

Sustainable Community Care Coordination

Companion Workbook to the Sustainable Community Care Coordination Guide

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NATIONAL
RURAL HEALTH
RESOURCE CENTER

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Introduction

This workbook is designed to accompany the Sustainable Community Care Coordination Guide as a place for your organization to document the work you do as you move through the guide. It is also meant to be a reference for your future work.



This is the symbol you will see as you work your way through the Guide. This symbol indicates things to be recorded in this workbook. The Guide defines the different components and gives guidance on where to find the information or how to generate the information.

ORGANIZATION PROFILE: PAGE 15 OF THE GUIDE

1. Organization Description:

Mission:

Vision:

2. Care Coordination Service Description:

STRATEGIC THINKING: PAGE 16 OF THE GUIDE

3a. Target Market:

3b. Organization goals met by this care coordination service:

3c. Organization strategic objectives met by this care coordination service:



This is a stopping point if the care coordination service does not fit within your organization's vision, mission, goals or strategies.

MARKETING THINKING: PAGE 18 OF THE GUIDE

<p>4a. Jobs being worked on or problems being solved by the target market:</p>	<p>4b. Pains experienced by the target market while doing their work:</p>
<p>4d. Target Population:</p>	<p>4c. Gains wished for or expected by the target market while doing their work:</p>
<p>4f. Desired target market experience and relationship: How does the Target Market want to experience the Care Coordination service? (Contract or hire internally)</p>	<p>4e. Social Determinante of Health (SDOH) for Target Population:</p> <p>4g. Care Coordination service mode of delivery: How do SDOH effect the delivery? What are possible ways of delivering the care coordination service?</p>

4h. Key Messages:

4i. Data to Gather:



This is a time to stop if you are unable to collect key data necessary to support your key messages. Also, if your target markets want to hire internal care coordinators.

OPERATIONAL THINKING: PAGE 24 OF THE GUIDE

5a. Target Population:		5b. Assessment:	
Target Population (from 4d.)	SDOH of Target Population (from 4e.)	Is an assessment needed?	What is the purpose of the assessment or how will it be used?
Is it specific enough? Further refine if needed.	How will the target population be identified?	What assessment tools are your organization using?	
How will you communicate with and engage the person?		How will you communicate to who needs it? Where will it be stored?	

OPERATIONAL THINKING: PAGE 24 OF THE GUIDE

How will technology be used to perform these functions?			How will technology be used to perform these functions?		
5c. Care Plan:			5d. Care Team:		
What is the focus of your Care Plan?	What approach are you taking?	Who is part of the interdisciplinary care team?			

OPERATIONAL THINKING: PAGE 24 OF THE GUIDE

<p>What is included in the care plan?</p>	<p>Who is the coordinator?</p>	<p>How will you build collaboration with the providers or partners of the Care Team?</p>
<p>How will the care plan be communicated to engage the person? To engage the care team?</p>	<p>How will the Care Team communicate with the person and each other?</p>	
<p>How will technology be used to perform these functions?</p>	<p>How will technology be used to perform these functions?</p>	

5e. Key Initiatives or next big steps:	5f. Key Resources:	5g. Collaborations:
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FINANCIAL THINKING: PAGE 31 OF THE GUIDE

6a. Financial Goal:	6b. Financial Assumptions:																																								
<p>6c. Expenses:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;"></th> <th style="width: 15%;">Year 1</th> <th style="width: 15%;">Year 2</th> <th style="width: 15%;">Year 3</th> </tr> </thead> <tbody> <tr> <td>Start-up Costs Total</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Direct Costs Total</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Indirect Costs Total</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Expenses</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Year 1	Year 2	Year 3	Start-up Costs Total				Direct Costs Total				Indirect Costs Total				Total Expenses				<p>6d. Revenues:</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;"></th> <th style="width: 15%;">Year 1</th> <th style="width: 15%;">Year 2</th> <th style="width: 15%;">Year 3</th> </tr> </thead> <tbody> <tr> <td>Revenue Stream 1</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Revenue Stream 2</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Revenue Stream 3</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Revenues</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Year 1	Year 2	Year 3	Revenue Stream 1				Revenue Stream 2				Revenue Stream 3				Total Revenues			
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<p>6e. Forecasted annual net income (pro forma):</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;"></th> <th style="width: 15%;">Year 1</th> <th style="width: 15%;">Year 2</th> <th style="width: 15%;">Year 3</th> </tr> </thead> <tbody> <tr> <td>Total Revenues</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Expenses</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Net Income</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			Year 1	Year 2	Year 3	Total Revenues				Total Expenses				Total Net Income																											
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Your organization will need to determine if it wants to proceed if the net income is zero or below. Also consider what kind of profit margin it needs to continue with the care coordination service.

Action Planning Template				
Workgroup Name:		Initiative or Purpose:		
Team Members and Roles: <ul style="list-style-type: none"> • • • • • 				
What does success look like?				
Key issues or bottlenecks are a priority to address or resolve early in the project?				
Action: Title	Timeframe		Who is Responsible for Doing the Action	Needed Resources: Supplies, Volunteers, Funding, etc.
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