



# ANNUAL REPORT

2023

# Health equity is at a **CROSSROADS.**

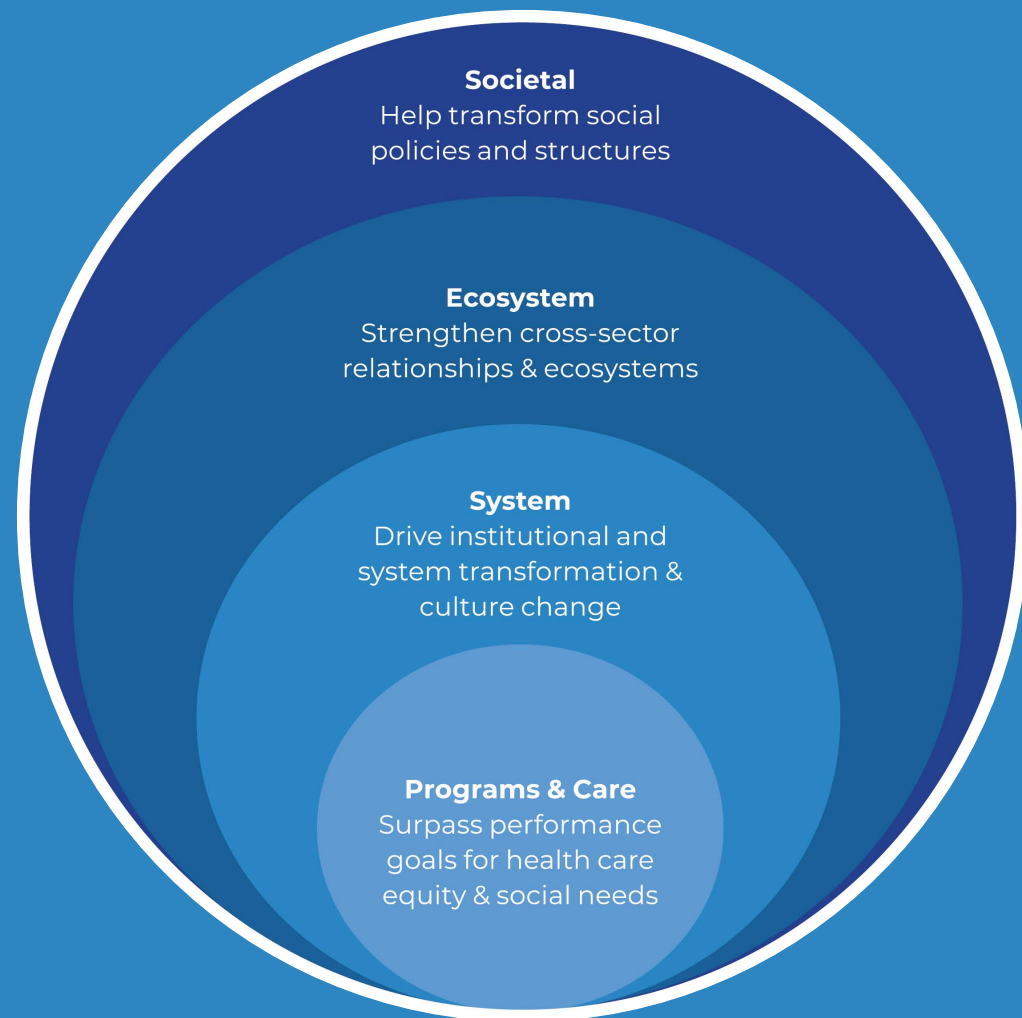
In the last year, we've seen remarkable progress as many policymakers and practitioners worked to center and advance health equity. At the same time, we've seen reactionary forces push back against, undermine, and even outlaw equity, diversity, and inclusion. At this moment of both promise and peril in the journey upstream, we need to think and act bigger—and in greater solidarity—to move beyond basic compliance to achieve broad impact together.

We can do that when we forge a bold vision centered on equity, stitch patchworks of programs into cohesive portfolios, and work together across levels of impact to change the conditions that cause harm or support health, from exam rooms and boardrooms to living rooms and city halls across the nation.

This is an inflection point, one that will define the trajectory of equity work for years to come. As always, we look forward to meeting this moment together with you, with commitment, humility, rigor, and love.

## The Compass for Health Equity Transformation

Health equity and justice require cohesive strategies across levels of impact



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Dear friends,

There comes a critical moment in any growth process when conditions change and you have to adapt to accelerate. That is the crossroads where HealthBegins—and the Upstream Movement as a whole—are right now. It's a pivotal moment, and an important one to pursue intentionally.

For years, health equity was an unofficial endeavor in healthcare, pursued by a small group of passionate caregivers, administrators, and community partners in the tiny gaps between official duties. Now, many health equity leaders across the country are stepping into new, official roles in health systems and managed care plans, with equity as their explicit mission. Many are starting to recruit teams, strengthen community partnerships, and marshal the resources to deliver on big, bold commitments. In state and federal agencies, more policymakers are connecting health inequities with social needs and creating new avenues to address them. Yet even as Upstreamists in some places make great, visible strides, those in more embattled states persist amid painful setbacks to human rights and diversity, equity, and inclusion.

This moment holds both real peril and huge potential. The door is open, at least for now, to **drive significant advancement in health and racial equity** in many places. Even in states where the door may appear closed, we're inspired to see state agencies, healthcare organizations, and social care organizations reach out to us for support to move their health equity priorities forward.

As a movement and a nation, we will overcome the peril and realize the potential only if we grow intentionally—growing our aspirations along with the capacity of our organizations—and unify to deliberately retool and refuel. Our purpose is not merely to clear new regulatory hurdles or put a few programs in action; it's to effect powerful, pervasive change.

HealthBegins itself has undergone two such growth phases. The first came six years ago, when we transformed from a part-time labor of love into a full-time, mission-driven firm. Now we're shifting gears again, moving from startup mode into the next phase of strategic growth, developing systems, scaling solutions, and expanding our capacity to answer the increasing requests for support we receive from courageous leaders initiating change. This next phase of growth will build on what continues to make us unique and valuable in the field of health equity: the practical expertise, skills, and tools to help Medicaid-serving clients implement multi-level strategies that transform health care and the social, institutional, and structural drivers of health equity.

