

Business Plan Development

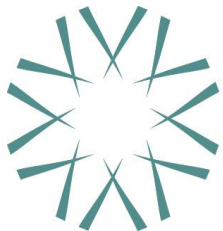
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Program Specialist

August 2015

Rural Health Innovation's Purpose

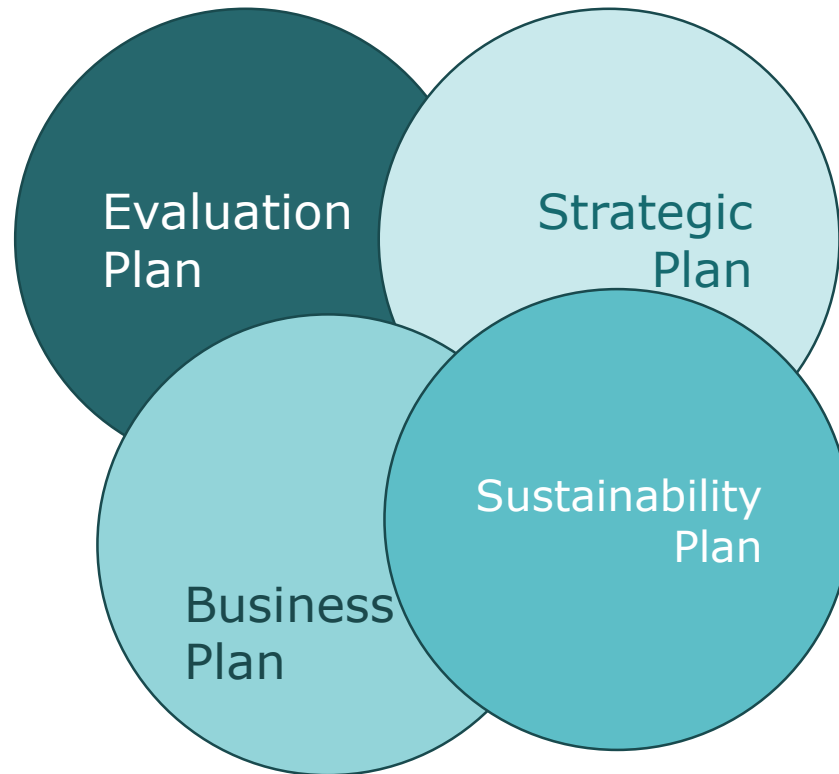
Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are the nation's leading technical assistance and knowledge centers in rural health. In partnership with The Center, RHI connects rural health organizations with innovations that enhance the health of rural communities.



NATIONAL
RURAL HEALTH
RESOURCE CENTER



Plans



Components

Evaluation

- Program Description
- Evaluation Design
- Measuring and Reporting Data
- Evaluation Findings
- Communication of Evaluation Findings

