Health Equity Plan Report
June 2024

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CCO Workforce, CAC, and Service Area Demographic Information

CCO Name:	Advanced Health	
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Section 1: Focus Area Updates

Each contract year Contractor shall provide a status update on **Focus Area (FA) strategies** and develop new or update existing strategies. OHA has provided a table for each focus area below.

Year 5 Focus Areas have not changed from Year 4 Focus Areas. For each FA, begin with an update on previous year strategies and goals, even if those strategies and goals have been completed or discontinued. Then give information about new strategies and goals in the space provided. Contractor may add sections to the template for additional goals and strategies within each FA.

When applicable, OHA has included guidance and prompts based on Exh. K, Pt. 10, Para. b (2)(a-e) in the CCO Contract.

Provide a progress update on Year 4 FA strategies and plans for Year 5 FA strategies in the table below.

Please note there is a 25-page limit for this section but please strive to be brief while also being comprehensive.

Focus Area 1: REALD / SOGI
Year 4 Progress Update
Strategy 1: The Advanced Health Analytics Department has been integrating REALD data into all reporting as necessary and as requested. Advanced Health has contracted with Reliance HIE and Unite Us. Reliance is a Health Information Exchange platform that most local provider organizations also use. Unite Us is the Connect Oregon platform for Community Information Exchange. Beginning in February 2023, Unite Us was available to Advanced Health's provider network and local community-based organizations as a platform to coordinate closed loop referrals for social health needs. Unite Us has built-in functionality to gather REALD and SOGI data from screenings in community organization settings. We are exploring what data is collected and shared by community partners through Unite Us. We have continued to discuss using Reliance to enhance our REALD data. We have taken pause on including any data outside of Oregon Health Authority (OHA) data until we can properly identify what data came from what location. This is to ensure we have an internal source of truth data (OHA data files), and then other files can supplement additional information. This would need a bigger data warehouse to encompass all data from all sources we receive data from.
Strategy 1 Status update: Advanced Health began receiving SOGI data September 2023. A lot of the data is "Did Not Answer" but with more conversation about SOGI data collection with our providers, we hope those answers will improve.

Previous Year Strategy 1, Goal 1:

All internal reporting dashboards will include REALD data. By including REALD data in all reports, it may display a trend (or not).

Goal 1.1 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified

Advanced Health has gone through an internal Analytics restructuring which has included reviewing each reporting dashboard for data accuracy and data addition. This is on-going as there are many dashboards to work through with stakeholders.

Baseline:	**Metric/Measure of success:**
Internally published dashboards that have been evaluated for the need of REALD to be added: 55%	All internal reporting dashboards will be evaluated for REALD data addition by end of 2024.
Monitoring:	**Person responsible:**
Analytics Team to add REALD and SOGI data into dashboards as appropriate/requested	Chief Information and Technology Officer

Updated Resources Attained / Needed:
Staff Time

Year 5 Strategy

Please select one option for Year 4 strategy and complete the appropriate portion of the table below.

☐ Strategy is the same as Year 4
☒ Strategy has been modified for Year 5
☐ A new strategy has been developed

If strategy has been modified for Year 5

Year 5 strategy is the same as Year 4 with a few modifications. Advanced Health Analytics department is in the process of creating dashboard and reporting templates. These templates will by default include REALD data. The analytics department will also update the Report Request Form to include a standard option for requestors to include REALD/SOGI data.

SOGI data is being received from OHA. Advanced Health is integrating it into already established dashboards as necessary/requested.

With the incorporation of SOGI data, internal meetings will need to be held to discuss how to appropriately use the SOGI data.

Focus Area 2: CLAS Standards as an organizational framework to advance health equity

Year 4 Progress Update

- **Strategy 1 (Governance, Leadership, and Workforce):**

Note: this information was moved here from year 2023 Focus Area 5 due to a better alignment with the 2024 template.

Hiring Process: Advanced Health includes diversity, inclusion, and civility questions in the interview process. These include:

- Describe your understanding of diversity and why it is important to this position.
- What kind of people do you find it most difficult to work with?
- Our member population is diverse, including various racial and ethnic groups, differing levels of health literacy, limited English proficiency, and diverse gender identities and sexual orientations. Do you have any hesitancy or reasons that would prevent you from working with our member groups?

By using the above interview questions in the hiring process, Advanced Health is able to hire individuals who contribute positive interactions to the workplace, support diversity and inclusion initiatives, and mitigate unconscious bias.

Attachments: A01. Organization Update Chart 2.0_2023.11.06
A02. AH.AD.16_Executive Program Director
A03. AH.AD.Health Equity Policy Analyst
A04. AH.AD.Health Policy Analyst_final

CLAS Champions workgroup: The CLAS Champions are currently working on a CLAS 5-year guide. This guide will standardize the process of renewing policies, procedures, manuals, announcements, publications on Advanced Health's website, and member facing resources that are supported by CLAS standards. The collection of these materials will illuminate any gaps not covered. The guide includes the following six goals:
1.Foster cultural competence
2. Reflect and respect diversity
3.Ensure language access
4.Build community partnerships
5.Collect diversity data
6.Benchmark, plan, evaluate

Attachment: **A05**. CLAS 5-Year Guide (this is a guide that is still in progress)

- **Strategy 1 Status update:**

Workforce: Advanced Health collects REAL-D data from employees, board-, and committee- members. The first of two planned 2024 data collection cycles were completed on June 14, 2024.

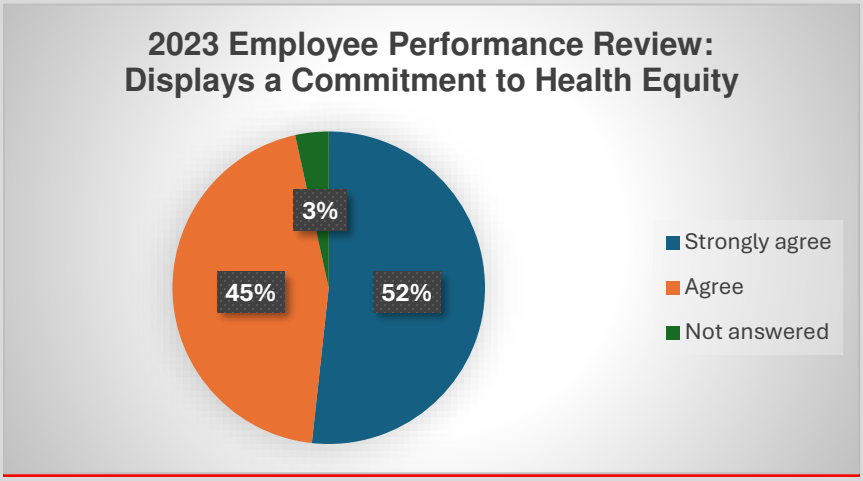
On an annual basis, Advanced Health reviews the company's employee benefits package for equitable access and distribution for all employees. Advanced Health has maintained the previously implemented Equity-related PTO/VTO benefit for all employees. Advanced Health provides health plan options that meet the needs of different lifestyles, families, and health conditions. Advanced Health provides benefits packages for both full-time and part-time employees.