What we're equipping those leaders to do reflects what we have learned firsthand. We know that **intentional growth** involves connecting organizational development and impact. To pursue health equity effectively, we need to invest in ourselves, our systems, and our capacity. Guided by the wisdom of Upstreamists before us and our own hard-earned experience, we help leaders navigate four critical shifts in approach that underpin effective health equity work, moving from:

**compliance** → **impact**

a **patchwork** of programs → a **portfolio** of initiatives

**reactive** responses → **strategic** action

**siload** work → collective impact and **solidarity**



We also use our [Compass for Health Equity Transformation](#) and our [Upstream Strategy Map](#) to help these leaders **develop and align their efforts across multiple levels of influence**—from programs and care to systems to ecosystems to society—to advance health equity and improve its social, institutional, and structural drivers. In practice, this often looks like (a) aligning health equity priorities, (b) turning them into a road map, and (c) operationalizing that road map as a work plan for multi-level transformation. Because only that combination of intention, investment, and strategy will bring about impact on the scale that real equity requires.

In doing so, we recognize that **growth is not just organizational but individual**. The journey upstream entails a transformation not only of our communities and institutions but of ourselves as leaders. We intentionally make spaces within our team and with our partners to support the emotional and energetic demands of this work. We are committed to providing you, our colleagues and comrades, not just tactical support but emotional and moral solidarity to navigate the challenges that surround the journey. We know the present opportunity won't last forever (and in some places may be appearing to close), but together we can build the structures to prop the door open regardless of what comes our way.

We are tremendously proud to share with you the animating ideas and powerful achievements highlighted in these pages. HealthBegins' contributions in 2023 have, in turn, led us to even more learning and growth—all of which we commit to put to work fueling the collective journey upstream.

Best,  
Rishi & Sadena



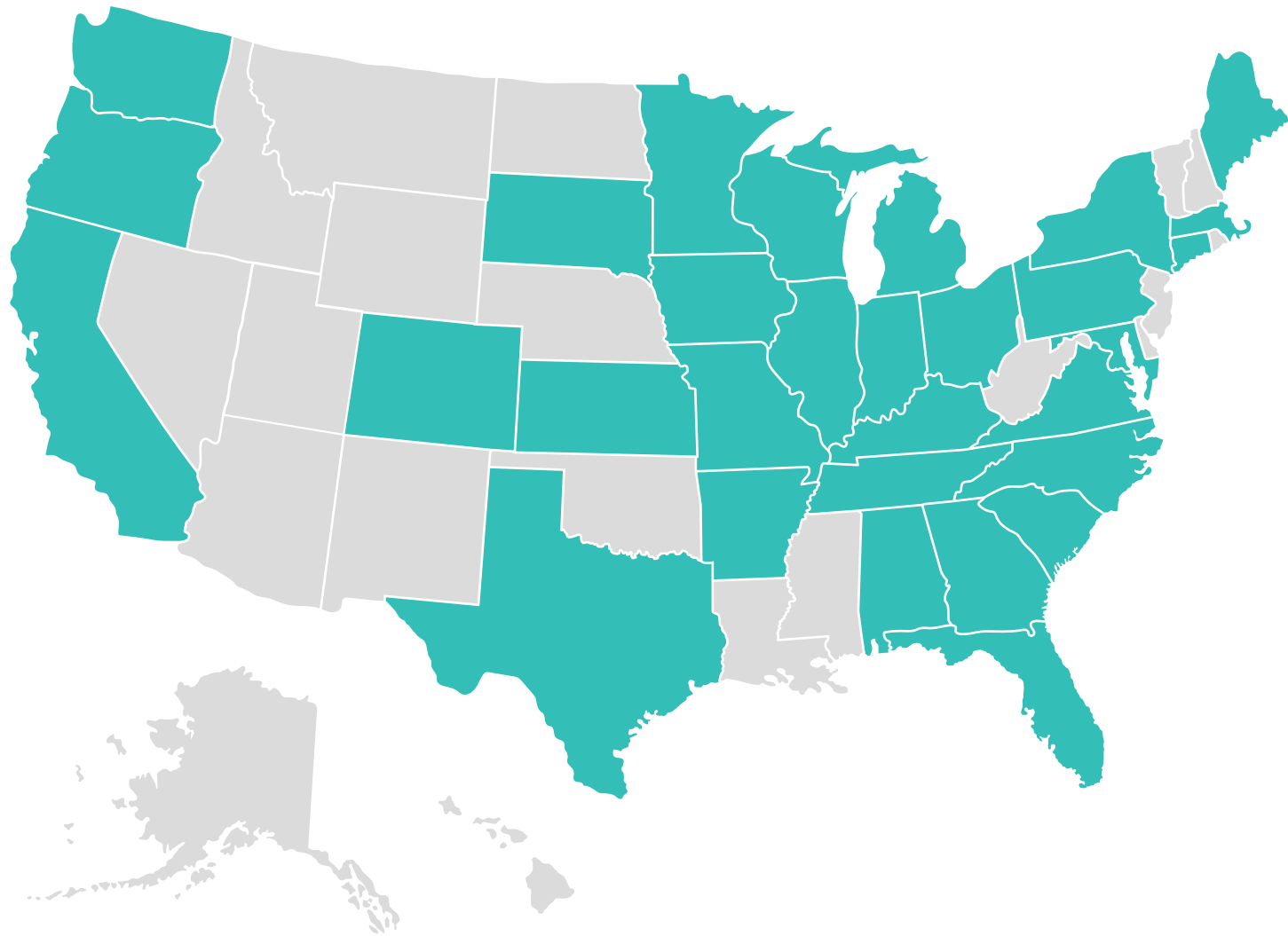
RISHI MANCHANDA, MD, MPH  
CEO



SADENA THEVARAJAH, JD  
MANAGING DIRECTOR

HealthBegins helps Medicaid-serving clients design, implement, and sustain comprehensive health equity and social needs strategies in communities across the United States.

