

Fostering Innovation & Entrepreneurship With Managed Care Organizations — The VOA & Humana Case Study

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OPEN MINDS

Today's Presentation

Most of us are now familiar with Social Determinants of Health (SDOH) and how they impact health and health outcomes:

- Economic Stability
- Education Access and Quality
- Health Care Access and Quality
- Neighborhood and Built Environment
- Social and Community Context

More and more health plans are looking at ways to address SDoH because they know:

- The total health care resource use is highest among consumers with behavioral health and cognitive conditions
- Social needs drive over a quarter of health care spending

Our presentation today will show us not only how one provider organization has successfully partnered with a health plan to address some of these issues, but also the value of Social Impact Investing and Community Health Incubators.



VOA: Social Impact Investing & Community Incubators

Launched in 2018 as a subsidiary of Volunteers of America Inc., the Futures Fund is a social impact investment fund that supports the development and expansion of **high impact health, housing and social service models and enterprises within Volunteers of America and as joint-venture partnerships with external community health entrepreneurs**. The Futures Fund provides catalytic capital, training and coaching to test new ideas, launch social enterprises, and expand successful service lines that improve the social determinants of health.

The Futures Fund's definition of social impact extends beyond just the value derived by communities served by VOA. **It also intends to support sustainable non-profit innovation that improves organizational culture for innovation, increases capacity to serve, and advances racial and health equity.**

Domains:

- Healthcare Expansion
- Workforce Development
- Food Security



Volunteers of America®

Fostering Innovation and Entrepreneurship with

Humana
Foundation

Humana

Celebrating over **125 YEARS**, with nearly **16,000 EMPLOYEES**, Volunteers of America empowers more than **1.5 MILLION PEOPLE** in over **400 COMMUNITIES** in **46 STATES** as well as the District of Columbia and Puerto Rico.