Safety Committee: The Advanced Health Safety Committee continues to include wellness in the committee's initiatives, which contributes to employee satisfaction and inclusivity. A 2023 event hosted by the committee provided accessibility for all.

Employees were teamed up in groups of 3 – 5 and asked to report on their physical activity, and all activity counted. This ensured that any employee of any ability was able to participate. The employees' response and participation were positive.

Attachments: A06. Safety Committee Charter_FINAL_2023.04.27

Performance Review – Commitment to Equity review question: Advanced Health's Employee Performance Evaluations include an equity-related question. This reinforces professional development and job knowledge to further health equity as an organizational value. Advanced Health staff are required to complete equity-related trainings upon new hire and on an annual basis.



Equity Assessment Summary: Advanced Health's Employee Equity Assessment is planned for Q3 2024. The employee assessment allows Advanced Health to gain further insight into the employee perspective on Advanced Health's health equity infrastructure and capacity.

Leadership: Advanced Health continues to have Anna Warner, Executive Program Director, in the Health Equity Administrator role. This executive leadership position has broad oversight of the health equity initiatives and programs which span many departments in the organization. This role is an integral part in the success of Advanced Health's health equity infrastructure. In collaboration with the Health Equity Steering Committee, and two designated positions – the Health Policy Analyst and the Equity Policy Analyst, Advanced Health has allocated staff and budget resources to support the progress of health equity and associated goals, as seen in the attached organization chart. The policy analyst positions continue to be instrumental in providing subject matter expertise and provide organization and project management to specific reporting and monitoring processes that address health equity. The Human Resources Department allocates time, knowledge, and budget to various equity initiatives, such as the administration of fair and equitable hiring policies, data collection for workforce diversity, accessible benefits administration, professional development and training, and safety and wellness initiatives.

Governance

Organizational Health Equity: Advanced Health maintains an Organizational Health Equity Policy and Procedure which provides high-level guidance to employees to further health equity in policies, procedures, practices, and services.

Advanced Health has successfully adopted an Equity Impact Assessment Tool as an embedded section in the company's policy and procedure template. The Equity Impact Assessment was approved by both the Health Equity Steering and Policy Review Committees. Staff training and the revised policy and procedures template were rolled out in Quarter 4 2023.

Further details on the Organizational Health Equity Policy and Procedure and Equity Impact Assessment Tool can be found in Focus Area 5 beginning on page 20 of this report.

Diversity Conference: Advanced Health continued to sponsor the local annual diversity conference, which was held in-person in 2024 by the Regional Health Equity Coalition, South Coast Equity Coalition (SCEC). In 2024, 16% of Advanced Health and DOCS Management's 90 employees attended, which was a 6% decrease from the 22% attendance in 2023. (DOCS Management provides administrative services for Advanced Health.) Last year, we noted a 24% attendance rate, but this figure had a margin of error due to the timing of the employee count. Moving forward, we will calculate the average number of employees based on data from January to April each year. A summary of the overall attendance of the conference is attached.

The South Coast Equity Coalition (SCEC), the Regional Health Equity Coalition, collects data during the South Coast Diversity Conference to inform planning for the following year's conference. This effort supports the SCEC goal of understanding community perspectives on Diversity, Equity, Inclusion, Justice, Accessibility, and Belonging (DEIJAB) principles. By doing so, it prioritizes topics identified by the community's priority populations that address the root causes of inequities.

As a result of the 2023 diversity conference, the SCEC hosted a two-part series in collaboration with the Coalition of Communities of Color, focusing on Data Justice and its impacts on underserved communities. Several Advanced Health staff were in attendance for both series. The training addressed the lack of representation and equitable engagement of BIPOC and LGBTQIAS+ individuals in quantitative data collections. The goal was to deepen understanding of historical trauma related to data and to provide clear definitions and tools for embedding justice in data practices.

Attachments: **A07**. Annual South Coast Diversity Conference flyer 2024
A08. Annual South Coast Diversity Conference Training Evaluation Summary Complete 2024

- **Strategy 2 (Communication and Language Assistance):**

Increase participation from members with limited English proficiency and diverse cultural backgrounds by recruiting additional members to participate in Advanced Health committees and activities. Get feedback by increasing listening sessions to collect data on needs and barriers.

Strategy 2 Status update:

Advanced Health made efforts to improve participation from members with limited English proficiency by encouraging participation in Advanced Health's Member Engagement and Education Committee (MEEC). We asked members of Advanced Health's Community Advisory Council (CAC) if they would or knew of another member who would be interested in joining the MEEC. We have not had anyone reach out. We have also notified members who have called in of the option to join the committee. The CCO is researching if members can be compensated to be on the committee to eliminate any barriers that may affect the member's ability to participate in an Advanced Health committee. The CCO's Qualified Spanish Interpreter also promotes participation in the committee to LEP members upon their interactions.

The Director of Member Services held listening sessions with individual members to discuss perceptions, experiences, and barriers by the CCO's LEP membership surrounding language access in our communities. Members reported several concerns, including a lack of Spanish-speaking providers near their homes, difficulty understanding messages or materials sent to them, unawareness of available language access services, and inconsistency in language access support across the provider network. For instance, some providers offer paperwork in Spanish, while others do not, and clinic staff support varies. In one case, a member was not identified as Spanish speaking until she called the CCO with a question. To address these barriers, we have set goals to better support members with limited English proficiency.

Attachments: A09. MS- Language Access and Healthcare Interpreter Services_ Policy and Procedure_12012023_Final-signed
A10. MS-Member Information_Policy and Procedure_Final Signed 03.24.2024.

Previous Year Strategy 2, Goal 1:

Increase engagement of members with limited English proficiency and members from diverse cultural backgrounds.

Goal 2.1 Status Update: ☐ Completed ☐ Progressed ☐ Ongoing ☒ Modified

The previous goal has been moved to the "new strategy" section on page 11 of this report to accommodate the new strategy for the same previous year goal. The baseline, measure of success and monitoring *are* also in the "new strategy" section.

Previous Year Strategy 2, Goal 2:

Complete listening sessions with Advanced Health members with limited English proficiency and from diverse cultural backgrounds to gather feedback.

Goal 2.2 Status Update: ☐ Completed ☐ Progressed ☐ Ongoing ☒ Modified

During individual listening sessions with members who have limited English proficiency, they expressed that they felt there was insufficient assistance from the provider network and inadequate effort to ensure they understood the information and materials. Additionally, they felt there were not enough Spanish-speaking providers in the area.

