

2025 Community Health Needs Assessment

Regional Needs Prioritization

January 20, 2024



Agenda

Time	Activity
9:00 am	Welcome!
9:10 am	Data Presentation - Regional data overview - Results of the pre-session survey - Q&A
9:45 am	Roundtable Discussions (45 minutes) - PEARL-E Discussion
10:30 am	Roundtable Report Outs
11:00 am	Final Voting
11:05 am	Roundtable Discussions (15 minutes) - What are potential strategies to address these needs?
11:25 am	Results of the Final Voting

About the Central Florida Collaborative

- Established 2012
- 5th Community Health Needs Assessment (CHNA) effort
- Multi-disciplinary group of community health providers and advocates
- Shared goal of improving the health of the communities we serve



2022 Top Community Needs

- **Health Care Access and Quality**

- Recruitment and retention of culturally diverse and informed providers who demographically reflect the community.
- Co-located case managers and behavioral health providers at community-primary care sites.
- Healthcare services in lower-income and priority communities.
- Childcare services, especially for children with special needs.
- Access to free or low-cost healthcare services for all residents.
- Information sharing among providers.
- Case managers, Community Health Workers, and similarly licensed professionals to guide high-need patients.
- Access to care for seniors (e.g. transportation).

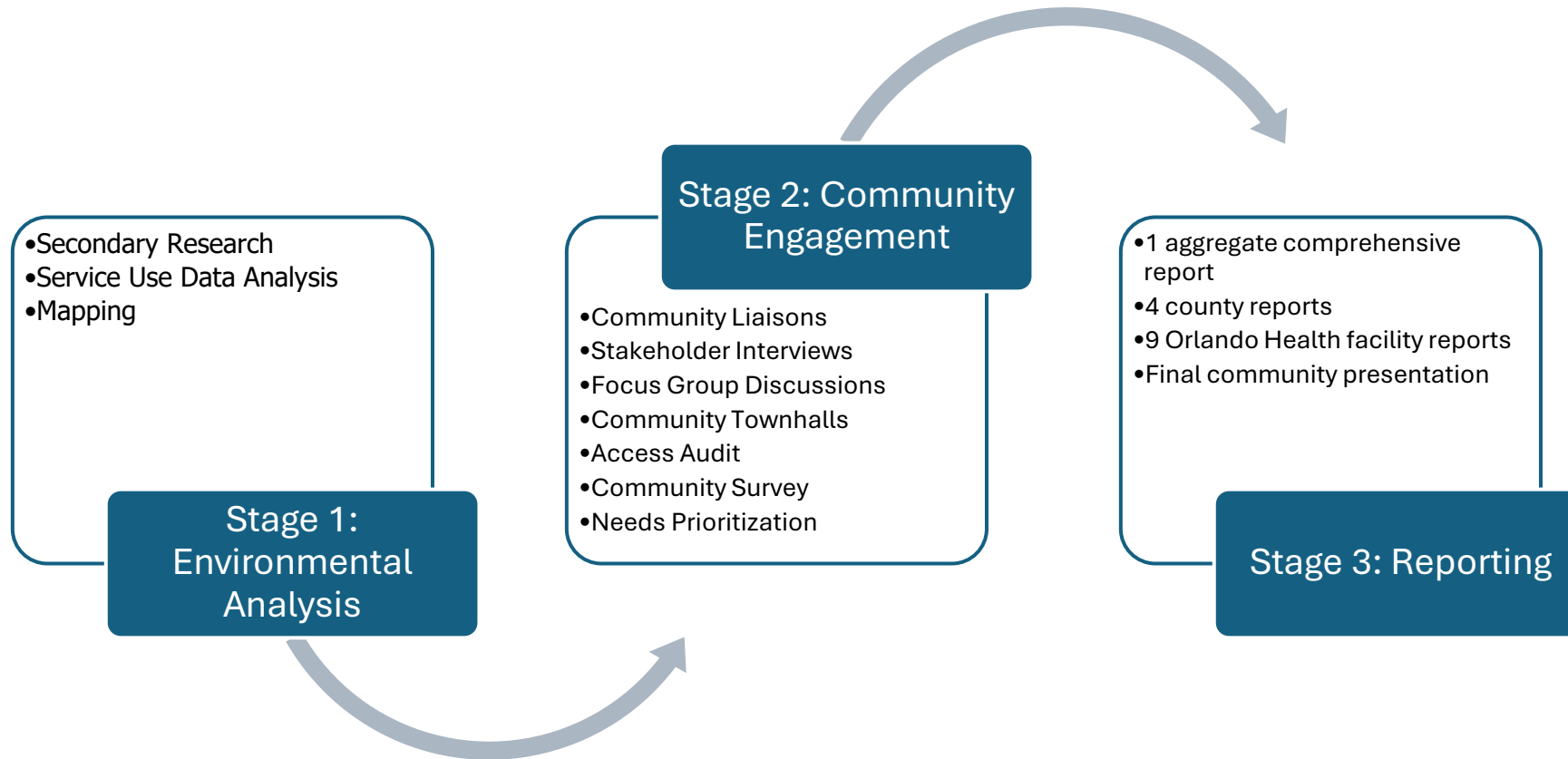
- **Enhance Mental Health Outreach and Treatment**

