



# CHC ENTRY-LEVEL WORKFORCE PROJECTS: LESSONS LEARNED

#### Introductions:

# Welcome and Introduction to the RCHN Community Health Foundation Webcast Series by

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## Aligning Workforce & Patient Care

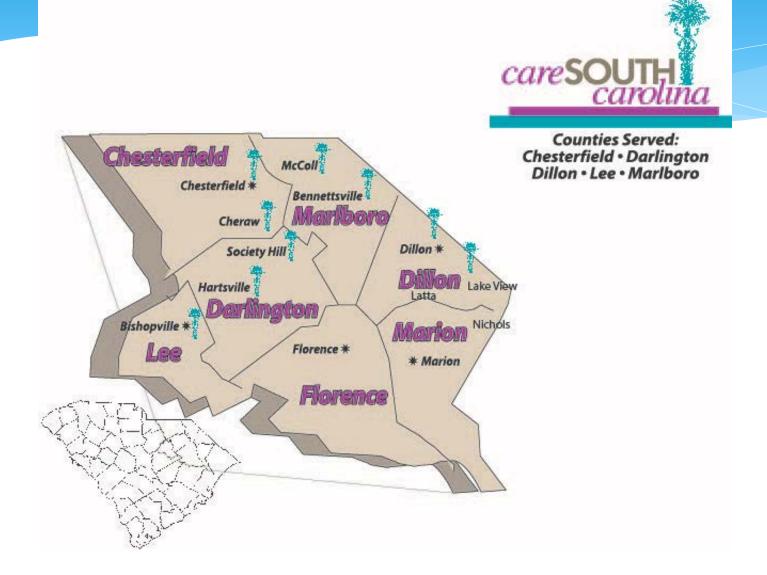
CareSouth Carolina, Inc. Hartsville, SC



### Who is CareSouth Carolina, Inc.

- \* CareSouth Carolina is a federally qualified community health center that is JCAHO-accredited and a Patient Centered Medical Home in the Pee-Dee area of South Carolina.
  - \* CSC Serves Chesterfield, Darlington, Dillon, Lee and Marlboro Counties.
- \* With more than 300 employees spread throughout our organization, we serve over 32,000 patients, 49% of whom have no health insurance.
- \* CareSouth Carolina has been distinguished as a national model of success in the delivery of health services to people in need in rural communities.

### CareSouth Carolina, Inc. Locations...



## CareSouth Carolina, Inc.

#### \* Mission

- \* As a community health center, we build healthy communities, provide premier patient centered health care homes and deliver community services for everyone.
- \* Vision
  - \* Lead the transformation of community centered care and services.
- \* Our Values help keep us aligned in our overall mission and values....
  - \* Teamwork, Excellence, Joy, Respect and Integrity to everyone in every situation.

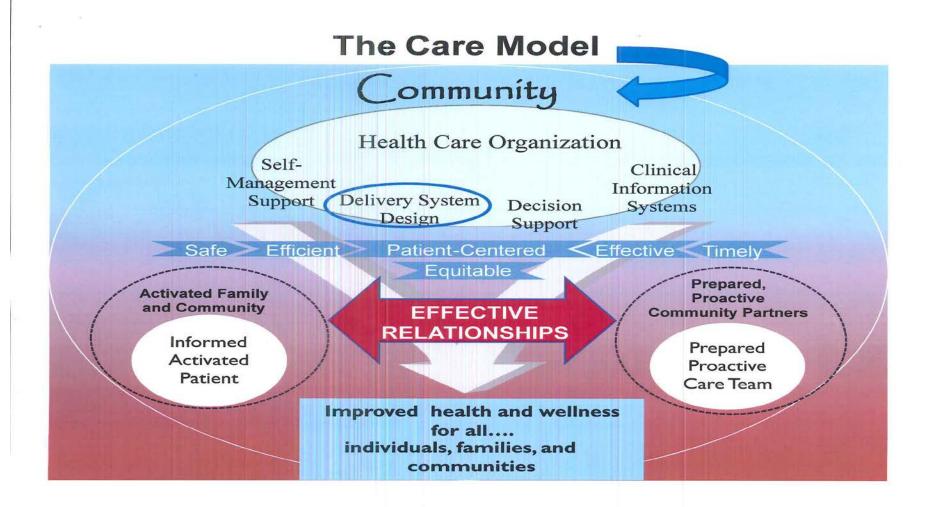
## Background – Convergence

- RCHN Community Health Foundation
  - Improve entry-level workforce capabilities and institutionalize the Patient Centered Care Team model
- \* SC Community Health Worker Demonstration
  - \* 1 of only 16 practices in SC invited to participate to prove the effectiveness of CHW's on health and cost
- \* SC Healthy Outreach Plan (HOP) Hospital Partners
  - \* CHW services to 1) high utilizers of the E/R; 2) have no health insurance; and 3) have chronic condition.
- Robert Wood Johnson Foundation LEAP Project
  - \* Learning from Effective Ambulatory Practices 1 of 30 practices in the nation.