Baseline:	Metric/Measure of success:
Feedback was obtained directly from the members to understand needs and barriers. Minimal information of the network providers current processes is known.	The CCO obtained additional feedback and information on barriers. The CCO identified the need to gather additional data from the provider network. We have modified the goal and strategy in response to the information gathered from the listening sessions.
Monitoring:	**Person responsible:**
Obtain information from network providers on how they are meeting members' language access needs, gather additional feedback, identify areas for education/improvement, and develop new processes or practices to address them. The goal is to complete these actions by the end of the first quarter in 2025. Suggested changes will be reviewed by the MEEC committee, CAC, and Advanced Health network providers.	Director of Member Services

Updated Resources Attained / Needed:

Means to survey network provider.
A venue to discuss improvements with providers to assess their processes.

- **Strategy 3 (Engagement, Continuous Improvement, and Accountability):**

Increase communication about availability of health care interpreter (HCI) services in order to increase accessibility to members and increase use of HCI services.

Strategy 3 Status update:

Over the past year, we have expanded our use of the multilingual educational platform Krames by furnishing access to network providers to ensure the CCO and network clinics meet the members' language needs for healthcare education materials. Krames provides health education sheets at a 5th grade reading level and videos in multiple languages. There are also 100% pictorial materials. We have trained our internal staff and clinic staff to provide the materials. Information can also be facilitated by staff to provide maximum benefit and understanding.

In 2024, use of the Language Line increased and has continued steadily. We continue to offer the InSight Video interpretation to allow for face-to-face translation via video in over 240 languages, including American Sign Language, as well as the Language Line itself. We continue to support and promote use of the Language Line throughout the provider network by providing informational posters, flyers, and materials to the clinics to ensure the provider network and membership are aware the service is available at no cost. A Certified Spanish Interpreter is available to our members and Provider Network to provide Spanish translation. We have also seen an increase in utilization of this service. We continue to promote use of certified or qualified

interpreters and available supports in all avenues including the Advanced Health Website, Interagency Quality and Accountability Committee, Community and CAC presentations, member communications including the Member Handbook and Annual letter, Advanced Health's Facebook page, and upon identification of any individual member need.

Attachments: **A11**. 2023.2024 Language Line Data

In 2023 Advanced Health added a Spanish-language queue to our telephone system to ensure all members calling in to the CCO are able to easily connect with Spanish-speaking staff.

In 2024 the CCO created an educational flyer with a spotlight on our on-staff Qualified Spanish health care interpreter to send to Advanced Health members who have been identified as needing a Spanish interpreter. The goal was for the members to become familiar with the interpreter and understand that interpreter services are available to them at no cost. The CCO also created laminated flyers to provide to clinics to promote the use of the Language Line and the CCO's on-staff Qualified Spanish Interpreter.

Attachments: A12. Advanced Health HCI brochure2
A13. Language Access Promotional Flyer Spanish_20240405
A14. Advanced Health – Spanish Language Hand Out Prints.

Previous Year Strategy 3, Goal 1:

Increase access to CCO's healthcare interpreter services by completing a review of interpreter services available in our provider network. Update provider and member education materials about CCO's healthcare interpreter services. Provide training opportunities for staff members at local clinics to become certified healthcare interpreters. Include evaluation of health care interpreter services utilization when developing and planning changes to the Delivery System Network (DSN).

Goal 3.1 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified

We continue to assess the provider network interpreter services and regularly promote the services through meetings, the CCO's website, provider newsletters and provider's communication. We have identified various methods being used by the providers and would like to have more consistency across the network. Once the data is complete, we will develop a goal to improve the member's experience. We are currently experiencing an increase in use of both the Language Line phone interpretation service and the Advanced Health's Qualified Healthcare Interpreter's in-person services. As of the end of May 2024, the use of our health care interpreter was already at a 50% increase from 2023. We will also implement OHA's suggestion of using the automated phone system to inform members about available language access supports when they call the CCO. The CCO continues to offer scholarships for interpreter training and certification, however, there have been no new applicants so far in 2024.

Attachments: **A15**. AH Qualified HCI Spanish Interpretation Log 2023.2024.

Baseline:	Metric/Measure of success:
2023, there were 62 members who used the CCO's HCI services.	A 20% increase of the utilization of CCO's HCI services.
Monitoring:	**Person responsible:**
Qualified HCI Spanish Interpretation log.	Director of Member Services

Updated Resources Attained / Needed:
Staff time and funding for the materials sent to members and providers.

Year 5 Strategy

Please select one option for Year 4 strategy and complete the appropriate portion of the table below.

☐ Strategy is the same as Year 4
☐ Strategy has been modified for Year 5
☒ A new strategy has been developed

For New Strategies ONLY

This section only applies if you selected "a new strategy has been developed" for Year 5.

New Strategy 1:

Advanced Health continues to work towards health equity and inclusivity. The annual South Coast Diversity Conference is a space for all organizations in the community to gain more tools and knowledge on how to create inclusivity and equity within their organizations and the community.

Therefore, the strategy is to engage more CCO staff members with the annual South Coast Diversity Conference.

Background/Context:

The South Coast Diversity Conference resumed in-person attendance in 2023 and there was CCO staff attendance, and more staff were interested in attending but were unable due to time constraints. In 2024, although there was a 6% decrease in staff attendance, staff members resoundingly remarked this was the best year to date. The Equity Policy Analyst attended and returned with materials from the conference including, but not limited to, video and slides shared during the conference. Additionally, we unpacked the lessons shared at the conference in the CCO's Health Equity Steering Committee.

Issues and barriers:

The CCO is a hybrid organization, with staff working both on-site and remotely. Remote staff may have barriers in attending due to travel and accommodation. In-office staff may have difficulty attending due to the need to find coverage for their regular duties supporting Advanced Health members.

New Strategy 1, Goal 1:

Increase the number of CCO staff attending the annual south coast diversity conference

Baseline:	Metric/Measure of success:
2023: 22% of staff attended 2024: 16% of staff attended	2025: 22% staff attendance Although the CCO had a 22% staff attendance in 2023, attendance decreased in 2024. Therefore, aiming to reach 22% to match the 2023 attendance will mean that there is more staff interest in the future.
Monitoring:	**Person responsible:**
Staff attendance list	Human Resources Manager and Equity Policy Analyst

Resources Needed:

Staff time and funding to support out-of-state or out-of-area remote employee attentance.

New Strategy 2:

To support the Communication and Language Access strategy 2, the CCO will continue to work in increasing participation from members with limited English proficiency, with visual and hearing challenges, and diverse cultural backgrounds. Improvements for member engagement will be made by increasing efforts to recruit additional members to participate in Advanced Health committees. This will improve member engagement and communication along with providing feedback and monitoring of language access needs and current state. We will be outreaching and surveying current practices and how they can be improved. Additionally, we will be using the data obtained to develop a plan with the Network Providers to assure improvements in that area based on the data.