- Mental health crisis services and community awareness of available resources.
- Mental health outpatient services capacity.
- Behavioral health outpatient services for children.
- Mental health inpatient bed capacity.
- Mental health and substance use disorder transition care for inmates being released from jail.
- Mental health stigma reduction.

- **Social Determinants of Health**

- Affordable, quality housing

2025 Methodology Overview



BY THE NUMBERS



106
Stakeholder
Interviews



29
Focus Groups
with over 150
participants



2,659
Survey
Respondents

Demographics – Population Growth

	United States	Florida	Lake County	Orange County	Osceola County	Seminole County	Four County Region
2023	332,387,540	21,928,881	398,696	1,440,471	406,943	474,912	2,721,022
2010	308,745,538	18,801,310	297,056	1,145,957	268,683	422,718	2,134,414
Percent Change (2010-2023)	+7.7%	+16.6%	+34.2%	+25.7%	+51.5%	+12.3%	+27.5%
Projected 2031 Population	363,255,837	24,779,838	468,373	1,714,001	491,801	540,994	3,215,169
Percent Change (2022-2031)	+9.3%	+13.0%	+17.5%	+19.0%	+20.9%	+14.0%	+18.2%

Sources: U.S. Census Bureau American Community Survey 2010 One-year Estimates | U.S. Census Bureau American Community Survey 2019-2023 Five-year Estimates



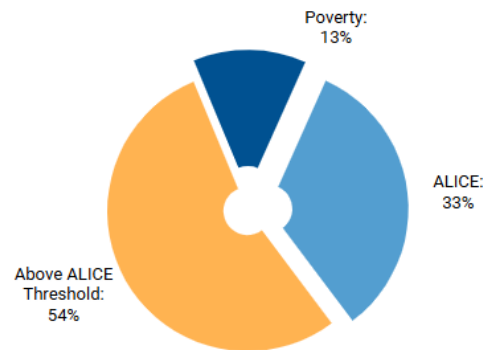
Huge population growth is projected over the next 10 years in all the counties!

Demographics – Select Key Indicators

	Florida	Lake County	Orange County	Osceola County	Seminole County
Median Household Income	\$71,711	\$69,956	\$77,011	\$68,711	\$83,030
Below Poverty Level	12.6%	9.5%	13.0%	12.5%	9.2%
Minority Population	48.6%	34.7%	63.2%	71.5%	43.9%
Under 18	16.9%	12.8%	16.8%	15.6%	10.1%
65 and Older	11.4%	7.8%	12.1%	14.0%	8.0%
Median Age	42.6	46.7	36.4	37.0	39.8
Housing Cost-burdened	35.6%	30.5%	38.4%	41.2%	34.1%

Sources: U.S. Census Bureau American Community Survey 2010 One-year Estimates | U.S. Census Bureau American Community Survey 2019-2023 Five-year Estimates

Rising Cost of Living and Meeting Basic Needs



In Florida, 33% of households are considered **Asset Limited, Income Constrained, Employed** (ALICE). They earn more than the Federal Poverty Level, but not enough to afford the basic needs.

