

**North Carolina's *Healthy Opportunities Pilots*:
A Medicaid Managed Care Program to Address Social Needs
Implementation Lessons and Policy Recommendations from
Planning, Capacity-building, and Early Implementation**

Duke-Margolis Center for Health Policy & North Carolina Institute of Medicine

July 28, 2022 | 10:00 am – 11:30 am ET

Meeting Agenda

Meeting Objectives:

- Disseminate practical cross-cutting themes from the planning, capacity-building, and early implementation periods of the *Healthy Opportunities Pilots*, including successes, lessons learned, challenges encountered, and innovative solutions for overcoming challenges.
- Discuss with policymakers, researchers, evaluators, implementation leaders, and frontline providers their experiences over the past two years—and thoughts on the future of the program.
- Help leaders from North Carolina—as well as from other states, payers, and settings considering similar models—to “see around corners” by discussing timely implementation and policy considerations for maximizing Medicaid managed care to address social needs moving forward.

10:00 AM **Welcome and Overview**
Kathy Colville, MSW, MSPH; President and CEO, North Carolina Institute of Medicine

10:05 AM **Presentation: Practical Implementation Considerations and Policy Recommendations from Planning, Capacity-building, & Early implementation**
Will Bleser, PhD, MSPH; Assistant Research Director, Health Care Transformation for Population Health, Social Needs, and Health Equity, Duke-Margolis Center

10:15 AM **Panel 1: State-level Perspectives on Designing, Evaluating, & Administering the Pilots**
The goal of this session is to discuss with state policymakers, researchers, evaluators, and technology and implementation leaders their experiences designing, evaluating, and administering the Pilots—and thoughts on the future of the program.

Moderator

Kathy Colville, MSW, MSPH; President and CEO, North Carolina Institute of Medicine

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Panelists

- **Seth Berkowitz, MD, MPH;** Associate Professor of Medicine, Division of General Medicine and Clinical Epidemiology, School of Medicine; and Cecil G. Sheps Center for Health Services Research; University of North Carolina at Chapel Hill
- **Will Bleser, PhD, MSPH;** Assistant Research Director, Health Care Transformation for Population Health, Social Needs, and Health Equity, Duke-Margolis Center
- **LaQuana Palmer, MPA;** Program Director, NCCARE360, Foundation for Health Leadership & Innovation
- **Faith L. Samples;** Director of Community Partnerships, Carolina Complete Health
- **Ayana N. Simon, MSW, MHA;** Healthy Opportunities Program Director, Carolina Complete Health
- **Amanda Van Vleet, MPH;** Associate Director, Innovation, NC Medicaid Strategy Office, North Carolina Department of Health & Human Services

10:45 AM *(5-minute break)*

10:50 AM **Panel 2: Regional and Community Perspectives on Designing, Evaluating, & Administering the Pilots**

The goal of this session is to discuss with implementation leaders, frontline providers, and researchers their experiences designing, studying, and administering the Pilots—and thoughts on the future of the program.

Moderator

Rob Saunders, PhD; Senior Research Director, Health Care Transformation, Duke-Margolis Center for Health Policy

Presentation: Experiences and Recommendations from HOP Beneficiary Focus Groups
Will Bleser, PhD, MSPH; Duke-Margolis Center

Panelists

- **Dionne Greenlee-Jones, MPA;** Interim Executive Director, Impact Health
- **Emilie Hart, MSW;** Regional Director, Catholic Charities of the Diocese of Raleigh, Inc., Cape Fear Regional Office
- **Madlyn C. Morreale, JD, MPH;** Managing Attorney, Medical-Legal Partnership Program, Legal Aid of North Carolina
- **Sarah C. Ridout, MBA, SPHR;** Healthy Opportunities Program Director, Cape Fear HOP, Community Care of the Lower Cape Fear
- **Melissa Young Roupe, MSN, RN;** Vice President, Healthy Opportunities, Access East, Inc.

11:25 AM **Wrap-Up, Closing Remarks, and Next Steps**

Kathy Colville, MSW, MSPH; President and CEO, North Carolina Institute of Medicine

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11:30 AM Adjournment

Speaker Biographies

Seth Berkowitz, MD, MPH, is an Associate Professor of Medicine at the University of North Carolina at Chapel Hill School of Medicine in the Division of General Medicine & Clinical Epidemiology. He is a general internist and primary care doctor. He studies the relationship between health-related social needs, such as food insecurity, and health outcomes. His current work emphasizes interventions that address these needs as part of clinical care, and the health effects of policies that affect the distribution of unmet health-related social needs.

