Introduction

Community Health Project, Inc. dba Callen-Lorde Community Health Center (Callen-Lorde) was established 50 years ago, when two volunteer-based clinics that provided screening and treatment for sexually-transmitted diseases merged to create a mostly volunteer-staffed, episodic care program housing the nation’s first community-based HIV clinic. Today, Callen-Lorde is the global leader in lesbian, gay, bisexual, transgender and queer (LGBTQ) health care, transforming lives in our communities through excellent comprehensive care, provided with cultural and clinical knowledge and free of judgment. We are welcoming to all, regardless of ability to pay.

Callen-Lorde is at an important moment in the organization’s history, celebrating 50 years of LGBTQ health care in 2019. We are no longer a small, grassroots organization run by volunteers, but a thriving, professional Federally Qualified Community Health Center (FQHC) network with over 350 employees who care for nearly 18,000 patients each year. After large scale capacity building in the 2010s, Callen-Lorde again finds ourselves at the precipice of major growth. Opening a new site in downtown Brooklyn is expected to welcome over 100 new employees and grow patient care by over 60% when fully operational.

This advancement is enormously exciting – and, growing responsibly requires thoughtful planning and diligence. Callen-Lorde is confronted with a series of critical questions. What does growth look like after Brooklyn in the cut-throat New York City real estate market? What will be the financial impact for the next phase of expansion – and how will we prioritize future opportunities? How can we best care for our staff – our most valuable resource – to ensure the capability for advancement and that equity and inclusion are indelibly sewn into the bedrock of everything that Callen-Lorde does, across all levels of the organization? How do we continue to dream big about broadening our impact locally, nationally and internationally amidst the bustling business of on-the-ground operations? And, how do we best seize upon and sustain the opportunities in patient care offered by emerging technologies and modalities?

The 2019 – 2021 Strategic Plan provides a framework to guide Callen-Lorde through this pivotal period of growth. Building on pillars that were set forth in prior planning efforts, this plan lays out a series of actions responsive to the imperatives of the moment. This plan combines tactical planning with information gathering and analysis, moving the organization ever forward while at the same time arming ourselves with the data needed to make difficult decisions in the years to come.
Prior Strategic Plan: How did we get here?

During the past five years, Callen-Lorde has undertaken important strategic planning efforts to provide a roadmap for the next phase of the organization’s growth. This process began in 2013 with a large-scale values assessment that engaged various stakeholders over an eight month process. Ratified in 2014, the plan recommended that Callen-Lorde pursue five strategic priorities to drive business decision making, divided among near, mid and long term timeframes.

These priorities were arrived at through an inclusive values assessment process collected through surveys, focus groups and key informant interviews. The process revisited and ultimately reaffirmed Callen-Lorde’s mission and service delivery model – the board, staff and planning committee unanimously agreed that Callen-Lorde should continue to provide primary medical, dental and mental health care focused on LGBTQ communities. The priorities that resulted articulate a strategy for Callen-Lorde to continue meeting its core mission by remaining financially viable, and to expand capacity in order to respond to ever increasing demand from the communities we serve.

In the ensuing years, Callen-Lorde took important steps towards advancing these strategic pillars. In the near term, Callen-Lorde had the imperative to prioritize financial sustainability. We took measures to monitor and maximize reimbursement through third party payers and explored opportunities to collaborate with LGBTQ-serving partner organizations. Callen-Lorde also made significant progress to increase the number of patients served and expand our capacity: in 2015, we successfully competed for a New Access Point grant and became a designated homeless health center in the South Bronx with the capacity to serve over 1,500 additional patients. In early 2017, we signed a lease on a new 25,000 square foot site in Brooklyn, slated to open in early 2020 and serve over 15,000 additional patients at full operational capacity.
Subsequent planning in 2017 focused on carrying these priorities forward through concrete tactics and actionable projects. The primary tactical activities outlined in that plan include:

- Conducting a new Brooklyn community needs assessment to inform capacity expansion planning;
- Implementing a multi-year diversity, equity and inclusion initiative to strengthen organizational culture and patient care by working against racism, transphobia, sexism, homophobia, ableism, as well as bias writ large;
- Continued planning and infrastructure building to ensure ongoing financial sustainability during a time of tremendous uncertainty; and
- Laying the groundwork to further our impact as a model for LGBTQ health care by training the next generation of Advanced Practice Nurses committed to the provision of primary care through a year-long fellowship program.