VOA
125

CHILDREN &
YOUTH

VETERANS

EMERGENCY
SERVICES

DISABILITY
SERVICES

INTEGRATED
CARE

SUBSTANCE
ABUSE

HOUSING

MANAGED
CARE

HOMELESS
SERVICES

BEHAVIORAL
HEALTH

COMMUNITY ENHANCEMENT

SENIOR SERVICES &
SENIOR LIVING

CORRECTIONS

EMPLOYMENT & TRAINING

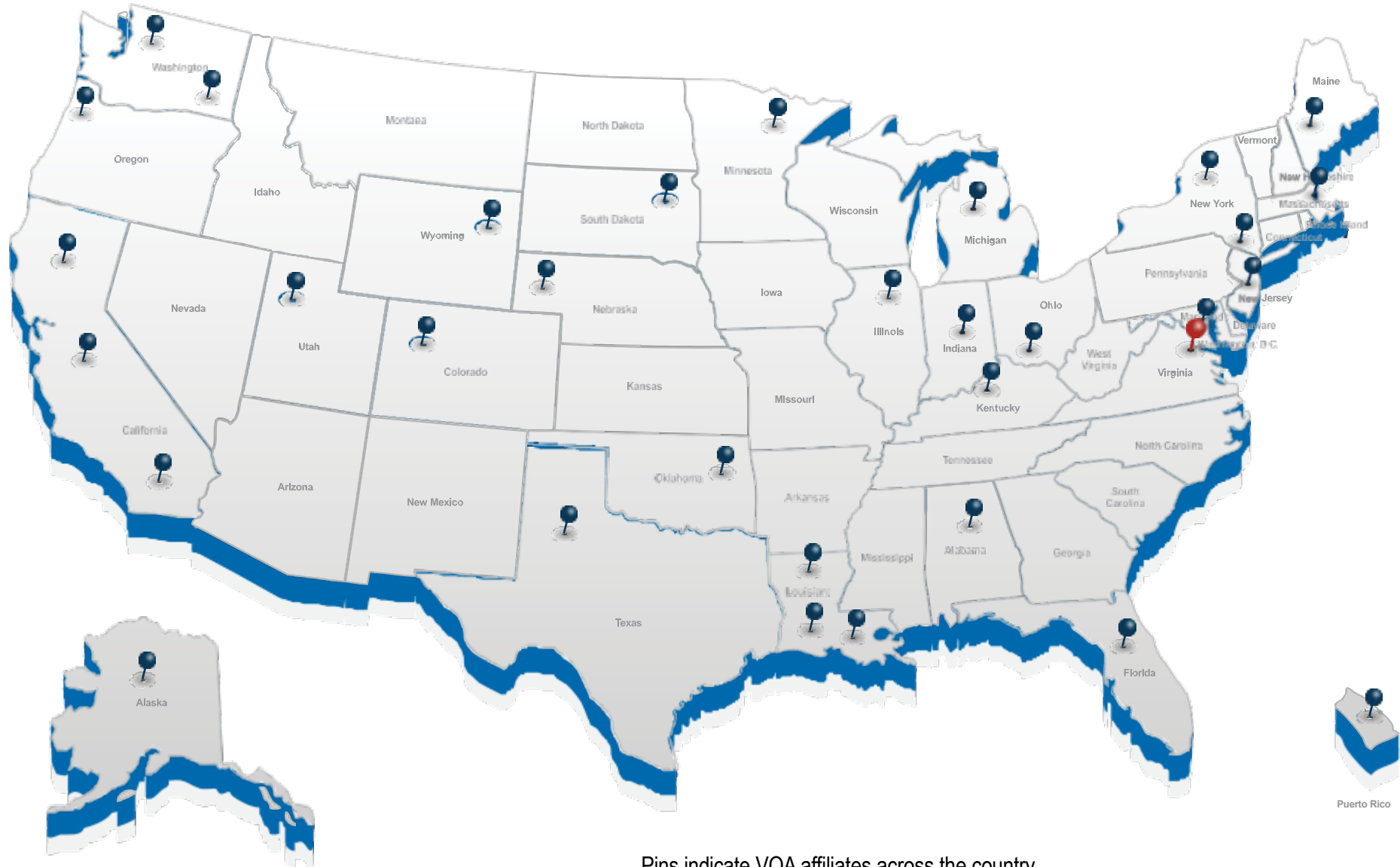




NATIONAL REACH | LOCAL IMPACT

VOA FAMILY OF ORGANIZATIONS





- Headquartered in Alexandria, VA
- National and local experts in health and housing
- 30+ local VOA affiliates trusted by community members, policy makers and industry leaders
- Over \$120M in Medicaid revenue earned by over half of the affiliates



Pins indicate VOA affiliates across the country.
Our affiliate offices coordinate services in 400+ communities across the nation.



LEGEND:

-  19,500+ Housing Units
-  951 Skilled Nursing Facility Beds
-  Pace Program
-  1,105 Units of Assisted, Independent, Memory, Home & Community Based Services





HEALTHY COMMUNITIES FOR ALL

VOA National Strategic Plan 2022 -2025

STRATEGIC PILLARS

1 LEAD WITH EQUITY

2 ACCELERATE GROWTH IN
WHOLE-PERSON SERVICES

3 “VOA HEALTHY COMMUNITIES
FOR ALL” BRANDING,
PARTNERSHIPS AND ADVOCACY



Humana
Humana
Foundation



a social impact investment fund that supports the development and expansion of high impact health, housing and human service models and enterprises within Volunteers of America and as joint-venture partnerships with external community health entrepreneurs.

Over \$2.8M invested



**Healthcare
Expansion**

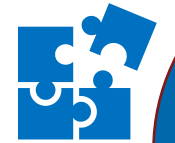


**Workforce
Development**



**Food
Security**





ASSETS

16,000 employees
1.5 million lives
Field expertise

400 communities
43 States & PR
23,000 housing
units
20+ senior
healthcare facilities

Disability Care
Veteran Support
Children & Family
Behavioral Health
Workforce Development
Criminal Justice & Reentry
Addiction Treatment
Community Health
Homeless Services
Senior Services

COACHING

Health Equity
Product Testing
Community Health
Client Centered Design
Mentorship
Pitching
Scaling

