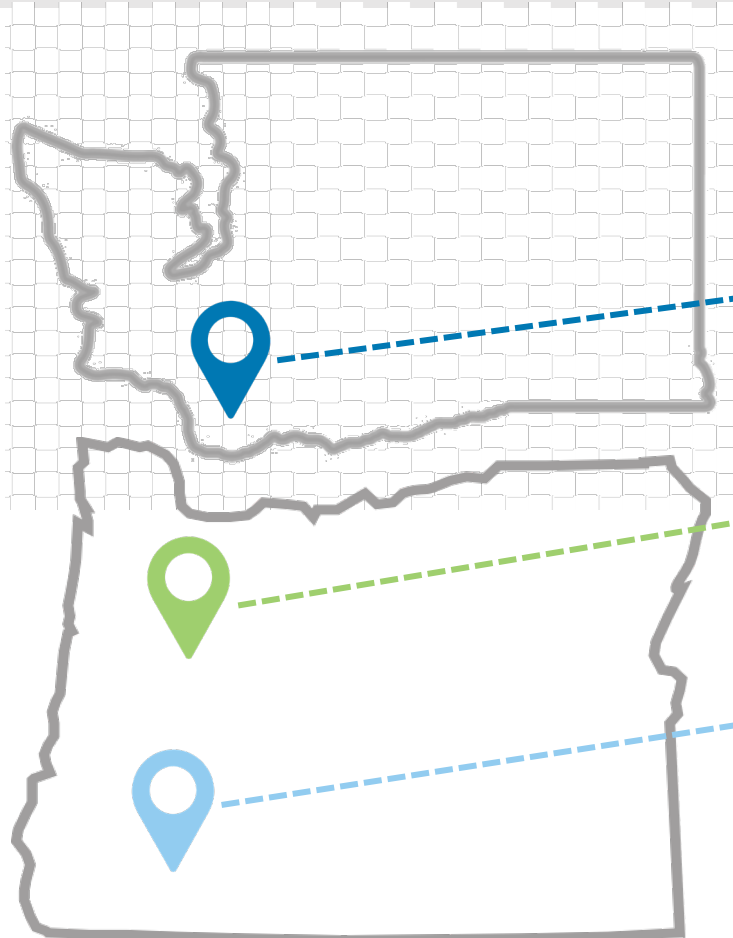
Pay for social services.



When offering event sponsorships, request that they join the network.

Way to Lessen the Burden: Community Clinic Integration (CCI) Grant Initiative

Kaiser Permanente NW awarded over **\$1.7 million** in one-time, capacity building grants to CBOs to learn about, provide feedback on, and experiment with Connect Oregon and Unite Washington.



SW Washington Region

CBOs Funded: 21
\$ Awarded: \$514K total, \$24.5K/grant
Years: 1
% CBOs Joined Network: 90%

Portland Metro, SW Washington and Mid-Valley Regions

CBOs Funded: 10
\$ Awarded: \$600K total, \$60K/grant
Years: 2
% CBOs Joined Network: 80%