#### CSC's Goal with this endeavor...

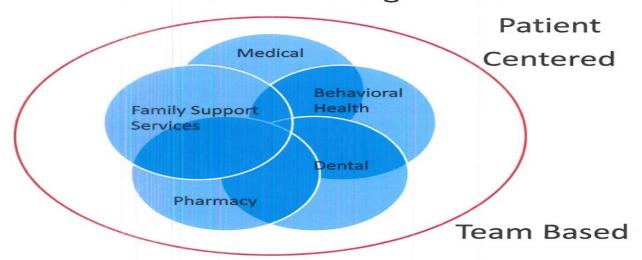
- \* The goal of CareSouth Carolina, Inc. was to implement and accelerate a workforce development program that improves entry-level workforce capabilities and focuses on the Patient Centered Medical Home and the use of the Care Model.
- \* The Care Model utilizes the following staff along with the patient themselves:
  - \* Provider (MD or FNP), Certified Medical Assistant/LPN, Front Office, Medical Records and a Community Health Worker.

#### Care Team Model at CSC...



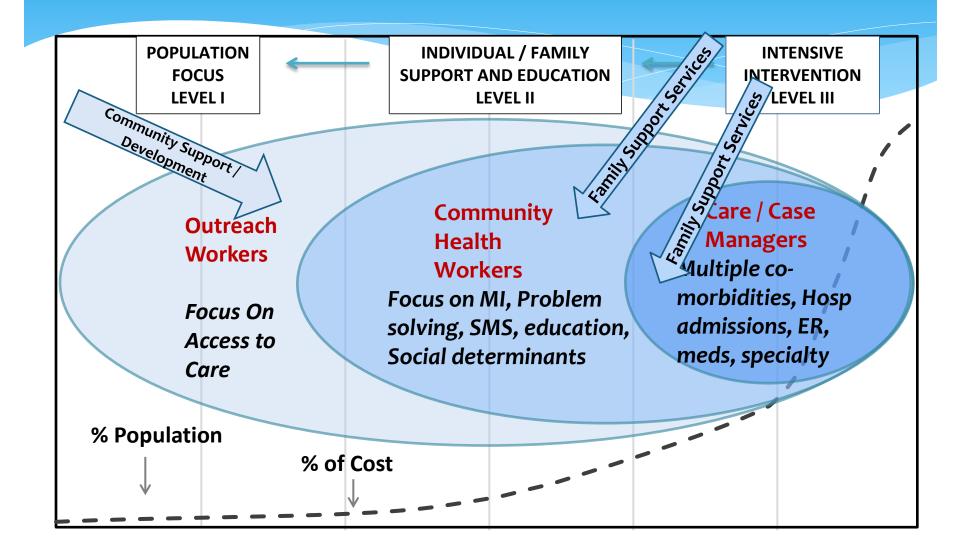
# CareSouth Carolina, Inc. – Delivery System...

The CSC Health and Wellness Program
AKA the Delivery System Design
within the Health Care Organization



Taking the Care Model and integrating it into the overall care of the patients utilizing all employees and producing better healthcare results.

## Range of Family & Support Services



# CareSouth Carolina, Inc. and Northeastern Technical College

- \* CareSouth Carolina and Northeastern Technical College undertook this challenge and took on three goals.
  - \* Implement an accelerated CSC workforce development strategy that improves entry-level workforce capabilities and institutionalizes the Patient Centered Care Team model as the cornerstone of the organization's delivery of services.
  - \* Implementation of a Certified Medical Assistant higher education program at the local level, in partnership with Northeastern Technical College, that contributes to entry-level workforce enhancement at the CHC, as an integral part of the Patient Centered Care Team, and at the community level.
  - \* Implementation of a Community Health Worker curriculum and program at the local level, in partnership with Northeastern Technical College, that contributes to entry-level workforce enhancement at the CHC, as an integral part of the Patient Centered Care Team, and at the community level.



