



Office of the National Coordinator
for Health Information Technology

ONC Social Determinants of Health (SDOH) Information Exchange Learning Forum 2022-2023

Summary Takeaways | February 2024

Prepared by EMI Advisors under contract for the
Office of the National Coordinator for Health IT (ONC)



DISCLAIMER

This document was developed by EMI Advisors under contract A+ GS35F0565T-140D0420F0486 for the Office of the National Coordinator for Health Information Technology (ONC). Although every effort has been made to accurately summarize discussions held across the ONC

SDOH Information Exchange Learning Forum, this document does not address all possible considerations for SDOH information exchange. Each SDOH information exchange initiative and partner are unique and will need to consider its particular circumstances and requirements. The views expressed in this report do not necessarily represent the views of ONC.



Table of Contents

Executive Summary	4
Background	6
Learning Forum Overview	7
Webinar Series	7
Webinar Engagement	8
Small Group Sessions	10
Learning Forum Takeaways	11
Foundational Element: Community Readiness and Stewardship	11
Foundational Element: Financing	11
Foundational Element: Governance	12
Foundational Element: Implementation Services	13
Foundational Element: Legal	14
Foundational Element: Measurement and Evaluation	14
Foundational Element: Mission and Purpose	15
Foundational Element: Policy	15
Foundational Element: Technical Infrastructure and Data Standards	16
Foundational Element: User Support and Learning Networks	17
Foundational Element: Values and Principles	18
Cross-Cutting Takeaways	19
Conclusion	20





Executive Summary

The federal government, states, communities, and other partners recognize the impact of unmet social needs on health inequities, quality of care, health outcomes, and health care costs.¹ Social determinants of health (SDOH) are defined by the Centers for Disease Control and Prevention (CDC) as “the nonmedical factors that influence health outcomes. They are the conditions in which people are born, grow, work, live, and age, and the wider set of forces and systems shaping the conditions of daily life.”² Addressing SDOH holistically is complex given the multi-sector nature of services needed to address unmet individual and community needs. Barriers to the coordination of care and services across disparate settings and sectors include, but are not limited to: unstandardized data collection, differences in information technology (IT) system design and capacities, and varied abilities to exchange information.

To support the health care community’s use of technology to collect, share, use, and integrate health and social care information, the Office of the National Coordinator for Health Information Technology (ONC) worked with a panel of experts in 2021 to develop the [SDOH Information Exchange Toolkit \(Toolkit\)](#). The Toolkit serves as a resource for persons of all experience levels to learn more about SDOH information exchange, promising approaches for implementation, and key considerations to advance their goals using a framework of Foundational Elements. These Foundational Elements are designed to guide SDOH information exchange initiatives through inclusion of governance, user support and learning networks, technical infrastructure and data standards, implementation services, policy considerations, legal considerations, financing considerations, measurement and evaluation, mission and purpose, values and principles, and community readiness and stewardship.

ONC launched the SDOH Information Exchange Learning Forum (Learning Forum) to explore the Foundational Elements framework in practice by engaging in peer-to-peer learning.

The Learning Forum brought together a diverse set of health IT partners, including health care providers, community-based organizations (CBO), government agencies, payers, health information exchange (HIE) networks, digital platform developers, innovators, and other partners to share lessons learned, challenges, and promising practices related to exchanging SDOH-related data. The Learning Forum facilitated a series of webinars with additional small group sessions held between March 2022 and June 2023.

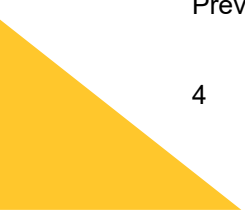
This document summarizes the themes and learnings that emerged through the ONC SDOH Information Exchange Learning Forum webinars and small group sessions. These include:

Community stewardship

SDOH information exchange initiatives require time and investment to build trust and align partners, including CBOs on the mission, purpose, and decision-making processes of the initiative.

¹ Exec. Order No. 13985, 86 Fed. Reg. 7009 (Jan 20, 2021)

² C. (2022, December 8). Social Determinants of Health at CDC. Centers for Disease Control and Prevention. <https://www.cdc.gov/about/sdoh/index.html>





Co-design governance

It is critical to engage a diverse set of representative partners, including CBOs and individual service recipients with lived experience, in the co-design of governance processes and decision making. Some entities may face challenges in putting this equity principle into action.