States where **WE WORKED** in 2023



**1,429**

Courageous leaders supported



**92**

Healthcare organizations supported (providers and payers)



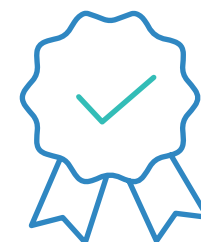
**119**

Social-service organizations supported



**44**

Communities where we helped design & implement health-equity strategies



**100%**

of employees state: "I'm proud to tell others I work here."

BY THE  
**NUMBERS**



## VISION

**We envision a just and equitable future** in which all people can live their healthiest, most joyful lives possible. To realize this future, health care, public health, community partners, and policymakers will work together in new ways and take bold action to improve the social and structural drivers of health and equity at all levels—for individuals, communities, and society.

## MISSION

**We inspire and drive radical transformation in health equity** by equipping healthcare, public health, and community partners to improve the structural and social drivers of health equity. We specialize in helping health care executives accountable for health equity to meet growing state and federal requirements for health equity and social needs, exceed program compliance and performance goals, and achieve long-term impact.

**We do this by “moving upstream”** which means helping clients and partners to equitably and effectively integrate health and social care, address individual health-related social needs, improve community-wide social determinants of health, and dismantle deeper structural determinants of health inequity.

## VALUES

Moving upstream is transformational work and must be rooted in core values. In our workplace culture, our client and partner relationships, and our role in the broader Upstream Movement, we seek to uphold these values:

### + Equity

We center our work in racial equity. From the way we show up for our teammates to the way we work with clients and allies, we understand that racial equity is not just an outcome, it's an ongoing practice.

### + Growth

We are committed to growing, as an organization and as individuals. With clients and colleagues alike, we create opportunities for continuous learning, improvement, and professional development. We grow only when we help ourselves, our partners, and our community grow.

### + Joy & Hope

We share joy and practice disciplined hope. We recognize the human suffering caused by health inequities and racial injustice, just as we understand the energy and commitment required to combat them. To nourish and sustain ourselves and our partners in this work, we cultivate a discipline that creates safe, supportive spaces to share joy, setbacks, and hope.



## Our work is informed by key observations:

- Health and social **inequities are experienced as harm.**
- **Social arrangements**, including structural racism, **put some people in harm's way.**
- Equity is not just the absence of harm or unjust differences, it's the presence of **systems that promote and preserve healing, opportunity, and justice.**
- Since structural violence and harm is spatialized, **institutions need a portfolio of strategies** to advance health and social equity that is place-based, outcomes-focused, and works across levels of change.
- **Courageous leaders need support and solidarity** to implement these strategies, and to transform their institutions, relationships, communities and themselves in the process.

# Meet our **TEAM**



**Sara Bader, MCD, CPHQ** | Training Programs Director

Sara Bader is an experienced QI strategist and coach with a passion for helping organizations make health care more equitable and safer. She began her career as an urban planner before transitioning to health care and quality improvement. She has worked on quality initiatives for state hospital associations and a health system, coaching organizations to plan, assess, implement, and evaluate interventions to promote safe and reliable care. She has a master's degree in civic design from the University of Liverpool, a Lean Six Sigma Black Belt from Dartmouth College, and is a certified professional in healthcare quality and patient safety.



**Eva Batalla-Mann, MPH, MSW** | Program Manager

Eva Batalla-Mann has dual masters degrees in public health and social welfare from UCLA. She has experience working in various areas including arts programming for incarcerated populations, weight stigma in clinical settings, community food justice movements, and support for unhoused communities. Before joining HealthBegins, Eva created and managed programs to support community clinic staff in Los Angeles County successfully navigate challenges related to the COVID-19 pandemic.



**Alejandra Cabrera, MPH** | Senior Program Manager

Alejandra Cabrera has experience implementing and managing multifaceted community-based research and programs. She is passionate about supporting and strengthening structures and services that aim to improve health equity and social justice and reduce health disparities among vulnerable and marginalized people. She has gained deep knowledge of trauma-informed care models, harm reduction approaches, and client-centered practices.



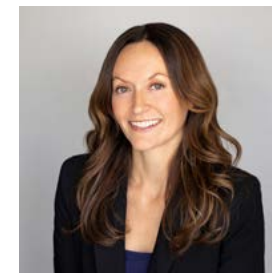
**Roza Do, MPH, MCP** | Health Equity Senior Associate

Roza Do has spent the last decade working with nonprofit organizations, health systems, and cross-sector initiatives to support learning and collaborative action at the intersection of primary care and community health improvement. She brings experience in program development and management, coaching, and application of human-centered design principles. She launched various grantmaking initiatives and learning collaboratives for community health centers and hospitals focused on addressing social determinants of health and creating technology innovation hubs to improve care for marginalized communities. She holds master's degrees in public health and city and regional planning from the University of California, Berkeley.



**Kathryn Jantz, MSW, MPH** | Senior Associate

Kathryn Jantz is a public health policy expert focused on mobilizing the healthcare system to address the structural drivers of health inequity. In prior roles, she supported states in developing strategies to finance care for children in youth with special health care needs, led the implementation and design of Colorado Medicaid's primary delivery system, and ran a successful Accountable Health Communities Model in Western Colorado. Kathryn holds a Masters in Social Work with a focus in Clinical Practice and a Masters in Public Health with a focus in Health Law.



**Erica Jones** | Business Operations and Special Projects Manager

Before joining HealthBegins, Erica Jones worked for a national mental health nonprofit that fights for the dignity and rights of people with serious mental illness. In this role, she supported executive leadership as well as provided direct service to members in a variety of ways that aimed to improve health, increase opportunity, and end social and economic isolation. She is a graduate of St. Francis College, in Brooklyn, NY with a BA in Psychology. When Erica isn't out on a weekend road trip, she's writing, playing with her dog, and creating new food recipes.





**Ellen Lawton, JD** | Senior Fellow

Ellen Lawton is a national expert in the integration of legal professionals into health care to address the social determinants of health. She helped found and then led the National Center for Medical-Legal Partnership at George Washington University. An expert in poverty law, she is internationally recognized for her leadership in developing the medical-legal partnership model and has published an array of articles in clinical and legal journals.