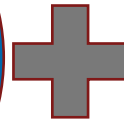
CATALYTIC CAPITAL

INTRAprenurship
Feasibility Grants
Incubator Founder
Capacity Grants

Impact-First
Investments
Debt
Equity
Revenue Sharing

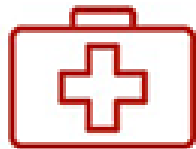
BOLD OUTCOMES

Health Equity
Field Innovation
Venture Partnerships
Multi-Sector Collaborations
Whole Person Health
Sustainable Financing



COMMUNITY HEALTH INCUBATOR

Sponsored by
**Humana
Foundation**



Increase access to
health services



Reduce disparities by
addressing SDOH



Business support and funding



VOA asset matching: client,
network, services and housing



Implemented with community
health experts and practitioners



Impact-first lens with
compelling financial upside

HOW IT WORKED

4 VOA Affiliates

+

3 Mission-Aligned
External Founders

=

1-2 Investable
Enterprises



Phase 1: Train & Model

March – May 2022

- Entrepreneurship & health equity training
- Weekly group workshops
- Field experts
- Business modeling



\$10,000
Capacity Grant

A Go / No-Go Assessment
of Business Model



Phase 2: Test & Pilot

June – August 2022

- Coaching from industry mentors
- Customer interviews
- Lean process
- Market application
- Collaborative learning between VOA and external entrepreneurs
- VOA asset matching



\$15,000
Pilot Grant

Pitch Deck and Presentation
for Partners & Investors



Phase 3: Investment Ready

Open Timeframe

- Due diligence
- Potential underwriting
- Investor meetings



Up to \$200,000
of venture capital

Venture partnerships with
Futures Fund and VOA
Affiliate(s)

ADVISORY BOARD



Abbie Gilbert
Humana
Associate Director
Health & Advocacy



Christopher Thompson
Humana
Director, Corp. Strategies /
Strategic Initiatives



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CEO/Founder



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Director, Impact Investments



Lawrence Hendrix
VOA Ohio & Indiana
Sr. Director, Warehousing &
Logistics | Retail Operations



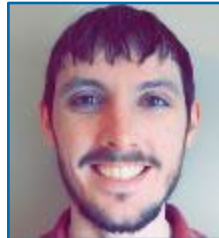
Shayna Hetzel
Am Fam Insurance Institute for
Corporate and Social Impact
Director, Community and Social
Impact

Incubator
Alumni

Let's get **\$et**



LIFTING
UP



Paul Orlando
Incubator Director



Entrepreneurship Knowledge
Increased by 12%
Based on pre and post survey



Four Domain Areas:
Behavioral Health, Economic Stability,
Food, Healthcare



Health Equity Knowledge Improved
by “A Lot” or “A Great Deal”
Based on post survey