#### CareSouth Carolina and NETC Goal 1.

- \* Develop/Accelerate training related to patient activation, motivational interview etc...
  - Our current program is very robust and covers many areas and we are constantly adding to it. They cover CPR/BLS, Customer Service, Diversity, Team Building, Computer Assessment/MS Office and Cross Training is becoming a stronger emphasis.
- \* Develop and implement a team-based incentive structure...
  - New competence evaluation as being designed to include all entry level and lower tier staff to include Medical Records, Keyers and Front Office.
- \* Implement career ladders for all entry level staff...
  - \* Our career ladder is changing to include various levels of MOA (MOA 1, MOA 2, etc...) Medical Records (HIM 1, HIM 2, etc...) CHW (CHW 1, CHW 2, etc...). This will include different levels of responsibility and a more accessible path forward to advancement.



- Formalize a mentoring / job coaching program...
  - \* CSC uses this approach with all new hires. After our HR orientation, they are released to their Technical Advisor, which is a specialist in their field of work.
  - \* We also use our 6-month assessment tool, known as the "roadmap to the future" which allows us to gauge their talents and find where their passion lies to help move them in the right direction.
- Build internal health center capacity to "train our own"...
  - CSC utilizes a train our own atmosphere.
    Trainings are conducted in house by our various department heads and technical advisors. Our most recent addition to this is our conversion to the Electronic Health Record.

#### CareSouth Carolina and NETC Goal 2.

- NETC has successfully instituted the Certified Medical Assistant Program at the Community Level.
- \* Class instruction includes: Medical law and ethics, medical terminology, medical office management, anatomy and physiology, exam room procedures, laboratory procedures, minor surgical procedures, medication administration procedures and first aid.





- \* The Certified Medical Assistant (CMA) Program at NETC has been based off of Greenville Technical Colleges Program in Greenville, SC.
- Medical Assistants perform the routine administrative and clinical task to keep our offices running smoothly
- \* They will play a key role in our Patient Centered Medical Home and Care Team Model.













<u>CMA Class 1:</u> Franklin "Van" Carlisle, Shae McDuffie, Elisha Harrington, Teresa Adkins, Deloras Jackson, Priscilla Price.

# CareSouth Carolina and NETC Goal 2 - Continued.

One course, nine months in length has been started thus far. It has 528 hours of class room time and 160 hours of clinical time.

Class One – Currently in Progress– (6 CareSouth Employees and 14 members from Community)





#### CareSouth Carolina and NETC Goal 3.

- NETC has successfully instituted the Community Health Worker Program at the Community Level.
- \* Class objectives are: outreach methods/strategies, client/community assessment, effective communication, culturally based communication/care, health education for behavior change, support, advocate and coordinate care for clients, public health concepts and approaches, community capacity building, ethics and writing/technical communication.





- \* The Community Health Worker (CHW) Program at NETC has been based off of Minnesota's curriculum for CHW's.
  - \* CHW's are frontline public health workers that have a great understanding of the communities they serve.
  - \* They help individuals/families access community resources/services to improve their health.
  - \* They deliver health information using culturally appropriate terms and concepts.
  - \* They help decrease emergency room visits and hospitalizations by improving utilization of the primary care physician and increase the partnership between the patient and the physician/medical homes.



NETC CHW Class 1: Front row – Brenda Petruccelli, Jessica Brunetti, Judy O'Neal, Carrie Burch. Back row – Hannah Parler, Marianne Liebenberg, Rhonda Fedorchuk, Tammy Gosnell

# CareSouth Carolina and NETC Goal 3 - Continued.

Two courses, both 6 weeks in length have been completed thus far and the third class is half way through completion.