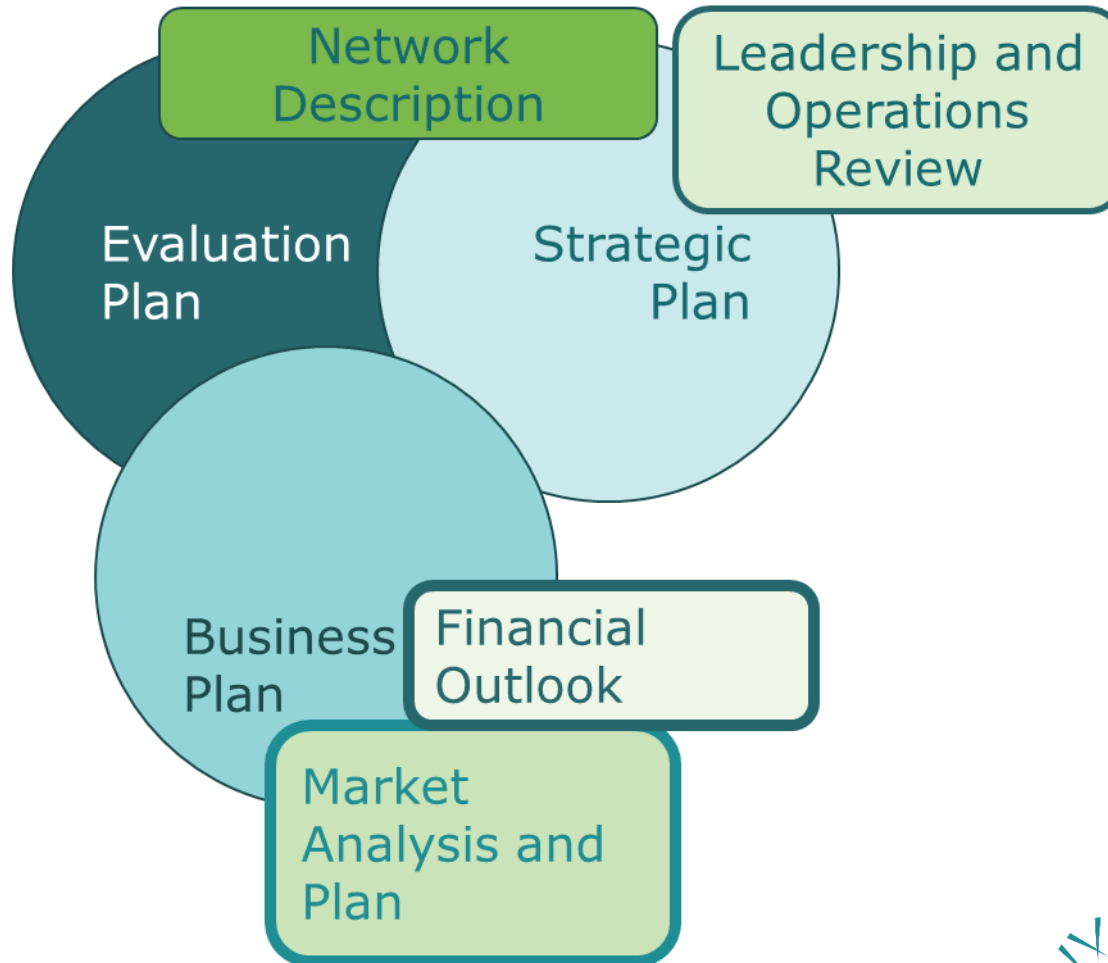
Strategic Plan

- Program Description and Shared Vision
- Strategic Planning Approach and Design
- Environmental Scan and Analysis
- Strategic Objectives
- Communication Plan
- Operationalize the Plan with Work Plan
- Monitoring and Adjusting with Evaluation Plan

Business Plan Components

- Network Description
- Market Analysis and Plan
- Leadership and Operations Review
- Financial Outlook

Plans and Components



Resources Developed for Business Plan

- Business Plan Guide
- Business Plan Template
- Case Study Business Plan

Supplemental Resources

- Business Canvas Worksheet
- Business Canvas Tool
- Creating a Value Proposition Worksheet
- Sample Strategic Plans

Business Plan Guide

Business Plan Guide Rural Health Network Development

August, 2015



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Terms



Members



Customers




**Product /
Service**

Network Description

Network Description

- Mission
- Values
- Vision
- History, Purpose and Culture
- Strategic Objectives
- Business Structure and Governance

Mission



Network Description	Notes and Guidance
Mission:	A mission statement articulates your Network's purpose for being. It includes how the Network will achieve its vision in relation to specific objectives and customer needs. Your mission is part of your strategic plan.
Values:	Value statements are principles and beliefs that guide your Network's activities and the way it operates. It articulates your Network's shared beliefs. If they are not already part of your strategic plan you should determine them at this time.
Vision:	A vision statement articulates your Network's aspirations. It outlines where your Network wants to be; communicating your Network's purpose and values. Future oriented. Your vision is part of your strategic plan.
History and culture:	The information in this section is foundational for the business plan. It provides the reader with just enough information to make sense of the rest of the plan; giving context for the network's services, infrastructure, and financial projections. A brief history of your network is part of -your strategic plan. An area that may be new for your network to consider is your Network's culture. To consider the culture of your network ask "how do we do our work when meeting our mission and implementing our work plans?" In a way your culture describes how your network staff lives the values. For example, high expectations for excellence, a learning organization