Connected Startup Founders to Affiliates:
15



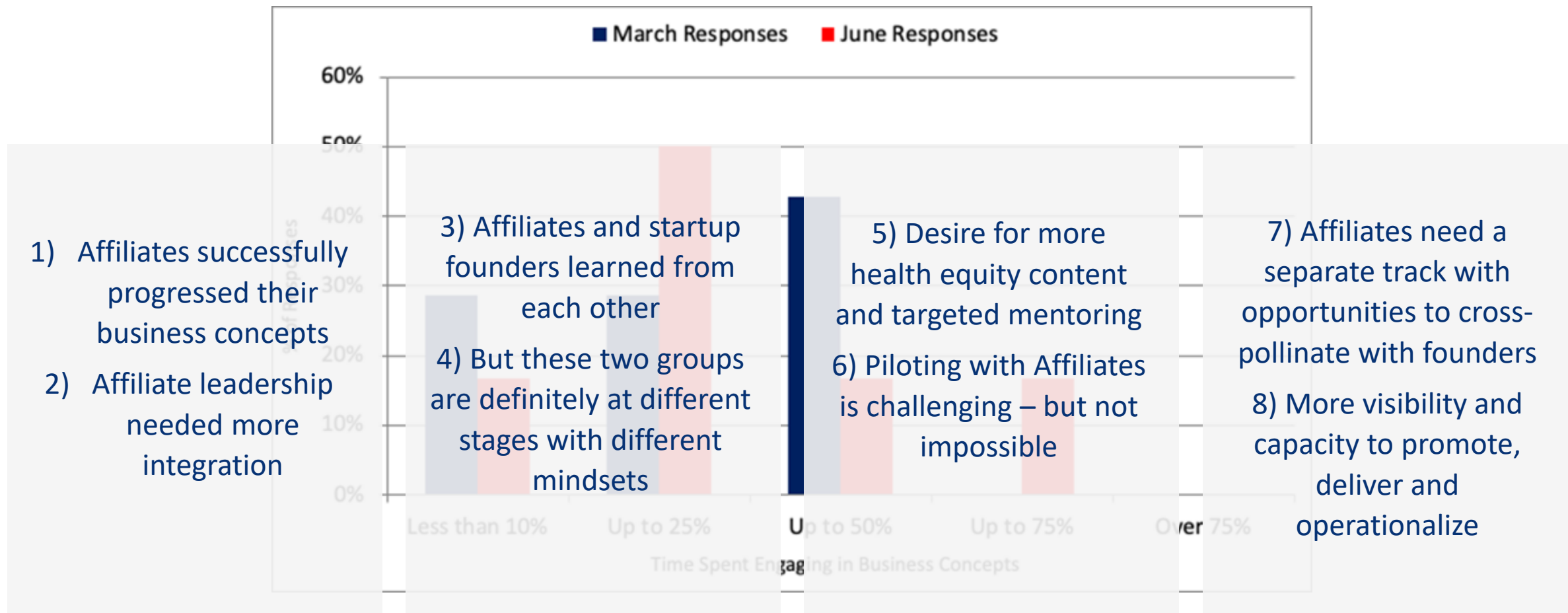
17 Mentors Were Engaged
through the Incubator