Having taken significant action to forward these priorities from 2017 to the present, Callen-Lorde finds ourselves again in the position to refresh our perspective and set organizational targets for the next three years. The overarching pillars that were ratified in 2014 remain relevant today, with a triple focus on financial stability, expanding capacity and increasing our impact. Accordingly, we propose to implement a tactical plan that builds clearly upon the work outlined in our previous plan, guiding the organization through this tumultuous time in the local and national health care environment.

Strategic Plan, Fiscal Years 2019 – 2021

Setting the Context

New York City is home to a health care system in crisis. Underused inpatient beds and poor hospital financial performance lead to rampant hospital closings, mergers and acquisitions over the last decade. New York’s Governor’s Office, Office of the Mayor, public officials and organizations across the state, including the New York State Department of Health and the Community Health Center Association of New York State (the state’s Primary Care Association), have called for a transition from hospital-centric systems of care to grow community-based safety nets and expand access to community health centers.

In the increasingly competitive health care environment in New York City, expansion and growth are a key strategy to achieving financial sustainability. Success in a value-based payment system depends upon factors that are enhanced by increased scale. For example, health care entities of all sizes must attend to regulatory compliance as well as rapidly evolving technology needs and opportunities, including the sophisticated analytics and Health Information Technology (HIT) capacity needed to provide population health and participate in risk-based contracting. While these demands are costly, they become more sustainable with scale. Moreover, scale increases leverage in rate negotiations with payers.
In this environmental context, Callen-Lorde is anticipating fiscal challenges related to increasing expenses and diminishing revenues. On the expense side, the ever-increasing complexity of the health care landscape demands ever more organizational resources for compliance with local, state and federal regulations; innovative use of technology; and, sophisticated data analytics. Moreover, Callen-Lorde’s growing workforce, approximately two thirds of whom work under a collective bargaining agreement with SIEU 1199, requires ongoing and increasing investment. On the revenue side, Callen-Lorde is monitoring policies at the federal and state level as well as market changes that will impact key revenue streams, including the 340B pharmacy program and drug pricing as well as New York State uncompensated care funding.

As the environment grows less stable, the organization continues to struggle with significantly greater demand for its services than capacity, with the primary hurdle for capacity expansion being physical space and real estate. Appointments are often booked out over four months into the future and most sites are forced to be closed to new patients, in order to ensure continuity of care for existing patients.

The next phase of the strategic plan for 2019 – 2021 represents a guide to address the challenges and opportunities. First and foremost, the organization will continue on a path of growth in response to unflagging need from our communities. We will also take steps to ensure ongoing sustainability, including through our growth, but additionally by exploring strategic partnerships and by developing a long term plan for the organization’s real estate assets and liabilities. Further, we will redouble our commitment to equitable and affirming space for our staff and patients, across all sites and locations. Thus, we will continue to focus our attention on diversity, equity and inclusion, and specifically building an intentional and explicit anti-racism culture, through a second phase of work that we will be doing for many years to come. Lastly, Callen-Lorde will further our efforts to expand access beyond our doors, by training the next generation of primary care providers in LGBTQ-affirming care, and by exploring the promise of telehealth.

The pillars of Callen-Lorde’s 2019-2021 strategic plan are encapsulated in the following four focus areas, which are detailed in the following report.

I. Becoming the size that our communities need us to be

II. Ensuring ongoing sustainability

III. Continuing our multi-year diversity, equity and inclusion initiative, with a focus on anti-racism

IV. Expanding our impact and sharing our expertise in LGBTQ health
Focus Area 1: Becoming the size that our community needs us to be

Callen-Lorde has experienced tremendous growth during the past 10 years, and the need for culturally and clinically competent health care for our communities continues to grow. For nearly a decade, community need has surpassed Callen-Lorde’s ability to expand to meet these needs. Many appointment types are regularly booked out over four months and most Callen-Lorde sites are closed to new patients, to ensure continuity of care and service availability for existing patients. Throughout 2018 and 2019, Callen-Lorde estimates that we have referred over 100 people each week to other partnering health centers due to the lack of physical capacity to serve them. These patients come to Callen-Lorde from across New York City and beyond, some of them traveling long distances for the opportunity to see a quality health care provider that treats them with respect, dignity and understanding.

Growth serves the strategic priority to enhance the organization’s sustainability by improving economies of scale. Callen-Lorde’s financial model benefits from growth. In today’s competitive healthcare environment, there is an imperative to maximize patient and service volume to the greatest extent possible. Reimbursement from third party payers for patient services represents a significant revenue stream for Callen-Lorde. With increased scale, the organization safeguards against potential challenges related to outlier events and unanticipated shifts in payer mix. In addition, attaining increased scale will advantage Callen-Lorde with regard to hospital and payer negotiations, as well as value-based payment arrangements. Becoming a larger organization renders Callen-Lorde a more desirable partner in potential merger or consolidation discussions, a factor that must be considered in the current health care environment. In the next several years, Callen-Lorde will pursue two main strategies for growth, by A) opening Callen-Lorde Brooklyn and B) pursuing opportunities to open satellite sites co-located with community partners.