Semantics

Different partners use different terms to describe SDOH which can cause confusion. Examples of terms in use today include “health-related social needs,” “social care,” “determinants of health,” “social drivers,” and SDOH. Notably, the framing of the work can give distinctive meaning to the terms used.

Implementation of standards

The use of Health Level 7 (HL7®) Fast Healthcare Interoperability Resources (FHIR®) holds promise to support easier and more interoperable SDOH information exchange. The health care and social care landscapes vary in their FHIR readiness and would benefit from increased awareness and education on FHIR's value for social care data integration and exchange.

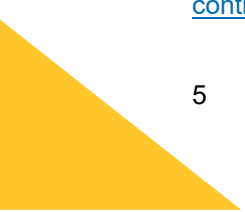
Vendor-agnostic approaches

Designing a vendor-agnostic technical infrastructure for SDOH information exchange enables partners to leverage current workflows and systems and use standards to enable interoperability. This approach can support whole-person care by integrating data clinical settings, public health, claims, behavioral health, and social care.

Privacy and consent guidance for non-Health Insurance Portability and Accountability Act (HIPAA)-covered entities

There is limited awareness and understanding of current federal guidance for non-HIPAA-covered entities and this may inhibit efforts to scale data exchange efforts across the country.³

³ Current federal guidance can be found here: [3008-Does HIPAA permit health care providers to share PHI about an individual with mental illness with a third party that is not a health care provider for continuity of care purposes? | HHS.gov](https://www.hhs.gov/hipaa/for-professionals/special-topics/2008-Does-HIPAA-permit-health-care-providers-to-share-PHI-about-an-individual-with-mental-illness-with-a-third-party-that-is-not-a-health-care-provider-for-continuity-of-care-purposes/)





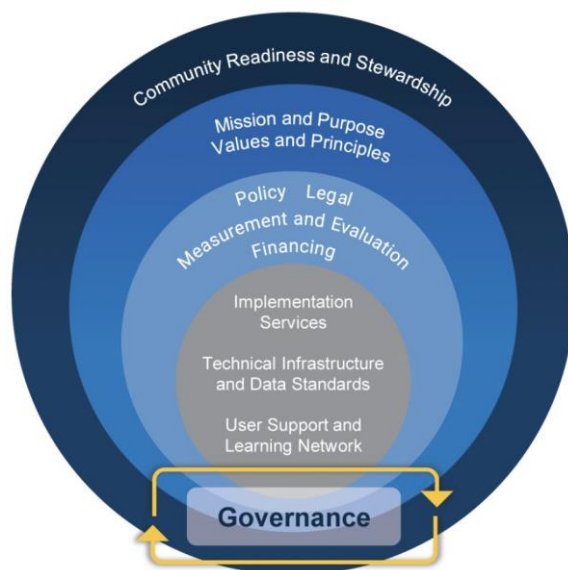
Background

In 2021, the Office of the National Coordinator for Health Information Technology (ONC) convened a panel of experts from across the health and social services sectors to form a Technical Expert Panel (TEP) to share expertise and insights on the topic of SDOH information exchange. With inputs from the TEP, ONC with support from contractor EMI Advisors (EMI) developed the SDOH Information Exchange Toolkit (Toolkit). The Toolkit serves as a resource for persons of all experience levels to learn more about SDOH information exchange, promising approaches for implementation, and key considerations to advance their goals.

A framework of 11 interrelated SDOH Information Exchange Foundational Elements (see Figure 1) is included in the Toolkit to help communities organize their efforts. The framework is not a one-size-fits-all approach and different initiatives will prioritize and sequence their focus on the Foundational Elements as most appropriate.

In March 2022, ONC launched the SDOH Information Exchange Learning Forum (Learning Forum), which brought together a diverse set of health information technology (IT) partners including providers, community-based organizations (CBO), government agencies, payers, health information exchange (HIE) networks, digital platform developers, innovators, associations, academia, and others to share lessons learned and challenges related to exchanging SDOH data. Through the Learning Forum webinars and small group sessions, participants explored the Foundational Elements, heard from champions in the field, and engaged in collaborative learning and information sharing.

Figure 1: ONC SDOH Information Exchange Foundational Elements Framework





Learning Forum Overview

WEBINAR SERIES

The Learning Forum consisted of a webinar series conducted from 2022 to 2023.⁴ Below Table 1 summarizes the webinar topics, learning objectives, dates, and presenters.

