

# Opportunities for Sustainability

## A Sustainability Action Plan Guide

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Rural Network Health IT Workforce Grantees  
March, 2016



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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## BACKGROUND AND 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 (TA) and knowledge centers in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing TA to the Rural Network Health IT Workforce grantees through a contract with the Federal Office of Rural Health Policy. Sustainability of rural health networks is determined by how productive the organization is in achieving its objectives and goals and how successfully it has positioned itself for the future. For this *Opportunities for Sustainability: A Sustainability Action Plan Guide*, sustainability is defined as the ability to achieve desired outcomes and financial viability through implementation and deployment of the organization’s business plan.

The *Opportunities for Sustainability: A Sustainability Action Plan Guide* is designed to support rural health network leaders in both developing and writing action plans for network sustainability. There are three components within this guide for sustainability:

- **Organizational Profile** provides an understanding of the network organization systems by summarizing the network’s business plan components of strategy, marketing and communication, leadership and operations, and financial outlook, is the first and a critical step toward planning for sustainability. It is in this preparation that a network will gain insight to enable you to identify and prioritize opportunities for sustainability.

- **Sustainability Action Plan Assessment** is based on the Baldrige Performance Excellence framework with a purpose of identifying performance gaps that are barriers for the network in sustaining its efforts and reaching its vision. A multi-faceted approach for considering and assessing organization performance is key to identifying opportunities for sustainability (OFS).
- **Opportunities for Sustainability (OFS) Action Plans** are a tool to focus on selected key barriers, OFSs, identified through assessment as opportunities for sustainability. Action plans that address opportunities for sustainability support the network's ability to achieve desired outcomes and financial viability. The action plans identify what initiatives are needed to address the barrier(s), who will implement the actions, a timeline for implementation, and what resources are needed. The primary function of the action plans is as an internal document for network leaders to focus initiatives and resources. Network staff will use the action plans to implement identified improvements. Board members will use the action plans to better understand the network's sustainability and provide support and input on development of network systems.



## ORGANIZATIONAL PROFILE

- The organizational profile is a starting point for self-assessment as it helps the network leader carefully consider and understand the systems of the network organization by summarizing the network's business plan.
- The key to writing the organizational profile is to review each component of the network's business plan and summarize the key aspects that describe the organization or how it operates. If a business plan has not been completed, it is appropriate to complete the organizational profile without. The key is to consider each aspect of the organization in order to understand the systems within the organization.
- Refer to the following **Organizational Profile Overview** for detailed explanation.

Organizational Profile Overview		
<b>Vision:</b> A vision statement articulates your network’s aspirations. It outlines where your network wants to be or wants to achieve; communicating your network’s purpose and values. It is future oriented and part of the Strategic and Business Plans.		<b>Mission:</b> A mission statement articulates your network’s purpose for being; communicating what the network does. It is present oriented and describes how the network will achieve its vision in relation customer to needs. It is part of the Strategic and Business Plans.
Strategic Thinking		
<b>Environmental Blocks:</b> The top 6 events and happenings going on in health care, your community, and your organization that are hindering the network in moving toward its vision.	<b>Environmental Levers:</b> The top 6 events and happenings going on in health care, in your community and your organization, that are helping the network in moving toward its vision.	<b>Strategic Objectives:</b> The paths toward the network vision. Depending on the planning framework you are using, they may be referred to as strategies or outcomes. This is part of the Strategic, Evaluation, and Business Plans.
Marketing Thinking		
<b>Environment</b> of health care that is influencing your network and members. <b>Members/customers</b> summary profile including the type of organization and years as members. <b>Member needs</b> identified as those that drive service development. This is part of the Business Plan; Value Proposition Member Needs Assessment. <b>Competitors and their strengths profile</b> to identify other avenues for members to meet their needs.	<b>Value Propositions:</b> Articulate the value that the network provides to its current and potential members/customers, answering the question, “what benefit does this network service provide to our members or customers?” Articulate value propositions for each network product and service with a focus on specific members or customers. Keep this description at a summary level. This is part of the Business Plan; Value Proposition Business Product and Service.	<b>Promotion and Communication</b> approach and methods of the network’s value propositions; such as, message, audience and mode of communication. <b>Delivery</b> of network services to the customer, such as, remote, in person, virtual, training, etc. Keep this section at a summary level. This is part of the Business Plan, Desired Customer Experience and Relationship and Communication and Delivery.