Focus Area 1A) Brooklyn Expansion

Opening a site in Brooklyn has long been a strategic priority for the organization, cited in each of the past three Callen-Lorde strategic plans in 2010, 2014 and 2017. Historically, almost one third of Callen-Lorde’s patients travel from Brooklyn to receive care. The borough has consistently ranked as the expansion location of choice among patients and staff. In recent years, the need for the new site has grown more urgent, as our capacity to meet demand is limited.

Data from community needs assessments conducted in 2014 and 2017 by researchers at Hunter College demonstrates clearly the need for the new site among LGBTQ Brooklyn residents. Researchers surveyed a statistical sample of current LGBTQ Brooklyn residents, one third (33%) of whom are Callen-Lorde patients and two thirds (67%) who are not currently patients at Callen-Lorde. In all, 82.4% of prospective patients said that it is somewhat or extremely important for them to be able to discuss LGBTQ-specific health care concerns with their doctor, but only 31% reported that they are currently highly comfortable discussing these needs with their doctor, 10% report not being out to their doctor, and an additional 12% report that their doctor knows nothing or almost nothing about LGBTQ-specific health care. Nearly one-third of Brooklyn LGBTQ residents reported not having a regular source of care, and the number one reason given by those surveyed was a lack of LGBTQ-specific providers in the area.
Callen-Lorde possesses significant strengths that will enable the organization to successfully carry out the next era of growth. Callen-Lorde’s governing board stands ready to guide the organization through the implementation of the project, with current representation of the Brooklyn service area and the homeless target population in place. An experienced senior management team has laid the groundwork and conducted extensive planning to ensure that the project is responsive to community need and fully compliant with health center requirements. Callen-Lorde has been a model of compliance at its existing sites, most recently demonstrated through a perfect operational site visit from HRSA, with zero findings and additional recognition for use of a promising practice, as well as an audit by the New York State Department of Health for Article 28 licensed entities which yielded no findings. Callen-Lorde was recently recognized by CMS as an Exemplary Practice, as well as by HRSA as a National Quality Leader.

Callen-Lorde’s sites act as ‘magnet’ health centers – Callen-Lorde Brooklyn will draw patients from across the borough-wide service area. For this reason, locating the site in downtown Brooklyn within a centralized transportation hub is ideal, rendering the site accessible to those who most need our care. Centralized locations have long been a source of safety for LGBTQ patients who may not feel safe accessing LGBTQ health services in the communities where they live and work. Particularly among transgender patients, the bustling downtown environment may offer anonymity and protection from becoming the potential target of harassment or gender-based violence.

Callen-Lorde identified an ideal site at 40 Flatbush Ave Extension, on the third floor of a multi-use building at the base of the Manhattan Bridge. The Downtown Brooklyn neighborhood is a major business and transportation hub of and easily accessible via public transportation. A long-term lease has been executed for the entire 25,000 square foot floor, which was delivered to Callen-Lorde as a white box for construction and renovation and is, as of the writing of this plan, being built out. Callen-Lorde Brooklyn will house integrated primary medical care and behavioral health services as well as care coordination/case management and an onsite pharmacy. Pharmaceutical services will be provided by an onsite pharmacist and pharmaceutical technicians, staffed under a contract with an experienced pharmacy management contractor.

Construction and renovation, equipment, and initial outfitting is estimated to cost approximately $20 million. Callen-Lorde was competitively awarded $2.5 million in capital grant funding in March 2016 from the New York State Department of Health to build the site, attesting to the project’s ability to build primary care capacity in the local health care delivery system. The project is also financially supported through participation in the New Market Tax Credit program, which is designed to promote new business enterprises in low-income communities. Our lending partners in the program include Primary Care Development Corporation and Corporation for Supportive Housing, which is particularly invested in the health care for homeless and unstably housed patients that the Callen-Lorde Brooklyn will provide.
The site is designed to enhance the delivery of integrated care, with four separate “care pods” that each house an integrated care delivery team. Each care pod has its own waiting area, 6 treatment rooms and 4 consult rooms supported by utility rooms, storage space and clerical areas. Each care pod also features a shared work area with charting/work stations, storage, files and work counters. This design was enabled by regulatory changes in New York State with the introduction of the “Integrated Outpatient Services” license.