**Dr. Rishi Manchanda, MD, MPH** | CEO

Dr. Rishi Manchanda is CEO at HealthBegins. He has designed and advanced bold strategies to help health care move upstream and advance health equity for historically marginalized patients and communities throughout his career as physician, executive, and public health champion. Dr. Manchanda served as the founding director of social medicine for a network of community health centers in South-Central Los Angeles, as the first lead primary care physician for homeless veterans at the Greater Los Angeles VA, and as the inaugural chief medical officer for a self-insured employer with a large rural agricultural workforce. In his book—The Upstream Doctors—and TED Talk, he introduced “Upstreamists,” a new model of healthcare professionals who improve outcomes by addressing the social and structural drivers of health equity—patients’ social needs, community-level social determinants of health, and structural determinants of health equity including structural racism.



**Melissa Meza, MPH** | Senior Program Manager

Melissa Meza holds a master of public health from the University of San Francisco and has significant experience advancing and implementing projects to increase access to equitable healthcare using a multi-disciplinary community-oriented approach. In her previous roles, she has led and designed projects with Tribal, county, and community-based organizations across various domains, including primary prevention, early cancer screening and detection, and cancer survivorship. In her free time, she spends her time assisting partners with cancer research, attending social events, reading, and spending time with family.



**Vincent Pancucci, MPH** | Health Equity Project Coordinator

Vince Pancucci is a public health professional with over 10 years of experience in community-based participatory research, community engagement, and health and social policy within the areas of HIV/AIDS, LGBTQ+ health, substance use, and sexual and reproductive health. Prior to joining HealthBegins, Vince held positions at a variety of health and social service organizations, including Fenway Health, AIDS Research Alliance, and most recently, the Los Angeles LGBT Center. Vince holds a master of public health in health policy and management from the UCLA Fielding School of Public Health.



**Tatiana A. Perez** | Business Operations Director

Tatiana Perez joins HealthBegins with 18 years of administrative and operations experience, with a focus on empowering and elevating the wellbeing of disenfranchised and underserved communities. Previously she was the inaugural Director of Operations for the AltaMed Institute for Health Equity. She is currently on the board for Proyecto Pastoral at Dolores Mission, a Boyle Heights-based community-building organization working in the east side of Los Angeles. Tatiana holds both an MBA and BS in business administration from Cal State LA.



**Kyron Pierce** | Health Equity Project Coordinator

Kyron Pierce joins HealthBegins with a breadth of experience from various healthcare settings. With a BS in kinesiology from Temple University, Kyron began his healthcare career in clinical research at University of Pennsylvania working for the Women In Steady Exercise Research study. He also worked on the NEXUS Comprehensive Patient Navigation Program under a SAMHSA grant at Family Health Centers of San Diego to help connect MSM and transwomen of color to mental health, substance use, and HIV case management services. Kyron hopes to be a lifelong advocate for the accessibility, affordability, and equity of healthcare nationwide.



**Grace Rubenstein** | Editorial & Communications Director

Grace Rubenstein is a journalist, editor, and podcast coach specializing in health science. She tells stories through words, sounds, images, and video while maximizing the unique storytelling power of each medium. Grace’s award-winning work has appeared in the Atlantic online, New York Times, Boston Globe, STAT News, Longreads, and the Center for Investigative Reporting (Reveal). Her radio tales have reached the airwaves of Morning Edition, KQED’s The California Report, and PRI’s The World. She is also the story editor of TED podcasts including WorkLife with Adam Grant and The TED Interview. She earned a BA in psychology from Williams College.



**Alexis Taylor, MPA** | Senior Program Manager

Alexis Taylor is a third-generation advocate of structural equity who has worked to repair disparate societal outcomes through legislative advocacy and BIPOC+ community investment. Alexis is deeply committed to her family, and she is impassioned by writing, storytelling, and teaching. She holds a graduate degree in public administration and was honored to be a select scholarship recipient at the USC Gould School of Law for a second graduate degree concentrated in law.



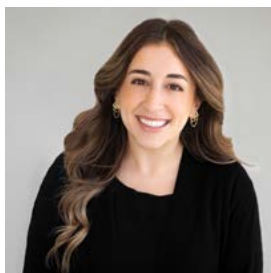
**Sadena Thevarajah, JD** | Managing Director

Sadena Thevarajah has spent over 10 years at the intersection of health law, policy, and stakeholder engagement. She led the first external affairs department at the USC Schaeffer Center for Health Policy and Economics and shaped patient programs at the American Cancer Society. Previously, she served in the Obama Administration, both in the Office of the HHS Secretary as well as in the White House during the passage and early implementation of the Affordable Care Act. She holds a law degree from Washington University School of Law in St. Louis and a public health degree from Johns Hopkins University.



**Vsem Yenovkian** | Communications Manager

Vsem Yenovkian comes to HealthBegins with more than 14 years of marketing and communications experience, including positions at a technology startup and a medical genetic testing company. At these organizations, he focused on developing a comprehensive content marketing strategy designed to raise brand awareness and generate demand. He understands the power of words and is able to connect with an audience on all marketing channels. With this approach he successfully grew the social media outreach and market footprint at each company. Vsem holds a BA in sociology from York University in Toronto.



**Taleen Yepremian, MHA** | Training Program Manager

Taleen Yepremian has her master's degree in health administration from the University of Southern California. She aspires to improve the quality of healthcare services through innovative process improvement solutions. Through previous roles, she coordinated various projects and initiatives to improve access to mental health services for underserved youth throughout Los Angeles County, as well as worked with several stakeholders to find solutions to improve the social-structural influences on health outcomes.

# How HealthBegins HELPS

Health begins **UPSTREAM.**

And it flows through the individual social needs, institutional systems, community conditions, and societal structures that either promote healing or put people in harm's way, shaping the presence and distribution of health and inequity in our communities and clinics.

We partner with Medicaid-serving providers and payers to drive upstream transformation for health equity and justice across all of these levels, through bold strategies and initiatives.

Leaders in Medicaid-serving institutions, such as health systems, managed care plans, and social sector organizations, as well as state Medicaid agencies and funders, have health equity needs and aims that evolve over time and across levels of transformation. With our expertise and capabilities, we meet clients in their moment of need and opportunity, regardless of which level they're working on.

