The Stewards of Change Institute™

9th Annual National Symposium

JUNE 4TH - 6TH, 2014 ■ BALTIMORE, MD

ADVANCING HEALTH AND HUMAN SERVICES INTEROPERABILITY:

FROM THE "STATE OF THE ART" TO THE "ART OF THE POSSIBLE"

Bloomberg School of Public Health, School of Medicine and Institute for Health and Social Policy

Stewards of Change
INSTITUTE, INC

JOHNS HOPKINS
U N I V E R S I T Y

Bloomberg School of Public Health

615 N. Wolfe Street / Room W1041
Baltimore MD 21205-2179
410-955-3540 / Fax 410-955-0121

Michael J. Klag, MD, MPH
Dean

June 4, 2014

Dear Colleagues,

IT IS MY GREAT HONOR ON BEHALF OF the Bloomberg School of Public Health to welcome you to Johns Hopkins University (JHU). This marks the third year that we have collaborated with the Stewards of Change (SOC) Institute to hold their National Symposium here at JHU in Baltimore. SOC's holistic approach is consistent with the strategic orientation of our School and indeed many of our faculty colleagues throughout the University. JHU has a long tradition of approaching the world's most complex problems by fostering collaborative dialogue, research and education among a large and diverse number of disciplines and cultures.

This Symposium is convening as awareness of the necessity for collaboration in the delivery of health and human services continues to increase. Fueled in part by the Patient Protection and Affordable Care Act (PPACA), many states and local jurisdictions are poised to start the next phase of their interoperability journey by building connectivity--across programmatic and funding silos--among health care, human services, public health, justice, education and other systems. While the promise of these initiatives is inspiring, there are serious challenges to be overcome.

The 9th Annual SOC Symposium will provide a national venue to facilitate collaborative learning, share what works, and chart a national roadmap so that we may seize the opportunities for making dramatic improvements in information sharing as we move into the future.

Developing and implementing solutions to address the enormous challenges of interoperability we all face requires great effort, dedication and collaboration among a large number of people and organizations in both the public and private sectors. By working together we can meet that challenge. I know we are all eager to use this opportunity at our 2014 Symposium to exchange ideas and identify new ways in which we can partner to pursue our collective goals.

Sincerely,

Michael J. Klag

Michael J. Klag, MD, MPH
Dean, Johns Hopkins Bloomberg School of Public Health

Protecting Health, Saving Lives—*Millions at a Time*

Tuesday | June 3

▶ 7:00 – 9:00 P.M.   Hilton Colonnade Hotel – Lobby

Informal Reception and Registration

Wednesday | June 4

▶ 8:00 – 9:00 A.M.   LOCATION: Glass Pavilion

Registration, Breakfast and Networking

▶ 9:00 – 9:45 A.M   LOCATION: Glass Pavilion

Welcome to the Symposium and Johns Hopkins University

Stewards of Change will kick off its 9th Annual National Symposium, and third year at Johns Hopkins University, with a welcome from our hosts.

Michael Klag, MD, MPH, Dean, JHU Bloomberg School of Public Health

PG Forest, Ph.D., Director, JHU Health and Social Policy Institute

▶ 9:45 – 10:15 A.M   LOCATION: Glass Pavilion

QUESTIONS OF CONSEQUENCE: The "State of the Art" and the "Art of the Possible"

Using a peer-interview process, participants will discuss key considerations regarding the delivery of health and human services, with an eye toward what matters most now and in the future for accelerating interoperability and information-sharing initiatives across the HHS ecosystem.