The layout allows for collaboration and flexibility in service delivery, with exam and counseling rooms clustered around a centralized care team work space. The co-located space encourages collaboration among care team members, including physicians, nurse practitioners, physician assistants, registered nurses, licensed practical nurses, medical assistants, psychiatric nurse practitioners, social workers, case managers, patient care associates, and prevention outreach providers. The design also reduces the waiting area footprint, optimizing the space for care delivery. A spacious one-level floor plan allows for streamlined registration processes and signage, which will translate to reduced wait times for appointments. Onsite pharmacy and laboratory access further reduces access barriers for patients.

During the first year ramping up the site, Callen-Lorde Brooklyn will occupy approximately one third of available exam and counseling rooms. When fully ramped up, Callen-Lorde Brooklyn will expand to use all available exam and counseling rooms, with the capacity to serve over 15,000 patients when fully operational.

Outcomes to be Tracked
- Open Callen-Lorde Brooklyn within required HRSA timeline related to either New Access Point or Change in Scope (anticipated Q2 2020)
- Serve 2,086 patients in calendar year 2020 (as proposed in Callen-Lorde’s New Access Point application)

Focus Area 1B): Satellite Sites
In the increasingly competitive health care environment in New York City, expansion and growth are a key strategy to achieving financial sustainability through economies of scale and leverage. Satellite sites represent an opportunity to achieve expansion goals without the additional challenge and expense of independently obtaining real estate. By co-locating services within partnering organizations with shared missions and target populations, Callen-Lorde can reach and serve additional patients, furthering our mission, strengthening partnerships and meeting community need - without considerable start-up or capital expense to the organization.

Current New York State Department of Health policy imposes extensive physical plant requirements for the provision of medical services (licensed under Article 28 of New York State public health law). For this reason, Callen-Lorde has chosen to explore opportunities for satellite expansion of behavioral health services, which are not subject to the same stringent – and costly – facility regulations.

Under our previous strategic plan, Callen-Lorde furthered our focus on strengthening partnerships with sister organizations serving our communities, as a way to expand our reach and provide holistic care for our patients. To this end, Callen-Lorde opened a very small, one evening a week satellite
practice co-located within The LGBT Community Center (The Center), where we provide mental health services for patients accessing substance abuse treatment services at The Center. Since welcoming our first patient at The Center in 2018, Callen-Lorde has provided mental health care for 71 patients making nearly 300 visits.

Callen-Lorde will build upon this valuable work over the next several years, as we continue to identify opportunities to better meet community need through partnerships and satellite expansion.

Callen-Lorde also participates in policy discussions regarding licensing and oversight of health care services, including serving on statewide committees focused on integration of behavioral health licensure. The New York State Department of Health is expected to release updated guidance regarding integrated licensure in calendar year 2019, which may include provisions that allow organizations to begin to provide integrated services for which they do not possess individual licensure. For Callen-Lorde, this may pave the way for the organization to offer a higher level of substance abuse services, particularly within these satellite opportunities.

Outcomes to be Tracked

- Develop pro-forma business and implementation plans for satellite Article 31 clinics co-located in partner organization facilities by Q4 2019
- Open at least one Article 31 licensed satellite clinic in a partner facility by Q2 2020

**Focus Area 2: Ensuring ongoing sustainability**

In the face of the complex and intersecting challenges described, Callen-Lorde needs to develop an internal strategy for ongoing sustainability to ensure that we meet the significant demand for our unique cultural acumen and clinical expertise in the years to come. During the next phase of strategic planning from 2019-2021, Callen-Lorde will gather the necessary insights to understand the viability of various strategies to address current and anticipated financial stressors. This includes exploring opportunities for strategic partnerships and studying the benefits gained through programmatic expansion and achieving greater economies of scale; and, assessing real estate and the potential to consolidate and save on lease-holdings. The other priorities explored separately in this report (see Focus Areas 1, 3 and 4) also lend themselves to ongoing sustainability – Callen-Lorde approaches sustainability from a specific tactical standpoint, as well as an overarching lens through which we view all strategic activity.