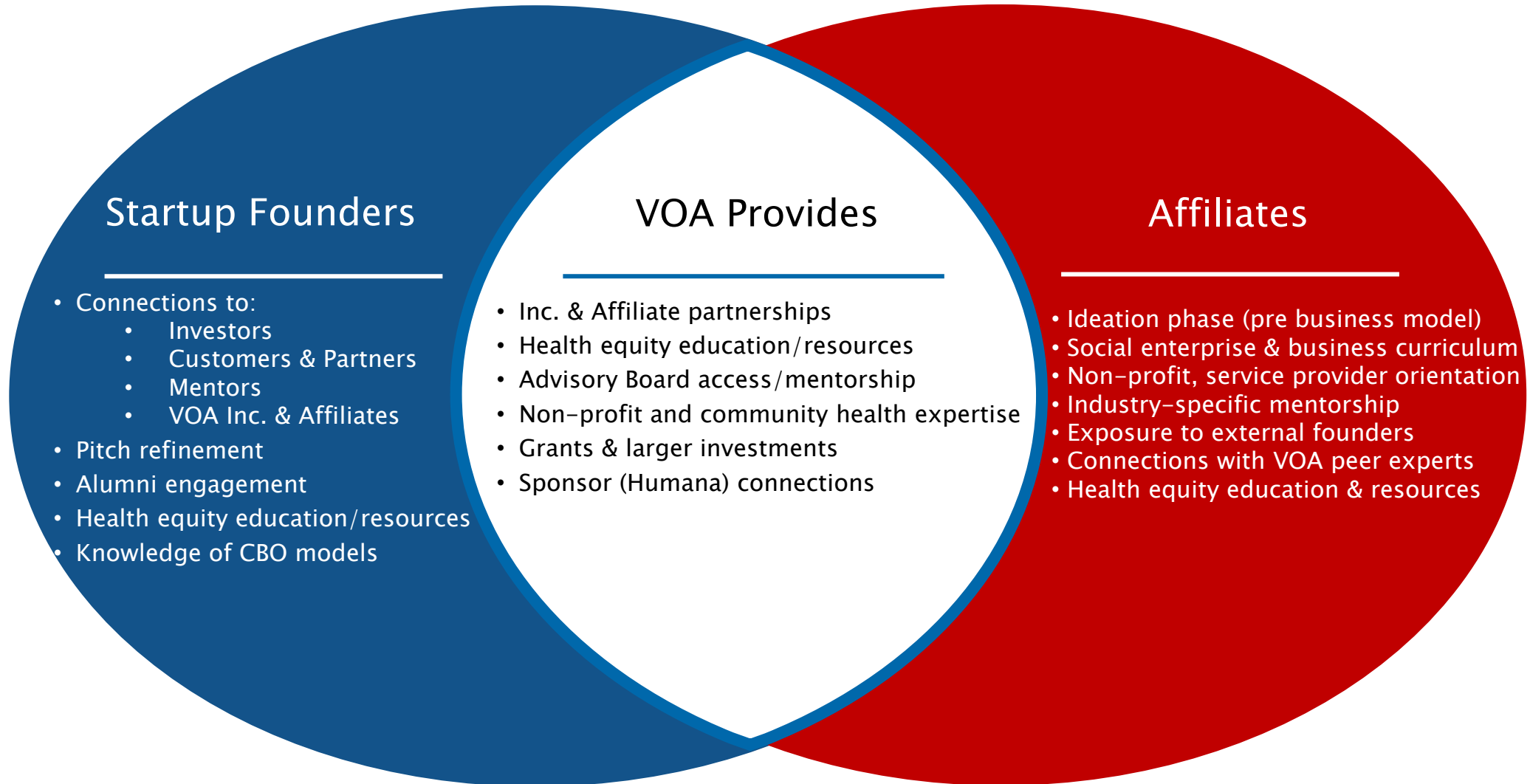


One Publication Released
Press Release



WHAT WE LEARNED







Let's get **\$et**



IMPACT 
INVESTMENT

Let's get \$et

The mobile platform guiding low-wage households on paths to financial security

Tax-time is the most important financial moment for families making <\$40K to get right,

and yet households leave \$12 Billion unclaimed each year.

than line 41, enter -0-

72 c ☐ Form(s) 8889

44
45
46

1040

Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return

For the year Jan. 1–Dec. 31, 2007, or other tax year

Your first name and initial

If a joint return, spouse's name and initial

Home address (number and street name)

City, town or post office, state, and ZIP code

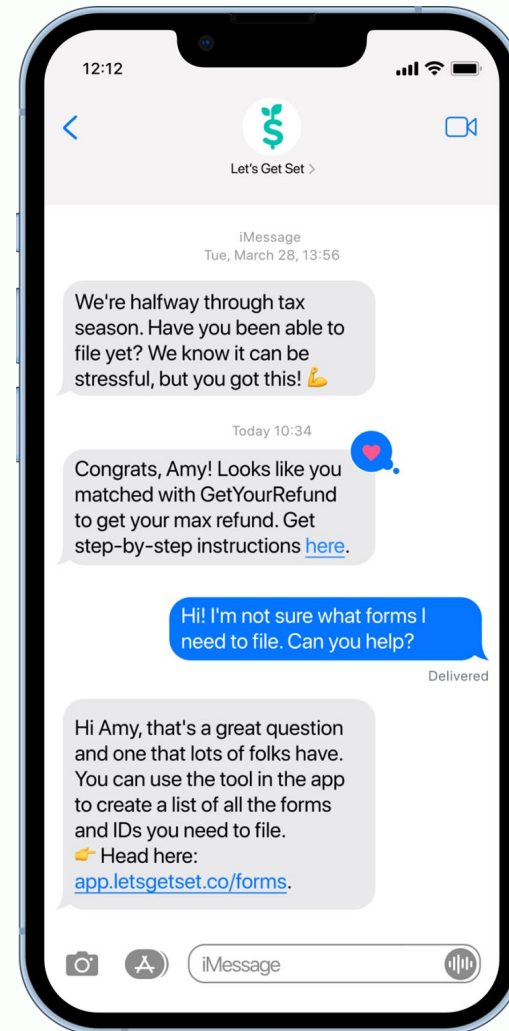
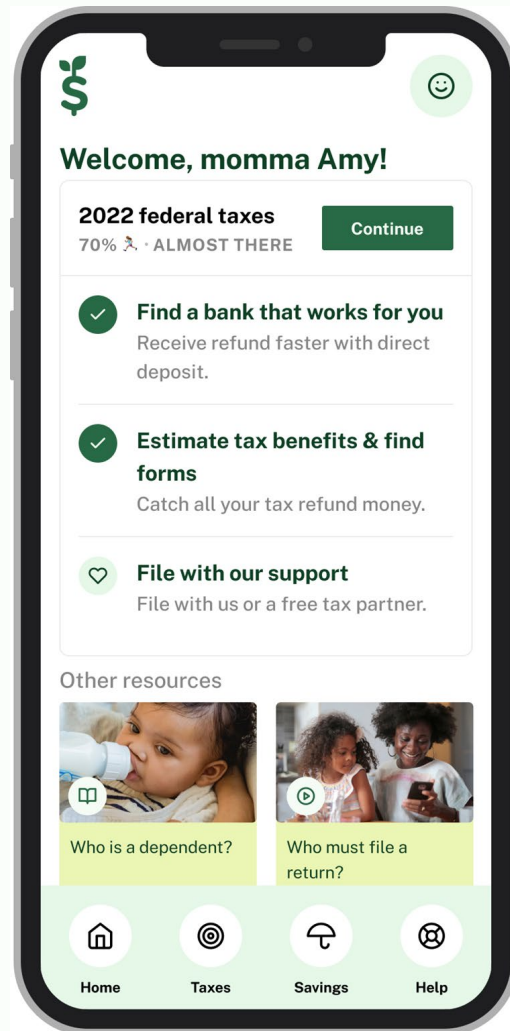
Check here if you, or your spouse, are

