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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 2015December 2015May 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 2014March 2014April 2014May 2014July 2014August 2014September 2014October 2014November 2014January 2016February 2016March 2016April 2016June 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 2015August 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:* |