Values

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Vision

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History and Culture

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Strategic Objectives



Strategic Objectives:	Strategic objectives are goals that convert your mission statement into reality. These are located in your strategic plan. To help your reader, it is recommended that are consistent with your language throughout your plan when describing your strategic objectives, for example, goals, strategies, objectives, outcomes, etc. Additionally, it is helpful to your ready to number your strategic objectives if you refer to them later in the business plan.
Business Structure and Governance:	Business structure is a description of your network's leadership and staff alignment. It provides a picture of how the leadership and staff are paid. Business governance describes how decisions are made. Network governance is usually located within the Network's by-laws or memorandum of agreement (MOA) or understanding (MOU). . As reference a sample by-laws document is included in the e Case Study <i>Business Plan</i> You may also reference the Board Development presentation as it addresses structure and governance.

Strategic Plan Sample

Strategic Objectives (Sample A)

Strategic Objective Documentation: Network Strategic Planning						
Network Vision: Improving access to dental care in underserved areas by utilizing technology to leverage existing resources.						
Consensus Strategic Objectives	Continued Pursuit of Medicaid Reimbursement for Tele-Dental Services to Improve Sustainability	Complete Expansion of Service into Dental Office and Mobile Clinic	Recruitment of Part or Full-Time Dentist to Expand Capacity of Treatment	Further Development of Tele-Dentistry Protocol for Adoption by the State Department of Health	Implementation of Student Rotation of Tele-Dentistry Services	Finalize the Method for Staff to Provide Oversight and Consultation Services
Small Group Ideas and Actions Data	<ul style="list-style-type: none"> Examine the best practices of other states with billing codes; e.g. California Continue advocacy of tele-dental billing codes from State Department of Health Advocate to recognize the hygienist as a provider of services under protocol Explore additional funding opportunities such as Ryan White, state oral health, and tobacco prevention funding 	<ul style="list-style-type: none"> Finish installation of circuit and equipment once circuit is available Review all equipment needs to ensure full functionality Review facilities for possible remote dental sites Explore the possibility of utilizing additional community data and network resources to expand accessibility to tele-dental program 	<ul style="list-style-type: none"> Target new graduates, retired or near retired dentist, or dentist from local area with ties to community Pursue a loan repayment program to attract new graduates Leverage our partners at local dental school to educate students on Public Health and inform them of employment opportunities Advertise via newspaper ads, State Dental Association publication, State's School of Dentistry, and the Association of State and Territorial Dental Directors 	<ul style="list-style-type: none"> Additional chapter to existing State Public Health Dental Protocol specific to tele-dentistry building on components already in place Review and revise current intake packets 	<ul style="list-style-type: none"> Use the rotation to familiarize students with the technology and tele-dental services Explore additional use of system capabilities such as providing CEU credits to dentist and hygienist Develop method of supervision for dental students that are in rotation by a pediatric dentist 	<ul style="list-style-type: none"> Utilize teleconferencing technology to allow easy access of dentist by network members to provide live interaction and consultation of outstanding cases Utilize tele-dental tools such as digital x-ray and intra oral cameras via teleconferencing to relay dental images to dentist

Business Structure and Governance

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Market Analysis and Plan

Market Analysis and Plan

- Rural Health Care Environment and Compleitive Analysis
- Rural Health Network Members and Customers
- Member and Customer Needs Assessment
- Value Proposition of Products and Services
- Promotion and Communication