Daniel Stein, President, Stewards of Change Institute

▶ 10:15 – 10:45 A.M.   Break   LOCATION: Glass Pavilion

▶ 10:45 – 11:30 A.M.   LOCATION: Glass Pavilion

INSIGHTS FROM ACROSS DISCIPLINES: "The Art of the Possible" through Time

Ori Z. Soltes, Ph.D., Georgetown University

▶ 11:30 – 12:15 P.M.   LOCATION: Glass Pavilion

Symposium Overview and Agenda

We begin with the end in mind. As we work our way through the Symposium, we are working toward a compelling strategy for the next leg of our journey. Our tour guide will help us orient ourselves to the Symposium's sessions that have been carefully designed to develop deeper understanding of the work that has already been done, is on-going, and must yet still occur. Here we provide an overview of each session's key concepts, approaches, and tools that will be used throughout the Symposium to prepare for the final day where we roll up our sleeves and together design the strategy to take us beyond the discussion and into the implementation of the features of an information sharing environment that builds upon established principles.

Bill Davenhall, Senior Health Advisor, Esri; Stewards of Change Institute Board Member

Vernon Brown, Chairman, Stewards of Change Institute Board of Directors

Daniel Stein, President, Stewards of Change Institute

▶ 12:15 – 1:15 P.M. Lunch   LOCATION: Glass Pavilion

▶ 1:15 – 2:15 P.M.   LOCATION: Glass Pavilion

PROJECT INTEROPERABILITY: An Approach for Improving Systems and Transforming Health and Human Services across Federal, State and Local Government and Private Sectors

After 9/11, Congress called on President Obama to create the Information Sharing Environment (ISE) to improve the nation's response to terrorism through better information sharing tools and capabilities. In this keynote, Mr. Paul will outline the purpose of the ISE which includes actively promoting interoperability across all branches of government and the use of standards to accelerate information sharing to improve government operations. Mr. Paul will also introduce the new "Project Interoperability" initiative and its applicability to health and human services. He will outline ways that Project Interoperability can support government and private industry – particularly within health and human services - to leverage the models, learning and approaches developed for ISE to accelerate change.

Introduction: Paul Wormeli, IJIS Institute Executive Director Emeritus; Stewards of Change Institute Board Member

Kshemendra Paul, Program Manager, Information Sharing Environment

▶ 2:15 – 3:00 P.M.   LOCATION: Glass Pavilion

INTERACTIVE SESSION: Team-Building Collaboration Exercise

Facilitator/Presenter

Rachel Pratt, Senior Consultant, Stewards of Change Consulting

Shell Culp, Chief Deputy Director, Agency Information Officer, Office of Systems Integration, CHHSA (former)

▶ 3:00 – 3:30 P.M.   Break   LOCATION: Glass Pavilion

▶ 3:30 – 4:45 P.M.   LOCATION: Glass Pavilion

The State of the Art of Interoperability within Health and Human Services

This panel of interoperability innovators will provide analysis gleaned from their experiences fostering innovation and integration in large, complex HHS organizations. The session will consider overall strategic approaches, key drivers of success and early results from important initiatives in their organizations. The discussion will also focus on the opportunities, challenges and development plans that are core to successful delivery of effective and efficient services to customers across states and localities.

Moderator: Shell Culp, Chief Deputy Director, Agency Information Officer, Office of Systems Integration, CHHSA (former)

Presenters:

Nick Macchione, Director, Health and Human Services Agency, San Diego County, California

Nirav R. Shah, MD, MPH, Senior Vice President and Chief Operating Officer for Clinical Operations, Kaiser Permanente, Southern California; (Former) Commissioner of Health, State of New York

▶ 4:45 – 5:00 P.M.   Closing   **LOCATION:** Glass Pavilion

▶ 7:00 – 9:00 P.M.   DINNER: La Famiglia Restaurant

Thursday | June 5

▶ 7:30 – 8:30 A.M.   **LOCATION:** Glass Pavilion

Breakfast and Networking

▶ 8:30 – 8:45 A.M   **LOCATION:** Glass Pavilion

WELCOME: Overnight Reflections (Table Discussions)

▶ 8:45 – 10:00 A.M   **LOCATION:** Glass Pavilion

DATA: It's All about What We Do with It to Effect Policy and Practice Change

In recent years, the pace of "liberating" health and human services data has dramatically increased. From government at all levels to academic and research institutions, and from businesses to non-profit organizations, the movement is growing and is getting more and more attention from the public. Serious consideration and discussion is warranted regarding the appropriate role and use of data in a context of conflicting responsibilities: openness and privacy, timeliness and quality, access and financial sustainability. This session will address the policy, strategic and financial roles of government, the private sector and citizens regarding Open Data, Big Data, Research Data and Personally Identifiable Data. Discussants also will focus on specific ways these various data types can inform one another and create new knowledge, generate practical solutions and change culture to improve public health and well-being.