Source: United Way, United for ALICE (2022)

54.0%

Lake County

54.0%

Orange County

47.0%

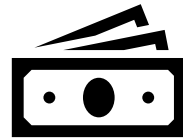
Osceola County

60.0%

Seminole County

Households in each county that are essentially “living paycheck to paycheck.”

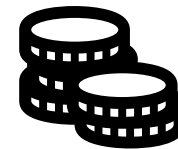
Source: United Way, United for ALICE (2022)



\$35.71

Hourly Wage necessary to afford a 2-bedroom Fair Market Rate apartment (\$1,857)

Source: National Low Income Housing Coalition 2024



3.0

Full time jobs at minimum wage (\$12.00)* to afford 2BR FMR

“We need a reality check on what “affordable housing” is and we need to stop making assumptions about people’s lives. \$1200 for an efficiency in a bad part of town is NOT affordable housing.” – *Orange County Stakeholder*



* As of 9/30/24, Florida’s minimum wage is \$13 per hour for non-tipped employees and \$9.98 per hour for tipped employees and it is scheduled to increase by \$1 ever September 30th until it reaches \$15 per hour in 2026 (US Department of Labor).

Rising Cost of Living and Meeting Basic Needs

CHILDCARE

“Cost of childcare is completely unaffordable. If you don't have an income, I don't know how you take care of your kids. A lot of people don't work because they can't afford childcare.”
– Stakeholder Interview



\$11,440

Average annual price for full-time center-based childcare in Florida for an infant.



\$9,880

Average annual price for full-time center-based childcare in Florida for a toddler.

Source: ChildAware. 2022 Child Care Affordability Analysis

TRANSPORTATION



1 in 20

People in the Central Florida region don't have a vehicle

Source: American Community Survey, 2019-2023

“Suburban-rural area. Distances are far. Without a car, you're pretty limited in terms of mobility. Mobility is a big challenge. It's hard to provide mobility services that are cost-effective. If someone doesn't have a car, they have to rely on friends. Uber isn't an option here, and it's cost-prohibitive.”

– Focus group participant

Mortality and Life Expectancy

LIFE EXPECTANCY

Florida	Lake County	Orange County	Osceola County	Seminole County
78.0	77.1	79.1	77.8	79.2

Source: Florida Department of Health, Division of Public Health Statistics & Performance Management, 2020-2022

AGE-ADJUSTED MORTALITY RATES FOR LEADING CAUSES OF DEATH

Per 100,000 Population	Florida	Lake County	Orange County	Osceola County	Seminole County
Heart Disease	145.5	160.5	142.8	162.5	128.6
Cancer	138.3	151.5	131.4	139.5	139.8
Unintentional Injury	69.9	86.1	57.3	57.8	63.0
Stroke	45.2	45.7	54.8	58.0	58.1
Chronic Lower Respiratory Disease	32.2	38.2	26.4	31.7	28.2
Diabetes	23.4	29.8	22.9	25.5	25.4
Alzheimer's Disease	18.9	15.3	21.4	23.1	19.3
Suicide	13.6	14.2	9.5	8.6	13.2

Source: Florida Department of Health. Bureau of Vital Statistics, 2020-2022



Heart disease is the leading cause of death in all counties except Seminole County.

Self-Reported Health Status

Physical Health

% Reporting Poor or Fair Health

14.7%

Lake County

12.3%

Orange County

13.6%

Osceola County

11.5%

Seminole County

14.1%

Florida

Mental Health

% Reporting Poor or Fair Health

16.3%

17.4%

17.1%

16.1%

16.8%

Source: Centers for Disease Control and Prevention. PLACES: Local Data for Better Health

Access to Care



“There aren't a lot of options for OB/GYN care in Osceola, and there aren't a lot of options for prenatal care.”