Background/Context:

After holding listening sessions in 2023, it became clear that Advanced Health's provider network needs to address several issues. Members with limited English proficiency felt there were not enough Spanish-speaking providers and that there is not consistency in language access support across the provider network.

Issues and barriers:

The CCO struggled to obtain member involvement in the Member Engagement and Education Committee (MEEC). Some barriers identified included members who stated they were struggling financially and were focused on meeting their daily living needs. The CCO is currently investigating what the guidelines and ability is to compensate members for their time and efforts. The barriers to inconsistent provider practices in obtaining data, lack of understanding of the member's needs, both culturally and linguistically, and low utilization of HCIs included a lack of knowledge of available supports, inconsistent practices among the provider network of supports, and a lack of education of providers on the member's specific needs. While identifying these barriers we also identified the need to obtain additional information from the provider network for a complete look at how to complete a successful strategy.

New Strategy 2, Goal 1:

Increase member Engagement in Advanced Health's Member Engagement and Education Committee.

Baseline:	**Metric/Measure of success:**
There are currently no Advanced Health members on the Member Engagement and Education Committee.	Advanced Health will add at least one new member to the MEEC committee in the next year.
Monitoring:	**Person responsible:**
The MEEC will continue to develop new means to recruit members including social media.	Director of Member Services
Resources Needed: Staff time and funding to provide a stipend for members who attend the meetings.	
New Strategy 2, Goal 2: Survey clinics on the tools used for their in-house healthcare interpreter services.	
Baseline:	**Metric/Measure of success:**
There is currently not consistency throughout the provider network of HCI tools used and support offered.	Obtain data from the provider network and create alignment among providers for how members' cultural and linguistic needs are identified and addressed.
Monitoring:	**Person responsible:**
In 2024-2025, a survey will be created to collect data from providers. The survey will be administered to as many network providers as possible. The data will be reviewed by the Health Equity Steering Committee (HESC) and they will develop an action plan.	Director of Member Services
Resources Needed: Survey to the provider network. Staff time to review the data such as the HESC. Staff time to discuss and develop new practices with the provider network .	

Focus Area 3: People with Disabilities and LGBTQIA2S+ People
Year 4 Progress Update
• **Strategy 1 (People with Disabilities):**
Advanced Health shall collaborate with the National Association of Developmental Disabilities and Mental Health Needs (NADD) for training and consultation. Additionally, select CCO staff will attend monthly Community Living Case Management (CLCM) meetings to identify additional barriers and gaps for the intellectual and developmental disabilities (I/DD) population. **Intensive Care Coordination:** Intensive Care Coordination (ICC) is a program that offers care coordination services to Advanced Health members that have been identified as having Special Health Care Needs (SHCN) or who belong to a priority population such as members with disabilities and/or are showing signs of social,

emotional, or behavioral problems. As part of the program, members have access to either a Nursing or Traditional Health Worker (THW) Care Coordinator who provides holistic and culturally competent care to diverse populations. To improve the member experience, Advanced Health sponsors Mental Health First Aid and Safe Zone training to ICC and Customer Service staff who provide coordination of member healthcare. Mental Health First Aid is a national program and course that teaches how to identify, understand, and respond to signs of mental illnesses and substance use disorders. The training gives attendees the skills needed to reach out and provide initial help and support to someone who may be developing a mental health or substance use problem or experiencing a crisis.

All Advanced Health staff that communicate directly with members, either verbally or in-person, will complete Safe Zone and Mental Health First Aid (MHFA) trainings.

Attachments: A16. Adult MHFA Flier_2023, A17. Out of the Rain Safe Zone Participant Packet.

Strategy 1 Status update:

The monthly NADD meetings were in direct conflict with other required meetings days and times. However, there were other training courses attended in lieu of the NADD workshops which included System of Care/OHA sponsored learning opportunities. CLCM meetings changed from monthly to quarterly. The Behavioral Health Manager coordinated a meeting with the CLCM Manager to address barriers related to employment challenges for I/DD youth and adults. A CLCM placement criteria presentation was provided to SOC members in both Coos and Curry Counties. Additionally, the Advanced Health SOC provided grant funds for an independent provider in Curry County who developed a childcare center for children who experience Autism and needed outdoor sensory equipment.

Previous Year Strategy 1, Goal 1:

Increase participation in National Association of Developmental Disabilities and Mental Health Needs (NADD) training and participation in monthly CLCM meetings.

Goal 1.1 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified

Advanced Health Behavioral Health Manager is unable to attend NADD training due to conflict in required date/time of each training.

The Behavioral Health Manager attended 2 of the 4 CLCM quarterly meetings due to overlap in other required meetings.

Baseline:	Metric/Measure of success:
Advanced Health Behavioral Health Department staff have not attended NADD training.	Advanced Health Behavioral Health Manager shall attend a minimum of 2 NADD workshops and an Advanced Health representative will attend at least 10 monthly CLCM meetings per year.

Monitoring:	**Person responsible:**
Attendance list during meetings (virtual and in-person meetings). Basecamp posts to SOC members	Director of Behavioral Health Behavioral Health Program Manager

Updated Resources Attained / Needed:
Meeting slides are shared with SOC members and Advanced Health colleagues.
CLCM criteria shared with SOC members via Basecamp, and remote and in-person Advanced Health colleagues.
Need: Staff time to attend assigned training courses and meetings.

Previous Year Strategy 1, Goal 2:

All Advanced Health staff that communicate directly with members, either by phone or in-person, will complete Safe Zone and Mental Health First Aid (MHFA) trainings.

Goal 1.2 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified

We are seeing noteworthy progress with this goal since very few of the staff have attended either training. Our completion rate may potentially be limited by staff availability given the demands of daily coverage of member services and care coordination.

Training courses are scheduled twice a year to ensure availability to all new hires.

Since June 2023 until now, three Customer Service Representatives and one ICC staff completed Safe Zone trainings, another training will be offered in the year.

Baseline:	**Metric/Measure of success:**
No member-facing staff have taken the Safe Zone or Mental Health First Aid trainings before 2023 Member facing departments: Care Coordination (CC), Customer Service (CSR), Community Engagement (CE), and Grievances and Appeals (GA)	2023 Outcome: 64% of listed departments completed MHFA and 45% completed Safe Zone training. 2024 Goal: 75% of member-facing staff will complete both trainings
Monitoring:	**Person responsible:**
Verified via training attendance records twice yearly. Departmental staff quarterly reviews will be used to monitor knowledge gained and how training is used in daily work, department operations, and quality of member services	Director of Care Coordination Human Resources Manager Behavioral Health Program Manager

Updated Resources Attained / Needed:
Certified and experienced trainers
Curriculum
Conference room space
Staff time and training budget

- **Strategy 2 (People who identify as transgender, nonbinary, or gender diverse):**

Work with Advanced Health provider network and the community to gather additional information, offer additional training, and continue to seek new resources for this population. Currently, the CCO lacks data on these populations. The first step in our strategy will be to collect accurate data on members who identify as transgender, nonbinary, or gender diverse. Once data is collected and quantified, we can develop additional strategies and goals to identify gaps and secure access to new and existing services within the community.