### Our Equity-Focused Services:

- Design and Implement Strategy
- Launch and Scale Initiatives
- Drive Learning and Improvement



At health systems and health plans across the U.S., courageous leaders want to prioritize equity. New regulatory and accreditation standards from the likes of the Centers for Medicare and Medicaid Services (CMS), state Medicaid agencies, the National Committee for Quality Assurance (NCQA, and The Joint Commission require action to improve the inequities that have long persisted in health and health care. Yet these leaders see that such criteria represent only the first step for change—that our true goals for equity and justice lie far beyond that baseline. They understand that the roots of health inequity are pervasive, and that consequently, real progress requires more than incremental action. A patchwork of programs will not lead to substantive change. A portfolio of strategies, addressing inequity across multiple levels of influence, is required to deliver not merely compliance, but impact.



Translating this understanding into a cohesive, strategic action plan—and aligning the support and collaboration to grow and sustain that action—is the next great challenge. That’s where HealthBegins helps. We support clients to define and align their strategies to advance health equity and apply a structural understanding to drive impact across levels.

**To do this we:**

- **Facilitate discovery** of gaps and assets between current-state and health equity goals
- **Establish goals** for improving health equity and driving value within and across levels of transformation
- **Define opportunities** to address organizational challenges and gaps
- **Co-design an action plan** with timeline and recommendations to achieve equity goals

With that action plan drawn, we then help clients and partners set it in motion, translating steps into concrete work plans that everyone on the team has the resources and skills to implement.

**To do this we:**

- **Increase stakeholder knowledge and buy-in** to build capacity for multi-level transformation
- **Develop a cohesive strategic portfolio** to achieve equity goals across levels of transformation
- **Define measures of success** for health equity programs and investments
- **Define and track** the impact, value, and return of health equity investments and portfolios (VOI & ROI)

## FEATURED CLIENT: Corewell Health

**Corewell Health**, a Michigan health system and managed care plan serving more than 1 million members, is working with HealthBegins to design and implement a transformational health equity plan. A critical feature of this work is expanding on traditional definitions of financial return to capture the full value of health equity investments through Community Benefit allocation. Corewell’s first mission is improving equity in maternal and infant health. In practice, this means HealthBegins worked closely with Corewell’s health equity leaders in 2023 to center equity in social-needs strategies, engage stakeholders within their organizations, define and measure their **Return on Investment (ROI)** and **Value on Investment (VOI)** goals, and craft a comprehensive action plan. That work continues into its next phase in 2024, as we help Corewell build the infrastructure and capacity to move from planning to implementation.

“The Upstream Strategy Map is becoming the primary organizing tool for assessing our health equity investments across all three regions and has helped us become more sophisticated in thinking about the choices we make.”

— Corey Smith, PhD, Director, Health Equity Evaluation, Corewell Health



## FEATURED TOOL: Upstream Strategy Map

Levels of Intervention

	Programs & Care	System	Ecosystem	Structural
Promotion	+	+	+	+
Primary Prevention	+	+	+	+
Secondary Prevention	+	+	+	+
Treatment	+	+	+	+

View the interactive online Map [here](#)

## FEATURED CLIENT: Health Net

**Health Net**, a health plan serving 3 million members across California, asked HealthBegins in 2023 to support its development of a comprehensive health equity strategy. A central approach that emerged from that process is the creation of regional **Community Impact Councils (CICs)** composed of stakeholders who will bring community priorities to the health plan governing board. Health Net will then provide funding directly to CICs to implement programs to address these issues. HealthBegins conducted and synthesized stakeholder interviews to design a road map that outlines the steps to establish or join a CIC. We are now helping Health Net prepare to launch these councils, which will serve to build community priorities into its governance structure and investments.

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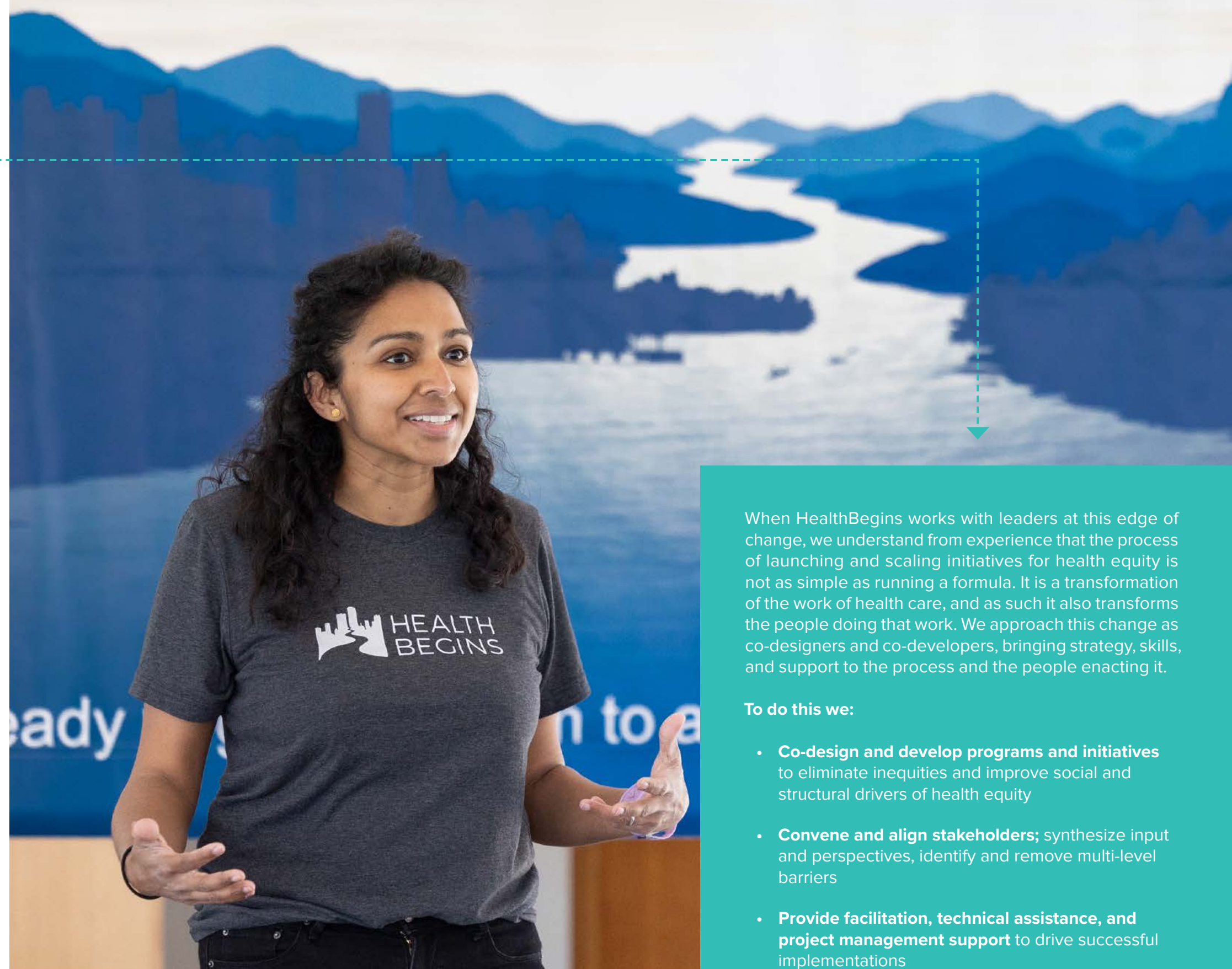
regions with identified inequities where Health Net will join existing coalitions or build new Community Impact Councils to identify and address community priorities

