



2023

# InnovationEX

HOSTED BY NACHC

Operationalizing and Sustaining  
Innovation for the Future

## AGENDA

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- 8:00** • Event Check-In & Continental Breakfast
- 9:00** • Program Begins  
Welcome to NACHC's Center for Community Health Innovation, Merrill Warschoff Press  
Innovation Conversation with NACHC's New CEO, Dr. Kyu Rhee
- 10:00** • Innovation Incubator Live Pitch Session
- 11:45** • Break
- 12:00** • Panel  
Operationalizing Innovation for the Future
- 12:50** • Networking Lunch
- 1:50** • Panel  
Sustaining Innovation for the Future
- 2:40** • Break
- 2:55** • Roundtable Activities with IDEO.org  
Operationalizing & Sustaining your Innovation
- 4:40** • Incubator Pitch Session Awards
- 5:00** • Wrap Up
- 5:30** • Program Ends



Welcome to NACHC's Innovation Experience Event! This year, we will focus on **Operationalizing and Sustaining Innovations for the Future.**

#### **What is InnovationEx?**

InnovationEx is a new annual 1-day event hosted by NACHC's Center for Community Health Innovation. The goals of InnovationEx are to expand the community of health center innovators, spread sustainable innovations throughout the health center ecosystem, and convene a forum for health center innovators to network and share ideas.

#### **About NACHC's Center for Community Health Innovation**

At the heart of this innovation journey is **NACHC's Center for Community Health Innovation (CCHI)**. Founded in 2021, CCHI's mission is to serve as a catalyst for innovation at America's Community Health Centers and to help advance future-focused approaches that increase access to affordable, equitable, quality health care for all.

*The NACHC's InnovationEx 2023 was made possible by a generous grant to CCHI by the RCHN Community Health Foundation.*





**Ashish Abraham**  
Foresight  
CEO

Dr. Ashish Abraham is a healthcare entrepreneur and physician-executive with 20+ years of diverse experience in direct clinical care, health plan operations, healthcare technology and strategic consulting. Dr. Abraham is currently an independent consultant offering advisory services in care management program design and implementation, quality improvement, health plan operations and healthcare investment and acquisition activities. Till recently, Dr. Abraham was the Chairman and President of Altruista Health a health technology and solutions company that he co-founded in 2007, providing care management technology solutions to clients in 35 states and serving 18 million lives. In the past, Dr. Abraham has had extensive experience in the health insurance sector serving as Senior Vice President of United Health Group's Medicaid Health Plans MSO Division.



**Jeff Allen**  
FORVIS  
Healthcare Partner

Jeff is a member of FORVIS National Health Care Group and the firm's community health center practice leader. He manages audit and cost report preparation services and provides consulting services in the areas of Medicare and Medicaid reimbursement, federal grant reporting and operational issues. Jeff also serves as a firmwide resource regarding federal audit guidelines and their application to community health centers. As an avid public speaker, Jeff frequently presents on community health center topics for the NACHC and several state primary care associations. He also conducts presentations for private and governmental organizations seeking to develop the community health center model for their communities. Jeff has co-authored articles on community health center accounting as well as operational and reimbursement topics for national as well as FORVIS publications.



**Honor Childress**  
MPCA – Senior Director of  
Payer & Financial Strategy

Honor brings over a decade of FQHC expertise, executive leadership, and an unwavering commitment to healthcare innovation to her current role at the Michigan Primary Care Association (MPCA). Honor has championed value-driven care, creative financial strategies, and pioneering partnerships aimed at driving the success of holistic integrated service delivery models. She has collaborated with health centers spanning urban, rural, and tribal settings across the nation, engaging in diverse projects aimed at dismantling barriers to care, enhancing access and efficiency, and bolstering long-term sustainability.



**Cecilia Corral**  
Care Message – Co-Founder and  
Vice President of Product

Driven by her experiences growing up in a low-income immigrant household, Cecilia takes a patient-centric approach to product development with a relentless focus on user research. Outside of her work at CareMessage, she is an advocate for Diversity and Inclusion in the tech industry through collecting and publishing data on Latina Tech Founders. Cecilia was on the 2019 Forbes 30 under 30 list for Healthcare and graduated with a B.S. in Product Design Engineering from Stanford University.



**Michael Crawford**  
Howard University – AVP for  
Strategy and Innovation

Michael is an experienced, entrepreneurial, and intellectually curious healthcare executive with over 20 years of domestic and international management, operations, strategy, finance, policy, and business development experience at large corporations, nonprofits, and start-ups, including Howard University, Unity Health Care, Inc., Johnson & Johnson, GlaxoSmithKline, and Gannett Company. He is an innovative, strategic, and solution-oriented leader that is adept at managing multi-disciplinary teams, sophisticated projects, and strategic partnerships. In addition, he enjoys solving complex business challenges by leveraging innovative ideas, people, processes, and technology.