## Organizational Profile Overview

### Leadership and Operations Review

**Leadership:** Briefly describe the leadership skills and attributes that contribute to the success of the Network. On organizational chart may be helpful. The key here is to show that you have the people resources in place to support success of the network. This is part of the Business Plan.

**Key Initiatives:** 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 that are aligned with your vision. This is part of the Business Plan.

**Key Resources and Infrastructure:** 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 just enough detail to show that the operations are effective, reliable, and stable. This is part of the Business Plan.

**Key Partners:** Identify the key partners and how they are supporting the operations of the network. 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. This is part of the Business Plan.

**Key Results:** This is an executive level summary of the top 3-5 measurements that help tell the story of network progress and impact. Include comparative data or trend information as appropriate. This is part of the Business Plan.

### Financial Outlook

**3 Year Net Income Forecast:** Show the net income forecast for your network. If appropriate illustrate the net income forecast (pro forma) for network service or product, i.e. individual value propositions or by scenarios. If appropriate include assumptions that develop different scenarios about your network's future. For example; changing the number of member's: Scenario 1 = no growth, Scenario 2 = increasing members each year by a specific number or % increase, etc. This is part of the Business Plan.

## SUSTAINABILITY ACTION PLAN ASSESSMENT

### Instructions:

It is important to complete this Self-Assessment **after** completing the Organizational Profile. The Organizational Profile sets the context and provides key insights to be considered during completion of the Assessment.

Our suggestion is to use a small group that knows your network, for example, including network leadership and staff at a minimum and other partners, members and customers may be beneficial.

- Complete this Self-Assessment by highlighting or circling the most appropriate number to rate your network on a scale of 1-5. (5=complete/achieved, 4=mostly complete, 3=in progress, 2= just begun, 1=unaware of need/not started)
- After completing this assessment find and highlight those that are rated a 3 or below.
- Use the following conversation to identify the key Opportunities for Sustainability (OFS) to focus on and develop individual Action Plans.

### OFSs Action Planning Conversation:

Identify the questions that were rated 3 or lower. Read those questions aloud and/or post them to a flip chart for consideration.

- **Ask:** Of all of the low rated OFSs;
  - Which ones are you surprised that were rated a 3 or below?
  - Which ones make sense to you to be rated low?
- **Ask:** In considering these low-rated OFSs;
  - Which ones have we already been working on?
  - Which ones do we think are not significant or that we don't need to consider for our sustainability?
  - Which ones may be important to consider for our sustained work?
- **Ask:** In considering these low-rated OFSs;
  - Which ones, if we don't address them, may have a long-term impact?
- **Ask:** For developing specific OFS action plans with the intention of improving our sustainability;
  - Which are the 1-3 most important OFS's we want to address, and then develop individual action plans for to submit for this Sustainability Plan?

## OPPORTUNITIES FOR SUSTAINABILITY (OFS) ACTION PLAN

Opportunities for Sustainability Action Plans support the network's efforts to achieve desired outcomes and financial viability. The action plans identify what initiatives are needed to address the selected OFSs from the Sustainability Action Plan Assessment including, who will implement the actions, timeline for implementation, resources needed, and plans for monitoring and communicating progress. Use the template provided on page 11 of the *Opportunities for Sustainability: A Template for Action Planning*.

The primary function of the action plan is as an internal document for network leaders to focus initiatives and resources. Network staff will use the action plans to implement identified improvements. Board members will use the action plans to better understand the network's opportunities for sustainability and provide support and input on development of network systems.