**Focus Area 2A): Strategic Partnerships**

Programmatic expansion through partnership offers the opportunity for Callen-Lorde to diversify revenue sources as well as expand its scope of services. Revenue and service diversification is critical in the face of potential revenue decreases and increasing expenses. Diversification also supports already planned program design changes that further integration of social services and clinical services. In such partnerships, Callen-Lorde would seek to evaluate the effects of integrated care delivery models in order to increase the impact of its undertaking and inform its own as well as others’ future integration efforts. Potential services partners under this model include those offering services critical to our patients and communities, including but not limited to substance abuse services under an Article 32 license (which Callen-Lorde does not currently possess), housing or housing coordination, food access, and workforce development.
Callen-Lorde will also explore partnerships that further the strategic imperative for growth to achieve economies of scale, including merging or consolidating with like partners. These partnerships may include Callen-Lorde adopting operational ownership of one or more component of a partner’s business, such as a mental health practice or care coordination services. Additionally, this may include merger or consolidation of the partnering organization under Callen-Lorde. Callen-Lorde will seek partners that share the intent of our mission and values, as well as those serving a shared target population of LGBTQ New Yorkers, including persons living with HIV. Potential partners will likely possess one or more licenses under New York State Articles 28, 31 or 32 and may also be Federally Qualified Health Centers. During the strategic planning period, Callen-Lorde will identify one or more of these opportunities and conduct the necessary organizational analysis and business planning to arrive at a decision about moving forward.

However, there is the possibility that scale is simply not attainable or sufficient to achieve long term sustainability under our current model. In this case, Callen-Lorde may face the difficult decision that joining a larger network offers the most benefit for the communities we serve, and is the only viable solution for ongoing viability. Even in this scenario, the stated strategy to pursue growth and diversification remains well founded – in cases of consolidation, the larger and more diverse the organization, the greater Callen-Lorde’s leverage in negotiations with potential large partners.

Outcomes to be Tracked
- Identify strategic partnership opportunities (in process and ongoing)
- Conduct fiscal, legal, and cultural assessments to determine the viability of such partnerships (Q3 2019 and ongoing)

Focus Area 2B): Real Estate Planning
Long term planning in the realm of real estate is needed to ensure that the organization can sustain post-Brooklyn capacity levels and continue to grow as needed to meet community demand. In addition, real estate planning will help Callen-Lorde tackle long term capital improvement needs. Callen-Lorde anticipates facing significant cost increases in currently leased spaces due to required renewals. Among leased properties, renegotiation is required on all sites (other than Brooklyn) before 2025, with some expiring in the next two years. Callen-Lorde also faces critical capital improvement needs at its one owned property at 356 West 18th Street. While Callen-Lorde has been awarded capital grant funding to conduct a portion of these repairs, the total capital budget for renovation and repairs needed far exceeds the funds awarded.

Within the next several years, there may be opportunities to consolidate or otherwise realign our real estate planning to alleviate the organization’s lease burden. In total, Callen-Lorde’s lease commitments exceed $2 million annually. Analysis is ongoing to better understand opportunities and limitations as they relate to real estate; Callen-Lorde will rely upon expert consultative support to guide this strategic exercise.
To address these interrelated issues, Callen-Lorde will undertake a strategic real estate planning initiative with consultative support from Cushman & Wakefield, a firm with which Callen-Lorde has worked on several past projects, including the search for Callen-Lorde Brooklyn property. Activities will include assessment of the “baseline” projected costs of Callen-Lorde’s current real estate portfolio, including in-place and pro forma lease renewals for spaces in the Manhattan, Bronx and Brooklyn locations as well as an operating and capital improvement analysis and (re-)valuation of 356 West 18th Street. Following baseline assessment, Callen-Lorde, with support from Cushman & Wakefield, will conduct a comparative analysis of the current “baseline” portfolio to alternative scenarios, including options within each respective neighborhood, to determine if a relocation or consolidation could achieve cost benefits and program/administrative efficiencies for Callen-Lorde. Callen-Lorde will also engage in financial consultative support for assistance with analysis of potential Medicaid rate changes based on changing capital cost structures.

Outcomes to be Tracked
- Conduct real estate planning in consultation with Cushman Wakefield, resulting in a final report to guide decision making (Q3 2019 – Q2 2020)
- Develop Medicaid rate appeal analysis based on capital cost structures (Q3 2020) OR Submit Medicaid rate appeal (Q2 2021)

Focus Area 3: Implementing a multi-year diversity, equity and inclusion initiative

The third component of Callen-Lorde’s strategic planning for 2019 – 2021 is work that will occur over the next several years and beyond to assess and improve the agency’s efforts to foster an inclusive and affirming environment for staff and patients. This effort began under our 2017 plan in order to improve organizational culture in regards to equity and inclusion, as well as further Callen-Lorde’s organizational goal to reach the most underserved members of LGBTQ communities.

Diversity, Equity and Inclusion (DEI) Phase I concluded in 2017 and Callen-Lorde began Phase II of the initiative in February 2018. During the strategic planning period from 2019 - 2021, Callen-Lorde expects to continue Phase II of this multi-year effort to improve organizational culture in transformative and sustainable ways, including through the building of an intentional anti-racism framework. DEI Phase II is expected to continue throughout the duration of the plan and beyond, because the culture change that Callen-Lorde seeks to achieve must be built over time and requires significant ongoing commitment and attention, so that these processes become ingrained in the very fabric of the organization.