- Stakeholder interview

RATE OF LICENSED HEALTH CARE PROVIDERS

Per 100,000 Population	Florida	Lake County	Orange County	Osceola County	Seminole County
! Medical doctors	261.2	155.7	328.1	110.9	237.9
Physician assistants	51.0	31.1	60.9	20.0	54.0
Family practice physicians	13.3	12.9	15.5	6.3	22.8
! Pediatricians	16.5	9.0	27.0	6.7	15.5
Registered nurses	1,441.2	1,495.5	1,232.3	1,163.2	1,594.0
Licensed practical nurses	278.9	33.8	195.4	228.4	230.3
Certified nursing assistants	628.6	632.4	485.7	427.5	327.7
! Dentists	61.5	41.8	65.1	22.0	67.4
Paramedics	145.4	171.2	132.8	94.9	130.9
Emergency medical technicians	166.0	214.2	156.6	115.0	179.2
! OB/GYNs	8.6	4.6	12.5	5.2	9.4

Source: Florida Department of Health, Division of Public Health Statistics & Performance Management. Florida HealthCHARTS, County Health Dashboard Health Resource Availability, 2023



Identified in qualitative research as needed providers.

Maternal Health and Prenatal Care

Percent of Total Births	Florida		Lake County		Orange County		Osceola County		Seminole County	
	2019	2022	2019	2022	2019	2022	2019	2022	2019	2022
Births to obese mothers at the time pregnancy occurred	27.1%	29.5%	30.9%	32.7%	24.9%	28.9%	27.8%	30.8%	25.4%	28.9%
Births to mothers with first-trimester prenatal care	75.9%	71.6%	77.1%	70.5%	78.5%	67.2%	81.4%	74.2%	80.0%	73.6%
Low birth weight (percent of total births)	8.8%	9.1%	8.2%	9.3%	8.7%	9.4%	8.0%	8.1%	6.8%	8.1%
Infant mortality rate per 1,000 live births	6.0	6.0	8.5	4.5	5.8	5.7	4.7	4.0	6.9	5.1

Source: Florida Department of Health, Division of Public Health Statistics & Performance Management. Florida HealthCHARTS, Pregnancy & Young Child Profile

- Obesity has increased in mothers for all counties.
- First-trimester prenatal care has decreased in all counties.
- Low birth weight has also increased in all counties.
- Infant mortality has decreased in all counties.



**Emerging theme
in 2025**

Health Care Access

“Most psychiatric care providers are private pay, so even if you can find it, it's unaffordable. Specialists are hard to find, there's a lack of urologists, neurologists, and endocrinologists that are accepting new patients. Providers have stopped taking insurance.”

- Stakeholder interview

“The racial disparities in birth outcomes suggest there's not equal access to care. We work closely with health care providers and some of the patients are turned in and out and it makes you wonder how can they be getting the true level of care they need when you can't even get through to them by phone to get an appointment scheduled.”

- Stakeholder interview

“Cultural sensitivity depends on community and ethnic backgrounds, and this is really important.”

- Focus Group Participant

“There are many misconceptions, like there is no preventive care. Haitian community seems to wait until there is an emergency and then they seek services. There needs to be more education for those people who are afraid to access care because fear of immigration status.”

- Focus Group Participant

“Osceola has a lack of maternal health care. It's hard to find providers that can establish a history.”

- Stakeholder interview

Health Care Access



1 in 4

Survey respondents reported needing medical care but did not receive it.

Top 3 Reasons Why:

- Cannot take time off (22.3%)
- Do not have insurance to cover medical care (17.2%)
- Unable to find a doctor who knows or understands my culture, identity, beliefs, or language (16.6%)



1 in 5

Survey respondents reported needing mental health care but did not receive it.

Top 3 Reasons Why:

- Unable to find a doctor who knows or understands my culture, identity, beliefs, or language (20.3%)
- Doctor's office does not have convenient hours (15.4%)
- Unable to afford to pay for care (12.2%)



1 in 3

Survey respondents reported needing dental care but did not receive it.