Rural Health Care Environment



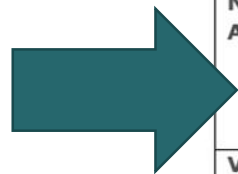
Market Analysis and Plan Components	Notes and Guidance
Rural Health Care Environment and a Competitive Analysis	<p>Briefly describe the current health care environment that is impacting or influencing your Network and its members/customers. This is found in your marketing plan or the environmental scan that is part of your strategic plan. If you do not have a marketing plan it is recommended that you consider completing this effort prior to writing your business plan. To identify aspects of the environment that are impacting or influencing your network or your members, review the environmental scan that is part of your strategic plan and ask: "what are the key drivers of change – those levers or blocks that require the network or its members to adapt or adjust its work in order to continue achieving its mission?"</p> <p><i>A Competitive Analysis</i> for your Network, considers the options your members/customers have in choosing a service from another organization. For example, if your members have other options for receiving the service then ask; "What are the competitor's strengths and weaknesses in producing and delivering the product or service?"</p>

Rural Health Network Members and Customers



Rural Health Network Members and Customers	<p>List your Network's current members/customers and provide a short description that offers the reader a brief insight in why each organization is a member/customer. You are building a profile of your members/customers here. This provides examples of member organizations that demonstrates the value in being a member. Suggestions for profile topics include: mission, type of organization, longevity of membership, location/town, specific equipment or connectivity, network products being utilized or valued, and shared resources.</p> <p>If you have a <i>Member/Customer Profile Study</i> or <i>Target Market Analysis</i>, include it here. Market analysis resource from the U.S. <i>Small Business Administration</i>: https://www.sba.gov/content/market-analysis.</p>
Member and Customer Needs Assessment	<p>Include a brief or summary level description of your members' and customers' needs. The needs assessment is located in your marketing plan. If you have not completed a member needs assessment to align your network's products and services; identify a product fit, then it is recommended to complete a needs assessment prior to writing the business plan. The <i>Pains and Gains</i> section of the Value Proposition Worksheet (pages 2 & 3) is a good resource. .</p>
Value Proposition of Products and Services	<p>This is an opportunity to articulate the value that the Network provides to its current and potential members/customers.</p> <p>Provide value propositions for each network product and service. Keep this description at a summary level. It will be a starting point when developing marketing materials.</p> <p>The value propositions are located within your marketing plan. If you have not completed a value proposition then it is recommended to complete prior to writing the business plan. The Value Proposition Worksheet (pages 4-7) is a good resource.</p> <p>If your Network has a <i>Competitive Advantage Study</i>, include it here. This will show your Network's ability to potentially deliver products/services for a lower cost or perhaps provide a higher level of service than competitors.</p>
Promotion and Communication	<p>Describe the approach and methods for promotion and communication of the network's value propositions Keep this section at a summary level.</p>

Member and Customer Needs Assessment



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Pains and Gains

Creating a Value Proposition Worksheet:

Pains and Gains: From the compiled list of your members' jobs and problems, brainstorm another list that identifies any Pains and Gains they experience with the associated work or problem. Then rank the Pains and Gains according to their intensity or relevance.

STEP 1: MEMBER NEEDS ASSESSMENT

Work, Jobs and Problems: Consider your members and brainstorm a list of the jobs they are trying to get done and/or the problems they are trying to solve.

<p>A. Work, Jobs, and Problems What work/jobs are your members trying to get done or problems they are trying to solve? What functional jobs is your customer trying get done? (e.g. perform or complete a specific task, solve a specific problem, ...), What social jobs is your customer trying to get done? (e.g. trying to look good, gain power or status, ...), What emotional jobs is your customer trying get done? (e.g. esthetics, feel good, security, ...)</p> <p>Work/jobs to be done and problems to solve:</p>