Moderator: PG Forest, Ph.D., Director, Johns Hopkins University Health and Social Policy Institute

Dwayne Spradlin, Executive Director, Health Data Consortium [Open Data/Big Data]

Emily Putman Hornstein, Ph.D., Assistant Professor, University of Southern California [Integrated Data Systems]

Gerard Farrell, MD, Director of the eHealth Research Unit, Faculty of Medicine, Memorial University of Newfoundland [Personally Identifiable Information]

▶ 10:00 – 10:30 A.M.   Break   **LOCATION:** Glass Pavilion

▶ 10:30 – 11:15 A.M.   **LOCATION:** Glass Pavilion

THE ART OF THE POSSIBLE: 21st Century Systems of Care – Fact or Fiction?

Vulnerable, high-cost, high-need population's drive disproportionate spending across health and human services programs. Their costs are perhaps best captured in healthcare where it's well established that 20% of individual clients drive more than 50% healthcare's costs. The industry is beginning to define these vulnerable clients by their 'social determinants' of health, rather than solely on their medical conditions. A human centered approach to care is emerging which promises to lower costs and improve outcomes. It is based on a holistic understanding of the client, their social network, and their engagement with the ecosystem of care and is the foundation for a new family-centered service delivery strategy that promises lower costs and improved outcomes. The presentation will discuss IBM's innovative approach to applying advanced technology to improve the lives of our most vulnerable citizens while lowering the growing and unsustainable cost of caring for them - thereby addressing two of the most intractable social and economic challenges that society faces today.

Ronan Rooney, Director of Programs of Care for IBM Research

▶ 11:15 – 12:30 P.M.   **LOCATION:** Glass Pavilion

INTERACTIVE SESSION: Working with Personas to Focus on Clients and System Changes to Support Interoperability

Stewards of Change has introduced the use of Personas at symposia to focus attention on the needs of the people within the health and human services systems. The interactive exercise, based upon fictionalized personas of clients, can quickly create a shared view of the needs of the client and systemic response to those needs by participants in the exercise. Typically, we use this to capture both an "As Is" and "To Be" view of the client and the system of service. At this year's Symposium we will use the Personas completed at last year's Symposium to challenge the participants to focus on information sharing and removing the barriers that inhibit a more holistic view of the client. Specifically, participants will be asked to consider those actions that can be taken to create an interoperable information sharing environment as quickly as possible. The ideas and output from this session will feed into subsequent sessions over the rest of the Symposium.

Daniel Stein, President, Stewards of Change Institute

SOC Facilitation Team

▶ 12:30 – 1:30 P.M.   Lunch   **LOCATION:** Glass Pavilion

▶ 1:30 – 2:15 P.M.   **LOCATION:** Glass Pavilion

Building Health and Social Services Solutions in the Age of Google

In this session, senior Google engineers will share their knowledge, experience and views about how accurate and timely information is key to achieving mission critical priorities for business and government. Mikey Dickerson will relate his experiences working on the urgent "fix" to the Federal Health Insurance Exchange. Umesh Vemuri will discuss how Google technologies are revolutionizing the way people work together, allowing government agencies to become more efficient and effective by accelerating collaboration and innovation. Over the last decade, Google has built infrastructure that serves 4 billion hours of video every month, supports 425 million Gmail users and stores and manages over 100 petabytes of web index. This session will cover how Google technologies have evolved into secure and necessary platforms for enterprise IT and how health and human service organizations can leverage them as they plan for and implement innovation strategies for the future.