Top 3 Reasons Why:

- Unable to afford to pay for care (32.2%)
- Cannot take time off work (14.5%)
- Unable to find dentist who takes my insurance (11.5%)

Behavioral Health

RATE OF LICENSED BEHAVIORAL HEALTH CARE PROVIDERS

Per 100,000 Population	Florida		Lake County		Orange County		Osceola County		Seminole County	
	2020	2022	2020	2022	2020	2022	2020	2022	2020	2022
Behavioral or mental health professionals ¹	117.1	130.4	84.1	96.3	119.2	135.4	54.6	61.9	176.1	199.2
Mental health counselors	57.3	64.0	46.4	54.6	71.1	80.9	30.9	35.9	103.9	114.5
Psychologists	23.4	23.0	8.4	8.1	15.1	15.4	5.2	6.6	21.9	23.3
Clinical social workers	49.7	55.2	31.7	34.7	37.4	42.9	21.1	22.3	56.6	67.0

Source: Source: Florida Department of Health Bureau of Community Health Assessment. Division of Public Health Statistics & Performance Management's Suicide & Behavioral Health Profile

¹ Includes marriage and family therapists, clinical social workers and mental health counselors with active licenses in Florida. Other behavioral healthcare professionals, such as psychologists or school psychologists, are not included in this measure.

Behavioral Health

HOSPITALIZATIONS FOR MENTAL & BEHAVIORAL HEALTH DISORDERS

Per 100,000 Population	Florida	Lake County	Orange County	Osceola County	Seminole County
Drug and Alcohol-Induced Mental Disorders	165.8	115.7	146.6	112.5	155.8
Mood and Depressive Disorders	425.1	352.0	616.8	425.1	581.8
Schizophrenic Disorders	233.6	162.8	295.0	167.1	166.1
Eating Disorders	13.1	8.9	13.6	8.7	15.3

Source: Florida Department of Health Bureau of Community Health Assessment. Division of Public Health Statistics & Performance Management's Suicide & Behavioral Health Profile, 2022

PERCENT CHANGE OF OVERDOSE DEATHS, 2019-2023

	Lake County	Orange County	Osceola County	Seminole County
Benzodiazepine	-79.6%	-37.3%	-38.8%	-75.3%
Cocaine	-67.6%	-42.1%	+17.1%	-66.7%
Fentanyl	-48.8%	-25.9%	+24.1%	-40.2%
Heroin	-93.3%	-90.5%	-75.0%	ND
Methamphetamine	-37.9%	-13.5%	+22.9%	-42.5%
Opioids	-64.7%	-38.6%	-16.9%	-58.0%

Source: Florida Drug-Related Outcomes Surveillance & Tracking (FROST) System

Behavioral Health

“Counseling - You can't even get in with a therapist due to insurance barriers and whether they are taking new patients or not. People want face-to-face and virtual therapy as exploded since the pandemic.”

- Stakeholder Interview

“Wait times are a big barrier. We have children who are in crisis and can't get an appointment for 6 months. We had a kid go to the emergency room, tell them they were suicidal, and they were sent home. There just isn't enough capacity to treat all of the people that need it.”

- Stakeholder Interview

“Behavioral health is always siloed from primary care. They aren't working holistically. If you have a client with Severe Mental Illness (SMI) - if that behavioral health problem puts them in a head space that is difficult to manage their health care, that makes things extra difficult. There are compensation models in other states that brings primary care and behavioral health into the facility.”

- Stakeholder interview

“Mental health is a big taboo within the Haitian community.”