Table 1: Learning Forum Webinar Series Information

Date	Webinar Topic	Learning Objective	Presenters
March 2022	Introduction to SDOH Information Exchange	Review the SDOH landscape and foundational elements to enable SDOH information exchange.	Karis Grounds, 211/CIE San Diego
April 2022	Vision, Purpose, and Community Engagement	Introduce promising practices to engage with CBOs and define a vision and purpose.	Nikisha Johnson and Angee Brown, Monroe County Systems Integration Project David Poms and Deniz Soyer, District of Columbia Community Resource Information Exchange Technical Solution (CoRIE) Project
May 2022	Governance	Examine different levels of governance for stakeholders engaged in SDOH information exchange initiatives.	Gena Morgan and Sara Standish, HealthierHere Martin Love and Jessica Osborne- Stafsnes, North Coast Health Improvement and Health Information Network
June 2022	Technical Infrastructure and Interoperability	Offer insights on data systems and standards to enable SDOH information exchange.	Paul Sorenson, Missouri Aging Services Data Collaborative Sara Gold and Bob Kreha, United Way for Southeastern Michigan Aaron Seib, Gravity Project
July 2022	Policy and Financing	Present policy considerations and financing models to support organizations pursuing SDOH information exchange.	Len Nichols, Urban Institute Kristi Klaverkamp, Colorado Health Institute Gabby Elzinga, Colorado Governor's Office of Information Technology Jurema Gobena, Commonspirit

⁴ Information on the ONC SDOH Information Learning Forum, including webinars and slides, can be found here: <https://www.healthit.gov/news/events/oncs-social-determinants-health-information-exchange-learning-forum>





Date	Webinar Topic	Learning Objective	Presenters
February 2023	Community-level Governance	Highlight promising approaches for engaging community partners in SDOH information exchange initiatives.	<p>Lisa Nicolaou and Dr. Mike Klinkman, Michigan Health Information Network (MiHIN)</p> <p>Dawn Opel, Food Bank Council of Michigan</p> <p>Vidya Lakshminarayanan, Dell Medical School</p> <p>Akram Al-Turk, Ending Community Homelessness Coalition</p> <p>Anjum Khurshid, Harvard Medical School</p> <p>Eliel Oliveria, Dell Medical School</p>
March 2023	Values, Principles, and Privacy	Provide information on privacy considerations and spotlight initiatives championing ethical and equitable approaches to engage partners.	<p>Melissa Moorehead, Data Across Sectors for Health (DASH)</p> <p>Jennifer Stoll, Oregon Community Health Information Network</p>
May 2023	Implementation, Measurement and Evaluation	Share information on measurement approaches and implementation and workflow considerations.	<p>Dr. Joel Andress, Centers for Medicare and Medicaid Services (CMS)</p> <p>Sue Lachenmayr, Maryland Living Center of Wellness, Inc. (MAC, Inc.)</p> <p>Marc Rabner, Chesapeake Regional Information System for our Patients (CRISP)</p>
June 2023	SDOH Information Exchange Forum Summary	Provide a recap of information and learnings shared throughout the webinar series.	<p>Karis Grounds, 211/CIE San Diego</p> <p>Stephanie Pugliese. and Cassi Niedziela, Colorado Office of eHealth Innovation (OeHI)</p> <p>Joseph Lugo, Administration for Community Living (ACL)</p> <p>Vanessa Candelora, Gravity Project and Point of Care Partners (POCP)</p> <p>Jessica Little, Civitas Networks for Health</p>