**Feygele Jacobs**  
George Washington University  
Professor & Director

Feygele Jacobs, DrPH, MS, MPH is a Professor of Health Policy and Management and Director of the Geiger Gibson Program in Community Health at the Milken Institute School of Public Health, George Washington University. Prior to joining GW, she was President and CEO of the RCHN Community Health Foundation (RCHN CHF), a non-profit foundation dedicated exclusively, until its sunset in 2022, to supporting and benefiting health centers and the communities and patients they serve across America, and whose signature initiatives focused on expanding access and helping health centers enhance their capacity and strengthen systems and operations.



**Leinaala Kanana**  
WCCHC – Chief Community Health Services Officer

Leinaala Kanana has recently come into her new role of Chief Community Health Services Officer since Jan of 2023 after serving over 20 years in the Community Health Services Department. Leinaala completed her bachelors of social work degree from Brigham Young University – Hawaii campus and joined Waianae Coast Comprehensive Health Center (WCCHC) wanting to explore more in the medical social worker realm. After working in the Malama Recovery Service Department as a Baby SAFE Outreach Worker and transferred to the Perinatal Program where she worked with substance using pregnant and post-partum women. She obtained her masters in social work from Boston University and worked her way up to the Director of Community Health Services where she oversees the health centers enabling services including transportation, case management, homeless outreach, care coordination, and eligibility services.



**Brynn Kolada**  
IDEO.ORG  
Partnerships Director

As a Partnerships Director at IDEO.org, Brynn focuses on creating the conditions for great design, supporting design teams to do their best work, and building relationships with a diverse set of partner organizations working in support of IDEO.org's mission to create a more just and inclusive world.

Brynn's work at IDEO.org has spanned sectors and geographies, including building a portfolio of work related to humanitarian contexts and displaced populations, stewarding digital financial services projects in support of micro-merchants around the world, and expanding IDEO.org's health equity work in the US.



**Julia Liou**  
Asian Health Services (AHS)  
CEO

At AHS, I led our advocacy and multi-million dollar fundraising campaigns, strategic planning, development, the AHS Business Council, compliance and communications. I also bring a wealth of relationships and connections to California State legislators, community groups across the state and local businesses due to my work co-founding, developing and directing the California Healthy Nail Salon Collaborative, which passed four statewide bills and has evolved into a national initiative in four states. Recently, my collaboration with a cohort of rural and urban FQHCs through NACHC resulted in the initiation of a federal funding stream to seed innovation and technology initiatives for community health centers nationwide.



**Kathryn McKenzie**  
Abbott – Divisional Vice President,  
Global Citizenship and Sustainability

Kathryn McKenzie serves as Divisional Vice President of Global Citizenship and Sustainability at Abbott. She leads a team working to find ways to deliver long-term impact for the many people Abbott serves – building a more sustainable business, shaping the future of healthcare and helping the greatest number of people live better and healthier. She also serves as Vice President of Abbott Fund, the company's philanthropic foundation, which partners with others to expand access to healthcare, strengthen communities worldwide, and promote science and health education.



**Kim Schwartz**  
Roanoke Chown Community Health Center (RCCHC) – CEO

Kim Schwartz currently serves as the Chief Executive Officer of Roanoke Chown Community Health Center (RCCHC), a Federally Qualified Community Health Center in Eastern North Carolina. In this role, she champions the unique challenges of the health care needs of rural communities in traditionally marginalized areas and has generated key collaborations and innovations to advance RCCHC's mission of enhancing the lives of Eastern North Carolinians. Kim leads RCCHC's team as a member of the Institute of Health Improvement (IHI) Leadership Alliance, represents US Congressional District 1 on the North Carolina Medical Care Advisory Committee, and serves on the Board of OCHIN, a HCCN and is past Chair of the North Carolina Community Health Center Association.



**Abby Sears**  
OCHIN  
President & CEO

As President and CEO of OCHIN, Abby Sears leads the nation's largest health information technology and innovation organization focused on the needs of primary care providers serving historically underserved communities nationwide. A prominent national speaker and HIT advisor, Abby is driven by the goal of health equity as she builds a premier information and technology network. Abby is steering OCHIN to harness the power of its membership, research, and data to change health outcomes through OCHIN's national reach.



# A CONVERSATION WITH DR. RHEE



## **DR. KYU RHEE**

PRESIDENT and CEO, NACHC

Dr. Kyu (“Q”) Rhee joined the National Association of Community Health Centers in 2023 to lead efforts to advance health equity and support the mission of community health centers, which provide high-quality, affordable, transdisciplinary primary care services to more than 31.5 million people at over 14,000 sites across the nation.