The goal of Phase I of the work was to arrive at a strategic plan for strengthening organizational culture at Callen-Lorde. With Pipeline Consulting, Callen-Lorde conducted an in-depth staff survey as well as focus groups to collect feedback from staff. A staff-led DEI Catalyst Committee steered the initiative, with representation from multiple positions and departments through all levels of the organization.
Mary Pender Greene Consulting (MPGC) has been contracted to consult on Phase II efforts. MPGC is a New York City-based consultant group with extensive experience in providing anti-racist capacity building services. MPGC is a New York State certified minority and women-owned business enterprise (M/WBE) with a team composed of multi-talented leaders in the fields of social and racial justice, professional social work, psychology, psychiatry, health, mental health, research, intimate partner abuse, organizational growth and transformation, business management, substance use and abuse treatment, research and program evaluation, as well as youth work and community organizing. All MPGC services, training and coaching are informed by an anti-racist/anti-oppressive lens and framework.

Callen-Lorde will also hire a Chief People Officer (CPO) at the outset of the strategic planning period – as a member of the senior leadership team, the CPO will provide strategic leadership with a focus on Callen-Lorde’s workforce and culture, with a particular emphasis on the development, implementation, and continuous improvement of strategies to nurture an inclusive, healthy workplace that values different viewpoints and provides opportunities for all members of Callen-Lorde to grow professionally. The CPO will help to steer Callen-Lorde through a period of planned growth, with an expected increase in staff from the current 350 to approximately 500 over the next several years, largely due to the opening of the new clinical location in Brooklyn in 2020.

The CPO will be charged to develop and implement pieces of the diversity, equity and inclusion work to be described in detail below, including staff training programs; serving as an internal consultant on people issues that affect organizational culture, morale, performance, and business relationships; and revising policies, procedures and processes to reflect DEI principles. The existing Human Resources department will report to the CPO, and the organization hopes to build an Organizational Learning department that will likewise report to this position.

Board Diversity
Callen-Lorde prioritizes diversity, equity and inclusion across all levels of the organization, including amongst board leadership. Our consumer-majority board will develop a collaborative relationship with the CPO and DEI project consultant by meeting to discuss an overview of Phase II DEI work. The Board will identify its own DEI goals and requests for resources or training. Board members will also be encouraged to participate in two-day anti-racism training provided by MPGC and to contribute thoughts to DEI Committee's development of a DEI Values Statement; almost half of current Board members have participated in the training as of this writing.

DEI in Employment Processes
Callen-Lorde will work over the next several years to ensure that the processes for hiring, promotion and retention within the organization are equitable and inclusive. The CPO will lead the review, development and implementation of human resources policies, programs and services, including recruitment, selection, retention, legal compliance, employee benefits, employee relations, employment practices and procedures, employee communications and employee events, as well as guidelines about organizational culture consistent with Phase II of the DEI work.
Callen-Lorde’s centralized Human Resources (HR) Department will review evaluations, recruitment, hiring, retention, development of promotion policies and practices using a DEI lens to ensure all practices and tools are equitable and inclusive including:

- Recruitment and hiring process in line with Recommendations from the Organizational Assessment Report.
- Review and standardize:
  - Academic requirements for jobs,
  - Hiring protocols
  - On boarding of new staff (including an orientation to Callen Lorde DEI Values)
  - Mandatory anti-racism training
  - Staff evaluations
  - Standards for promotions
  - Exit interviews
  - Tracking hiring, promotion and retention of diverse staff (racially, culturally, gender identity)
- Training for everyone who does hiring & interviewing in maintaining bias free selection processes and criteria
- Expand staff and leadership recruitment networks

Training and Education

When resources permit, the CPO, in conjunction with other organizational stakeholders and leadership, will facilitate efforts to fully develop and implement an internal training department. This training department will be a centralized resource for Callen-Lorde staff, and will coordinate training and staff development activities, to further efforts to enhance and encourage diversity, equity and inclusion across the organization. This will include the development, implementation, and continuous quality improvement of resources for ongoing staff training programs to ensure appropriate staff competencies, including fostering an intentionally anti-racist, anti-bias culture. The program will also establish internal supports to ensure that staff with less societal or systemic access to educational and professional development opportunities have access to appropriate resources and support.