Strategy 2 Status update:

System of Care (SOC) has continued to work with the transgender, non-binary and gender diverse populations by offering resources such as, youth scholarship opportunities (to include educational scholarships, assistance with job training/placement/transportation, leadership training, etc) for LGBTQIA2S+ youth ages 14-24 in Coos and Curry County, and equity education activities for the same population. To date, 13 scholarship awards have been issued with one being returned due to the student choosing another path. A total of $8,000 went towards scholarships, $1,000 supported cultural activities, and $1,000 in administrative fees. Youth from both counties received funding, and in addition to providing educational scholarships, SOC supported two local youth with scholarships that helped with their employment requirements. Through this process Advanced Health partnered with the South Coast Equity Coalition to supplement their BIPOC/LGBTQIA2S+ awards as appropriate. All scholarship funding has been expended.

Previous Year Strategy 2, Goal 1:

To obtain accurate SOGI data from the Advanced Health Provider Network to identify barriers and implement innovative programs.

Goal 2.1 Status Update: ☐ Completed ☐ Progressed ☐ Ongoing ☒ Modified

To assure consistency of the gathering of SOGI data by the Advanced Health Provider Network.

Baseline:	**Metric/Measure of success:**
Network providers are inconsistent on what data is collected and how it is collected.	Provider Network providers will be consistent in the data collected and the means they collect it.
Monitoring:	**Person responsible:**
The CCO will survey providers before 12/2024 to understand what data and methods they are currently using. The CCO will then use the data to discuss consistency across the network over the course of 2025.	Director of Member Services

Updated Resources Attained / Needed:
Staff to develop the survey and collect data.

- **Strategy 3 (People with sexual orientation diversity):**

Work with Advanced Health Provider Network and the community to gather additional information, offer additional training, and continue to seek new resources for this population. Currently, the CCO lacks data on this population. The first step in our strategy will be to collect accurate data on members who identify as transgender, nonbinary, or gender diverse. Once data is collected and quantified, we can develop additional strategies and goals to identify gaps and secure access to new and existing services within the community.

Strategy 3 Status update:

A new strategy has been created to support the changes and growth that has occurred due to members' feedback.

Previous Year Strategy 3, Goal 1:

To identify gaps and secure access to new and existing services within the community.

Year 5 Strategy

Please select one option for Year 4 strategy and complete the appropriate portion of the table below.

☒ Strategy is the same as Year 4
☒ Strategy has been modified for Year 5
☒ A new strategy has been developed

If strategy is same as Year 4 (insert rationale below)

Strategy 1 remains the same as the previous year since it is ongoing. Advanced Health staff continue to attend the NADD and CLCM meetings with adjustments due to their availability.

Member-facing departments, Customer Service, Coordination Care, Community Engagement and Grievances and Appeals will continue to have staff trained in Safe Zone and Mental Health First Aid. Since there are new employee hires within Advanced Health, this will be ongoing unless the CCO reaches a satisfactory number of staff members in those departments.

If strategy has been modified for Year 5

For Strategy 2, supporting Goal 2.1: after completing listening sessions with the local Queer community, we gained a better understanding of the barriers and areas for improvement. We also realized the need to gather additional information. Some of the concerns raised included the lack of providers, specifically Primary Care Providers, who understand their needs and are educated on the Queer community, and lack of knowledge of available resources. The listening sessions also revealed that some members have experienced inconsistent gathering of their SOGI data including what information was gathered and at how or at what point it was gathered.

For New Strategies ONLY

This section only applies if you selected "a new strategy has been developed" for Year 5.

New Strategy:

This new strategy falls under Strategy 3 (people with sexual orientation diversity). Receive feedback from Advanced Health members who identify as people with sexual orientation diversity on the CCO's current efforts to be inclusive.

Background/Context:

This strategy was selected due to the current data the CCO is receiving from OHA regarding SOGI data. The data received by the CCO does not allow for supportive measures for people with sexual orientation diversity due to responses of "do not want to answer" from members. Due to the success of previous qualitative data collection of listening sessions and surveys to Advanced Health members, these methods will be applied to receive feedback from those who identify as people with sexual orientation diversity.

Issues and barriers:

Individuals who identify as people with sexual orientation diversity may not be forth coming in sharing their opinions or identity due to the difficult realities of living in a rural community. Finding Individuals to share their experiences could be difficult if people do not have time to engage in the CCO's CAC or listening sessions due to the lack of available time.

New Goal 1:

Survey people with sexual orientation diversity on their experiences with Advanced Health.

Baseline:	**Metric/Measure of success:**
The qualitative data collected in the November 2023 listening session with people in the sexual orientation diversity and people who identify as transgender, non-binary, and gender diverse groups. Advanced Health received feedback regarding its providers on how they interact with members in the LGBTQIA2S+ community.	Send surveys and receive responses from people with sexual orientation diversity.
Monitoring:	**Person responsible:**
Collect answered surveys	Director of Member Services Equity Policy Analyst

Resources Needed:

Staff time and budget for survey distribution and collection.

Focus Area 4: Community Engagement

Year 4 Progress Update

Strategy 1:

Engage more members in the CAC meetings by providing them with alternate methods to access resources discussed during meetings. Therefore, more participation within the community to address health equity gaps.

Strategy 1 Status update:

Advanced Health provided CAC meeting materials in print as well as digitally. Digital information was attached to each monthly calendar invite and uploaded to the website for easy access. Printed materials were provided at the in-person meetings and sent via postal mail when requested.

Previous Year Strategy 1, Goal 1:

Engage more members in the CAC meetings by providing them with alternate methods to access resources discussed during meetings. Therefore, more participation within the community to address health equity gaps.

Goal 1.1 Status Update: ☒ Completed ☐ Progressed ☐ Ongoing ☐ Modified

Increase the amount of information and updates provided during monthly CAC meetings available to meet the needs of all individuals including 3 new ways for CAC members to access information by 2024.

Baseline:	Metric/Measure of success:
2023: Not all current CAC members that choose to attend the meetings in person rather than virtually can access electronic mail systems.	All CAC members who choose to attend meetings in person will have access to information shared via email in printed hard copies, large font print and Spanish formats when requested.
Monitoring:	**Person responsible:**
Monitor by feedback from CAC members twice yearly.	Community Engagement Manager

Updated Resources Attained / Needed:

We have a Spanish interpreter available upon request. We also have an American Sign Language interpreter available upon request.