<p>B. Member Pains: Describe the negative emotions, undesired costs, and situations that your members experience before, during or after getting the work/job done.</p> <p>What are your members' main challenges? What risks do your members' fear? What common mistakes do your members make?</p> <p>Rank each pain according to the intensity it represents for your members and how often it occurs. (3=high, 1=low)</p>		<p>C. Member Gains: Describe the benefits your members expect, desire, or would be surprised by; including functional utility, social gains, positive emotions, and cost savings.</p> <p>What would make your members work/job easier? How do your members measure success or failure?</p> <p>Rank each gain according to its relevance to your members and how often it occurs. (3=substantial, 1= insignificant)</p>	
Rank	List of Pains	Rank	List of Gains

Based on Business Model Generation: Business Model Canvas and Value Proposition Designer and designed by RURAL HEALTH INNOVATIONS, a subsidiary of the National Rural Health Resource Center, 3/2015

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Value Proposition of Products and Services

Rural Health Network Members and Customers	<p>List your Network's current members/customers and provide a short description that offers the reader a brief insight in why each organization is a member/customer. You are building a profile of your members/customers here. This provides examples of member organizations that demonstrates the value in being a member. Suggestions for profile topics include: mission, type of organization, longevity of membership, location/town, specific equipment or connectivity, network products being utilized or valued, and shared resources.</p> <p>If you have a <i>Member/Customer Profile Study</i> or <i>Target Market Analysis</i>, include it here. Market analysis resource from the U.S. Small Business Administration: https://www.sba.gov/content/market-analysis.</p>
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Promotion and Communication	<p>Describe the approach and methods for promotion and communication of the network's value propositions Keep this section at a summary level.</p>



Products and Services

Creating a Value Proposition Worksheet:

Step 2: Value Proposition

Identifying Potential Products and Services: Based on the brainstormed and prioritized list of Pains and Gains AND considering the organizations' mission, vision, and strategies; **brainstorm a list of possible products or services.** Include the organizations' current products, services, and member benefits along with any new ideas that are generated. ***This section requires you to analyze and synthesize the needs of your members into specific products and services that are aligned with your network's mission and vision.*** Allow yourself to consider the needs from a fresh look at your member's work/jobs and associated pains/gains. You may come up with some new ideas.

A. Initial Listing of Potential Business Product or Service: What is the business product or service that will reduce members' pains and increase members' gains (needs assessment) AND is aligned with the network's mission, vision, and strategic objectives?	
RANK	Name of Product/Service

Creating a value proposition worksheet:

D. Relieve Pains: Describe how this product or service alleviates member pains. (Intense relief or light relief). Refer to all of the earlier work of brainstorming the pains. <ul style="list-style-type: none"> Rank each pain reliever according to the intensity it represents for your members. Intense relief (+) or Light relief (-) 	E. Create Gains: Describe how this product or service creates member gains or reduces negative emotions. (Substantial or insignificant). Refer to all of the earlier work of brainstorming the gains. <ul style="list-style-type: none"> Rank each gain creator according to its relevance to your members. Substantial (+) or Insignificant (-)
Crucial Product/Service 2	
•	•
Crucial Product/Service 3	
•	•
Crucial Product/Service 4	
•	•

Promotion and Communication

	<p>If you have a <i>Member/Customer Profile Study</i> or <i>Target Market Analysis</i>, include it here. Market analysis resource from the U.S. <i>Small Business Administration</i>: https://www.sba.gov/content/market-analysis.</p>
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Promotion and Communication	<p>Describe the <u>approach</u> and methods for promotion and communication of the network's value propositions Keep this section at a summary level. This information is located within the marketing plan. If your Network has a <i>Marketing Strategies</i> and/or a <i>Branding Plan</i>, include it here.</p> <p>If you have not yet completed a marketing plan that includes promotion and communication it is recommended to complete this work prior to writing the business plan. The Business Planning Worksheet, page 3, is a good resource. Also, reference the Case Study Business plan, p. 8.</p>



Business Canvas Worksheet

Business Canvas Worksheet:

3. Desired End-User Experience & Relationship:

- What experience do you want your members to have while they are receiving or using your product or service? (i.e. personal, interactive, remote, etc.)
- What relationship do your members expect you to establish and maintain with them when they receive or use your product or service? (i.e. personal assistance, self-service, automated, communities, co-creation, etc.)
-