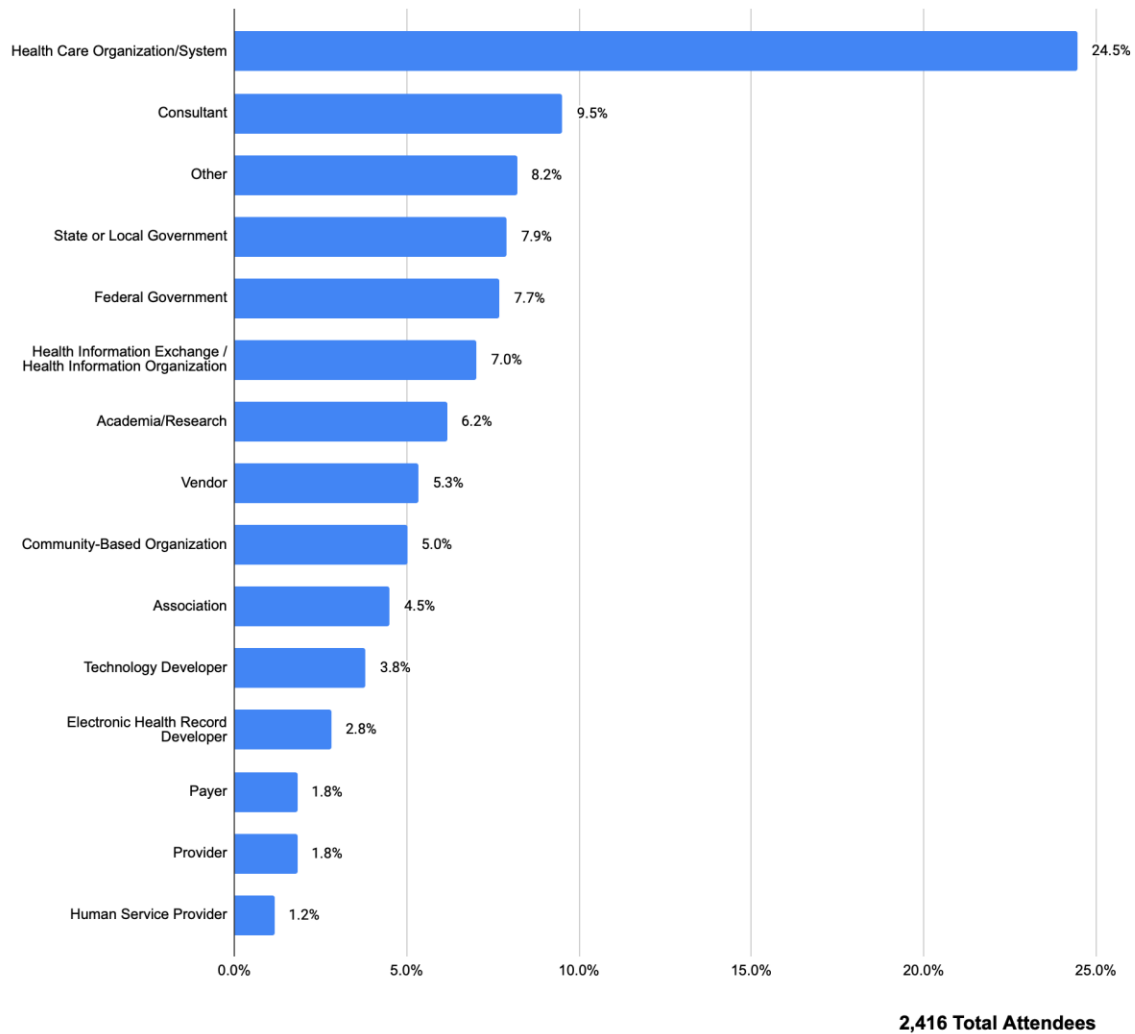
WEBINAR ENGAGEMENT

A total of 2,416 unique individuals attended at least one Learning Forum webinar between 2022-2023. Below Figure 2 provides information on the groups that attended the 2022 and 2023 Learning Forum webinars. Note that some registrants did not provide their affiliation in 2022 so not all participants are represented.



Figure 2: Partners Represented Across All ONC SDOH Information Exchange Learning Forum Webinars

ONC SDOH Learning Forum Partner Groups



Note: The following Partner Groups account for <1% of attendees and are not included in the graph: Accreditation Body, ONC Staff, Standards Development Organization, ONC Contractor, Consumer, Tribal Entity, Congressional*, Media**, and ONC Grantee.

* The congressional group was a category used during the 2022 webinar sessions, but not in 2023.

** The media group was a category used during the 2023 webinar sessions, but not in 2022.





SMALL GROUP SESSIONS

After most Learning Forum webinars, ONC invited interested participants to attend a smaller group session to continue exploration of the Foundational Elements and engage in further information sharing. Typically, the attendance of the small group sessions consisted of up to 15 participants, based on a first-come, first-serve basis. Presenters of the related webinars were invited to join the small group sessions to continue sharing on their experiences and learnings.