As health equity increasingly becomes central to the work of health care, leaders in some health plans and health systems feel ready to move beyond marginal changes. In addition to making their existing programs more effective and equitable, they want to launch bold initiatives to transform their relationships and communities. These leaders need support to translate these aspirations into functioning, flourishing programs, rigorously designed and strategically scaled to move the needle on inequity and improve the structural conditions that drive it. Their success hinges on a robust process that includes needs assessment, data analysis, stakeholder engagement, and goal setting tailored to each client’s priorities and challenges. Just as importantly, it depends on support and care for the courageous teams driving such innovation.

“ Kaiser Permanente is grateful to partner with HealthBegins to expand its innovative Health, Housing, and Justice: Medical-Legal Partnership Initiative across 7 of its regions.

The initiative brings critical housing-related legal services to Kaiser Permanente members and communities, helping prevent evictions to increase housing stability—a critical part of good health and health equity.”

— Bechara Choucair, MD, Senior Vice President and Chief Health Officer, Kaiser Permanente



When HealthBegins works with leaders at this edge of change, we understand from experience that the process of launching and scaling initiatives for health equity is not as simple as running a formula. It is a transformation of the work of health care, and as such it also transforms the people doing that work. We approach this change as co-designers and co-developers, bringing strategy, skills, and support to the process and the people enacting it.

**To do this we:**

- **Co-design and develop programs and initiatives** to eliminate inequities and improve social and structural drivers of health equity
- **Convene and align stakeholders;** synthesize input and perspectives, identify and remove multi-level barriers
- **Provide facilitation, technical assistance, and project management support** to drive successful implementations
- **Design and develop monitoring systems** to assess progress and impact of bold initiatives

## FEATURED CLIENT: California Department of Health Care Services

California is pioneering **Medi-Cal (Medicaid) transformation** through partnerships between Medicaid managed care organizations (MCOs) and community-based organizations (CBOs) to improve outcomes and equity by **integrating health and social care**. HealthBegins plays a critical role in this initiative, known as California Advancing and Innovating Medi-Cal (CalAIM), as a facilitator of the collaboratives established to convene health care and social care partners to identify and overcome implementation challenges.

In 2023, HealthBegins intentionally nurtured relationships among state, MCO, and CBO partners, as well as between CBO peers. Through those strengthened connections, we translated and communicated social-service providers' needs into opportunities for initiative-wide improvement. We fostered information sharing and cooperation among providers, facilitating regional scalability. And we developed a simple **contracting best practices guide** and supported CBO peer mentors to help new providers navigate the complex contracting process.

**100,000**

Medi-Cal members connected with social services in the first year of California's Medi-Cal transformation

Our work helped dismantle barriers for CBO partners and led to a **significant increase in the number of community organizations contracted to provide services**—thereby increasing community members' access to a wider range of services. The closer connections we helped build between partners strengthened referral pipelines. We also organized a **Quality Improvement campaign** to help CBOs identify their challenges and test and implement solutions, then share their innovations with fellow providers.

Our position on the front lines of this transformative effort has given us the opportunity to identify, document, and elevate core challenges and solutions. These best practices will serve as models for Medicaid transformation across the country.

## FEATURED TOOL: ROI Calculator

HealthBegins, in collaboration with the Commonwealth Fund and the SCAN Foundation, developed a newly expanded and improved [Return-on-Investment \(ROI\) Calculator](#) to help health care and social care partners map financial models for partnership. The relaunched calculator includes a Quick-Start Mode that makes it easier to calculate the potential ROI of specific social needs interventions. In addition, the calculator creates an awareness of the opportunities and benefits of health and social care integration for both healthcare and community partners—and supports the development of structured, sustainable partnerships.



## FEATURED CLIENT: Kaiser Permanente

Our groundbreaking housing-justice project with **Kaiser Permanente** and the **National Center for Medical-Legal Partnership** grew substantially in scale and impact in 2023. The project aims to prevent evictions in Kaiser Permanente's communities and demonstrate the power of partnerships between health care and legal aid organizations to meet patients' health-related legal needs. Building on the pioneering work of four Kaiser Permanente sites across Oregon, Northern California, and Maryland in 2022, two additional sites in Southern California and Colorado launched **medical-legal partnerships** and brought them to full operation in just two months. All six of these sites can now address the legal needs of patients whose housing is at risk. In 2023, HealthBegins also developed and delivered a **QI training series**, providing two dozen trainings to boost capacity for more than 400 case managers, navigators, and social workers to understand basic housing dynamics and make effective referrals.

Preliminary data show that the initiative is making a **tangible impact**. As of fall 2023, legal aid partners had provided 1,600 Kaiser Permanente members and their families—66% of whom are people of color—with access to housing-related legal help. We look forward to scaling up that impact. When the initial project grant concluded at the end of the year, Kaiser Permanente renewed it for 18 months. Now the project partners are moving further upstream by **leaning into policy**, seeking to identify and activate sustainable funding mechanisms for this work through Medicaid.