William K. Bleser, PhD, MSPH, is Assistant Research Director, Health Care Transformation for Population Health, Social Needs, and Health Equity at the Duke-Margolis Center for Health Policy in Washington, DC. His portfolio of work includes peer-reviewed research as well as policy briefs, issue briefs, and convening and collaborating with relevant stakeholders to have real-world impact. He focuses on issues related to accountable care and other alternative payment models or risk-based contracts to support population health, and marginalized populations—especially how value-based payment models can better address social needs and improve health equity. Before coming to Duke, Dr. Bleser worked at the Pennsylvania State University studying inequities in preventive health services, evaluating national health quality improvement efforts, and achieving change to the patient-centered medical home delivery reform model. He previously worked for the US Department of Health and Human Services on improving adult influenza vaccine coverage and better understanding rare adverse events to influenza vaccines. He earned his PhD from Pennsylvania State University jointly in health policy and demography, his Master of Science in Public Health from the Johns Hopkins Bloomberg School of Public Health in disease epidemiology and control, and his BS from the College of William and Mary in neuroscience.

Kathy Colville, MSW, MSPH, is the president and CEO of the North Carolina Institute of Medicine, an independent agency chartered by the NC General Assembly that works collaboratively with stakeholders from across the state to identify and build consensus around actionable solutions to the health challenges facing North Carolina. This work ties together the throughlines of Kathy's work and values, fostering policy and system change, integrating health and social care, and grounding it all in commitment to connected, inclusive and caring communities. From 2014 to 2020, Kathy led Cone Health's (Greensboro, NC) Department of Healthy Communities, working to connect clinical services and community assets to promote equity and access to the healthcare and living conditions that foster long and healthy lives. Kathy holds a Bachelor's degree in Comparative Literature from Brown University and Masters Degrees in Social Work and Public Health from UNC Chapel Hill. She is a PhD candidate in Public Administration at NC State University and a fellow in the Robert Wood Johnson Foundation's Interdisciplinary Research Leaders program.

Dionne Greenlee-Jones, MPA, is Interim Executive Director, Impact Health. The North Carolina Department of Health and Human Services selected Impact Health as one of three organizations to serve three regions of the state in the Healthy Opportunities Pilots Program. Previously, she's served as a Resource Development Manager for United Way, as a grant writer and strategic planning consultant,

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and as a Community Engagement Manager for Unite Us/NCCARE360—the nation’s first statewide coordinated care network—serving in 23 WNC counties, and in numerous others in partnership with statewide coalitions. Formerly, Dionne directed the Duke Nonprofit Management Certificate Program and consulted with Duke’s Continuing Studies and Duke Integrative Medicine, assisting with program development and implementation. As a “change agent,” she utilizes her skills in Diversity, Equity, and Inclusion (DEI), along with group and facilitation training methods, to accelerate strategic collaborations among stakeholders, bringing them to consensus to address critical community issues. Academic credentials include distinction as a UNC Chapel Hill Pogue Scholar, a BA in English from UNC Charlotte, a BS in Public Health from UNC Greensboro, a Master of Public Administration from UNC Charlotte, and pursuit of graduate studies and the documentary arts at Duke University. She holds a certificate in Epidemiology from the Centers for Disease Control, and an Executive Certificate in Nonprofit Management from Duke University, among others.

Emilie Hart, MSW, is Regional Director, Catholic Charities of the Diocese of Raleigh, Inc., Cape Fear Regional Office—a human service organization delivering services for the Pilots. Emilie started with Catholic Charities in February 2015 and has dedicated her time here serving the Cape Fear Region. She received her Master’s degree in Social Work from the University of Pennsylvania in 2012. She has over 17 years of experience in the social work field in various settings such as schools, prisons, mental health facilities and refugee resettlement. Emilie lives in Wilmington with her husband and two kids.