The small group sessions provided an additional peer-to-peer learning opportunity and engaged participants in discussions on challenges, learnings, questions and information needs, promising approaches, and resources. The small group sessions drew participants from a variety of backgrounds including payers, consultants, IT vendors, and state and local government, among others. The sessions catered to the specific needs and questions of the participants who joined.





Learning Forum Takeaways

FOUNDATIONAL ELEMENT: COMMUNITY READINESS AND STEWARDSHIP

Overview

Community readiness and stewardship includes exploration of the existing landscape in the geographic area and/or population of focus, assessment of the capacity and willingness of the community to participate, and development of shared rights and responsibilities through a process of co-design, evaluation, and decision-making.

Takeaways

During the Learning Forum, participants learned some best practices to engage with community members across different sectors and work collaboratively to define a vision and purpose for an SDOH information exchange initiative. Takeaways include:

- Several presenters emphasized the importance of engaging community-led organizations to convene and steward local initiatives to build trust among partners.
- Numerous states participated in the webinars and small group sessions sharing information on plans to engage in SDOH, and in some cases, implement technology platforms. Learning Forum participants acknowledged the critical role of state leaders working collaboratively with communities to understand current workflows, needs, and technology investments that can help shape state plans.
- Participants and experts indicated that conducting a landscape assessment to understand the assets, needs, and readiness of CBOs is a critical first step in planning for a SDOH information exchange initiative.

FOUNDATIONAL ELEMENT: FINANCING

Overview

Financing includes considerations for funding opportunities, sources, ongoing costs, opportunities for blended approaches, sustainability planning, and incentives for community adoption and use.

Takeaways

During the Learning Forum finance webinar, presenters highlighted their funding model and sustainability plans. They also discussed considerations for funding sources that contribute to sustained SDOH information exchange initiatives and technology services. Takeaways include:





- Several presenters indicated that sustainability planning is a top priority, yet few initiatives have achieved such sustainability. Most sources of revenue for SDOH information exchange initiatives are a combination of public and philanthropic funding. Participants expressed a need for additional support to identify funding sources and learn more about how to blend and braid funding streams.
- Participants and experts shared that CBOs typically do not have available funding or other incentives to upgrade their existing IT systems or adopt new digital solutions or hire additional staff to support SDOH information exchange activities. As an example, some CBOs are unable to receive and respond to social care referrals due to constraints imposed by their funding streams.
- Participants shared that CBOs could struggle to embrace new workflows and digital solutions. SDOH information exchange initiatives often fund technology contracts and implementations, but do not always finance sufficient workforce development and end user training necessary for successful adoption and ongoing use.
- Experts suggested CBOs explore implementing creative financing models, such as a community banking model, where various partners pool funds in accordance with their prospective needs and ability to pay. The pooled funds are then allocated according to the community's priorities.

FOUNDATIONAL ELEMENT: GOVERNANCE

Overview

Governance includes the development of decision-making processes and groups, across different levels, including, institutional, administrative, and data governance.

Takeaways

The topic of governance was cross-cutting throughout the Learning Forum discussions and thereby merited two dedicated webinars that sought to explore the different levels, sample frameworks, and approaches for engaging community-level stakeholders. Takeaways include:

- Presenters highlighted the importance of equitable governance structures that ensure community representation and balance power dynamics across membership. Exemplar governance models and frameworks incorporate approaches for engaging community members at different levels of governance, especially leadership and decision-making to help shape and drive an initiative.
- Participating HIE organizations discussed investments in their data exchange infrastructure and services that could be extended to support collection and integration of social and health data. Some social sector participants noted that for HIEs to fully realize their potential role in SDOH information exchange, they may need to evolve their governance model to balance incentives, costs, and power dynamics to ensure community and broader social sector representation.





- Many implementing SDOH information exchange initiatives recognize the importance of involving CBOs and individuals with lived experience in their governance processes as a function of their commitment to principles of equity and representation. However, some participants noted they struggle to put these principles into action and are seeking more information on promising practices to increase engagement.
- Experts noted that software-led initiatives often focus on one use case or a target population rather than the development of a governance model, processes, and multi-sector engagement for a unified approach that supports a broad range of data exchange scenarios across health and social sectors. Participants indicated that the application of technology in advance of establishing governance can be more costly in the long run.

