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| **The Scan Foundation - Logo**  **Organization Name:** |  |
| **Project Title:** | **Linkage Lab** |
| **GOAL STATEMENT:** | Develop contractual relationships with the health plans from the eight duals counties**.** |

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| **Objective 1:**  Participate in organizational capacity building, including executive leadership and management development as well as organizational readiness preparation through participation in 4 seminars (up to 10 days total) | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Finalize senior management team selection:   **Required**:   * Executive Director or Chief Executive Officer * Chief Financial Officer/Director of Finance * Chief Operating Officer/ Director of Programs   **Plus** staff in charge of:   * Outreach * Marketing * Operations   Point of Contact for project team – must be one of the project team members. | January 1, 2015 | * Completed contact sheet including names, titles, phone numbers and email addresses. |
| *Status:* | | |
| 1.2 Attend 3 – day kick-off seminar in Southern California | January 14 – 16, 2015 | * Team member attendance * Assessment of organizational capabilities * Development of strategic plan to offer Long-Term Service and Supports on a contractual basis with health care partner |
| *Status:* | | |
| 1.3 Attend three additional 2 - 3day seminars in locations to be determined | June 2015  December 2015  May 2016 | * Team member attendance * Work Assignment from previous seminar has been completed and turned in * Organizational capacities are improved and the organization is prepared to enter into a contractual partnership with a health care provider |
| *Status:* | | |

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| **Objective 2:** Select 1 member for participation in Advisory Board | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| 2.1 Attend twelve, 1-hour Advisory Board calls. | Feb 2014  March 2014  April 2014  May 2014  July 2014  August 2014  September 2014  October 2014  November 2014  January 2016  February 2016  March 2016  April 2016  June 2016 | * Team member attendance * Reports on progress towards assigned tasks * Preparation for upcoming seminars |
| *Status:* | | |

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| **Objective 3:** Participate in Learning Collaborative through use of web based platform | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| 3.1 Provide monthly updates on activities and progress via web based platform | January 2015 – June 2016 | * Monthly Reports |
| *Status:* | | |

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| **Objective 4:** Participate in technical assistance activities with identified consultants. | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Host two in-person technical assistance meetings for your organization ranging from 3-5 hours | February 2015  August 2015 | * Agenda * Technical assistance summary * Team member attendance |
| *Status:* | | |
| 4.2 Participate in monthly technical assistance support calls | January 2015 – June 2016 | * Agenda * Technical assistance summary * Team member attendance |
| *Status:* | | |

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| **Objective 5:** Complete a Root Cause Analysis (RCA) to determine what causes high costs and low quality care for the target population | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Consumer interviews, potential partner discussions, chart reviews, review of QIO data (if applicable), etc. * Hone in on Target Population * Identification of needs of the target population * Identification of potential health care partner’s needs * Understanding of what the new models/ interventions are needed to address the issues revealed in the RCA |  | * Final Report |
| *Status:* | | |
| * 1. Conduct an external scan of the market to understand   existing health care and community-based services, resources, under-utilized assets, gaps in service areas, potential areas of duplication, etc.   * Understanding of existing services and gaps * Identification of potentially needed CBO partnerships |  | * Final Report |
| *Status:* | | |

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| **Objective 6: Identify Potential Partnership with the Health Care Sector (represent new business opportunity)** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| 6.1 Identify potential partners (health care and managed   care providers) |  | * List of identification of potential partnerships |
| *Status:* | | |
| * 1. Facilitate an assessment of your organization’s core offerings / gaps, consider what the potential partners might need from your organization, and create a framework for strategic-oriented partnership discussions |  | * Final strategy and plan for ongoing partnership development |
| *Status:* | | |
| * 1. Determine messaging around core offerings and   strategies for new service development |  | * Initial concept paper / executive summary that can be shared with potential partners |
| *Status:* | | |
| * 1. Schedule and host meetings; determine follow up and   ongoing communication plan with potential partner |  | * Dates, agendas and summaries of partner meetings and an ongoing plan for fostering the relationships |
| *Status:* | | |

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| **Objective 7: Determine if other CBO Partnerships are needed for Model Design and Service Delivery** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Determine organizational gaps and identify the services for what type of collaborative relationships may be needed other CBOs |  | * Final report of Organizational Assessment and an understanding of the services offered by potential CBO partners |
| *Status:* | | |
| 7.2 Identify CBO partners if needed |  | * List of identified CBO partners |
| *Status:* | | |
| * 1. Host meetings with potential CBO partners, determine   collaborative structure for multi-organization involvement, and a plan for ongoing meetings/ communications |  | * Summary of Collaborative Structure for working together |
| *Status:* | | |
| * 1. Craft and sign Memorandum of Agreement (MOA) for working   together, if needed |  | * Agreed upon and signed MOA |
| *Status:* | | |

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| **Objective 8: Design Service Delivery Model** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Research existing models / interventions that meet the needs discovered via RCA, interviews, market scan, etc. |  | * Summary of Model Research findings |
| *Status:* | | |
| * 1. Determine interventions / strategies / key foundational   areas of focus based upon RCA findings, market and consumer research, etc. |  | * Final report including Model Design |
| *Status:* | | |
| * 1. Determine model operations, protocols, integration   strategies, overall management, staffing, intake / referral, assessment, and service delivery process |  | * Final report including Model Operations |
| *Status:* | | |
| * 1. Define measurements and how performance will be   evaluated |  | * Final report including Performance Measurements |
| *Status:* | | |
| * 1. Assess organizational level of readiness for service   delivery and determine a plan for capacity building |  | * Final report including Capacity Building for Implementation |
| *Status:* | | |
| * 1. Develop strategy and implementation plan with   documented tasks, roles, and timelines |  | * Final report including Strategy and Implementation plan with documented tasks, roles, and timelines |
| *Status:* | | |

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| **Objective 9: Develop a Budget and Rate Structure** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Define services/ interventions, cost of delivery, volume, staffing, wages, expenses, training, rate structure, etc., and develop financial model to reflect a variety of situations |  | * Final plan defining Budget and Rate Structure |
| *Status:* | | |

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| **Objective 10: Develop an Approach to Marketing** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Define and craft messaging around new service / model in a manner that is important to potential partners and develop marketing material |  | * Final plan defining Communication Strategy and Marketing Material |
| *Status:* | | |
| * 1. Determine additional training / support needed to   promote services on an ongoing basis |  | * Marketing Training |
| *Status:* | | |
| * 1. Determine strategies for education, outreach, and the   development of new business |  | * Final plan defining Business Development plan including projections, target partnerships, strategies per partnership, roles, and timelines |
| *Status:* | | |

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| **Objective 11: Finalize the Business Plan** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Create a business planning framework and a plan that includes (executive summary, target market, service description, organizational structure, partnerships & alliances, budget, implementation plan, outreach plan, growth plan, etc.) |  | * Business Plan * Outline for Further Proposal Development |
| *Status:* | | |

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| **Objective 12: Formalize a partnership with a Healthcare or Managed Care provider** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| * 1. Finalize structure of the partnership including an   outline of services, implementation plan,  communication plan, performance standards, and an  agreed upon and signed legal agreement |  | * Formalized partnership |
| *Status:* | | |

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| **Objective 13: Participate in Evaluation Activities** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| 13.1 As developed and implemented by The SCAN Foundation participate in evaluation activities. |  | * Formalized partnership |
| *Status:* | | |

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| **Objective 14: Additional Activities** | | |
| **ACTIVITIES/TASKS** | **TIMELINE** | **OUTPUTS (**Tangible products that result from a program’s activities or tasks**)** |
| 14.1 |  |  |
| *Status:* | | |