Opportunities for Sustainability:   
A Template for Action Planning

Organizational Profile, Assessment and Action Plans

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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 leading national technical assistance 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 Allied Health Training Network grantees through a contract with the federal Office of Rural Health Policy.

The purpose of this *Opportunities for Sustainability: A Templat for Action Planning,* is to act as a tool for rural health networks to actively plan for sustainability as network leaders deploy their networks’ business plan. The goal is to create specific action plans that will address identified opportunities for sustainability (OFS). Sustainability can be addressed through careful consideration and assessment of an organization’s efforts with specific guiding questions based on the Baldrige criteria including, “Is your organization doing as well as it could?”, “How do you know?”, and “What or how can your organization improve or change?” Patrice Spath, prescribes using a management framework, such as the Baldrige Framework, for effectively diagnosing opportunities for sustainability.

# Instructions

To use this *Opportunities for Sustainability (OFS): A Templage for Action Planning* for your network’s sustainability plan, follow steps 1-4 below:

1. Change the document’s header and footer to reflect your network’s name.
2. Change the title on the cover/title page of this template document to reflect your network’s program name, and a new sub-title might be “Sustainabilty Action Plan”. Also, update the date on cover/tile page.
3. Remove the RHI logo and insert your network logo.
4. This template document will become grant’s Sustainability Action Plan deliverable upon completing the organizational profile, assessment, action plans for selected OFSs, and OFS summary that follow.

# 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.

A 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 it. The key is to consider each aspect of the organization in order to understand the systems within the organization. Refer to the Organizational Profile Overview, on pages 6-8 of the “Opportunities for Sustainability Guide” for a detailed explanation.

**Instructions:** Remove these instructions and the descrtiption above upon completion of the tables below, reflecting your network’s specific organizational information.

| **Organizational Profile** | | |
| --- | --- | --- |
| **Vision:** *(<50 words)* | | **Mission:** *(<50 words)* |
| **Strategic Thinking** | | |
| **Environmental Analysis:** *(top 4-6)* | | **Strategic Objectives:** *(<6 objectives/strategies or outcomes)* |
| **Blocks:** | **Levers:** | **Strategies/Outcomes:** |

| **Organizational Profile** | |
| --- | --- |
| **Marketing Thinking** | |
| **Market Analysis:** *(< 100 word description of each)* | |
| **Environment:** | **Network Members:** |
| **Member Needs:** | **Competition:** |

| **Organizational Profile** | |
| --- | --- |
| **Marketing Thinking (cont.)** | |
| **Value Propositions:** *(list by service and member or customer)* | |
|  | |
| **Promotion and Communication:** *(top 3-5 messages)* | **Delivery:**  *(describe by service)* |
|  |  |

| **Organizational Profile** | |
| --- | --- |
| **Operations Review** | |
| **Leadership Strengths:** *(< 100 word description of each)* | **Key Initiatives:** *(top 5-10 initiatives)* |
|  |  |

| **Organizational Profile** | |
| --- | --- |
| **Operations Review** | |
| **Key Resources and Infrastructure:** *(top 5-10 resources or infrastructure that is in place and operational)* | **Key Partners:** *(<30 words per partner)* |
|  |  |
| **Key Results:** *(top 3-5 key measures)* | |
|  | |

| **Organizational Profile** |
| --- |
| **Financial Outlook** |
| **3-Year Net Income Forecast:** (by value proposition if appropriate) |
|  |

# opportunities for Sustainability Action Plan Assessment

**Instructions:**

1. It is important to **complete this self-assessment after completing the Organizational Profile,** as itsets  
   the context and provides key insights to be considered during completion of the assessment.
2. Our suggestion is to use a small group that knows your network, for example, network leadership and staff at a minimum, and other partners, members and customers who may be beneficial.
3. Complete this self-assessment by circling the most appropriate number to rate your network on a scale of 1-5. (Scoring: 5-Fully Completed 4-In Progress 3-Being Considered 2-Have Not Considered 1-Will Not Complete)
4. After completing this assessment, find and highlight those that were scored a 3 or below.
5. Use the conversation from page 9 of the Opportunities for Sustainability Guide to identify the top three **Opportunities for Sustainability.**
6. Delete these instructions upon completing the Action Plan Assessment so that your completed Assessment results fall under the title (Opportunities for Sustainabilty Action Plan Assessment) on this page.