FOUNDATIONAL ELEMENT: IMPLEMENTATION SERVICES

Overview

Implementation services include support for technical services (e.g., defining requirements, standards specifications, and integration with existing infrastructure and services), programmatic services (e.g., defining use cases and workflow design or redesign), and for adoption and utilization by individuals and the community.

Takeaways

During the Learning Forum webinar and other sessions, participants discussed approaches for operationalizing SDOH information exchange services and designing workflows to ensure adoption and use among partners, especially CBOs. Takeaways include:

- Presenters underscored the importance of initiative partners and IT vendors providing technical support to CBOs to build capacity, support workflow design or redesign, and provide ongoing training and support services. These critical activities support successful implementation, adoption, and sustained use of information exchange services to achieve the vision and purpose of an initiative.
- Participants acknowledged the benefit of establishing a unified, vendor-agnostic infrastructure. This allows easier connection of individual IT systems to integrate multi-sector data. This approach can support whole-person records that enable service providers to understand and better meet individual needs. Several presenters indicated they are implementing solutions that integrate data from the clinical setting, public health, claims, behavioral health, and social care.
- Participants noted that in some cases the IT systems used by CBOs can present a barrier to implementing SDOH information exchange services. These IT systems have various workflows, code sets, and standards that require a concerted effort to align with those used by the health sector. Many SDOH information exchange initiatives are working to meet CBOs at their current level in using technology. Participants are leveraging their current investments and supporting updates and connections to their IT systems (where needed and appropriate) to enable interoperability of data.





- Experts highlighted the value of shared resource directories but noted the usefulness of the directories depends on the accuracy of the information they hold and whether they are in alignment with national standards. Discussions that followed emphasized the importance of having a plan for maintenance and quality checks.
- Experts noted that closed-loop referral solutions have great potential to improve CBO service coordination, but when its not implemented with existing workflows and supported by effective training, they may become a burden. Participants in the Learning Forum suggested working with CBOs to understand their existing workflows, business processes and IT systems before engaging in detailed discussions on how and where to collect and share referrals.

FOUNDATIONAL ELEMENT: LEGAL

Overview

Legal includes the establishment of a framework of legal processes and operations and rights and obligations to support data use and sharing in alignment with federal, state, local, and tribal laws.

Takeaways

The Learning Forum webinar on this topic focused on privacy and consent considerations for SDOH information exchange initiatives. Takeaways include:

- Participants discussed the need to deploy technical approaches to authorizations and role-based permissions that align with data governance decisions and support appropriate access and use of data.
- Experts recommended collaboration across health and social care partners, with legal counsel to develop and adopt consent policies and practices, as well as data sharing agreements that align with applicable federal, state, local and tribal laws.
- Presenters and experts indicated that CBOs struggle to understand the applicability of legal frameworks, policies, and varied consent models in use. Further discussions centered on the need to increase CBO capacity to build trust, protect data, and use data sharing agreements to appropriately share information to better serve individuals.

FOUNDATIONAL ELEMENT: MEASUREMENT AND EVALUATION

Overview

Measurement and evaluation encompass an array of activities that define and assess performance metrics, individual and population outcomes, program effectiveness, and quality management and improvement.

Takeaways

The measure and evaluation webinar introduced new Center for Medicare and Medicaid Services measures for social drivers of health and highlighted other emerging measurement initiatives. Takeaways include:





- Participant discussions centered on the need for initiatives to establish their definition of success and align measurement and evaluation frameworks to this information to monitor progress.
- Presenters discussed the importance of consistent, accurate, and standardized SDOH data collection to support reuse in measurement activities and meaningful analysis.
- Participants noted the value of implementing short-term and mid-term feedback loops to more rapidly assess, inform, and adapt SDOH information exchange initiatives efforts.
- Presenters affirmed that SDOH information exchange initiatives can contribute to a learning health system where data and experience are used to continuously improve knowledge and decision-making and adapt approaches for better outcomes.

FOUNDATIONAL ELEMENT: MISSION AND PURPOSE

Overview

The initiative's intention, including the value proposition, vision, scope of services, and expected benefits, are encapsulated in the mission and purpose Foundational Element.