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately

Our product guides low-wage households through tax season and beyond, getting the \$5,200 they risk losing.

Individualized tools to
decide to file

File taxes with us or
our partners



Consistent point of
contact

Automated reminders
+ nudges

Get questions
answered from
chatbot or human

Tax credits combat poverty and improve maternal, infant, and child outcomes.

Benefits for mothers:

- **reduced stress,**
- **reduced smoking,**
- increased spending on **preventative healthcare**

Benefits for children:

- **reduced ACEs** (adverse childhood experiences)
- increased **birth weight**
- increased **nutrition**
- improved **mental health**

We reach moms through partnerships with organizations leveraging trusted messengers.



Last tax season, our core tax product secured \$9.3M for 1,400 new parents. We're now partnering with nonprofits, healthcare providers, and healthcare payers to unlock these benefits for new mothers.

We focus on clients who are at risk of not getting this money:

- **41% of our clients <\$19K** (meaning we engage Medicaid-eligible clients, at-risk of not filing)
- **65% of our clients are moms of color**
- **95% of our clients are moms**



Interested in learning more?



Contact:

Clare Hecceg clare@letsgetset.co



Erin Leddy

erin@letsgetset.co

Aligned Strategies

VOA understands the intrinsic links between health, environment and resources. Our relationships with healthcare partners are based upon shared goals of **QUALITY** and **VALUE** to improve the lives of those we serve together.

TOGETHER, WE SEEK TO



Humana High Level Partnership

**Our initiatives are
focused on
advancing a more
equitable health
system where
social needs do not
determine your
health outcomes**



Behavioral Health with Wraparound Services

- Family-Focused Recovery (FFR) - support mothers recovering from substance use disorder (SUD) and address underlying physical, mental, and behavioral health concerns.
- Reentry Health Home - provide 'whole person' care for justice-involved individuals with chronic health conditions and co-occurring behavioral and substance use disorders (SUD).



Housing with Wraparound Services

- Affordable housing properties that serve as a hub for community-based health services and care
- Dallas (The Oaks); New Orleans (Terraces at Tulane)



Community Health

- Community Health Worker
- Workforce Development
- Community Health incubator

Humana®

 **Volunteers of America**
MID-STATES

For Our Communities

Humana's community strategy is built on partnerships, creating health equity for the communities we serve, identifying the root cause of disparities, working together to create scalable, sustainable solutions



SmartServices Alerts



Connecting the Dots around ACEs
for Trauma Responsive Schools



What do we do?

Automate communication from first responders to schools
if a student is impacted by a traumatic event



Why is this important?

Adverse Childhood Experiences Affect Education Outcomes



ACEs can lead to:

- increased suspension/expulsion rates
- higher absenteeism
- lower test scores
- increased risk of dropping out

But, there is hope!