Mid and South Valley Region

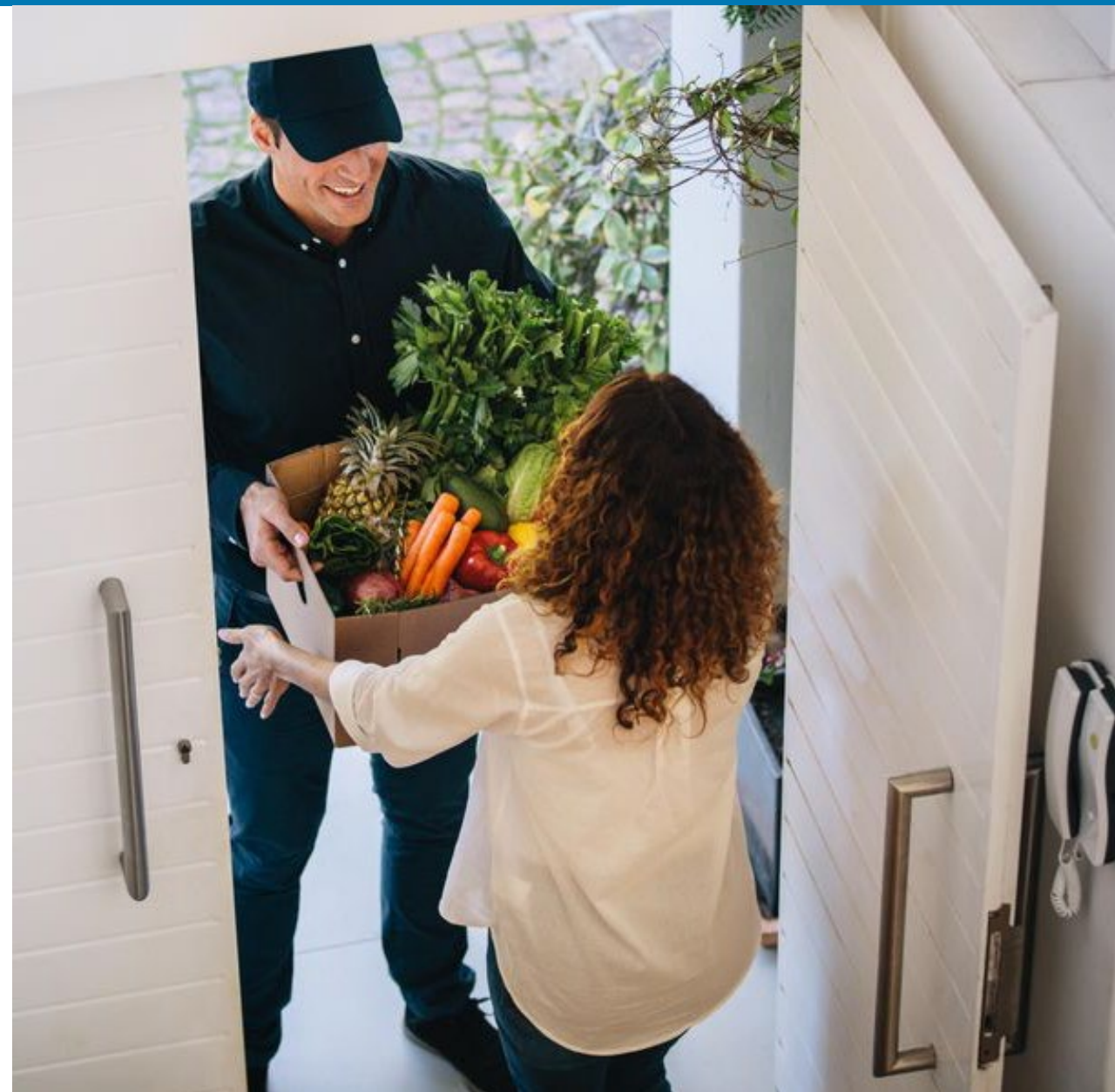
CBOs Funded: 12
\$ Awarded: \$720K total, \$60K/grant
Years: 2
% CBOs Joined Network: 100%



Way to Lessen the Burden: Pay for Services

From April 2020 – December 2021, Kaiser Permanente NW conducted a research project¹ where Meals on Wheels People delivered **19,393** medically tailored meals to the homes of **500** members with medical management, allergies, or chronic diseases. Meals on Wheels was reimbursed \$10/meal for a total of **\$193,930.**

1=KP National conducted this one-time research project to test efficacy of the model and does not currently offer this as a service to all members.



Unite Us Connect Oregon Success Stories

“Every time we get a referral in Unite Us and are able to connect people who need nutritional support with meals is a success. Early on, we got a referral from Kaiser for a patient discharged from the hospital with COVID-19. Her husband, who also contracted COVID-19, died unexpectedly. When we delivered her meals, we called to tell her they were on her porch and checked in weekly. Once she was able to get back to cooking for herself, **she told us she felt like it saved her life** to have people checking in on her on a regular basis. This is the miracle of service. To serve our community best, **we need partners like Unite Us** to show us the people in need.”¹

- Jody Grant, Program Manager at Meals on Wheels People, a nonprofit based in Portland, OR