Year 5 Strategy

Please select one option for Year 4 strategy and complete the appropriate portion of the table below.

☐ Strategy is the same as Year 4
☐ Strategy has been modified for Year 5
☒ A new strategy has been developed

For New Strategies ONLY

This section only applies if you selected "a new strategy has been developed" for Year 5.

New Strategy:

To increase community members' access to healthy fruits and vegetables and to increase awareness and education about available food resources. Additionally, enhance food nutrition education opportunities for community members.

Background/Context:

During the work for our 2023 Community Health Assessment, we completed 17 focus groups in several different cities. Every single focus group expressed their concern about the lack of access to healthy foods and nutrition information. We found the same concerns as we worked on our Community Health Improvement Plan and completed eight community data walks.

Issues and barriers:

We are seeing a growth in the need for food and nutrition across our communities. One service provider in Coos County reported an increase in their budget from 2022-2023 of $7,850 to $23,371 in 2023-2024. They also reported an increase in the number of sandwiches provided in sack lunches by 10,000 sandwiches in one fiscal year.

New Goal 1:

Increase access to healthy fruits and vegetables by investing in the expansion of existing successful programs to other cities within the counties they serve.

Baseline:	**Metric/Measure of success:**
Currently 11 distribution sites for fruits and vegetables in Coos and Curry Counties.	Increase the number of access sites available.
Monitoring:	**Person responsible:**
Update the Circle of Support as a living document of available resources to show growth. The Circle of Support is a community resource guide that shows all Community Benefit Organizations in the area.	Community Engagement Manager

Resources Needed:

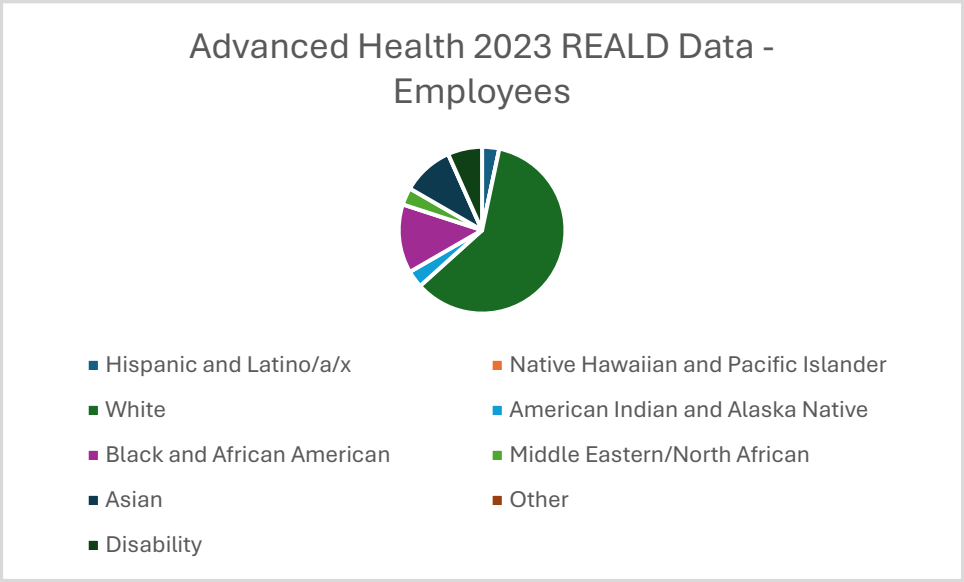
Funding for growth
Grant writing skills
Opportunities identified to apply for funding

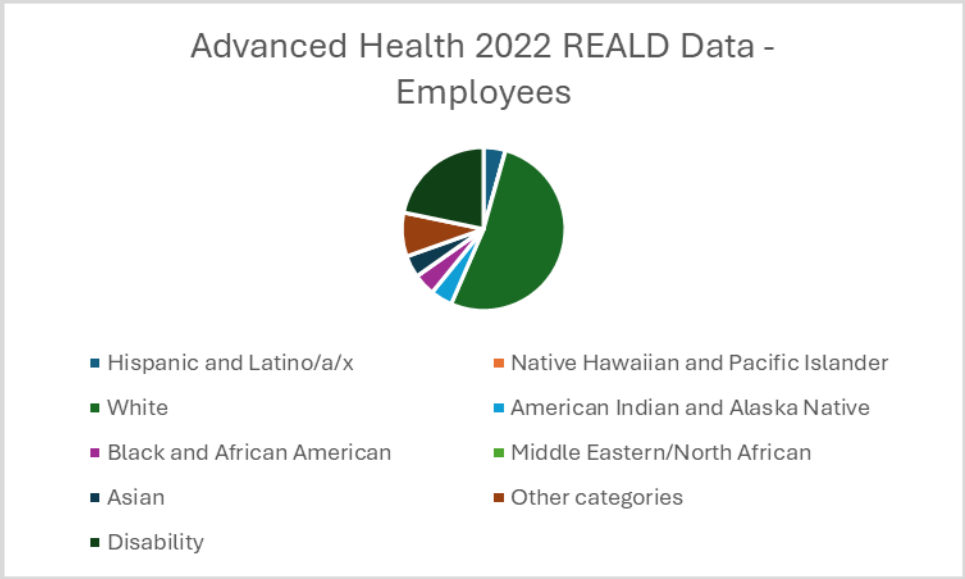
New Goal 2:

To increase local education offerings on food nutrition.

Baseline:	Metric/Measure of success:
Partnership with OSU (Oregon State University) Extension provided 41 nutrition classes in 2023. The Beet Food Systems provided 12 "Cooking with the Co-op" classes in 2023.	Increase the number of nutrition classes offered in 2024.
Monitoring:	**Person responsible:**
Measure the number of nutrition classes and webinars to show increase. Track education presentations and record attendance.	Community Engagement Manager
Resources Needed:	
Contacts and advertising to bring awareness to the education opportunities. Funding for new classes and programs.	

Focus Area 5: Continued development of organizational Health Equity infrastructure
Year 4 Progress Update
Strategy 1:
Continue with REAL-D and Employee Equity Assessment Survey data collections to further evaluate these areas. Continue with the Employee Benefits Evaluation on an annual basis to ensure equitable distribution and access for employees. And lastly, Advanced Health's human resource information system (HRIS) data insights are planned to be rolled out in 2024.
Strategy 1 Status update:
Although this section is similar to focus area 2, there are differences and additions, specifically data additions below. Advanced Health collects REAL-D data annually from employees, committee, and board members. The completion rate has increased yearly since 2021. This information is collected following the Advanced Health's REAL-D Data Collection Policy and Procedure and the Oregon Health Authority's REAL-D Data Collection Form. This ensures a secure, consistent data collection process. The detailed data are viewable only by the HR department for confidentiality purposes. Advanced Health has REAL-D data now from 2021, 2022, and 2023. Data shows employees identifying as racially, ethnically, and ability diverse throughout each year. Advanced Health maintains expanded recruitment location efforts to support a diverse applicant pool. Advanced Health will continue this practice.