Takeaways

An SDOH information exchange initiative's intention, including the value proposition, vision, scope of services, and expected benefits, are captured in the mission and purpose. Takeaways include:

- SDOH information exchange initiatives require more time investment than initially expected to be community- driven, build trust and work closely with various partners, including CBOs to define a shared mission and purpose.
- Presenters throughout the Learning Forum highlighted the importance of investing in human-centered design processes and capacity-building for organizational and systems change. Most presenters considered technical details associated with implementation as secondary considerations that follow rather than drive an initiative's mission and purpose.

FOUNDATIONAL ELEMENT: POLICY

Overview

Policy considerations include federal, state, local, and tribal policies to advance the ability to collect, share, and use standardized SDOH data, as well as collaboration and alignment with other relevant efforts in the community, region, and/or state for collective impact and improved outcomes.

Takeaways

During the Learning Forum policy webinar, presenters shared examples of policy levers to drive adoption and use of SDOH information exchange initiatives, advance use of standards, and approaches for navigating relevant federal guidance. Takeaways include:



- State and federal government participants and other experts indicated that policy is an important enabler for advancing SDOH information exchange and should be leveraged to build or expand initiatives. Participants acknowledged that policy levers can be used in multiple ways to advance initiatives and incentivize use of standards and interoperability approaches to enable exchange across systems. As an example, policy can promote interoperability via procurement processes, such as requirements to use nonproprietary standards and allocate resources to enable exchange of data across technologies, in addition to monitoring and compliance processes. Participants raised questions about how to design policies in their initiatives that support both HIPAA and non-HIPAA covered entities. Some shared a desire for additional guidance and resources for working with non-covered HIPAA entities to prevent the potential of varying interpretations that can become a barrier to interoperability and scaling data exchange efforts across the country.
- Other participants sense that HIPAA compliance may not address concerns about perceived risk associated with the technical aspects of SDOH information exchange. For example, one type of perceived risk relates to using aggregated anonymized data for algorithm development that can be susceptible to bias and inequitable outcomes.^{5,6} Other harms that may result from lawful activities include de-anonymization of aggregate data through linkage with other public information. It was suggested that clarification and additional rules may help facilitate privacy in individual and community contexts. Communities may also design their own locally appropriate rules using the foundational regulatory framework of HIPAA and other federal policy.

FOUNDATIONAL ELEMENT: TECHNICAL INFRASTRUCTURE AND DATA STANDARDS

Overview

Technical infrastructure and data standards include alignment of hardware, software, data, processes, and standards to enable scalable and interoperable data and IT systems.

Takeaways

Throughout the Learning Forum webinars and small group sessions, there was a heavy emphasis on technical SDOH information exchange approaches, use of standards to enable interoperability and related lessons learned. Takeaways include:

⁵ Rössli, E., Rice, B., & Hernandez-Boussard, T. (2020). Bias at warp speed: How ai may contribute to the disparities gap in the time of covid-19. *Journal of the American Medical Informatics Association*, 28(1), 190–192. <https://doi.org/10.1093/jamia/ocaa210>

⁶ Gottlieb, L. M., & Alderwick, H. (2019). Integrating social and medical care: Could it worsen health and increase inequity? *The Annals of Family Medicine*, 17(1), 77–81. <https://doi.org/10.1370/afm.2339>



- Participants noted it is a best practice for CBOs to engage in the design, development, testing, and implementation of the technical infrastructure of an SDOH information exchange initiative. Presenters emphasized the importance of understanding stakeholder data and IT assets that can be leveraged, as part of the technical infrastructure.
- Many participants' raised questions on the relative merits of various software systems as at-scale solutions, whereas most presenters asserted a principle of vendor neutrality in their technology strategies and governance model. Experts shared there may be a need to provide education on the difference between program-specific IT systems versus infrastructure to enable data exchange and interoperability among many IT systems.
- Participants agreed the use of the HL7 FHIR specification holds great promise to support social care data integration. But it was noted that both the health and social care landscapes vary in their FHIR readiness and would benefit from initiatives that raise additional awareness and support for the use of FHIR.
- Some participants expressed concern about the way in which the FHIR standard represents an individual receiving non- clinical services. It was specifically noted that the FHIR Patient Resource points to the Person Resource and creates a linkage that initiates data collection at the patient level instead of the person level. Conversely, the social care model refers to the individual as a person, not a patient.
- Participants underscored the importance of CBO perspectives and needs being represented in the process of developing standards for SDOH data and processes. Exemplar initiatives include the Gravity Project which engages multidisciplinary sectors like eldercare (i.e., Area Agencies on Aging and Aging and Disability Resource Centers) and information-and-referral providers (i.e., 211s). Participants encouraged deepening and sustaining such engagement in SDOH information exchange initiatives.
- The Learning Forum discussions on technical infrastructure focused more heavily on the value of closed-loop referrals. However, CBOs have highlighted a broader array of information exchange capabilities (e.g., document sharing, coordination of care, alerts, and benefits enrollment) that can improve the coordination of care and evaluation of health outcomes. There are opportunities for SDOH Information exchange initiatives to provide a suite of value-added services that extend beyond resource directories and referrals.