4. Product or Service Communication & Delivery:

- What communication methods will you use with your members as they learn about, receive and use your product or service?
- What are the methods you can use to deliver your product or service?
-




Leadership and Operations Review

Leadership and Operations Review

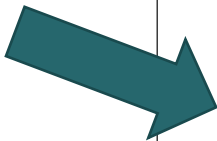
- Leadership Team and Skills
- Key Initiatives
- Key Resources and Infrastructure
- Key Partners
- Evaluation Dashboard

Leadership Team and Skills

Leadership and Operations Review Components	Notes and Guidance
 Leadership Team and Skills	<p>Briefly describe the leadership skills and attributes that contribute to the success of the Network. Keep it clear and direct, being mindful not to add too much 'fluff'. Provide an example if it will help paint the picture for the reader. An organizational chart may be helpful if you have one. The key here is to show the reader that you have the people resources and operational processes in place to support success. This section may have been developed for your strategic plan, but if not it is recommended to develop it for your business plan.</p>
Key Initiatives	<p>Describe key activities and initiatives focused on developing, implementing, supporting and providing products/services. This section is a summary or high level description of your work plan or logic model. Initiatives are those activities that take place from 6-18 months. Initiatives should be conveyed in a clear and concise manner in which the reader is convinced that your efforts are focused on the network's mission, vision and strategic objectives.</p> <p>Use the Key Initiatives segment (page 4) of the Business Planning Worksheet for this section. Using your work plan or logic model may also be helpful here. A scorecard format may be a helpful for this section. The scorecard is commonly located in the Evaluation Plan.</p>
Key Resources and Infrastructure	<p>Describe the fundamental resources and infrastructure of the Network that supports operations, (i.e. the 'guts or inner workings' that make the products/services possible to create and deliver). Provide the reader with just enough detail to convince them that the operations are effective, reliable, and stable. Keep this section concise by selecting the most important tools, technology, expertise, staffing, etc.</p>

Key Initiatives

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Business Canvas Worksheet (Key Initiatives)

Business Canvas Worksheet:

5. Key Initiatives:

- What are the key initiatives (actions) needed to develop, implement, support and/or provide this product or service?



•



6. Key Resources/Infrastructure:

- What are the most important tools, technology, expertise, staffing, materials, and/or financial resources needed to develop, implement, support and/or provide this product or service?



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7. Key Partners:

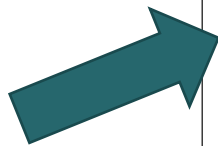
- Who are the key partners that are needed to develop, implement, support and/or provide this product or service?



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Key Resources and Infrastructure

Leadership and Operations Review Components	Notes and Guidance
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Business Canvas Worksheet (Key Resources/Infrastructure)

Business Canvas Worksheet:

5. Key Initiatives:

- What are the key initiatives (actions) needed to develop, implement, support and/or provide this product or service?
-



6. Key Resources/Infrastructure:

- What are the most important tools, technology, expertise, staffing, materials, and/or financial resources needed to develop, implement, support and/or provide this product or service?
-



7. Key Partners:

- Who are the key partners that are needed to develop, implement, support and/or provide this product or service?
-



Key Partners

plan or strategic plan. The [Business Planning Worksheet](#), Key Resources, (page 4) will be a useful resource for this section.

RURAL HEALTH INNOVATIONS

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Key Partners

Identify the key partners of your Network from the perspective of supporting the operations. This is not the same as a stakeholders list. Key Partners are those that are contributing to the success of the network's operations in meeting the mission. Key Partners may also be members.

Briefly describe the type of relationship the partner has with the Network, (i.e., long-time funder, ex-official board member, informal advisor, etc.). The goal is for the reader to have a clear understanding of how the partner organizations are supporting operations and to be convinced that the key partners are committed to the Network's success.

This will most likely be new writing for you, as it is not included in the strategic plan, although it would be appropriate and you may consider adding this section to your strategic plan. Refer to the Key Partners portion (page 4) of the [Business Planning Worksheet](#) for this section.