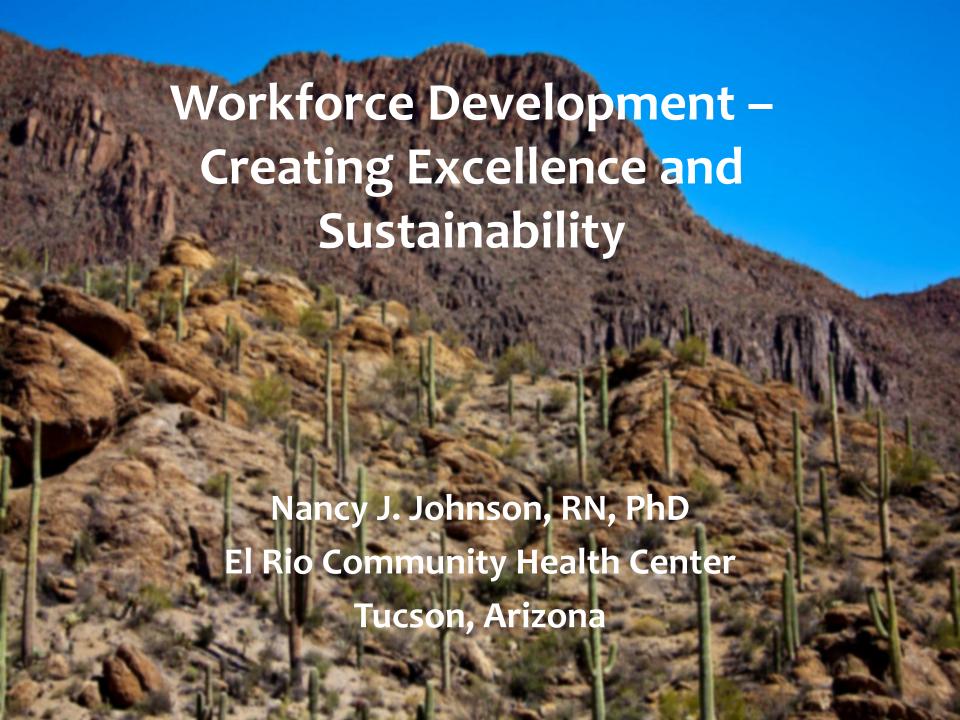
Class One – 100% pass rate – (5 CareSouth Employees and 3 members from Community)

Class Two – 75% pass rate – ( 12 Members of community)

Class Three – Currently in Progress – (10 Members of Community)







#### Our Mission and Vision

#### Vision

To be a national model of excellent healthcare.

#### Mission

Improving the health of our community through comprehensive, accessible, affordable, quality and compassionate care.



## El Rio Community Health Center

- Tucson, Arizona
- More than 325,000 visits per year
- About 1,000 employees, students and volunteers
- Provides a medical home for over 82,000 Pima County residents
- Wide diversity of ethnicity, language and culture within our patient and employee population



### RCHN Foundation Project Overview



- Changing health care delivery systems and models of care in FQHCs
- Goal of the Triple Aim
- Need for an integrated recruitment, training and retention system for El Rio which supports ongoing learning and development for our employees

# Establish El Rio as one of Tucson's premiere places of employment

- Thirty-five community tours and job fairs highlighting our PCMH, interdisciplinary care models and innovative programs, services and technologies.
- Provision of 42 internships for students including medical assistants, front office associates, pharmacy technicians, dental assistants, community outreach interns and pre-health students
- Collaborative OTJ programs with Goodwill and City of South Tucson
- Health Center nursing leadership serving on advisory boards at local community college for the MA, LPN and RN Programs

# Programs for new/existing entry employees to prepare for the future health care delivery model

 Development of HCA 154: Introduction to Health Care Delivery in collaboration with Pima Community College – completed successfully by 18 employees (14 of who are continuing their education towards an Associates Degree)

 Establishment of an annual teaching cycle of sponsored credit courses (currently offering Writing Course with community college and planning for the Fall Semester)

# Create and operationalize internal career ladders for existing entry level employees

- Review and analysis of all job descriptions
- Medical Assistant Career Development Program
- Online Training Programs Developed
- Entry Level Employee Skills Fairs

#### Secure Relationships for Formal Ongoing Education for Entry Level Employees with Academic Organizations

- Programmatic Agreement with Pima Community College
- Service Learning Agreement with Grand Canyon University College of Nursing







#### Successes and Lessons Learned

- Our positive image as a premier workplace is growing based on mission/vision, community outreach and new website (www.elrio.org)
- Pima Community College is a strong partner
- Onsite credit classes, career ladders and online learning positively received by employees
- Challenges with our workforce around reading/writing skills, time to devote to additional training during and after work hours

# QUESTIONS ??











## Point of Entry Project

Training Our Entry-Level Workforce to Meet the Needs of Our Patients and Improve Retention Rates

## Recognizing the Need

Entry level staff is an important part of an FQHC – Giving them the tools necessary to succeed in their work means the success of the organization.