**10,000**

community residents aimed to be spared eviction by 2025 through Kaiser Permanente's medical-legal partnership initiative

When health systems, payers, or community providers need help meeting specific performance measures or closing specific inequities, they often struggle with both **first-mile and last-mile problems**. How do we understand health equity through a structural lens? How do we equip our leaders and staff with the knowledge and skills to drive equity and integration of care? How do we generate more healthcare referrals to social service partners? How do we help frontline teams approach practice change and achieve demonstrable improvements?

HealthBegins empowers clients confronting these questions to build essential knowledge and skills and achieve equity-focused goals. At the center of this work is our robust Upstream Quality Improvement approach—which in 2023 evolved into **Equity-Focused Upstream Quality Improvement**, built with the insight that upstream initiatives can only advance equity if it's named and structured as a driving goal. This year we created new, flexible formats to make this learning accessible to a wide array of clients at all stages of transformation. Our new **accelerator model** offers education and support to activate goal-directed work on a timeline as short as 12 weeks. Our facilitated coaching brings customized knowledge and methodology to large-scale initiatives. Our suite of education modules on AMA's EdHub allows Upstreamists to build core competencies and spark critical conversations wherever they are and whenever they can.



Through each of these pathways, we lead learning journeys using data, training, tools, and a keen understanding of the change process—not only to build skills, but to shift mindsets about what is achievable in health equity.

**To do this we:**

- **Train and activate leaders** focused on accelerating health equity priorities
- **Provide health equity trainings and tools** to empower leaders and teams to develop core competencies and achieve equity focused goals
- **Support initiatives and programs** through Learning and Action Networks, Learning Collaboratives, and Leadership Communities
- **Provide upstream, equity-focused expertise,** practice transformation, and Quality Improvement coaching
- **Build client/partner capacity and community engagement** to sustain initiatives

FEATURED PROGRAM:

## REaL Data Accelerator

HealthBegins launched its first online accelerator program in spring 2023, serving teams from **Imperial Beach Community Clinic** in California and **Siouxland Community Health Center** in Iowa. Both teams came to build knowledge and best practices to strengthen their race, ethnicity, and language (REaL) data collection efforts and leverage that data to improve equity-focused primary care improvement efforts.

Over 12 weeks, participants use an extensive self-assessment to uncover strengths and blindspots and identify opportunities to make meaningful changes within their resource constraints. They set clear, measurable goals to collect patients' REaL data, enter it into their electronic health record, and ensure its accuracy. Then, with coaching, they designed and implemented tests of change to meet those goals. Imperial Beach, for example, increased its percentage of patients with complete REaL data **from 80% to 99%** during the three months of the program. We hosted a second REaL Data Accelerator in the fall and will adapt the model to offer a **Value on Investment (VOI) Accelerator** in 2024.

“The HealthBegins program provided us with the vital resources and direction we needed to jump start our collection and stratification of REaL data. Their expertise helped us to focus on creating a foundation of data collection and analysis that will support our ability to unveil trends and possible drivers of race inequities.

— Donna O'Connor, Director of Quality, Imperial Beach Community Clinic



**850 → 14**

Patients at Imperial Beach Community Clinic missing race, ethnicity, and language information at the beginning and end of HealthBegins' REaL Data Accelerator program



FEATURED CLIENT:

## Health Resources and Services Administration

The U.S. Health Resources and Services Administration (HRSA) tapped HealthBegins and the Preeclampsia Foundation to help Abt Associates address one of the nation's most urgent inequities: **maternal health**. Together with our project partners, we're supporting health centers across the country to design and implement care models to meet social needs, such as food, housing, and transportation, to improve maternal health equity and outcomes.

HealthBegins is putting our Upstream Quality Improvement expertise to work by directly coaching 10 of these health centers, while co-developing a technical assistance model that touches 30 health centers in 30 communities nationwide. We also created a self-assessment tool that participants will use to gauge their improved readiness to engage in health equity work — a critical evaluation metric for the whole initiative.

FEATURED TOOL:

## AMA EdHub Modules

Health equity education became more accessible to the entire healthcare field with the debut of HealthBegins' [course page](#) on the **American Medical Association's EdHub**, now home to six education modules available free to aspiring Upstreamists everywhere. The courses represent years of collaboration with the AMA and cover topics including Upstream Quality Improvement and Management, Structural Determinants of Health Inequity, and Financing and Sustaining Upstream Transformation. These modules serve myriad purposes, both as a training tool for care providers and a lever to drive deeper conversations and action within organizations.

HealthBegins’ mission is to “inspire and drive radical transformation in health equity.” The emphasis on health equity broadly, rather than health care narrowly, is no accident. Close collaboration with healthcare providers, payers, and partners is indeed the heartbeat of our daily work. Yet the change we ultimately seek to create is not limited to our impact for clients. Our goal is health equity on a societal scale.

We commit resources every year to helping advance the entire health equity field. We do that by articulating critical ideas and practices—and creating tools and collective actions—that help Upstreamists everywhere learn and engage for impact.

In 2023, we were honored to work with esteemed partners across the country to further this work. We also produced writings and resources of our own to equip and advance the field. Please find highlights of these contributions on these pages—and take our encouragement to learn from, use, and share them!



## NATIONAL INITIATIVES

### Rise to Health Coalition

HealthBegins is a founding collaborator in this health care equity coalition alongside the **Institute for Healthcare Improvement**, the **American Medical Association**, **Race Forward**, the **American Hospital Association**, the **National Committee for Quality Assurance**, **Groundwater Institute**, and other esteemed colleagues in this coalition that aims to transform the healthcare ecosystem through coordinated and collective action. The coalition has launched and is now working to build knowledge and capacity, develop tools, and change policies to advance equity and racial justice.

### Gravity Project Social-Needs Standards

The Gravity Project (a national public collaborative that develops consensus-based data standards to improve how we use and share information on social determinants of health (SDOH)), undertook a groundbreaking initiative in 2023 to map the needs and nuances of social care into its standards. With funding from The Robert Wood Johnson Foundation, HealthBegins partnered with the **Gravity Project** and **Civitas** to convene representatives from social care to inform its conceptual model and guide its standard creation. The lessons from these focus groups revealed concrete innovations that can be made in the data language—as well as broader reflections on challenges and opportunities in social care integration.