The first 2024 cycle of REAL-D data has been collected from employees, committee- and board-members. The first 2024 cycle of data shows a slight decrease in voluntary participation from employees from 36% to 32%. However, with two cycles planned for 2024, additional collection from new hires and a second opportunity to participate are expected to improve participation for the full year. 2024 results will be reported when data collection is finalized later in 2024.

For REAL-D collection for board and committee members, there was a 1 percentage point increase from 2022 to 2023, and the same values for 2023 to 2024.

Advanced Health maintains an employee benefits package that provides certain benefits to all employee types, not just full-time employees. For example, Advanced Health maintains the Equity-related PTO/VTO benefit available to all employees. Different health plans are available for employees to choose from based on their

specific healthcare needs, lifestyles, families, and health conditions. For example, spouse coverage includes options for same sex couples and domestic partners, instead of state-recognized marriage only.

The Advanced Health HR department will be conducting a benefits survey near the end of summer to ensure optimal equitable access and distribution of benefits to employees. This survey will include gathering information on how employees would like to receive information about their benefits and how well they feel they understand their benefits.

Previous Year Strategy 1, Goal 1:

To increase the number of responses for REAL-D and Employee Equity Assessment data collection, and to consider an employee benefits survey. To utilize the HRIS's data insights to further evaluate diversity and equity amongst staff, positions, and departments.

Goal 1.1 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified

Advanced Health's REAL-D survey participation annually from employees, committee- and board- members.

	2022	2023	2024 (1st cycle)
Board- and Committee- Members	15%	16%	16%
Employees	22%	36%	32%

Baseline:

REAL-D for Employees

2021 – 20%,

2022 – 22%,

2023 – 36%

REAL-D for Committee Members

2022 – 15%

2023 – 16%

Employee Equity Assessment

2020 – 45%,

2022 – 32%

2023 – N/A

Benefits Survey: none

Workforce Data Insights: none

Metric/Measure of success:

REAL-D participation: Employee goal: 40%, Board- and Committee Members goal: 25%.

2024 Update: The measure of success of 25% participation for board and committee members may not be possible by the end of 2024, 18% will be Advanced Health's metric of success as board and committee members continue to grow comfortable with the REALD survey.

Employee Equity Assessment participation: Increase from 32% in 2022 to 50%. And establish a communication plan for the Equity Assessment Action plan.

Benefits Survey: Improve data collection, usable data to evaluate benefits

Workforce Data Insights: Use HRIS data insights, such as genders or disability statuses in different roles

	(management roles for example), to evaluate workforce diversity further.
Monitoring: **REAL-D Communication Plan** 1. July, August, September email communication 2. Monitor monthly submissions 3. Share progress with Health Equity Steering Committee 4. Add a "Do Not Wish to Participate" option in 2024. **Employee Equity Assessment** 1. Complete review by Health Equity Steering Committee 2. Create and implement SMARTIE Goals & Action Plan 3. Communication Plan similar to REAL-D Communication Plan 4. Equity Assessment due in Q1 of 2024 **Benefits Survey** 1. Draft survey for HR, Finance, CEO review 2. Rollout 2024 Q2 **Workforce Data Insights** 1. HR preparation – 2024 Q1 2. Executive presentation – 2024 Q2 3. Action Plan – 2024 Q3	**Person responsible:** Human Resources Manager Health Equity Steering Committee (see **A18. attachment** of charter for committee roster) Board and Committee points of contact Executive Leadership Team
Updated Resources Attained / Needed: Staff time	
Previous Year Strategy 1, Goal 2: To progress health equity infrastructure into each of the organization's departments.	
Goal 1.2 Status Update: ☐ Completed ☐ Progressed ☒ Ongoing ☐ Modified **Training and Education Resources** **Leadership training:** The Advanced Health Executive Committee has approved and will be implementing the following CLAS-related training in 2024 as a training requirement for executive level staff: • Cultural Responsiveness & Implicit Bias This is in addition to the annual trainings all employees must complete and newly added ethics and corporate responsibility training. **Lunch and Learns:** CLAS Training has been presented on an annual basis for 2023 and 2024.	

New Hire and Annual Trainings: Added trainings: Creating Value Through Diversity Series: Understanding Conscious Bias, Understanding Diversity and Inclusion, Strategies for Tackling Unconscious Bias (1.2hrs)

CLAS Standards E-Learning Modules:

- Session 1: Introduction to the CLAS Standards
- Session 2: Governance, Leadership, and Workforce
- Session 3: Communication and Language Assistance
- Session 4: Engagement, Continuous Improvement, and Accountability

Attachments:**A19**. Staff Training and Development and Policy and Procedure_2021-22 revision_AH,
A20. AH EE HB_Mandatory Education Policy_2023.01.01
A21. Annual Employee Training Plan,
A22. Provider Trainings - Advanced Health

Workforce: Equity training in new hire orientation: Health Equity Training is a permanent onboarding session for the Semi-annual New Hire Group Orientation. The presenters are Anna Warner, Executive Program Director/Health Equity Administrator and Doris Kiragu, Equity Policy Analyst.

Organizational Health Equity: Advanced Health maintains the Organizational Health Equity Policy and Procedure which provides high-level guidance to employees to further health equity in policies, procedures, practices, and services.

Attachments: A23. Organizational Health Equity Policy and Procedures_Final - signed

Policy and Procedure Equity Impact Assessment: Advanced Health has adopted an Equity Impact Assessment Tool that has been embedded in the company's policy and procedure template. The Equity Impact Assessment Tool was approved by both the Health Equity Steering and Policy Review Committees. Pilot training was conducted by Health Equity Steering Committee members in 2023 Quarter 3, and then rolled out to all document owners and policy signers in 2023 Quarter 4 and 2024 Quarter 1.

Attachments: **A24**. Health Equity Impact Assessment Tool on CLAS Policy and Procedures

Baseline:	**Metric/Measure of success:**
Organizational Health Equity Policy and Procedure implemented December 1, 2021 with training provided to all staff.	The metric of revised Organizational Health Equity Policy and Procedure with updated training and technical assistance for all staff were met. **Updated metric status for 2024:** 100% completion rates of assigned training to applicable employee populations.

	An increase in the optional training courses such as the monthly Lunch and Learns.
Monitoring: The HR department will monitor and maintain training attendance and completion reports. HR and supervisors will serve as reminder and support, so employees understand and have time to complete required trainings.	**Person responsible:** Human Resources Manager
Year 5 Strategy	
Please select one option for Year 4 strategy and complete the appropriate portion of the table below. ☒ Strategy is the same as Year 4 ☐ Strategy has been modified for Year 5 ☐ A new strategy has been developed	
If strategy is same as Year 4 (insert rationale below) Advanced Health is has seen improved participation in REAL-D data collection efforts. These practices of data collection, assessment, and evaluation fundamentally support organizational capacity to advance equity within the organization and to advance health equity in the community.	