#### A Collaborative Effort With...

Funding Provided by: RCHN Community Health Foundation Training By:

- Health Center Network of New York (HCNNY)
- National Center for Farmworker Health (NCFH)

#### Participants:

- Finger Lakes Community Health
- Hudson River Health Center
- Oak Orchard Community Health



# Tools Used to Achieve the Goals

- Employee Satisfaction Surveys
- **❖** Baseline Measurement of Turnover
- **❖**Needs Assessment
- **❖** EMR Workflow Evaluation and Standard Development
- ❖ Development of Training Curriculum
- ❖ Post Training Satisfaction Survey



# A Three Pronged Approach

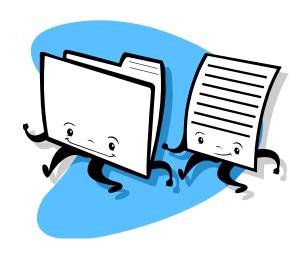
#### Train the trainer in:

- **Understanding the intake process in the context of FQHC mission and requirements.**
- **Cultural competence/population-appropriate communication.**
- **Executing intake procedures using an electronic medical record system.**



# Why Is All Of This Necessary?

Understanding the intake process in the context of FQHC mission and requirements.





# I Speak The Language...

# Cultural competence/population-appropriate communication.





# **Understanding Our EMR**

Executing intake procedures using an electronic medical record system.





# Training = Workplace Satisfaction & Accuracy = Retention





# Questions



#### **Enedina Marquez, Operations Manager**

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# Operations New Hire and Mentor Academies Lessons Learned

May 12, 2014





# **About OneWorld**



#### **Organizationally:**

- In Omaha, NE; 9 Locations
- Unique Patients: 27,108 (个15.9%)
- Visits: 116,047 Visits (个 9.9%)
- FTEs: 265 FTEs (309 People) (个 18%)

#### **Operations Front Line:**

- Front desk & appointment schedulers
- Medical records clerks
- Patient financial advocates
- Community outreach workers
- Patient support workers
- Marketplace enrollment specialists



# Front-Line Workforce Challenges

- High demand for a very specific, limited labor pool must be bilingual (Spanish) and culturally competent
- Lack of experience necessary for job success;
  - must have or able to learn medical vocabulary in two languages,
  - communication skills, computer skills,
  - customer service and basic office etiquette
- Current staff feedback expressed a desire for more opportunities to learn and grow
- Lack of direct career path options once through the Operations Department front door



# **Program Goals**

- 1. Establish a New Hire Learning Academy
- 2. Implement a career ladder model
- 3. Train seasoned operations staff as mentors

To maximize departmental productivity and satisfaction, minimize turnover and grow future organizational leaders.



# **Academy Core Competencies**

#### **New Hire**

- ACCOUNTABILITY
- ACHIEVEMENT ORIENTATION
- COMMUNICATION
- PROFESSIONALISM
- ORGANIZATIONAL AWARENESS

#### Mentor

- PEER SUPPORT
- IMPACT & INFLUENCE
- COMMUNICATION
- ORGANIZATIONAL AWARENESS
- EFFECTIVE MENTORING/COACHING



# New Hire Learning Academy

#### **CURRICULUM**

	Classroom Training		Online Learning		Job Shadow / Observation
•	OneWorld History, Mission, Vision,	•	Cultural Diversity for Non-	•	Operations Staff: to
	and Values		Clinical Staff		learn new hire role
•	Departmental Orientation	•	Confidentiality & HIPAA		among the team
•	Electronic Health Record	•	Competency exams for key	•	Medical Providers: to
	Orientation		classroom courses		learn clinic operations
•	"Road map to Success at	•	<b>Customer Relations</b>	•	Mentors and trainers
	OneWorld"	•	Electronic Health Record		observe new employee
•	Employee Empowerment and		Practice		on the job and provide
	Personal Improvement	•	Medical Terminology,		feedback.
•	Customer Service &		Spanish/English Translation,		
	Professionalism		& Abbreviations		
•	Patient Rights & Responsibilities	•	Job-Specific Task		
•	Handling Patient Complaints		Competency Assessments		



**Emergency Codes** 

## MENTOR ACADEMY

#### **CRITERIA**

- Meets or exceeds
   performance expectations on at least last two evaluations
- 2. Shows capacity to positively impact/influence peers
- 3. Demonstrates initiative
- Exhibits passion and capacity for developing people
- 5. Desires professional growth