Mikey Dickerson, Site Reliability Engineer, Google

Umesh Vemuri, Head of Sales Engineering - Public Sector, Google

▶ 2:15 – 3:00 P.M.   **LOCATION:** Glass Pavilion

IGNITE SESSIONS: Advancing Interoperability Through Leading Edge Initiatives

Moderator: Rachel Pratt, Senior Consultant, Stewards of Change Consulting

Governance Models: Illinois Toolkit

Kathleen Monahan, Director, Illinois Framework

H.R. 948, The Standard DATA Act

Anne DeCesaro, Professional Staff, Committee on Ways and Means, US Congress

Enhancing New York City Homeless Prevention through Visualization and Geo-mapping

Ellen Howard Cooper, Deputy Commissioner Prevention, Policy and Planning, New York City Department of Homeless Services

▶ 3:00 – 3:30 P.M.   Break   **LOCATION:** Glass Pavilion

▶ 3:30 – 4:45 P.M.   **LOCATION:** Glass Pavilion

IGNITE SESSIONS: *Continued*

Moderator: Richard Gold, Esq., Senior Consultant, Stewards of Change Consulting

New York State Confidentiality Toolkit and Health Passport

Richard Gold, Esq., Senior Consultant, Stewards of Change

Using Predictive Analytics to better service Virginia's At-Risk Youth

Mike Wirth, Special Advisor on eHHR Integration, Commonwealth of Virginia

Project Interoperability and Applications to HHS

Steven Ambrosini, Executive Director, IJIS Institute

Open Space Breakout Sessions Organized around Ignite Topics

▶ 4:45 – 5:00 P.M.   Closing   **LOCATION:** Glass Pavilion

▶ 6:30 – 8:30 P.M.   RECEPTION: JHU Club on Campus

Dinner on your own

Friday | June 6

▶ 7:30 – 8:30 A.M.   **LOCATION:** Glass Pavilion

Breakfast and Networking

▶ 8:30 – 8:45 A.M   **LOCATION:** Glass Pavilion

WELCOME: Overnight Reflections

▶ 8:45 – 9:30 A.M.   **LOCATION:** Glass Pavilion

THE ART OF THE POSSIBLE: The Next Decade - Thinking Ahead Out Loud!

As leaders within the health and human services field are we looking five to ten years into the future and asking: Are we planning for the "right" future? Stewards of Change Institute Board of Directors will take Symposium participants on a journey into the future by "thinking ahead, out-loud." They will explore what the future landscape of the health and human service ecosystem might look like "down-the-road" and consider how we could all be better prepared to know and understand the implications of the changes we now see off in the distance and long before they are obvious to everyone. Recognizing that change is inevitable, what will accelerate our thinking? How will agencies and organizations connect to respond to these changes? How will the connections change — technically, economically, and politically? Presenters will invite the participants to "practice" thinking ahead and out loud with them in this interactive discussion.

Moderator: Bill Davenhall, Senior Health Advisor, Esri; Stewards of Change Institute Board Member

Paul Wormeli, IJIS Institute Executive Director Emeritus; Stewards of Change Institute Board Member

Sid Gardner, Center for Children and Family Futures, Stewards of Change Institute Board Member

Vernon Brown, Chairman, SOC Institute Board of Directors

▶ 9:30 – 12:30 P.M.   **LOCATION:** Glass Pavilion

DEFINING THE ART OF THE POSSIBLE: Charting Project Interoperability within HHS and Beyond

In this session, we will build our compelling strategy to implement interoperability in three acts. First, we elicit perspective from the Federal Partners in light of the Affordable Care Act, the Information Sharing Environment and Project Interoperability. Against a backdrop of the awareness and understanding of overall goals, opportunities, challenges and potential solutions for increasing information sharing, the Panelists — all officials in the current administration with proven records of leading system change — will present their perspectives on where we are now, where we need to go, and the path to get there. The panel will also focus on longer-term ways that federal legislation, new funding mechanisms and administrative flexibility have and will drive states to connect their human services and health programs to achieve interoperability among systems that serve the same customers in a more comprehensive manner.