As a purpose-driven physician executive, scientist, teacher, and entrepreneur, Dr. Rhee has a reputation synonymous with leadership, innovation, and transformation across the nonprofit, public, and private sectors. Throughout his career, Dr. Rhee has actively worked to advance primary care, public health, and health equity for underserved populations. Before joining NACHC, Dr. Rhee held the position of Senior Vice President and Aetna Chief Medical Officer at CVS Health. He led a team of over 1,500 doctors, nurses, pharmacists, and other health professionals in the integration and delivery of clinical and population health solutions to improve the health and deliver the “Quintuple Aim” for up to 65 million people via commercial, Medicare, Medicaid, behavioral health, digital health, student health, vision, dental, and voluntary health plans. Dr. Rhee served for a decade as the Chief Health Officer at IBM, where he and his team led IBM’s global efforts to transform health using data, analytics, artificial intelligence, services, and research.

During the time of the Affordable Care Act, Dr. Rhee held the office of Chief Public Health Officer at the Health Resources and Services Administration. Dr. Rhee also worked at the National Institutes of Health as the Director of the Office of Innovation and Program Coordination.

Prior to his public service, Dr. Rhee was Chief Medical Officer at Baltimore Medical System and worked as a National Health Services Corps primary care physician and Medical Director for Unity Health Care.

Dr. Rhee was Chief Resident and completed his medical residency training in both internal medicine and pediatrics at Cedars-Sinai Medical Center in Los Angeles with dual-board certification. He earned his medical degree from the Keck School of Medicine at the University of Southern California. Dr. Rhee also holds a master’s in health care policy from Harvard University’s John F. Kennedy School of Government. He has a Bachelor of Science degree from Yale University in Molecular Biophysics and Biochemistry.



INNOVATION  
INCUBATOR

# PITCH SESSION

## MEET THE JUDGES



**JEFF ALLEN**

*FORVIS*  
Healthcare Partner



**MICHAEL CRAWFORD**

*Howard University*  
AVP for Strategy and Innovation



**BRYNN KOLADA**

*IDEO.ORG*  
Partnerships Director



**ABBY SEARS**

*OCHIN*  
President & CEO

## ABOUT THE INNOVATION INCUBATOR

NACHC has teamed up with the global healthcare company Abbott to launch the Innovation Incubator, helping health centers improve health equity by addressing their own **digital and health literacy challenges**. In May, NACHC selected eight health centers to receive seed funding, access to leading experts and training on human centered design principles. Participants designed and tested solutions and their work will be shared nationwide to help inspire and create new ways for community health centers to break down barriers that prevent people from getting the care they need.

## ABOUT THE INNOVATION INCUBATOR FUNDER

Abbott is a global healthcare leader that helps people live more fully at all stages of life. Our portfolio of life-changing technologies spans the spectrum of healthcare, with leading businesses and products in diagnostics, medical devices, nutritionals and branded generic medicines. Our 115,000 colleagues serve people in more than 160 countries.





## ABOUT OUR ORGANIZATION

Golden Valley Health Centers is a federally qualified health center whose mission is to provide quality medical, dental, mental health and specialty health care services regardless of language, financial or cultural barriers that serves 208K patients at 45 health centers in the North Central Valley of California.

## CHALLENGE

GVHC seeks to provide virtual enhancements as a means of increasing access, this has proven to be in-demand and effective even as social distancing has waned. Unfortunately, interventions intended to improve care for GVHC's patient base as a whole often do little to enhance access for rural or non-English-speaking patients, leading unintentionally to further disparities.

## SOLUTION

GVHC seeks to increase digital health literacy among patients by offering MyChart app in Spanish and creating a campaign that helps patient's access and learn how to navigate My Chart. This would include many departments at our health centers to from IT- to create the enhancements to our CHW team helping at lobbies to our Marketing department creating a campaign.



<https://www.instagram.com/seamarhealtheducation/>

## ABOUT OUR ORGANIZATION

Sea Mar Community Health Centers was founded on principles of social justice and has worked to improve the health of underserved communities, especially Latino/a, immigrant, uninsured, and low-income populations. The Sea Mar Health Education team works as part of the medical care team to promote self-management of chronic conditions by providing health education on the pathophysiology of chronic conditions, medication management, and healthy lifestyle changes. Considering the populations, we primarily serve, accessing culturally relevant and scientifically accurate health information in the patients' preferred language is a challenge. Through our work in the NACHC Innovation Incubator, we are seeking new ways to improve patient comprehension, language access, scientific accuracy, and cultural relevance of our patient education materials.

## CHALLENGE

Sea Mar patients need resources to improve their self-management of chronic conditions, but existing patient education materials do not address their cultural or literacy needs.

## SOLUTION

Our team is working to update our workflows for creating patient education materials to increase language access and community feedback processes. We will also implement digital, interactive materials to address the cultural, language, and literacy needs of the community more effectively.