The project consultants will also work with the CPO and DEI Committee to identify trainings about best practices in DEI organizational change. This will include delivering workshops that teach best practices in implementing DEI organizational change, such as anti-racist accountability strategies and protocols and a bias free hiring process. These trainings will be targeted to those charged with developing and implementing the new training program, including Human Resources staff and the DEI committee.

Outcomes to be Tracked

- Maintain board representation reflective of the demographic composition of patient population (as reported in annual UDS data), in keeping with HRSA health center board requirements (ongoing)
- Hire and onboard Chief People Officer by Q4 2019.
- Achieve at least 75% of current staff participation in Undoing Racism trainings by Q1 2020
- Assess and review employment policies & procedures and present revised policies to the Board for voting by Q4 2020
Focus Area 4: Expanding our impact and sharing our expertise in LGBTQ health

The fourth and final component of strategic planning is to advance Callen-Lorde’s presence as a model of excellence in LGBTQ health, at the same time expanding access to culturally affirming, clinically knowledgeable health care for LGBTQ patients. In order to advance this goal, Callen-Lorde proposes to pursue two strategies that address a lack of expertise in LGBTQ health among primary care providers, at the same time expanding access for patients: an accredited Nurse Practitioner Fellowship Program and telehealth, including e-consultation.

Focus Area 4A): Nurse Practitioner Fellowship Program in LGBTQ Health

As a global leader in LGBTQ health, clinicians from around the world come to Callen-Lorde each year to learn from our systems and providers: to learn about cutting edge HIV prevention and treatment, with efforts to eradicate the virus prioritized nationally and statewide; to learn about transgender health, where we treat over 4,500 transgender and gender non-conforming patients, the largest such practice in the US and likely the world; and to learn about working with street-involved and unstably housed LGBTQ youth, via a longstanding collaboration that utilizes a mobile health model to meet youth where they live and gather. Callen-Lorde Brooklyn will expand access to this expertise by opening one of the country’s first Nurse Practitioner fellowship programs focused on LGBTQ health, which will prepare the next generation of primary care to provide culturally affirming, clinically knowledgeable care and help address nationwide provider shortages.

One of the largest barriers to LGBTQ competent care is the lack of training available to providers. Numerous studies reveal that the lack of training in LGBTQ health care leads to major barriers to access to culturally and clinically competent care. Callen-Lorde’s own Brooklyn Community Needs Assessment (CNA) confirms these findings. Callen-Lorde partnered with researchers from the Hunter AIDS Task Force to conduct a CNA to inform services planning for a new Downtown Brooklyn site. Researchers surveyed a statistical sample of current LGBTQ Brooklyn residents, one-third (33%) of whom are Callen-Lorde patients and two-thirds (67%) who are not currently patients at Callen-Lorde. In all, 82.4% of prospective patients said that it is somewhat or extremely important for them to be able to discuss LGBTQ-specific health care concerns with their doctor, but only 31% reported that they are currently highly comfortable discussing these needs with their doctor, 10% report not being out to their doctor, and an additional 12% report that their doctor knows nothing or almost nothing about the LGBTQ-specific health care.

The Nurse Practitioner Fellowship Program will have a home within Callen-Lorde’s new site in downtown Brooklyn, slated to open in 2020. The space is specifically designed to meet the considerations for a successful fellowship program. NPs will benefit from practical training in a vibrant community-based setting, with an emphasis on clinical and cultural competency in serving LGBTQ communities. After completing the fellowship, these Nurse Practitioners will go on to provide culturally-affirmative and clinically-informed care for LGBTQ patients, rendering the health care system more responsive to the needs of this population.
The program will consist of three primary components: preceptor-led clinical session, specialty trainings, and didactic sessions. Preceptor-led clinical rotations will be the cornerstone of the program. Fellows will develop their own panel of patients under the mentorship of a Callen-Lorde medical provider. Fellows will also participate in a variety of medical specialty trainings relevant to primary care. Topics may include dermatology, sports medicine, emergency medicine, gynecology, and cardiology, to name just a few. Finally, in didactic sessions, fellows will attend lectures and presentations on topics relevant to their course of study, including LGBTQ cultural considerations and the link between health outcomes and systemic oppression. The Nurse Practitioner Fellowship Program will take what in most medical training programs amounts to one day or even just a few hours of LGBTQ cultural competency training and weave it through every aspect of the learning process, ensuring that it becomes an ingrained aspect of the fellows’ practice.