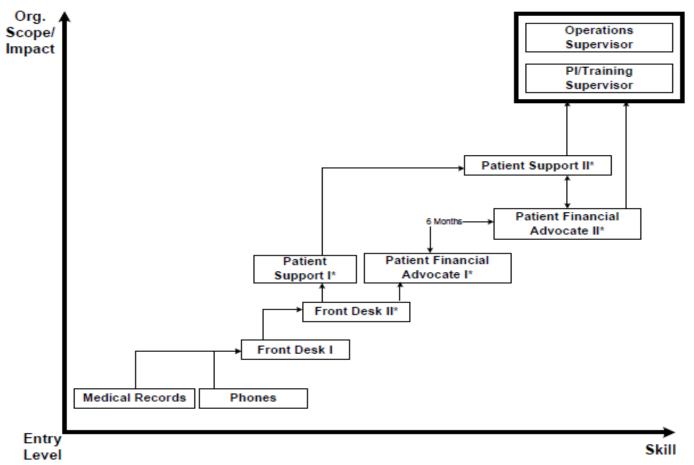
#### **CURRICULUM**

- Session 1: Mentor Kick Off Understanding Roles and Expectations
- Session 2: Understanding Coaching & Mentoring Preferences
- **Session 3:** Providing Feedback
- Session 4: Understanding How People Learn
- Session 5: Assessing and Reporting Progress



## CAREER LADDER

#### Taught in the New Hire & Mentor Academies



\* = May become an Operations Mentor



# **Program Evaluation**

	Method	Interval		
Program	Operations Employee Satisfaction	Quarterly		
Overall	Operations Turnover Rate	Monthly		
New Hire	Competency Self-Assessment	First Day of Training; 30 Days Post		
Academy		Training		
	Training Course Exams	Throughout Orientation		
	Job Competency Exams	Day 7 and Day 10		
	Lessons Learned Feedback Sessions	Monthly		
	Evaluation of Training	30 Days Post Hire		
	Content/Effectiveness	• 30, 90 and 180 Days Post Hire		
	Evaluation of Mentor Effectiveness	• 10, 30, 90, 180 Days Post Hire		
	Mentee Progress Reports from Mentor			
Mentor	Satisfaction with Mentor Academy	Upon completion of the Academy		
Academy	Content			
	Effectiveness of Mentor Academy	Monthly		
	Content	30 Days Post Mentee Assignment		
	<ul> <li>Lessons Learned Feedback Sessions</li> </ul>			
	<ul> <li>Mentor Effectiveness Self-Assessment</li> </ul>			



# Lessons Learned

- Program Delivery and Curriculum Design
  - Evaluate existing NEO
  - Strategy for Internal Transfers
  - Variable Class Size Strategy
  - Build in Down Time
  - Structure Job Specific Training Time
  - Consider new hire mind set when evaluating progress
  - Create re-training thresholds
- Relationships and Role Clarity
- Communication
- Contingency Planning





# Questions?



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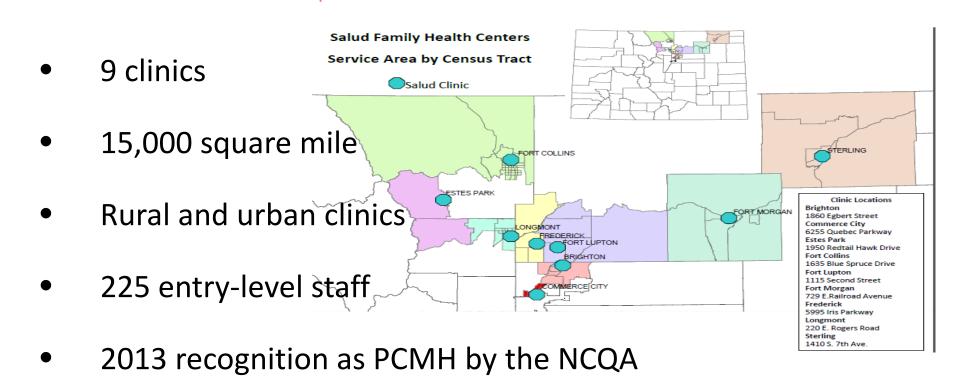
Recruitment & Retention of Entry-level Staff

# Positive and Sustainable Change



Teri Brogdon, MA.Ed., Education and Training Director, Salud Family Health Centers, Funding made possible by a grant from the RCHN Community Health Foundation