## ABOUT OUR ORGANIZATION

Upper Great Lakes Family Health Center's mission is providing exceptional health care services for all people in the Upper Great Lakes region regardless of their ability to pay, and we are proud to be a core resource within our communities. We offer integrated medical, dental, and behavioral health services and specialize in sports injury, substance use disorder treatment, women's health, and pediatric care. Being recognized by HRSA as a quality leader, advancing HIT for quality, and addressing social risk factors, our care team demonstrates professional, patient-centered care and truly inspires to be an accountable leader in providing value for our patients. At our 12 clinic sites, our community health workers and care managers help address social drivers and reduce hospitalizations and visits to the ED. The team provides care management services, helps patients to understand their medications and conditions, sets goals with patients to lead healthier lifestyles, and function as patient navigators and advocates with external care teams involved in a patient's care.

## CHALLENGE

We are challenged with inherent communication barriers that exist within the healthcare system, which create obstacles in effective screening for our patients' social drivers and barriers to care. These challenges are deeply rooted in patients' health literacy needs and the need for safe, informed environments for care. Patients are often asked sensitive questions in busy waiting rooms. Often, people feel compelled to not tell the truth and their unmet need continues to be a burden. As a patient-centered medical home, we pride ourselves in being able to ask these questions, but we have never thought about including patients' feedback and experiences into addressing some of these problems.

## SOLUTION

By taking the time to ask our patients about how we can improve, and working with our patients on those improvements, we have started to set aside our assumptions and embarked on a new journey that truly puts the patient at the heart of the care we provide. After listening to their feedback, we understand that we need to be able to ask these sensitive questions in a non-threatening, open environment and can use technology to do so. Our solution is to begin sending the PRAPARE screening to our patients and asking sensitive questions in an electronic format, we will be able to provide a new pathway to our patients that allows them to feel more comfortable in answering questions that may otherwise feel uncomfortable.



<https://lamaestra.org/>

## ABOUT OUR ORGANIZATION

La Maestra Community Health Centers serves 45,000 low-income, uninsured and underinsured individuals annually in central, east and south San Diego County, California. La Maestra's mission is to provide quality healthcare and education, improve the overall well-being of the family, bringing the underserved, ethnically diverse communities into the mainstream of our society, through a caring, effective, culturally and linguistically competent manner, respecting the dignity of all patients. La Maestra aims to achieve this by utilizing the La Maestra Circle of Care® services, which includes primary and specialty health care, along with integrated social services such as job training and placement, legal advocacy, transitional housing, interpretive services, eligibility and enrollment assistance, a community garden, food pantry, microcredit, and microenterprise programs.

## CHALLENGE

Only 10% of La Maestra senior patients have an active patient portal. Many of these patients have digital hesitations and/or prefer another language other than English.

## SOLUTION

Increased partnerships with providers, especially La Maestra's geriatrician. Increased Patient Portal sign up and awareness sessions in collaboration with IT, QI team, Development and Community Outreach to increase patient portal sign ups by reducing hesitations and barriers.



<https://www.eriefamilyhealth.org/>

## ABOUT OUR ORGANIZATION

Motivated by the belief that healthcare is a human right, Erie provides high quality, affordable care to support healthier people, families, and communities, regardless of their ability to pay. Erie's care encompasses medical, dental, and behavioral health. In addition to clinical care, Erie offers wraparound supportive services such as resource linkage, case management, health education, chronic disease management and more in an effort to reduce health inequities and address social drivers of health needs. Erie serves more than 86,000 patients across more than 185 zip codes a year through a network of 13 health centers in diverse Chicago neighborhoods and suburban communities.

## CHALLENGE

Erie's Social Drivers of Health (SDOH) Navigator team works remotely to connect patients to resources such as food, housing, baby items, transportation, and internet via telephone. There is a digital divide amongst patients who are elderly or speak a language other than English. These patients are less likely to engage in telehealth services, utilize MyChart to communicate with their provider, and access social resources. The SDOH Navigator team has faced challenges supporting patients with resources while not being in the same physical location.

## SOLUTION

We aim to identify and target patients with a high digital risk score and offer at-will telehealth support visits with the SDOH Navigator team. In these visits, the team will connect them to resources, sign them up for MyChart, or prepare them for an upcoming telehealth visit. This will allow the SDOH Navigator team to better connect with patients by utilizing telehealth features such as screensharing to visually and verbally provide support to patients. In addition, we are working on creating.



UNIVERSITY OF MINNESOTA

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<https://cuhcc.umn.edu/>

## ABOUT OUR ORGANIZATION

Community-University Health Care Center (CUHCC), the state's first and oldest Federally Qualified Health Center in Minnesota, opened in 1966 to serve children in the Phillips community. Today, the clinic serves people of all ages in pursuit of its mission to Transform care and education to advance health equity. CUHCC meets this mission by providing whole-person health care, training future health professionals and conducting research to improve patient care.