Madlyn C. Morreale, JD, MPH, is Managing Attorney of Legal Aid of North Carolina’s statewide Medical-Legal Partnership (MLP) Program. Legal advocates involved in this Program work collaboratively with health professionals in a variety of clinical, hospital, and health system settings to integrate access to “legal remedies” into team-based efforts to address social drivers of health, enhance health equity, and improve patient and community health. Prior to joining the staff of Legal Aid of North Carolina in 2008, Ms. Morreale co-founded the Center for Adolescent Health & the Law, served on the faculty at the Johns Hopkins University School of Public Health, and was Professional Staff for the Select Committee on Children, Youth, and Families in the U.S. House of Representatives.

LaQuana Palmer, MPA, serves as a Program Director at the Foundation for Health Leadership and Innovation (FHLI) and is responsible for managing the day-to-day operations and strategies of the statewide NCCARE360 program. She recently transitioned to FHLI from the North Carolina Department of Health and Human Services (NCDHHS), where she worked for the last four and a half years; two years in the Office of the Secretary with Healthy Opportunities, where she served as program manager of NCCARE360 implementation; and in an earlier roles as a Public Information Officer and Communications Unit Manager in the Division of Public Health - Public Health Preparedness and Response Branch. LaQuana earned a BS in Public Health Education from UNC at Greensboro, a Master of Public Administration from North Carolina Central University, and was a Community Mobilization Fellow at the Black AIDS Institute – African American HIV University in Los Angeles, California.

Sarah C. Ridout, MBA, SPHR, is the Healthy Opportunities Pilot (HOP) Program Director for Community Care of the Lower Cape Fear (CCLCF) where she focuses on implementation, monitoring and evaluation of the HOP program along with an incredibly talented team and network of organizations within a six-county region. Sarah’s previous work includes leading communication and grant writing efforts for CCLCF, grant management and compliance for a program funded by the Assistance to Firefighters Grant through FEMA and managing local and international projects for training & development, process

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improvement, and strategic planning. Sarah holds a Bachelor's Degree in Marketing and a Master's in Business Administration.

Melissa Young Roupe, MSN, RN, is the Vice President for Healthy Opportunities at Access East, Inc. Melissa provides visionary leadership to improve the health and well-being of community members in eastern NC. The North Carolina Department of Health and Human Services selected Access East, Inc. as one of three organizations to serve three regions of the state in the Healthy Opportunities Pilots Program. As a native eastern North Carolinian, Melissa understands the challenges of rural eastern NC and appreciates the value of partnerships to move the needle on difficult health issues. Through the development of innovative, non-traditional partnerships, Melissa is leading Access East, Inc.'s efforts to address social determinants of health through the Healthy Opportunities Pilot.

Robert Saunders, PhD, is a Senior Research Director, Health Care Transformation, at the Duke-Margolis Center for Health Policy. Dr. Saunders is part of the Center's Executive team and leads the strategic design, management, and direction of the health care transformation research domain within the Center. The strategic goals for his portfolio include generating practical evidence on payment and delivery reforms, identifying lessons learned from COVID, develop new ways to meet people's social needs and improve health equity, support North Carolina and other states in their efforts to improve health and value, and inform policy through convenings and stakeholder engagement. Prior to joining Duke-Margolis, Dr. Saunders was a Senior Director and then Senior Advisor to the President of the National Quality Forum, Senior Program Officer at the Institute of Medicine, and managed health care legislative affairs for Representative Rush D. Holt. He has a PhD in Physics from Duke University, where he focused on improving medical imaging for early stage cancer diagnosis, and an undergraduate degree from William and Mary.

Amanda Van Vleet, MPH, is the Associate Director of Innovation at NC Medicaid in the North Carolina Department of Health and Human Services (NC DHHS), where she leads the design, implementation, and oversight of innovation initiatives in NC Medicaid, including the *Healthy Opportunities Pilots*. She was an inaugural Quality Policy Fellow at the National Quality Forum. Prior to her work at NC DHHS, she was Program Design and Payment Lead, Medicare Diabetes Prevention Program, at the Center for Medicare & Medicaid Innovation. She was also the Special Assistant to the Executive Vice President and a Policy Analyst at the Kaiser Family Foundation, Program Associate at the Center for Health Care Strategies, and worked on health care and other legislative issues for U.S. Representative Ann Kirkpatrick (AZ-01). She has also worked with New York City's Office of Citywide Health Insurance Access. She earned her MPH in Health Policy and Management from the Columbia University Mailman School of Public Health, and her BBA in Consulting & Venture Management and International Business from Emory University's Goizueta Business School.

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