Section 2: Annual Training and Education Report (2-page maximum - not including required templates or attachments)

For this section CCOs are required to report on their 2023 **staff training** as outlined in their Organizational and Provider Network Cultural Responsiveness, Implicit Bias, and Education Plan. While not required, if CCOs provided any trainings to their provider network, CCOs are encouraged to report on it.

Please complete the separate **Excel reporting template named 2023 and 2024 Organizational and Provider Network DEI Training and Plan template** and attach it with CCO report submission (please note there are two tabs to this worksheet). Additionally, if you have any updates to CCO Organizational and Provider Network Cultural Responsiveness, Implicit Bias, and Education Plan for 2024, please describe them below.

Attestation:

Has the CCO adopted the definition of Cultural Competence set forth in OAR 943-090-0010 and is utilizing it to guide its development of cultural responsiveness materials and topics in its Cultural Competence Continuing Education training activities into its training plans for Health Care Professionals?

☒ **Yes** ☐ **No**

In an ongoing commitment to promoting cultural responsiveness, addressing implicit bias, and fostering inclusive communication, Advanced Health has maintained the organization's education plan and training opportunities for its employees, board and committee members, and provider network. This plan enhances cultural awareness, sensitivity, and understanding among CCO staff and healthcare providers, enabling the delivery of equitable care and support to all individuals served. Through the following efforts and updates to our employee and provider network education plan, Advanced Health is cultivating an environment of cultural responsiveness, addressing implicit bias, and focusing on health equity infrastructure. By fostering understanding, self-reflection, and continuous learning, Advanced Health is dedicated to delivering equitable, patient-centered care to individuals from diverse backgrounds. Advanced Health will continually assess and improve health equity initiatives to ensure that cultural responsiveness and health equity remain central pillars of the organization's values and practices.

Annual and New Hire Comprehensive Training Modules: Advanced Health offers a series of comprehensive training modules focused on cultural responsiveness, covering topics such as diversity, equity, and inclusion (DEI), implicit bias, culturally and linguistically appropriate services, language- and disability- accessibility, communication, and discrimination and harassment prevention. Advanced Health requires all employees to complete the list of approved training modules upon new hire and on an annual basis.

Attachments: A20. EE_HB_Mandatory Education Policy,

A19. Staff Training and Development Policy and Procedure_2021-2022 revision,

A21. Annual Employee Training Plan

Employee Lunch and Learn Opportunities: To foster a collaborative learning environment, Advanced Health continues to offer monthly Lunch and Learn events. These regular learning forums and group discussions offer opportunities to learn more about the CCO and its requirements, department activities and goals, and network with fellow employees. Many times, as seen in the Lunch and Learn schedule, the topics are health equity-related. These sessions promote understanding of the CCO's approach and how everyone contributes to health equity work in the organization and community.

Attachments: A25. Lunch and Learn Schedule

Diversity and Health Equity Event Sponsorship: Recognizing the impact of Advanced Health's support for the local South Coast Diversity Conference, sponsorship of the event continued into 2024. The South Coast Diversity Conference offers interactive workshops and learning tracks for "…diversity, equity, and inclusion training in a collaborative effort by sharing resources of multiple organizations to offer our region an engaging and educational experience." These workshops promote self-reflection and provide strategies to recognize and mitigate implicit biases that may influence decision-making and treatment of people with diverse backgrounds, abilities, and access

Attachments: A07. Annual South Coast Diversity Conference Flyer 2024

Health Equity Fair: This community event is scheduled to take place later in 2024.

Employee Resource Library: Advanced Health has established an online resource library that includes articles, videos, and online courses on cultural responsiveness, implicit bias, and health equity. This resource repository serves as a reference for staff to further deepen their knowledge and understanding of these important topics. Some examples include:

2024

- Collecting REAL/SOGI Data with Cultural Competency
- Creating LGBTQIA2S+ Equitable and Affirming Spaces
- ADA and Healthcare
- Improving Mental Healthcare Access – Including Patients with I/DD Training
- Juneteenth Celebrations

2023

- Advanced Health 2023 Health Equity Plan Report
- How Does Implicit Bias Affect Healthcare Providers?
- How to Reduce Implicit Bias in Healthcare
- The Importance of Cross-Cultural Considerations in Nursing
- What Is Cultural Sensitivity in Healthcare?
- Cultural Barriers in Healthcare & Communication Techniques
- Language Access Plans for Healthcare Organizations
- How To Build Patient Trust in Healthcare
- Cross-Cultural Care in Nursing with Hispanic Populations
- What Is Culturally Responsive and Socially Just Counseling?
- The Importance of Cultural Awareness in Nursing
- Advancing Equity in Collective Impact
- How Implicit Bias Impacts Healthcare Delivery & What You Can Do About It
- History of Racism in US Healthcare: Root Causes of Today's Hierarchy and Systems of Power

Completion of these resource library training courses is not currently being tracked. Review of requiring attendance for certain employee populations will be considered for 2024.

Performance Evaluation and Feedback: Advanced Health continues to have an equity-related question in annual Employee Performance Reviews, asking the manager to review whether the employees meet the following expectation: "Employee identifies health equity-related activities within their scope of work and the organization's commitment to health equity". All employees met or exceeded this expectation. This equity-related workforce objective will continue to be included in performance reviews to get another year of baseline information. Any unmet expectations will be addressed with additional training or resources. This encourages accountability and reinforces the importance of ongoing professional development in the area of health equity.

Provider Learning Opportunities: Advanced Health continues to offer CEU-accredited learning modules for the provider network and their staff. The online, self-guided learning modules address cultural responsiveness, implicit bias, and strategies for delivering culturally sensitive care.

Course objectives include an interactive approach designed to equip mental health care professionals with the necessary skills to engage effectively with diverse individuals throughout the entire care process, from diagnosis to ongoing management of mental health conditions, with a specific focus on depression; to address key Hispanic/Latino population data, healthcare disparities, and offers person-centered strategies to establish strong relationships and explore cultural traditions and beliefs related to healthcare; equip clinicians with the skills to effectively navigate cross-cultural issues and negotiate care management plans using the ResCUE Model™, and address legal requirements for healthcare organizations to provide interpreters and translated materials for patients with limited English proficiency (LEP).

2023 and 2024 – ResCUE Model for Cross-Cultural Clinical Care, Ensuring High-Quality Care for Patients with Limited English Proficiency

Attachments: A26. QIFlyer_Mental Health,

A27. QIFlyer_HispanicLatino,

A28. Course Flyer – ResCUE Clinical,

A29. LEP Course Flyer