In Callen-Lorde’s 2017 strategic plan, we set the goal to advance Callen-Lorde’s presence as a model of excellence in LGBTQ health and conducted extensive efforts to lay the groundwork to launch the fellowship program, including participation in a formal capacity building program by the Weitzman Institute targeted to Federally Qualified Health Centers to guide implementation planning. Callen-Lorde will continue to move this project forward during the next phase of strategic planning. We will begin ramping up in September of 2019 by starting the process of recruiting applicants and hiring administrative staff. Applications will be reviewed in December 2019, and acceptance letters sent out in April 2020. Nurse Practitioners accepted into the program would begin training in September 2020. At the end of the first year of operation, Callen-Lorde will seek accreditation for the program. We will also engage an external evaluator to assess the program and suggest ways that we can improve and expand it in the following years.

A Callen-Lorde Nurse Practitioner has been brought on board as the Clinical Director of the program. The Director of Project Management and the Clinical Director of the program will work lead efforts to build out the curriculum and identify hospital and community partners to act as additional training sites for the program.

Outcomes to be Tracked
- Develop an evidence-based LGBTQ health curriculum by Q2 2020
- Graduate 2 Nurse Practitioners trained in LGBTQ health to add to the New York State health care workforce by Q3 2021
- Obtain accreditation from the American Association of Colleges of Nursing Commission on Collegiate Nursing Education by Q3 2021

**Focus Area 4B): Telehealth and Electronic Consultation**

Telehealth and e-consults have demonstrated the potential to reduce costs and improve quality of care, and are promising practices for success in a value-based system. In 2019, New York State released reimbursement guidelines for telehealth in its Medicaid program. Previously, allowable telehealth offerings were limited to mental health services provided in a hub-and-spoke model, meaning that patients could only receive telehealth services at a licensed clinical facility provided by another licensed clinical site or facility. Now, NYS Medicaid allows for the provision of medical and behavioral health services to patients in their homes or other non-clinical locations.
This regulatory change offers Callen-Lorde the opportunity to address clinical needs of patients for whom travel to a clinical site poses hardship, such as those needing post-surgical care, including post-gender affirming surgery; patients who face violence on the streets and public transit; and, patients who travel long distances for Callen-Lorde’s unique clinical competencies. There are also benefits to expanding capacity without taking on the cost of additional physical space, which is a considerable expense given the real estate environment in New York City.

Moreover, telehealth, including various forms of e-consultation, offers an opportunity to reach patients outside of NYC as well as providers who could benefit from clinical consultative services for the treatment of patients of transgender experience. Callen-Lorde currently partners with RubiconMD, a health care technology platform that connects primary care providers to specialists via electronic consultations (eConsults) using web-based platforms, electronic health records or mobile applications. Starting in May 2017, select Callen-Lorde clinicians began to serve as transgender and gender non binary (TGNB) health specialists, fielding eConsult inquiries from clinicians across the nation.

Analysis has revealed that the majority of these requests come from clinicians serving populations facing systemic barriers to health: 90% are from community health centers, correctional facilities or rural areas. The benefits for clinicians who received eConsultation from Callen-Lorde experts in TGNB health are clear: over one third reported that they avoided unnecessary procedures and referrals as well as referrals to the wrong specialty; over one half reported that the consult was educational; and 71% reported that the consult resulted in improved care for the patient. Across the board, the program has resulted in improved access and delivery of competent TGNB health care.

Callen-Lorde sees enormous promise in this nascent program, which may have the potential to grow into a revenue-generating service and most importantly, expand access to culturally appropriate, clinically competent care for patients who live far beyond our doors. The monetization of clinical consultative services and trainings in LGBTQ health also offer potential for enhanced impact and new revenue streams. During the next several years, Callen-Lorde will take steps to analyze and develop this program by engaging with consultant support and meeting with contacts at the New York State Department of Health and the Community Health Centers Association of New York State to gain knowledge of the potential structure for a sustainable telehealth program. Following knowledge gathering, a selected consultant will assist Callen-Lorde to develop a business and implementation plan for telehealth and e-consultation services.

Outcomes to be Tracked
- Develop a telehealth business plan with consultant input by Q4 2019
- Develop an implementation plan for telehealth by Q4 2020
Conclusion

Callen-Lorde finds itself at a critical moment of the agency’s history, with major capital expansion planned in Brooklyn and the opportunity for further growth and broadened impact through collaboration continuing to arise. Alongside this exciting organizational evolution, the external environment is marked by tumult and the threat of major reductions in the healthcare safety net for our communities – and the providers who care for them. In the face of these realities, Callen-Lorde is conducting tactical strategic planning for 2019 – 2021 that will allow the agency to remain nimble to react as policy decisions unfold. This plan aims to ensure that Callen-Lorde remains a global leader in LGBTQ health, standing firm in our mission and with our doors open wide to serve LGBTQ patients and all who come to us, regardless of ability to pay.