### USAgging

HealthBegins brought our equity expertise to an initiative with USAgging, the national association representing Area Agencies on Aging. Through a series of convenings, we learned about the work of area agencies across the country and coached them on how to build equity strategies into their plans for serving older adults.

## Medicaid Food Security Network

HealthBegins partnered with **Share Our Strength** and **Benefits Data Trust** in 2023 to create the **Medicaid Food Security Network (MFSN)**, which launched in early 2024.

**This collaborative effort aims to accelerate the design and adoption of strategies for Medicaid to address food and nutrition insecurity in low-income children and youth.**

The initiative helps advocates engage with state Medicaid programs and Medicaid-serving systems to implement effective strategies to meet the full spectrum of families’ food needs by maximizing enrollment in the Supplemental Nutrition Assistance Program (SNAP) and Supplemental Special Nutrition Program for Women, Infants, and Children (WIC) and strengthening networks of local food resources.

## [The Compass for Health Equity Transformation: A Tool to Move from Compliance to Impact](#)

The Compass, and the associated Upstream Strategy Map, are tools that provide a practical and rigorous approach to the design and management of a portfolio of multi-level interventions.

**It helps leaders assess their current efforts and gaps, define their aims and action plans, and then align health equity strategies across different levels.**

### [The Return on Investment \(ROI\) Calculator for Healthcare Partnerships to Address Social Needs](#)

With the support of the Commonwealth Fund and The SCAN Foundation, HealthBegins has created a new return on investment (ROI) Calculator to help community-based organizations and healthcare organizations plan and develop sustainable partnerships to fund the delivery of social services for people with complex needs.

### [Medicaid Flexibilities to Address Health-Related Social Needs: A Stakeholders Guide](#)

States have significant flexibility to design their own Medicaid programs, including the ability to implement Health Related Social Needs (HRSN) benefits. States can broadly make changes in three ways: through a state plan amendment, managed care flexibilities, or a waiver. This document is a quick reference guide for these three policy pathways.

## SELECTED PUBLICATIONS

### WEBINARS

#### [New CMS Guidance on Addressing Social Needs Through Medicaid](#)

In this webinar hosted by HealthBegins and CHCS we discussed the CMS guidance and what it means for state Medicaid agencies and Medicaid managed care plans who are working to advance health equity and meet the social needs of Medicaid enrollees.

#### [Healthcare Partnerships: Considering ROI within the context of Value on Investment](#)

An in-depth discussion of the ROI Calculator and how to leverage its results to develop sustainable cross-sector partnerships.

### BLOGS

#### [How to Make Medicaid Transformation Equitable: The Wisdom of Experience](#)

“The social services that CalAIM providers are bringing to Medicaid beneficiaries would have also made a world of difference to me in my twenties, when I was diagnosed with aggressive, life-threatening breast cancer. I was just shy of my 25th birthday. My husband and I had a young son. And I was pregnant with our daughter.”

#### [New Data: Leveraging the Power of California’s Community Health Workers, Promotoras, and Community Health Representatives](#)

As the new data and our own experience make clear, California’s CHW/P/R workforce represents an invaluable resource that has the capacity to revolutionize the state’s healthcare system, reduce health inequities, and promote equitable access to care for all.

#### [Closing the Gap Between Medicaid Social-Needs Strategies and Health Equity](#)

Medicaid is accelerating support of health-related social needs (HRSN) interventions. ... This is a welcome change. But it is not sufficient to advance real equity.

## [Beyond ROI: Understanding Value on Investment in Social-Needs Partnerships](#)

### NEWSLETTERS

#### [March 2023: What Upstream Transformation Leaders Are Looking for Now](#)

We find these days that upstream leaders want to achieve four key results on this path of organizational transformation:

- Clarity
- Momentum
- Acceleration
- Joy

#### [May 2023: What We Do When Millions Lose Medicaid](#)

“My experience taught me that health insurance is not just a policy matter—it’s personal. And it’s not just the insured individual whose life is shaped by affordable care—medical coverage has ripples into whole families. My heart hurts now for all the individuals and families who began to lose it on April 1.”

#### [August 2023: You Don’t Have To Be In The C-Suite To Advance Equity](#)

A critical point in these stories is that our everyday work as Upstreamists equips us with knowledge and skills that we can apply, beyond our day jobs, in our own communities. Our work empowers us to insist on equity everywhere we go.

Measuring success through ROI alone will not suffice to meet the greater aim of creating a more integrated health system that supports health and health equity for all people. To achieve that we will need to expand our focus beyond ROI and cultivate and apply a broader Value on Investment (VOI) framework.





HealthBegins is a national design and implementation partner that helps Medicaid-serving clients move upstream and advance health equity for people and communities harmed by societal practices.

Founded in 2012 by physicians and public health experts, we believe that we all can and must take bold action to improve health care and the social and structural conditions that marginalize people and make them sick in the first place. While we are national thought leaders and pioneers in this space, HealthBegins is not a think tank. We are a “learn by doing” operation that helps clients and partners drive continuous improvement, learning, and action at all levels: addressing individual health-related social needs, improving community-wide social determinants of health, and dismantling deeper structural determinants of health inequity.

HealthBegins supports clients and partners with Strategic Planning and Design, Training and Education, and Solution Implementation. True to our mission, we also work with select partners to reimagine, innovate, and scale solutions to address pressing health equity challenges and systemic barriers. Over the years, we have activated and educated thousands of providers, educators, payers, and community partners around the world—and then equipped them to drive upstream radical transformation for health equity.

With headquarters in Los Angeles and employees based in Northern California, Washington, Colorado, and Massachusetts, HealthBegins has helped organizations in over 25 states and supports clients and partners throughout the country.

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

## CONNECT WITH US

The journey upstream requires a strong community, and we'd love for you to be a part of it. Join us online as we shed light on all the important discussions around the Upstream Movement, from social justice to health equity to public health efforts.

Connect with the HealthBegins community on social media or by subscribing to our newsletter:



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