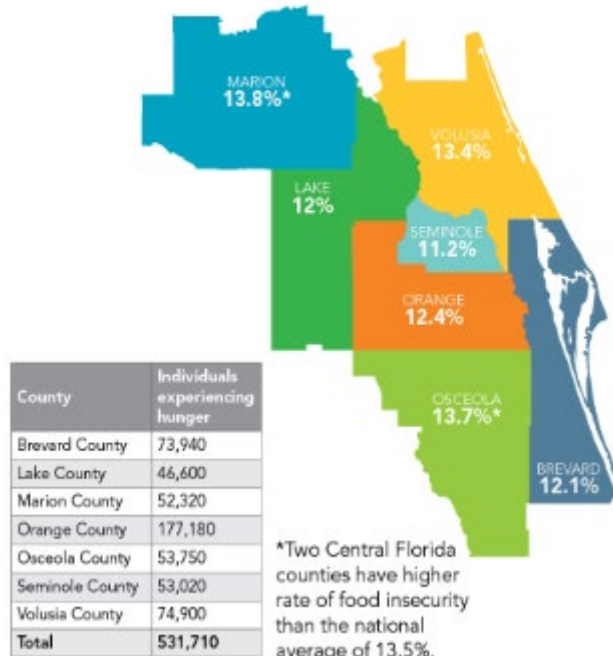
- Focus Group Participant

“There are a lot of resources for behavioral health around here – from non-profits to for-profits, but it's more about being able to navigate the system.”

- Focus Group Participant

Food Insecurity

Food Insecurity Rates IN CENTRAL FLORIDA



Source: Map the Meal Gap 2024

- Osceola County has a higher rate (13.7%) of food insecurity than the nation (13.5%).

“It's really hard to put nutritious food on your table. There are less food pantries, and the ones that they are don't always have healthy food, they're giving out sugary cereal and snacks.” - Stakeholder



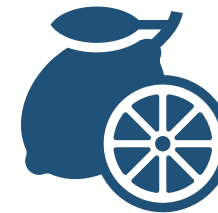
Emerging theme in 2025

COMMUNITY SURVEY DATA



1 in 8

Survey respondents worried about food running out before they got more money to buy more food in the past 12 months.



1 in 4

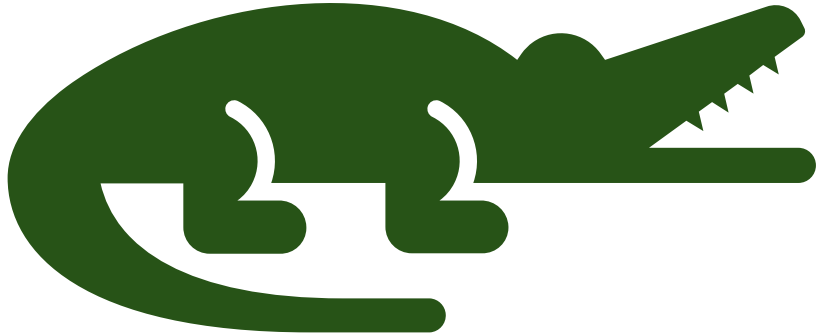
Survey respondents received emergency food in the past 12 months. Osceola County had the highest (33.9%).



1 in 10

Survey respondents reported that the food they bought did not last and they didn't have money for more. Osceola County had the highest (18.1%).

Questions?



Needs Prioritization

Community Townhall Voting Results

Lake County

- Affordable housing
- Emergency shelter for people experiencing homelessness
- Food insecurity
- Liveable wage jobs
- Specialty care services and provider shortages

Orange County

- Affordable housing
- Health literacy
- Culturally sensitive & competent resources
- Behavioral health provider shortage
- Liveable wage jobs

Community Townhall Voting Results

Osceola County

- General awareness of resources
- Affordable housing
- Behavioral health care services for uninsured
- Mental health services (outpatient)
- Liveable wage jobs

Seminole County

- Liveable wage jobs
- Affordable housing
- Food insecurity
- Health literacy
- Maternal and prenatal care

Needs Prioritization Process

- First step complete! Rate the following: magnitude, severity, and feasibility
- Step Two:
 - **Propriety** – Is a problem for the health problem suitable?
 - **Economics** – Does it make economic sense to address the problem? Are there economic consequences if a problem is not carried out?
 - **Acceptability** – Will a community accept the program? Is it wanted?
 - **Resources** – Is funding available or potentially available for a program?
 - **Legality** – Do current laws and regulations allow program activities to be implemented?
 - **Equity** - Do these needs impact vulnerable populations more than others?