CUHCC's culturally responsive whole-person care model includes medical, dental, and behavioral health services, and supportive services such as pharmacy; pro-bono legal services; insurance navigation; interpreting; and care coordination. In 2022, CUHCC served 9,945 patients through 49,886 visits.

CUHCC is also a primary care training site, annually providing inter-professional learning opportunities to nearly 200 residents/ students in medicine, dentistry, social work, nutrition, pharmacy, and more.

## CHALLENGE

CUHCC needs a way to improve confidence in the use of digital materials/systems for staff and patients.

## SOLUTION

Designate a team to help patients sign up for MyChart when they come in for their visits. Training classes for patients and staff on how to sign up, how to access health information and send messages to their care team.



<https://howardbrown.org/trans-health/trans-and-nonbinary-surgical-navigation/>

## ABOUT OUR ORGANIZATION

Howard Brown Health (HBH) is the largest LGBTQ+ health center in the Midwest serving more than 35,000 patients across eleven clinics in Chicago. HBH serves patients across the lifespan using a holistic model of care including primary care, sexual health, behavioral health, case management, transgender surgical navigation, research, and robust community engagement initiatives. Collectively, we intentionally work towards a future where healthcare and social policies actualize human rights and equity for all. About 20% of HBH's patients identify as transgender and gender-diverse (TGD). TGD patients experience complex barriers to care including discrimination, societal violence, unemployment, geographical barriers, and housing instability. With the introduction of anti-transgender legislation across the country, increasing access to gender-affirming care is paramount. HBH is fiercely dedicated to innovative solutions to in empowering TGD patients in gender-affirming care access.

## CHALLENGE

Trans and gender-diverse (TGD) people experience many barriers when attempting to access healthcare, including lack of educated and affirming providers, discrimination in insurance coverage, refusal of medical services, and increasing criminalization of gender-affirming health care. Now more than ever, we want to leverage our knowledge at Howard Brown Health to ensure that TGD patients can digitally access the care that they need. TGD patients need accurate and safe resources and referrals for gender-affirming care.

## SOLUTION

We created a digital information hub to help improve access to gender-affirming care, improve health literacy, and facilitate complex healthcare navigation for our TGD patients. The hub will also help TGD community members navigate the complex web of gender-affirming care services that Howard Brown does not offer by presenting safe and affirming referral resources. We've developed several digital health literacy resources, including a gender-affirming care factsheet, a gender-affirming care resource guide for Chicago and Illinois, and a roadmap document to help individuals navigate the multi-step process of legal name change and gender marker change in Illinois.



[ccnwa.org](http://ccnwa.org)

## ABOUT OUR ORGANIZATION

Community Clinic has served as a medical home in the Northwest Arkansas region for over 25 years. Community Clinic has 19 sites, and services include primary care, pediatrics, prenatal, dental, behavioral health, and physical therapy. Additional services include chronic disease management, nutrition and diabetic education, Medicaid enrollment, and tobacco, drug, and cancer education and prevention programs.

Community Clinic's mission is to deliver exceptional, accessible, and comprehensive care through patient-focused service to our communities. We champion health equity by providing culturally and linguistically appropriate care; we enhance the patient experience by focusing on clinical quality and patient-centered service; and we promote cost effectiveness by improving coordination of healthcare services for patients and workflow efficiencies for staff.

## CHALLENGE

Community Clinic seeks to destigmatize the use of health technology tools to enhance patient experience and streamline staff workflows. Specifically, we aim to increase the use of digital pre-registration forms, kiosk check ins, and patient portal engagement. Quantitative and qualitative data indicate that staff have a low comfort level with these tools and patients have low awareness of their availability. Our research also indicates that people prefer a variety of modalities to learn about and engage with these tools, including in-person assistance, written instructions, and short videos.

## SOLUTION

In response to our assessment of digital literacy challenges, we have created iLEAD (Inspiring Leaders in Digital Literacy), a multilingual, multimedia toolkit to empower others by providing tools and knowledge to actively engage in their healthcare. iLEAD is designed for health center staff and patients alike. By meeting people at any point in their digital literacy journey, providing resources to increase knowledge, and encouraging ongoing engagement, iLEAD seeks to impact the health of the diverse NWA community, one person at a time.

## MEET THE PANEL



*Moderator*

**ABBY SEARS**

*OCHIN*  
President & CEO



**ASHISH ABRAHAM**

*Foresight*  
CEO



**LEINAALA KANANA**

*WCCHC*  
Chief Community Health  
Services Officer



**SALLY TRNKA**

*Breakwater HCCN*  
Executive Director

## PANEL

# OPERATIONALIZING INNOVATION FOR THE FUTURE

### LEARNING OBJECTIVES

Discuss the integration of existing technology and systems as a means to bring innovative ideas to life efficiently and effectively.

Identify potential barriers when attempting to operationalize innovation within the health center ecosystem and discuss strategies to address these challenges.

Understand the importance of fostering a culture of innovation within health centers and how it contributes to the successful implementation and ongoing evolution of new ideas.

## Notes

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## MEET THE PANEL



*Moderator*

### **MICHAEL CRAWFORD**

*Howard University*  
AVP for Strategy and Innovation



### **JEFF ALLEN**

*FORVIS*  
Healthcare Partner



### **HONOR CHILDRESS**

*MPCA*  
Senior Director of Payer &  
Financial Strategy



### **CECILIA CORRAL**

*CareMessage*  
Co-Founder, Vice President of  
Product

## PANEL

# SUSTAINING INNOVATION FOR THE FUTURE

## LEARNING OBJECTIVES

Understanding what makes an innovation sustainable and what are the key components beyond funding that contribute to long-term success.

Evaluate diverse funding sources and strategies beyond traditional grants to support sustained innovation, including exploring reimbursement, innovative funding models and approaches.

Recognize the relationship between quality improvement and sustainable innovation, identifying strategies for maintaining and enhancing the quality of innovative initiatives.

## Notes

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FACILITATED BY IDEO.ORG

**ROUNDTABLE**  
**OPERATIONALIZING &**  
**SUSTAINING YOUR**  
**INNOVATION**

## **ABOUT THIS SESSION**

In the health sector, many people who have heard of human-centered design (HCD) think about using it at the very beginning of an innovation process. You use HCD methods for understanding your users, brainstorming potential solutions, maybe conducting some prototyping activities. However, many of the mindsets, principles, and methods of HCD are also necessary and valuable in the later stages of an innovation's lifecycle.

In this session, we will focus on using human-centered mindsets, methods, and tools to support you in taking your innovations to the next level—whether that's scaling, integrating into existing systems, or engaging a new set of stakeholders to enable long-term implementation. We'll get tactical with worksheets to guide your thought process, and peers who can offer advice or inspiration to help you take the next step.

## **ABOUT IDEO.org**

IDEO.org is a non-profit design studio with a mission to create a more just and inclusive world. From our studios in New York, San Francisco, and Nairobi, we have worked in over 45 countries and our work has reached over 68 million people worldwide. In the United States, we center the voices and visions of communities impacted by structural discrimination, racism, and exclusion. Together with our partners and people most impacted, we collaboratively design big visions (strategies, organizational models) and critical details (products, services, engagement experiences, brands, campaigns) that bring dignity, beauty, and joy to systemic change. Our work spans across the inter-connected sectors of health equity, economic mobility, and early learning and care.

# Worksheet 1: From Pilot to Permanent

*Shifting from pilot to sustained implementation requires prior planning, and consideration of structural, resource, and team dynamics. In this Roundtable, we'll aim to help you unpack your implementation challenges, seek external inspiration and advice, and equip you with some tools to tackle these challenges.*

What is your Innovation?

What is YOUR role in shifting from pilot to sustained implementation?

What are two major challenges to long-term success of your innovation?

What do you need advice on?

From your peers:

From other sources:

# Worksheet 2: Assessing Scale Readiness

Now that your solution has been running in the market for some time, you may be seeing opportunities, or feeling some pressure, to grow or scale. Scalable solutions are those that can achieve a steep increase in reach or outcomes, from just incremental additional investment. If your goal is to scale, then it's important that you and your stakeholders are aligned on what success looks like and what it will take to get there. Scaling an intervention is a complex and long term effort, but tools like this can help you start the process and quickly identify the first obstacles to tackle.

## How to Use It

Work through the 'Current Conditions' prompts in this worksheet to review your solution through the design lenses of desirability, feasibility and viability, and, most importantly, impact. Determine any immediate areas requiring optimization. Map out what you know about your potential conditions for scale. Think about the market you plan to scale into and its users, the channels or partners through which you might distribute or implement, and the investors or funders you might need to bring on board. This will require secondary research, consultations with key stakeholders, and most likely a round of field research with new users. Now work through the 'Potential Scale Conditions' prompts to dig into the areas where improvements or adaptations will be necessary for scale.

## What Comes Next?

As you work through the prompts, you should start to understand the scalability of your solution as it stands, and where you will need to Optimize & Adapt for success through new rounds of research, prototyping and iteration.

ASSESS YOUR SOLUTION		
	Current Conditions	Potential Scale Conditions
Impact	Is the solution achieving outcomes at the depth and rate required?	Does the solution have the potential to meet those outcome goals and targets under new scale conditions?
Desirability	How effective is the solution in attracting and engaging users?  What value do users get from the solution, at each step in the user journey?	To what extent will the solution meet user needs and desires in scale markets?  How well are our users already served in those new markets, and what will our solution be competing with?
Feasibility	How does the solution break down or fail to work in the real world?  How usable is the solution from an implementer perspective? Are they able to troubleshoot and adapt when they need to?	What capacities do new implementers and distributors need to deliver the solution as currently designed?  Will the solution need to be made simpler or more flexible for their needs?
Viability	Has the solution been successfully delivered within budget to date?  Is the solution meeting required cost-effectiveness benchmarks?	What budget will be needed to take the solution to scale?  What new cost-effectiveness benchmarks will the solution need to meet at scale, and are those achievable?
SYNTHESIZE YOUR LEARNING		
	What optimization is needed for a scalable solution?	What adaptation might be required for a scalable solution?
PLAN FOR PROTOTYPING AND ITERATION		
1	Are each of the solution components playing the role we intended them to play when we designed it?	
2	In what ways could the solution be made simpler, more efficient or more effective?	
3	How can we adapt the solution without disrupting elements that make it desirable & impactful?	

# Worksheet 3: Aligning Your Team

*Impact is a very loosely used term universally, and can be used to describe an influence or effect on virtually anything. Taking time to explore and align on your impact goals will ensure that your team and stakeholders are all working towards the same vision of success. In the process, you'll uncover expectations for the longer-term change that ultimately matters as well or more immediate outcomes that we believe will contribute to that change. It is often these more immediate outcomes, or smaller shifts in behaviours, that will keep your team engaged and inspired.*

### How to Use It

Use this worksheet to agree on and capture two statements. The first should reflect the lasting social change of the project—something that your design will contribute to over time. This will be your long-term Impact. You'll draw from post-its closer to the top of your ladder to identify this. The second statement should reflect a more near-term goal, an observable change or behavior that you want the people you're designing for to achieve. Capture these in order to share them back with your team and keep everyone working toward the same goals.

Then, describe some of the things that you will need to put into place to enable long-term implementation of your solution. Who would you need to engage to make this a success?

### What Comes Next?

At this very early stage of the project, you only need to define the Impact and Key Outcome. Later, you can come back to fill in the other worksheet steps, when you are working with your team to develop a full Theory of Change for your solution. Your Impact and Key Outcome statements should serve as a north star for your design challenge, helping to ensure you stay focused on your goals. These can also be used to tell the story of why your initiative is important, as you engage other key stakeholders in your transition toward long-term implementation.

### ALIGN WITH YOUR TEAM

The lasting social change we would like to contribute to is:

This is impact. It is usually long-term and something our work will contribute to over time. Think of this as a future vision.  
Example: Adolescent girls live healthy lives and fulfill their educational potential, by delaying the age of first pregnancy.

The more near-term, key outcome that tells us our solution is working is:

Identify 1-2 behaviors as goals for near-term success. They should be observable and measurable. In a Theory of Change these are called primary outcomes.  
Example: Increase uptake of contraceptive methods amongst teens.

### FROM PILOT TO PERMANENT

Going from a pilot to a permanent implementation often requires engaging additional stakeholders or aligning with existing systems. Map some of the enablers that you need to align in order to make this transition possible:

Enabler to long-term success

Who to engage

Enabler to long-term success

Who to engage

Enabler to long-term success

Who to engage

## **THANK YOU FOR JOINING NACHC'S INAUGURAL INNOVATION EXPERIENCE.**

As we conclude InnovationEx 2023, we invite you to carry the spirit of innovation with you as you return home.

- Stay engaged with NACHC and the Center for Community Health Innovation by keeping us apprised of your progress – both setbacks and successes.
- Do your part to build a culture of innovation in your organization.
- Actively participate in future NACHC innovation initiatives.
- Use the connections you built today to help carry your work forward – we are all here to support each other.
- And don't forget to be on the lookout for InnovationEx 2024.

### **LET'S STAY CONNECTED**

Be on the lookout for emails from [innovation@nachc.org](mailto:innovation@nachc.org), or email us with any questions/feedback. We will be in contact soon to learn more about your progress with operationalizing and sustaining your innovation(s).

## **ABOUT THE NATIONAL ASSOCIATION OF COMMUNITY HEALTH CENTERS**

Established in 1971, the National Association of Community Health Centers (NACHC) serves as the leading national voice for America's Health Centers and as an advocate for health care access for the medically underserved and uninsured.