With perspective from the Federal Partners as a guide post, in our next act, we will collectively roll up our sleeves and design a strategy to implement the tenets of interoperability that will compel action on several fronts - implementation of standards, alignment with architectural goals, and the funding necessary to seed projects and create community tools that will anchor these efforts toward a strong foundation for sustainability.

As we wrap up our collective design work, our third act will reconvene our Federal partners to invite reaction to our work. We end with an interactive discussion that considers other ways for supporting jurisdictional efforts to increase information sharing between health, human services, and other service areas that is intended to refine our compelling strategy for implementing interoperability.

Introductory Panel - Setting the Stage, Federal Perspectives:

Moderator: Daniel Stein, President, Stewards of Change Institute

Kshemendra Paul, Program Manager, Information Sharing Environment

Jessica Kahn, Acting Director, Division of State Medicaid Systems, Department of Health and Human Services

Damon Davis, Director, Health Data Initiative, Department of Health and Human Services

Interactive Project Planning and Roadmap Activities:

SOC Team and Hannah Sanford, Graphic Illustrator

▶ 12:30 – 2:00 P.M.   Working Lunch   Glass Pavilion

Debrief, React and Discuss Next Steps and New Directions – Closing Remarks

CALIFORNIA HEALTHCARE FOUNDATION

SUPPORTING IDEAS & INNOVATIONS TO IMPROVE HEALTH CARE FOR ALL CALIFORNIANS

The California HealthCare Foundation works as a catalyst to fulfill the promise of better health care for all Californians. We support ideas and innovations that improve quality, increase efficiency, and lower the costs of care.

PROGRAM AREAS

- Innovations for the Underserved seeks to reduce barriers to efficient, affordable health care for the underserved.
- Better Chronic Disease Care focuses on improving clinical outcomes and quality of life for Californians with chronic disease.
- Market & Policy Monitor promotes greater transparency and accountability in California's health care system.
- Health Reform & Public Programs Initiative supports the implementation of national health reform and advances the effectiveness of public coverage programs.

For more information, visit www.chcf.org.

Extend Your Health Data

With Esri® ArcGIS™ Online you can share your information internally, across your organization, and out to the community. Get the most out of your data with our maps, apps, and analytics.

Learn more at esri.com/healthy-communities

MARKET SOCIAL SERVICES PUBLIC HEALTH

esri

STUART FOUNDATION

INVESTING IN CHILDREN & YOUTH TO CREATE LIFELONG IMPACT

The Stuart Foundation is dedicated to transforming public education and the child welfare system so that all youth can learn and achieve in school and life. The Foundation is committed to disseminating *irresistible information* to ensure that data, analysis, and interoperabe data systems inform decision making on behalf of young people.

FOR MORE INFORMATION ABOUT THE STUART FOUNDATION PLEASE VISIT www.stuartfoundation.org

---

THANKS TO OUR SPONSORS

CHAMPION SPONSORS

IBM®

esri®

Google

FOUNDATION SPONSORS

STUART FOUNDATION
INVESTING IN CHILDREN & YOUTH TO CREATE LIFELONG IMPACT

CALIFORNIA HEALTHCARE FOUNDATION

---

ritetrack
Information Simplified

Web-based software for state and county juvenile justice and tribal social services

HANDEL

Stewards of Change offers special thanks to Johns Hopkins University for its support of this symposium.

Stewards of Change
INSTITUTE, INC

What's
the world
making today?

We live on a Smarter Planet.

We are generating unprecedented amounts of data every day. We are accessing powerful business and technology services on demand through the cloud. And we are connecting in new ways through mobile and social networks.

The convergence of all of these forces is allowing us to create value in new ways and to transform industries, professions and society.

We live in a moment of remarkable change and opportunity. What will we make of it?

For more information visit
ibm.com/government

Made with IBM