Results of Pre-Session Survey

1. Care coordination among healthcare providers
2. Increased communication between healthcare organizations and nonprofits
3. Case Management for people with complex medical and social needs
4. Health literacy, including signage, paperwork, etc. translated into different languages
5. Affordable healthy foods
6. Maternal and prenatal care, especially for BIPOC communities, including more OB/GYNs, awareness of services for New Americans, and more funding
7. Food insecurity
8. Chronic disease prevention and education programs (i.e., diabetes, heart disease, etc.), including obesity prevention
9. Liveable wage jobs
10. Culturally sensitive & competent resources
11. Healthcare navigation for people who don't speak English
12. Mental health services (outpatient)
13. Affordable housing, including for older adults
14. Behavioral health care services for uninsured
15. Social services for vulnerable populations, especially uninsured and undocumented families and unhoused people
16. General awareness of resources, including prenatal care services for New Americans
17. Transportation, especially to medical appointments and public transportation

Results of Pre-Session Survey

18. Affordable prescription medications
19. Health insurance enrollment assistance
20. Food pantries that have fresh foods (i.e. produce, dairy, meat, etc.)
21. Culturally competent health care services and providers, especially for immigrants and LGBTQ+, including providers that represent the communities they serve
22. Dental (especially low-cost and emergency), including more pediatric dentists and providers that accept Medicaid
23. Transitional housing for people experiencing homelessness
24. Behavioral health stigma, especially with BIPOC communities
25. Behavioral health provider shortage, especially prescribing professionals and providers who understand opioid misuse
26. Pediatric preventive education and services
27. Primary care provider shortage
28. Insurance gaps, including providers not accepting Medicaid
29. Emergency shelter for people experiencing homelessness
30. Building trust with immigrant/refugee population
31. Affordable childcare
32. Resources and health services for special populations, like children in foster care, children with developmental delays, Unhoused people, and survivors of domestic violence and human trafficking
33. Social and educational services for infant and preschool-aged children

Results of Pre-Session Survey

- 34. Health education, including reproductive / sex education, immunization education, distracted driving education and safety, substance use prevention (including vaping and marijuana), and nutrition
- 35. Behavioral health services for children under age 5
- 36. Tech literacy / education courses for first generation immigrants / people who don't speak English, and the elderly
- 37. Substance use treatment services
- 38. Specialty care services and provider shortage, especially gerontologists, developmental pediatricians, dermatologists, neurologists, and trauma beds
- 39. Job training for people with disabilities
- 40. Infrastructure investments in low-income communities, including roads, walkable routes, and quality parks and outdoor places for kids, and streetlights
- 41. Special services for older adults, including memory care & day care services for older adults & addressing this stigma, and mental health services
- 43. More support, care & understanding for HIV+
- 44. Accessible housing for people with disabilities
- 45. Long-term behavioral health care services for uninsured/under insured
- 46. Trauma informed care for queer community
- 47. Permanent supportive housing for people with mental health conditions
- 48. Emergency preparedness education for families (i.e., hurricanes, etc.)
- 49. Legal services for immigrant population
- 50. Residential facilities for people struggling with substance use disorders

Next Steps

- Create 6 tables – each table will be assigned 8 community needs
- Conduct the PEARL-E test – see your handouts
- Report out to the larger group
- Final voting

Final Top 15 Needs

Economic Stability

- 1. Food security, with a focus on affordable, healthy foods
- 2. Affordable housing, including for older adults
- 3. Jobs with livable wages
- 15. Affordable childcare services

Health Care Access and Quality

- 4. Access to outpatient mental health services
- 6. Improved care coordination among healthcare providers
- 7. Expanded maternal and prenatal healthcare
- 8. Better communication between healthcare organizations and nonprofits
- 9. Case management for complex medical and social needs
- 10. Programs for chronic disease prevention and education
- 11. Behavioral health services for the uninsured

Neighborhood and Built Environment

- 14. Accessible transportation for medical appointments and public needs

Social and Community Context

- 5. Support for vulnerable populations
- 12. Improved health literacy resources
- 13. Linguistically and culturally appropriate healthcare resources

Thank You!



Contact:

Katelyn Michaud, Managing Principal

katelynm@crescendocg.com