# Focused Goals

#### **Identified Goals**

1. Develop relationships for recruitment

2. Design structured training programs

3. Develop tiered career paths

#### **Create Mindset**

**≻**Collaboration

> Teaching and Learning Model

Commitment to Human Capital



# Community Collaboration

#### Who?

#### **Results**

1. Workforce Centers

- Connections with HR
- > Youth programs

2. Area High Schools

- Students tour clinics
- Student Road Trips

3. Colleges

- Career training programs
- > CHC content sharing



# Community Collaboration

#### Who?

Colorado Workforce
 2020 Initiative

2. WIB, Workforce Investment Board

#### Result

- > Community stakeholders
  - > Colleges
  - **Clinics**
  - > Hospitals
  - > High Schools
- Productive Networking
  - **➤ Middle Occupations**
  - > Stackable Certificates
  - Hiring Practices
  - Employment needs vs candidate skills



# Career Ladders

# **How - Development**

- Needs Assessments digital & paper/pencil
- 2. Focus Groups for employee input
- 3. Summarize employee input

# **Key Resources**

- Providers, entry-level staff, administration staff
- 1 hour per group
  - > Entry level staff
  - > Lunch hour
  - > Top 3 questions
- Graphs and charts shared with executive team
  - Collaborative decision making process



# Career Ladders

# **Implementation**

1. Finalize ladder chart positions-skills

2. Analyze financial impact

3. Organizational communication plan

# **Resources Required**

- Executive team & department input
- > CFO, HR, Exec Team consensus
  - Id employee count per position
  - Determine timeline
  - Infuse motivators i.e. bonuses, certificates, salary "bumps"
- Tools to communicate
  - ➤ Manager meetings big picture
  - Fast Facts sheet detail picture
  - Onsite visits hands on assistance



#### Medical Assisting Career Ladders

#### **Medical Assistant Rank Requirements**

	MA Trainee	Clinical Associate I	Clinical Associate II	Clinical Associate III	Clinical Associate IV	Clinical Specialist MA	Clinical Specialist Coordinator	Clinical Pod Lead
*Required Employment Experience	0-3 Months Salud	3 Months Salud	2 yrs. Salud Or 3 yrs. Other Experience	3 yrs. Salud OR 4.5 yrs. Other Experience	4 yrs. Salud Or 5.5 yrs. Other Experience	5 yrs. Salud Or 6.5 yrs. Other Experience	5.5 yrs. Salud Or 6.5 yrs. Other Experience	5.5 yrs. Salud Or 6.5 yrs. Other Experience
Required Credentials	High School Diploma	High School Diploma	Medical Assisting Credential or LPN – Updated and Current					
Required Salud Trainings	All New Employee Mandatory Trainings	Level I Courses All Employee Mandatory Trainings	Level 2 Courses All Employee Mandatory Trainings	Level 3 Courses All Employee Mandatory Trainings	Level 4 courses All Employee Mandatory Trainings	Salud Leadership and Supervision Training Lab Designee Training Employee Mandatory Training Successful Testing for at least 2: Quality Specialist OB Coordinator Immunization Referral Triage		
Required Competencie s	Successful Initial Competency	Must Advance	Successful Completion of Annual Competencies  Lab  Medical Procedure Immunization Electronic Health Record  Must Advance None None Completion of a Salud Improvement Project					
Improvement Activity	CA I	to CA II	Required	Required	None Required		of Project by a co	
Required Performance Review	Satisfactory Performance		Annual Satisfactory Performance					

<sup>\*</sup>Individual experience and qualifications will be considered at the discretion of the supervisor.



# Career Ladders

# **Implementation**

Determine
 methodology to enter
 a ladder position

2. Stages of implementation

## **Methods**

- Employee Development Plan
  - > Apply for ladder position
  - > Letter of recommendation
  - Complete required courses
  - Patient satisfaction scores
- Customer Service and CHC Course
- Credentialing
- Application to advance
- Partner with credentialing organizations
  - Registration assistance
  - Paid time
  - Review courses provided



# Curriculum

# **Developed**

#### Results

- Medical assistant training
- MA revised curriculum developed & approved by State of Colorado
  - Aligned with Allied Bureau of Health Education Schools standards
  - > 24 week curriculum 160 hr. externship

- 2. Customer Service
- Established 1fte Customer Service Trainer
  - Develop Salud program
  - > Teach and train all staff clinics
  - Observe and give feedback ongoing
- CMS required MA Credentialing tied to Meaningful Use
- All MA's credentialed by July 2015
  - Registration, practice test, review course& exam costs paid for by Salud



# Community HealthCorps















# Overview

- Launched by the National Association of Community Health Centers (NACHC) in 1995
- Largest health-focused AmeriCorps program that promotes health care for America's underserved, while developing tomorrow's health care workforce.
- Community HealthCorps Members try to help people who have no regular primary care provider to:
  - Increase access to health care
  - Provide health education
  - Recruit and develop volunteers for health centers



The *mission* of Community HealthCorps is to improve healthcare access and enhance workforce development for community health centers through national service programs.