**Scoring:** 5-Agree 4-In Progress 3-Being Considered 2-Have Not Considered 1-Disagree

| **Sustainability Action Planning Assessment Questions** | |
| --- | --- |
| **Strategic Thinking** | **Self-Rating 5 4 3 2 1** |
| Network has a mission and vision and have been communicated organization-wide. | 5 4 3 2 1 |
| Network has a formal strategic plan in and is updated no less than annually. | 5 4 3 2 1 |
| Network leadership uses a systems framework for planning to ensure a holistic approach. | 5 4 3 2 1 |
| The network has gathered information on member and community health needs and has incorporated this knowledge into its decision making strategies. | 5 4 3 2 1 |
| Network leadership includes non-traditional health care organizations as members, partners, or advisors, such as schools, allied health organizations, public health and community development organizations. | 5 4 3 2 1 |
| **Marketing Thinking** | **Self-Rating 5 4 3 2 1** |
| Network leadership is aware of regional and national trends in the health care industry that could impact the network organization or its members. | 5 4 3 2 1 |
| The network communicates the organization’s strategic plan to its partners as well as organization-wide. | 5 4 3 2 1 |
| The network utilizes planned communication to capture and share network activities with members, partners, and the community. | 5 4 3 2 1 |
| The network creates collaborative environments for members to share knowledge, solve problems and pursue opportunities. | 5 4 3 2 1 |

**Scoring:** 5-Agree 4-In Progress 3-Being Considered 2-Have Not Considered 1-Disagree

| **Operations Review** | **Self-Rating 5 4 3 2 1** |
| --- | --- |
| Network leadership has been stable for at least 2 years. | 5 4 3 2 1 |
| Network board works with formal By Laws and Membership Agreement. | 5 4 3 2 1 |
| The network measures and forecasts financial income and expense. | 5 4 3 2 1 |
| The network utilizes a measurement tool to effectively monitor and evaluate strategies and program data, such as Balanced Scorecard, dashboards and logic model. | 5 4 3 2 1 |
| Network leadership utilizes a staff satisfaction process. | 5 4 3 2 1 |
| Network leadership provides education and opportunity to staff to support a change-ready and adaptable workforce. | 5 4 3 2 1 |
| The network organization routinely uses process improvement tools and techniques, such as lean processes, plan-do-study-act methods, value proposition, needs assessments and process improvement initiatives. | 5 4 3 2 1 |
| The network systematically reviews procedures and processes to ensure appropriate infrastructure is in place and functioning. | 5 4 3 2 1 |

**Scoring:** 5-Agree 4-In Progress 3-Being Considered 2-Have Not Considered 1-Disagree

| **Financial Outlook** | **Self-Rating 5 4 3 2 1** |
| --- | --- |
| The network has a financial sustainability plan that includes strategies to obtain non-grant funding as well as financial support from network members. | 5 4 3 2 1 |
| Network leadership calculates financial impact of the network, such as cost savings/revenue ratio, member return on investment ratio and community economic impact analysis. | 5 4 3 2 1 |
| The network has financial cash reserves in place to support new product or service development. | 5 4 3 2 1 |
| The network has diverse revenue streams including two or more of the following; member dues, fee-for-services, product sales, grants and donations. | 5 4 3 2 1 |
| The network reports and disseminates evaluation and impact results to members and partners. | 5 4 3 2 1 |

The tables below are the Opportunities for Sustainability Action Plans I, II, and III. Use these tables to develop action plans for each of the three selected OFSs. *Delete these instructions upon completion of all three Action Plans.*

| **OFS Action Plan I** | | | | |
| --- | --- | --- | --- | --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)*  **Selected Key Opportunity for Sustainability (OFS):** *(write out first selected OFS)* | | | | |
|  | | | | |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:** | **Start Date:** | **Due Date:** |
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| **OFS Action Plan I (continued)** | | | |
| --- | --- | --- | --- |
| **Action Items** | **Needed Resources:** | | |
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| **Action Items** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
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| **OFS Action Plan II** | | | | |
| --- | --- | --- | --- | --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)*  **Selected Key Opportunity for Sustainability (OFS):** *(write out 2nd selected OFS)* | | | | |
|  | | | | |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:** | **Start Date:** | **Due Date:** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |

| **OFS Action Plan II (continued)** | | | |
| --- | --- | --- | --- |
| **Action Items:** | **Needed Resources:** | | |
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| **Action Items:** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
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| **OFS Action Plan III** | | | |
| --- | --- | --- | --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)*  **Selected Key Opportunity for Sustainability (OFS):** *(write out third selected OFS)* | | | |
|  | | | |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:** | **Start Date:** | **Due Date:** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |

| **OFS Action Plan #3** | | | |
| --- | --- | --- | --- |
| **Action Items:** | **Needed Resources:** | | |
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|  |  | | |
| **Action Items:** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
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# Opportunities for Sustainability Action Plans Summary

The *Assessment Action Plan Summary* is a tool designed for helping a network track progress. Use the table below to list the three individual OFSs, the key actions for changes for each, along with a start and due date. *Delete the instructions upon completion of the table below.*

| **OFS Action Plans Summary** | | | | |
| --- | --- | --- | --- | --- |
| **Selected OFS:** | **Key Actions for Change:** | **Start Date:** | **Due Date:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |