Learning Collaborative: Implementation
Managing a Project and Lessons Learned

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Capital Link

• Launched in 1995, nonprofit, HRSA national cooperative partner
• Offices in CA, CO, FL, LA, MA, MO, and WV
• **Over $1.1 billion** in financing for at least **230** capital projects
  - **Direct assistance** to health centers and complementary nonprofit organizations in planning for and financing operational growth and capital needs
  - **Industry vision and leadership** in the development of strategies for organizational, facilities, operational and financial improvements
  - **Metrics and analytical services** for measuring health center impact, evaluating financial and operating trends and promoting performance improvement
Learning Collaborative Overview

• For health centers anticipating a capital project in one to five years.

• Six interactive learning sessions that will provide practical direction and tools for planning, financing, and completing a capital project.

• One hour learning sessions between March and September 2018, scheduled monthly. Conducted via webinars with face-to-face sessions available during NACHC conferences in March and August.
Learning Collaborative Participants
Learning Collaborative Participants

- Baltimore Medical System, Inc. (BMS) - MD
- Betances Health Center - NY
- Cabarrus Rowan Community Health Center, Inc. - NC
- El Dorado County Community Health Center - CA
- First Choice Primary Care, Inc. - GA
- Friend Family Health Center, Inc. - IL
- Harmony Health Medical Clinic and Family Resource Center - CA
- International Community Health Services (ICH) - WA
- J.C. Lewis Primary Health Care Center, Inc. (JCLPHCC) - GA
- Kodiak Community Health Center - AK
- La Comunidad Hispana (LCH) - PA
- Marillac Clinic, Inc. (MarillacHealth) - CO
- McCloud Healthcare Clinic - CA
- Morris Heights Health Center - NY
- Mountain Community Health Partnership - NC
- Neighborhood Outreach Access to Health (NOAH) - AZ
- CL Brumback Primary Care Clinics - FL
- Sadler Health Center - PA
- Community Medical Centers, Inc. - CA
- Oakland Integrated Healthcare Network - MI
Learning Collaborative Overview

- Readiness and Planning: Organizational and Financial
- Planning: Evaluating Your Market and Determining Your Operating Model and Space Requirements
- Developing a Business Plan and Financial Forecast
- Design and Development: Assembling and Managing a Project Team
- Funding: Evaluating your Financing Options and Fundraising Plans
- Implementation: Managing a Project and Lessons Learned
We’ve Got Financing! What Now?

Implementation: Managing a Project and Lessons Learned

- To determine appropriate expectations
- To estimate realistic timeline
- To strengthen the organization and its overall operations
- To convey the appropriate messages to patients, staff, and partners
Transition Planning

“When do you start preparing for transition to the new facility?”

As soon as you have:

• Secured a site
• Signed your construction documents
• Secured your financing
Transition Planning

“Can we just wait and see what happens after we move in?”

No. Remember, your facility is only a tool!

• Capital financing only pays for the tool.
  • Ongoing operational cost must be covered by full, effective utilization of that tool.

• The curiosity factor is short-lived.
  • Sustained growth is built on good first impressions.
Appropriate Expectations & Timeline

• Financing
• Construction
• Service Disruption
• New Location(s)
• Appropriate staff, partners = project team
Strengthen Organization and Operations

• New or expanded services
• Huge project and undertaking – celebrate along the way
• Opportunity to reboot several aspects
Mitigate Risks through Effective Communication

• What does staff need to know?
• What does the community need to know?
• What do the patients need to know?
• What do partners/funders need to know?
Our Project – Your Project

Engage Stakeholders

Gather Data

Assess

Apply

Remember! Provide Feedback
When the Unexpected Happens...

Assessment
Program Plan
Operational Plan
Staffing Plan
Facility Plan

Protect the order of the Process – Form responding to Function
Health Center Experiences
La Clínica de La Raza Inc.
Oakland, CA

Anita Addison
Chief of Planning & Strategic Advancement
Overview of La Clínica

• Founded in Oakland, CA, in 1971 by students & community activists
• Federally Qualified Health Center (FQHC)
• Began in Fruitvale District in Oakland, CA and expanded across Alameda, Solano, and Contra Costa Counties
• Medical, dental, vision, behavioral health, health education services
Overview of La Clínica

In CY 2017:

• 86,884 served
• 360,570 visits
• $100M budget
• 874 FTE employees
Locations

- 35 service locations in three counties in San Francisco Bay Area, including:
  - Stand-alone primary care facilities
  - Clustered campus settings
  - School-based health centers
  - Mixed-use complexes
Patient Demographics: All Sites

Primary Insurance Coverage

- Uninsured: 5%
- Medicaid/CHIP/Other Public: 23%
- Medicare: 69%
- Private: 4%

Race and Ethnicity of La Clínica Patients

- Latino: 58%
- African American: 4%
- White (Non-Latino): 11%
- Asian/Pacific Islander: 9%
- Multiple: 10%
- Not reported: 8%
La Clinica Major Capital Projects

Fruitvale Transit Village
2003 – 40K sf ; $14.2 M

San Antonio
2009 – 16K sf ; $10M

Monument
2012 – 17K sf; $10.6 M
Latest Project in Vallejo
Site for Construction
Proposed Expansion: Vallejo

- 26,000 square feet
- Relocation and Expansion of existing medical clinic and dental clinic
- Expand service capacity – 6,000 to 15,000 patients
- 24 exam rooms (LC Vallejo has 14 currently)
  - Additional rooms for consultation, group visits, special procedure
- 16 dental operatories (LC Vallejo Dental has 5 currently)
- Classroom/conference room areas, staff break areas, and offices for administration, health education, patient enrollment
- Additional Service Enhancements: optometry service, telehealth capacity, teaching (e.g., internships, rotations, residencies) capacity
- Construction to begin November 2018 / Projected to Open in October 2019
- Total Projected Cost: $19M
Rendering of Proposed New Facility
PrimeCare
Chicago, IL

Joseph Moldovan, MBA
Chief Operating Officer/Chief Financial Officer
• PrimeCare provides care to medically underserved populations on Chicago’s West and Northwest sides.

• Since 1992, PrimeCare has provided comprehensive family medical care at its five locations, including health services for adults, seniors, women and children, as well as prenatal health services, behavioral health counseling, and case management.
• Health Center Project Overview
• Needs Assessment
• Size/Budget
• Timeframe
• Services/Patient Expansion
• Financing Options
• Lessons Learned
• Surprises - The Good and The Bad
• Internal/External Team Members - Staff, Project Monitor, etc.
• Financing Considerations
• Messaging to Staff and Patients
What’s Next?
Next Steps

Individual Project Discussions:

• Telephone discussions with Capital Link on individual project next steps. We will reach out over the next week or so

• Will schedule one more “open office hours” for questions

• Interest in additional small group peer learning?

Provide Feedback:

• Please respond to our survey at the end of this webinar/in follow up email

• Your input will inform our next Learning Collaborative beginning January 2019
Free Access to Capital Link Resources
www.caplink.org/resources

- Assembling a Capital Project Team
- Engaging Staff and Community in Defining Your Capital Project
- Creating a Dynamic and Useful Strategic Plan: A Toolkit for Health Centers
- Steps to Success: A Toolkit for Health Centers Navigating a Capital Development Venture
- Selecting the Right Capital Project Financing: A Guide for Health Center Staff and Board
- Creating a Business Plan for a Community Health Center Capital Project
- Creating a Facility that Supports the Patient-Centered Medical Home
- Debt Capacity Calculator
- NMTC Program Spotlights
Thank You for Your Participation!

Learning Collaborative resources, session slides, and recordings are available on our website:

http://www.caplink.org/index.php/events/learning-collaboratives?id=121
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