FOUNDATIONAL ELEMENT: USER SUPPORT AND LEARNING NETWORKS

Overview

User support and learning networks assist partners, including CBOs, with education, training, technical assistance, peer-to-peer learning, as well as capturing and sharing promising practices and lessons learned.





Takeaways

The topic of user support and learning networks was broached throughout the Learning Forum series with many participants seeking additional opportunities to learn. Takeaways include:

- Participants are eager for opportunities to discuss experiences, raise challenges, and share promising approaches across different partner groups. Information shared through the Learning Forum helped participants consider how to get started and better understand the emerging landscape of SDOH information exchange initiatives.
- There are existing learning networks that support engagement and learning through group meetings and provide valuable knowledge products to support planning and implementation of SDOH information exchange. Examples highlighted during the Learning Forum include the Robert Wood Foundation’s DASH program, the CIE National Network organized by the 211/CIE San Diego, and the Gravity Project Pilots Workstream.
- CBOs are seeking additional opportunities to build staff capacity and learn to effectively use IT systems that can support business processes and workflows and engage in information exchange.

FOUNDATIONAL ELEMENT: VALUES AND PRINCIPLES

Overview

Values and principles include identifying the interests and priorities of the people and institutions engaged in the SDOH information exchange initiative. This typically includes ethical and equitable principles focused on accountability to and fairness in actions and outcomes for the community.

Takeaways

During the Learning Forum webinar and small group session, presenters shared their process to engaging partners to define shared values and principles. Takeaways include:

- Participants agreed with the importance of respect and representation for the people and communities with lived experience as a central tenant of an SDOH information exchange initiative.
- Presenters highlighted the importance of not just working to address health inequities, but also addressing systematic racism and discrimination through initiatives and committing these values and approaches to governance and operational documents.
- Presenters emphasized that SDOH data is a community asset. To cultivate trust and garner robust engagement and support, it is critical to ensure the inclusion of all relevant partners in the SDOH information exchange initiative lifecycle to which promotes equity and seeks to prevent harm.
- Some experts recommend conducting risk assessments to monitor alignment with initiative values and principles and mitigate the potential for harm. This provides an opportunity to identify and address findings that may include de-anonymization, loss of access to services, misuse of data, and inequitable algorithmic development.





CROSS-CUTTING TAKEAWAYS

Overview

Through the Learning Forum webinars and small group sessions, the following items emerged that cut across many of the Foundational Elements.

- CBOs have limited financial, human, and technical capacity to effectively engage in SDOH information exchange initiatives.
- All SDOH information exchange initiatives run the risk of pilot fatigue and need to be designed in such a way to move into sustained, real-world implementations.
- There is tension between solving local challenges versus scaling an SDOH information exchange solution across a region or state to take advantage of economies of scale.
- There is support for vendor-agnostic approaches that promote integration of workflows and systems and enable interoperability through a unifying platform to make data accessible, shareable, and reusable.
- There is inconsistency in the terms used to define SDOH. It is unclear how to differentiate SDOH from other terms like “health-related social needs,” “social care,” “determinants of health,” “social drivers,” and SDOH.





Conclusion

The Learning Forum series brought together a diverse set of participants from varied experiences and backgrounds to explore the Foundational Elements detailed in the ONC SDOH Information Exchange Toolkit and collectively accelerate SDOH information exchange. Presenters and participants informed many takeaways related to the challenges and barriers faced by states, public health, health systems, CBOs and others trying to implement initiatives to exchange SDOH information. Through the webinars and small group sessions, presenters and participants were eager to share their own experiences and promising practices, learn from each other, and continue to bridge the gaps among health, social care, and other sectors to best support individuals, families, and communities across the United States.