**SmartServices
Alerts**

Here's how it works:



Message

To principal@school.org

Subject Handle With Care

Middle School

Student ID: 09152345

Student ID: 09554632

Student ID: 08775631

Visit alerts.liftingupllc.com to view your Alerts dashboard

You are receiving this Alert because one or more of your students
may have been impacted by a traumatic event in the last 24 hours
Please handle him/her with care.

Early Identification

Find out who needs help,
when they need it!

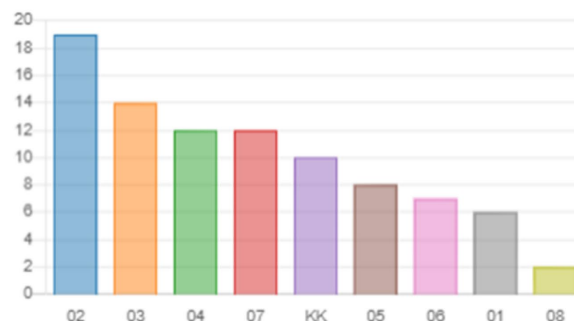
Monitoring

Track trends at a district, building, and grade level for interventions and resource allocation.

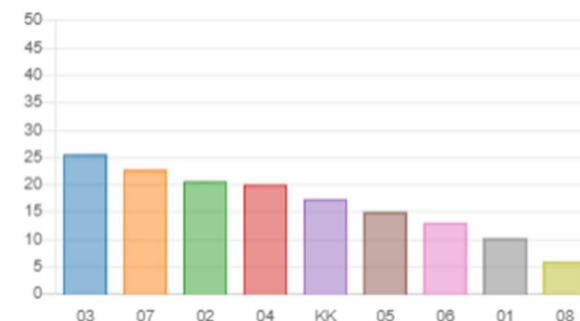
Summary Statistics

Total Matched Incidents	56
Total Students Impacted	74
Total Impacts	90

Total Impacts per Grade



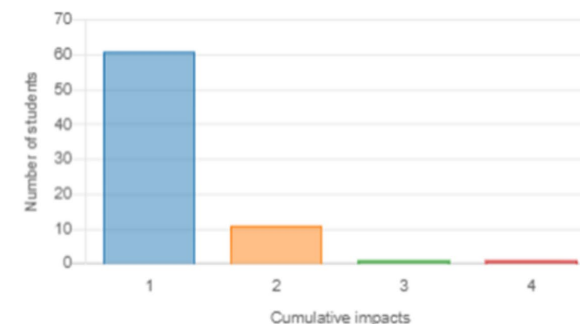
Percent of Impacted Students per Grade



Incidents per Month



Cumulative Impacts



Support

Use Alerts to engage and support students in different ways, for example:

- Establish relationships and build trust
- Connect a student with a counselor
- Connect with family liaison or community outreach worker if Alerts coincide with absences
- Consider Alerts alongside IEPs
- Consider Alerts for restorative justice vs discipline



Our Impact

2020-2021 Pilot

CONDUCTED SECOND
PILOT WITH RESPONSE
PROTOCOL

August 2022

SERVING 11 DISTRICTS, 62
SCHOOLS AND OVER
25,000 STUDENTS

2019-2020 Pilot

CONDUCTED PILOT
DURING COVID WITH
LARGE URBAN DISTRICT

August 2021

FULL LAUNCH WITH FIVE
DISTRICTS

Goals for 2023

- EXPAND TO NEW COUNTIES IN IL
- EXPAND SERVICE OUTSIDE IL
- PILOT WITH 2 VOA COMMUNITIES
- PILOT COMMUNITY HEALTH PROJECT W/ HUMANA

Thank You

Feel free to email me at katie@liftingupllc.com

Questions & Discussion

Financial Tools For Assessing Financial Sustainability

January 19, 2023 | 1:00 P.M. ET



Ken Carr

Senior Associate, *OPEN MINDS*

Turning Market Intelligence Into Business Advantage

OPEN MINDS market intelligence and technical assistance helps over 550,000+ industry executives tackle business challenges, improve decision-making, and maximize organizational performance every day.