The *vision* of Community HealthCorps is to become a national service pipeline for careers in community health centers that is improving access to necessary primary and preventative care services for the medically underserved.



## **Benefits of Serving**

- Living Allowance
- Education Award earned after successful completion of agreed upon term of service, can be used to pay off federally qualified student loans and for future schooling
- Health Insurance for Members who are not otherwise covered
- Child Care assistance for Members meeting eligibility requirements
- Loan forbearance and payment of accrued interest while serving upon successful completion
- Unique training opportunities and experience related to community health



#### **Service Activities**

- **Direct Service**: Work that addresses unmet human needs, the environment, public safety, and/or education. Examples include:
  - Outreach & Advocacy: Conduct outreach in the community and provide education about health insurance eligibility, available health and related programs, and health care options
  - Enrollment: Assist individuals with the enrollment process for health programs, health insurance plans, and/or pharmaceutical assistance programs.
  - Improve Utilization of Health Services and Programs: Provide linguistically and culturally appropriate translations, provide transportation assistance, provide health education in one-on-one or group settings, assist individuals with navigating health and related services/programs, etc.



#### Ideal Community HealthCorps Placements

- Outreach to vulnerable and/or underserved populations
- Development of new position(s)
- Involve service that would not otherwise get done and/or expands availability of services
- Utilizes unique talents of individual Members
- Does not displace or duplicate any paid employee providing the same or similar service at the site
- Provides opportunities for Community HealthCorps Members to perform direct service activities that that address health and/or human needs in the community



#### Performance Measures

- ACCESS TO CARE educating and / or coaching economically disadvantaged individuals regarding the importance of proper management of chronic conditions and share strategies for managing those conditions to help reduce the need for unnecessary primary care intervention and the costs related to these interventions.
- <u>FINANCIAL LITERACY</u> emphasizing economic opportunity with a focus on engaging economically disadvantaged individuals to improve their financial knowledge as it relates to health care.
- <u>INDEPENDENT LIVING</u> assisting older adults and individuals with disabilities with receiving food, transportation, or other services that will allow them to live independently.



# Training will be conducted by the Program Coordinator & Site Supervisor

#### **Pre-Service Orientation:**

 Provides an in-depth introduction to the Community HealthCorps, its objectives, performance measures, and policies and procedures at the beginning of the term of service.

Placement Site Orientation – conducted by the site supervisor and other staff, introduces the new AmeriCorps Member to the community, organization, project, and assignment description during the first few weeks at the placement site

#### **On-Going Training:**

- Prescription for Success Curriculum required for all Members by April 30 of the program year
- Spokesperson Trainings: Elevator Speech & Great Story training
- Develop knowledge & skills the Member and supervisor identified as required in reviewing the assignment description
- Regularly scheduled team meetings
- **Life After AmeriCorps** Designed to provide Members with the necessary tools to transition from a year of service to a professional career or further schooling, and should build professional skills
- Other examples include Member Development calls hosted by NACHC and local training opportunities when available



For further information about Community HealthCorps, visit www.communityhealthcorps.org



#### **Selected Resources:**

- The States' Next Challenge Securing Primary Care for Expanded Medicaid Populations. N Engl J Med 2011; 364:493-495
- Kaiser Family Foundation. Community Health Centers in an Era of Health Reform: An Overview and Key Challenges to Health Center Growth. (2013) http://www.kff.org/uninsured/upload/8098-03.pdf
- National Association of Community Health Centers, Robert Graham Center, The George Washington University School of Public Health and Health Services. Access Transformed: Building a Primary Care Workforce for the 21st Century. Bethesda, MD; 2008.
- RCHN CHF Request for Proposals on Health Center Entry-Level
  Workforce Recruitment and Retention Models 2012.
  <a href="http://www.rchnfoundation.org/images/FE/chain207siteType8/site176/client/RCHN%20CHF%20Workforce%20RFP%202012.pdf">http://www.rchnfoundation.org/images/FE/chain207siteType8/site176/client/RCHN%20CHF%20Workforce%20RFP%202012.pdf</a>



#### Thank You

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