



## National Health Foundation Expansion Soars with the Power of Microsoft Dynamics 365 and Ledgeview Partners

### THE SITUATION

National Health Foundation has evolved over the years to meet the needs of the Southern California community.

Today, they address social determinants of health for under-resourced communities to improve health and begin to resolve health inequities.

They do this by tackling food access, the built environment, housing those without homes, and education through youth organization, social advocacy, local programming, and more.

Their current programming includes aiding people experiencing homelessness who have just been discharged from local hospital care and moving them into housing.

In reflection of this programming, National Health Foundation saw a need to upgrade their technology to improve this decade-old program. When they approached Ledgeview after being referred to the firm from an industry peer, they were looking for a solution to complement this specific program.

Due to their recent expansion of serving 1,000, to now over 2,000 anticipated clients per year, they also needed a streamlined way for health providers to refer clients.

“We needed to upgrade the way we were tracking internally, and reporting externally,” says Danielle Cameron, Chief Strategy Officer at National Health Foundation. “We needed a better way to document their journeys moving through the program as a person experiencing homelessness coming out of the hospital and moving toward permanent housing.”

Crystal Hertz, Manager of Research and Evaluation at the foundation, concurs.

“As an organization, we are working at the intersection of two broken social systems: healthcare and homelessness with a history of data collection challenges,” Hertz says.

*\*Image Courtesy of National Health Foundation.*

“So, from a technological perspective, it didn’t seem like an appropriate fit to have an electronic health record for the size of the business or billings we did. We needed a platform and customized product that would consider our HIPAA concerns and data flow.”

After analyzing their current technology compared to where they wanted to go as an organization, Hertz and Cameron began looking into platforms that would suit these needs.

### THE SOLUTION

National Health Foundation chose Microsoft Dynamics 365 for a few key reasons after looking at several solutions.

Since they were already on the Office 365 platform, they felt they were “partially there” already due to the perceived ease of integration. HIPAA compliance was a huge selling-point for selecting the platform.

Microsoft currently helps users accelerate their deployment of HIPAA/HITRUST solutions, complying with the HITECH Act, on Azure.

“The large network of certified providers to support a non-profit along the growth journey with Microsoft Dynamics 365, as well as building with sustainability were also very important factors to us,” Hertz says.

“Through building a vast technological network, we found Ledgeview over a series of referrals. Ledgeview immediately stood out to me for their level of customer service, turnaround, and built-in customer service support that came with their scope of work.”

Hertz, Cameron, and their team were thrilled with their choices.

In Microsoft Dynamics 365, they found a solution that helped them sustain compliance and best serve their programming; and, in Ledgeview, they found a responsive partner that helped them exceed deadlines while offering essential ongoing support past the initial phase of development.



**“I was incredibly grateful for the responsiveness and degree of flexibility Ledgeview offered,” Hertz says.**

During the implementation phase, National Health Foundation was simultaneously building a brand new facility to expand their programming, and, as a small non-profit, this meant their resources were spread thin and their needs for software changed frequently. Hertz was impressed at how flexible and adaptable Ledgeview was during this time of change.

**“Working with Ledgeview made everything easier,” Hertz says. “I knew I could rely on them, and had a partner in solving whatever challenges came our way.”**

The process of user adoption is ongoing as the organization expands.

“Users are not only learning our internal processes but are getting up to speed with the database,” Cameron says. “We’ve established an internal database committee to determine where key pain points are and how we can monitor those over time. We are committed to using this system and keeping it accurate, valuing it as a long-term investment.”

Microsoft Dynamics 365 has helped National Health Foundation share more high-level and accurate data with their external partners, and has improved those partnerships because of that opportunity.

**“The system has helped to strengthen our internal processes,” Cameron says. “It has played an invaluable role in managing our day-to-day operations.”**

“It has helped to increase transparency and collaborations through all departments, at all levels,” Hertz adds.

As they are starting to utilize dashboards during the login process, users have begun to more easily identify where they need to prioritize tasks at a global level.

Of the functionality the system offers, National Health Foundation especially likes the robust data that’s right at their fingertips, allowing them to quickly extract information without complex coding. They excite over the ability to share data with their external partners.

“It enables us to teach people to fish, so to speak, breaking down the analyst barrier you often see by putting data into the users’ hands in real-time, teaching them how to see and look at it,” Hertz says. “It enables a broader range of abilities, letting them make data-driven decisions independent of me as their manager.”

With Ledgeview’s ongoing help and support, National Health Foundation plans to expand their user base as they move forward in their programming.

As needs evolve, Hertz and Cameron enthuse over the art of the possible with Microsoft Dynamics 365 and their partnership in Ledgeview.

#### ABOUT THE COMPANY

National Health Foundation was founded in 1973 to conduct research and educational programs related to healthcare delivery, particularly in hospital settings. As the field of public health has shifted over the years, National Health Foundation’s purpose has evolved to best anticipate and meet emerging needs.

Today, we know that health starts where people live, learn, work and play. National Health Foundation is committed to addressing the root causes of health disparities by working hand in hand with communities. We empower teens and adults to advocate for their health and identify needed changes in their neighborhoods. Then, we help develop and support the community’s vision of health by cultivating partnerships to deliver programs and services that are empathetic and inclusive.

*Learn more at [NationalHealthFoundation.org](http://NationalHealthFoundation.org).*