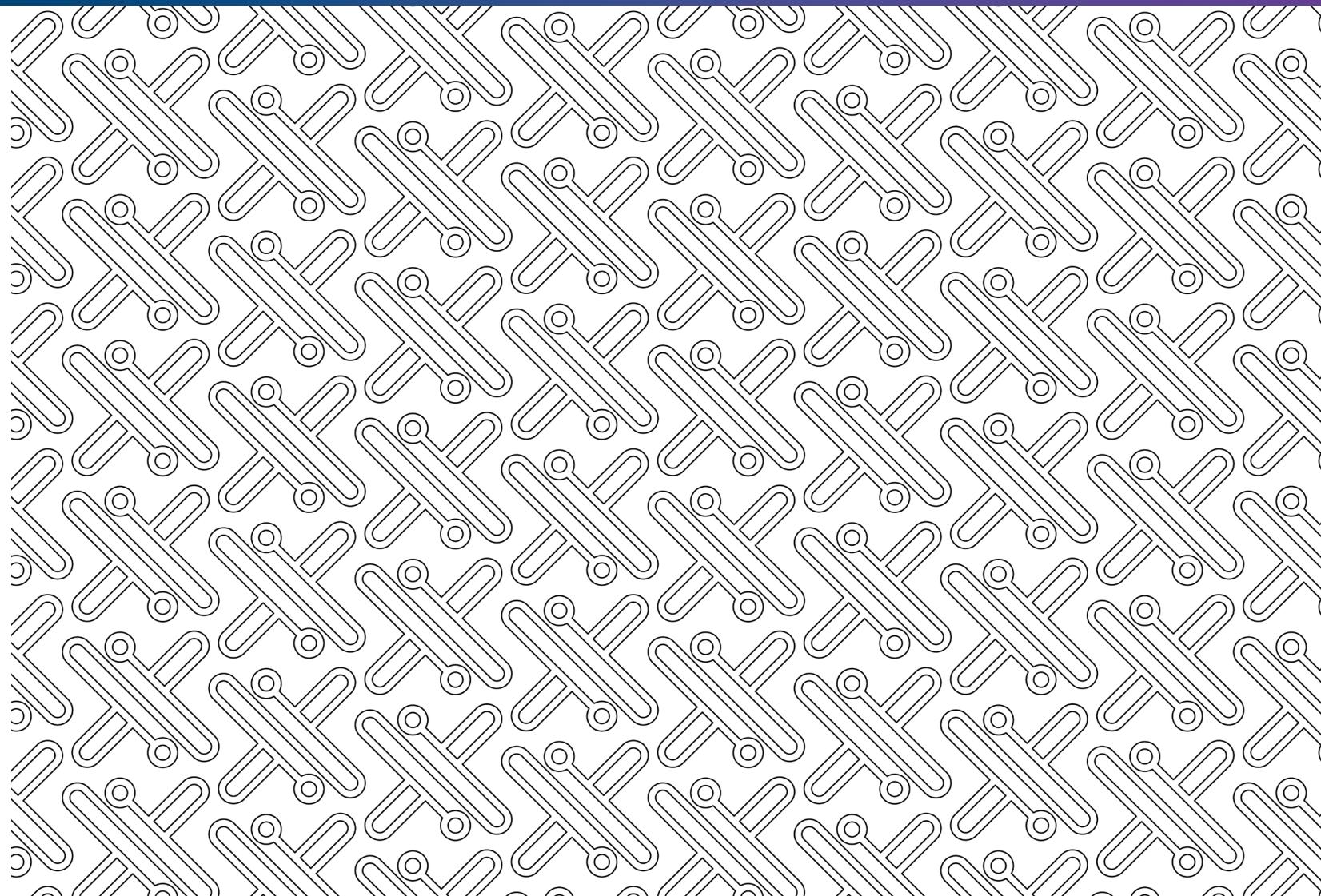


## ROUNDTABLE RESOURCES

At this stage in your innovation journey, there's no one-size-fits-all tool to guide you. We've gathered a list of resources that you may find useful to your work below.

- Design Kit: Design Kit is a platform created by IDEO.org which houses a set of videos, tools, and downloadable worksheets to help users apply human-centered design methods and mindsets within their own work. It can be found at [www.designkit.org](http://www.designkit.org)
- Scaling Impact Toolkit: Spring Impact is an organization dedicated to supporting mission-driven organizations to scale their impact. They have created a user-friendly Scaling Impact Toolkit that helps you work through all the challenges that you may encounter in route to scale. It can be found at [www.springimpact.org/toolkit-home](http://www.springimpact.org/toolkit-home)
- Acumen Academy Courses: Acumen Academy has worked with IDEO.org and other organizations to develop online courses that you and your organization can take, many for free. This is a great way to build alignment amongst a team and foster collaboration to support your innovation to thrive. They can be found at [acumenacademy.org/coursecatalog](http://acumenacademy.org/coursecatalog)
- HCD Exchange: HCDEXchange is a Knowledge Hub dedicated to exploring how human-centered design (HCD) can improve sexual and reproductive health needs and rights for youth and adolescents. It has a global health focus, but has a set of tools, resources, and discussions that would be very relevant to the US as well. It can be found at [www.hcdexchange.org](http://www.hcdexchange.org)

## NEED A COLORING BREAK?





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