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If you're ever in doubt,
do what's right for the
patient and you'll
always make the right
decision.

RICK WAGERS, Senior Vice President
and CFO, Regional One Health

Return on investment

Introduction

Demonstrating ROI



Introduction

If you followed all the steps so far in this guide, you should now be ready to calculate the Return on Investment from your complex care intervention. Thinking about ROI for vulnerable populations can be challenging. We often think of ROI as a purely financial calculation but as we've demonstrated, there are multiple values or "returns" achieved by your program: equity, trust in the community, transformed lives, and doing the right thing for people who deserve better care. When presenting your ROI, you should include both financial and non-financial value.

Nevertheless, while non-financial considerations are relevant, many health systems will expect a rapid and positive financial ROI on care management to continue investing. It often takes longer than one year to demonstrate ROI, yet impact within 12 months is often the expectation. Highlighting quick wins like access to benefits, reduction in ED visits, and increased primary care visits can be helpful to show value while gathering data on longer-term impact.

Demonstrating ROI

The Commonwealth Fund has published a [guide to calculating the ROI](#) of your program and provides evidence in support of various interventions including care management, housing, transportation, and nutrition. [Beyond the Grant](#) also offers a framework.

Your best partner in developing ROI specific to your intervention and organization is your CFO. Using the metrics and outcomes you collaboratively identify, have finance complete an annual assessment of your progress. Reporting movement in all the quadrants (cost, utilization, quality, satisfaction and equity) will also round out the case of ROI for different stakeholders.

Note: Complex care programs always have to contend with the argument of regression to the mean (that utilization would have naturally decreased) and have challenges demonstrating that the intervention caused improvements in outcomes. Within complex populations, there are subpopulations whose high utilization is more lasting (those with SUD and mental illness) and therefore less susceptible to regression to the mean. Integrating the number of years of prior high utilization can demonstrate impact.



You've got to be able to tell the story, no matter how hard or incomplete it is. A lot of people need that perspective for validity. It may not be the tightest ROI, but at least you've struggled through it. Then they'll be willing to listen to the rest of it.

GAY LANDSTROM, SVP and Chief Nursing Officer, Trinity Health





Key takeaways

- Create a plan with your CFO or financial analyst for ROI analysis
- Identify your plan for reporting outcomes to multiple stakeholders
- Based on the ROI analysis - Consider changes to be made to your intervention to generate ongoing support