Evaluation Dashboard

This is an executive level summary of metrics for monitoring and adjusting strategies and key initiatives. This dashboard format is located in your strategic plan. The dashboard should be limited to one - two pages. Resource for this section includes the Case Study Business Plan, p.11 and the [Sample Strategic Plans](#) (pages 25-27).

Business Canvas Worksheet (Key Partners)

Business Canvas Worksheet:

5. Key Initiatives:

- What are the key initiatives (actions) needed to develop, implement, support and/or provide this product or service?
-



6. Key Resources/Infrastructure:

- What are the most important tools, technology, expertise, staffing, materials, and/or financial resources needed to develop, implement, support and/or provide this product or service?
-



7. Key Partners:

- Who are the key partners that are needed to develop, implement, support and/or provide this product or service?
-



Evaluation Dashboard

plan or strategic plan. The [Business Planning Worksheet](#), Key Resources, (page 4) will be a useful resource for this section.

RURAL HEALTH INNOVATIONS

10

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Monitoring and Adjusting with Evaluation Plan

Monitoring and Adjusting with Evaluation Plan (Sample B)

1. Pursuit of Medicaid Reimbursement for Tele-Dental Services



Plans for Monitoring and Review

- Scheduled meetings with State Department of Health Liaison (attended 4/10/15 strategic planning meeting) to discuss status of billing status
- Medicaid generated revenue will be tallied and tracked with dental software
- Assess the potential revenue if tele-dental services reimbursed by Medicaid
- Work with billing team to draft dental billing policy Number of Medicaid billing codes established
- Assess potential revenue if tele-dental services are not reimbursed

2. Complete Expansion of Service into Dental Office and Mobil Clinic



Plans for Monitoring and Review

- Weekly meetings held with telehealth staff, all telehealth activities, including tele-dentistry, are discussed
- Tele-dentistry services successfully provided
- Number of tele-dental services documented in dental software (daily) and reports reviewed

3. Recruitment of Part or Full-Time Dentist to Expand Capacity of Treatment



Plans for Monitoring and Review

- Human Resources (HR) staff monitors applicant database for submissions
- If recruitment is unsuccessful, HR staff will reassess recruitment efforts

Financial Outlook

Financial Outlook

- Estimated Operations Cost
- Projected Revenues
- Pro forma Scenarios

Estimated Operations Cost

Financial Outlook Components	Notes and Guidance
Estimated Operations Cost	<p>Provide a brief narrative or chart of the estimated operational costs of your Network. Doing this in annualized dollars, costs for the full 12 month year of work, can be the easiest for people to understand.</p> <p>Support this narrative with a summary level chart that shows the total cost components for your Network.</p> <p>The Business Planning Worksheet, page 5 is a useful resource to identify various costs to take into consideration.</p> <p>Additional resources for estimating costs are under development and will be provided this fall, 2015.</p>
Projected Revenues	<p>Provide a brief narrative or chart of the estimated revenue of your Network. Doing this in annualized dollars can be the easiest for people to understand.</p> <p>Support this narrative with a summary level chart that shows the total revenue components for the Network.</p> <p>The Business Planning Worksheet, page 5 is a useful resource to identify various costs to take into consideration.</p> <p>Additional resources for estimating costs are under development and will be provided this fall, 2015.</p>
<p>NOTE: It may make the most sense to combine the estimated costs and revenues into the same chart. There is no one right way to present your financial information. The goal, however, is to make it easy for your reader to understand where you are spending</p>	

Projected Revenues

Financial Outlook Components	Notes and Guidance
Estimated Operations Cost	<p>Provide a brief narrative or chart of the estimated operational costs of your Network. Doing this in annualized dollars, costs for the full 12 month year of work, can be the easiest for people to understand.</p> <p>Support this narrative with a summary level chart that shows the total cost components for your Network.</p> <p>The Business Planning Worksheet, page 5 is a useful resource to identify various costs to take into consideration.</p> <p>Additional resources for estimating costs are under development and will be provided this fall, 2015.</p>
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Business Canvas Worksheet

Business Canvas Worksheet:

8. Development & On-going

Costs:

Describes and estimates costs related to the product or service.

- Look to key initiatives, infrastructure and resources for identifying costs.
- Estimate one-time purchases.
- Estimate on-going costs related to recurring fees and purchases, and human resources.


Forecast Assumptions:

Development/Start-up one-time cost components:

Ongoing costs components:

Annual Cost = one-time cost + on-going costs
per year

9. Expected Income:

- Identify a payment type for your product or service.
 - Estimate price and frequency of member's payment.
- 

Examples of payment types include: selling a physical product, charging on a per use basis (fee for service), subscription fee based on a time period, rent or lease a physical product, and licensing an intellectual property (shared staffing).

Forecast Assumptions:

Identify type of payment:

Estimate how much (price) and how often (frequency) your members are willing to pay:

$$\text{Annual Income} = \text{Price per Unit} \times \text{Frequency per year} \times \text{Number of Members}$$
$$\text{Forecasted Income} = \text{Expected Income} - (\text{Development} + \text{On-Going Costs})$$

Pro forma Scenarios

Additional resources for estimating costs are under development and will be provided this fall, 2015.

NOTE: It may make the most sense to combine the estimated costs and revenues into the same chart. There is no one right way to present your financial information. The goal, however, is to make it easy for your reader to understand where you are spending

RURAL HEALTH INNOVATIONS

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your money and how you are bringing in revenue. It needs to be easy for them to be convinced of your Network's financial stability.

Pro forma Scenarios

If your Network has some decisions to make that will impact the future of the Network, this is the place to include those various outcomes by using the same financial charts above, but changing the assumptions within the spreadsheet and showing different scenarios.

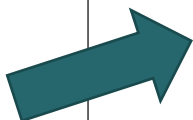
Example of changing the number of member's:

Scenario 1 = no growth, Scenario 2 = increasing members each year by a specific number or % increase, etc.

Example of different ideas for dues structure or pricing assumptions:

Scenario 1 = currently no dues, Scenario 2 = tiered structure based on member's net income, Scenario 3 = tiered structure based on members broadband use.

. Additional resources for developing scenarios are under development and will be provided this fall, 2015.



Business Plan Template

Business Plan Template Rural Health Network Development

August, 2015



This is a publication of Rural Health Innovations, LLC (RHI), a subsidiary of the National Rural Health Resource Center. The Technical Assistance for Network Grantees Project is supported by Contract Number HSH250201400024C from the U.S. Department of Health and Human Services, Health Resources and Services Administration, Federal Office of Rural Health Policy.

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This template is designed so you can literally paste your information into it. It is a Word document, so please feel free to insert your Network's name and logo as well.



Network Description

Network Description

Mission:

Articulates your Network's purpose for being. [Insert from page 6 of the *Business Plan Guide*. A sample can be found on page 3 of the *Case Study Business Plan*]

Values:

Principles and beliefs that guide your Network's activities and the way it operates. [Insert from page 6 of the *Business Plan Guide*. A sample can be found on page 3 of the *Case Study Business Plan*]

Vision:

Articulates your Network's aspirations. [Insert from page 6 of the *Business Plan Guide*. A sample can be found on page 3 of the *Case Study Business Plan*]

History, and Culture:

Brief history of the Network along with a brief explanation of the Network's culture. [Insert from page 6 of the *Business Plan Guide*. A sample can be found on page 3 of the *Case Study Business Plan*]

Business Plan Components

- Network Description
- Market Analysis and Plan
- Leadership and Operations Review
- Financial Outlook

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Case Study Business Plan

Case Study Business Plan Rural Health Network Development

August, 2015



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Business Plan Due Dates

- May Cohort
 - January 31, 2016
- September Cohort
 - May 31, 2016

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