Opportunities for Sustainability

A Template for Action Planning

Rural Health Network Grantees

February, 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 HHSH250201400024C from the U.S. Department of Health and Human Services, Health Resources and Services Administration, Federal Office of Rural Health Policy.

# Table of Contents

[Instructions 2](#_Toc442780767)

[Organizational Profile 3](#_Toc442780768)

[Sustainability Action Plan Assessment 10](#_Toc442780769)

[Opportunities for Sustainability Action Plans 14](#_Toc442780770)

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 Allied Health Workforce Training, Development, Planning, and HIT Workforce Network grantees through a contract with the Federal Office of Rural Health Policy.

# Instructions

Using this Opportunities for Sustainability (OFS) Action Plan Template for your network’s sustainability plan:

1. Revise the **Organizational Profile** page to reflect appropriate and specific network organization information and complete the profile template.
2. Remove the **Background and Purpose and Instructions** information within the first three pages of this template document.
3. Change the header to reflect the program name.
4. Remove cover page for each section, **Organizational Profile, Sustainability Action Plan Assessment, Action Plan Template and Summary.**
5. Complete the three sections provided with relevant information for your network organization.
6. Use this template as your grant Sustainability Plan deliverable.

# 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; A Guide for Action Planning”** for a detailed explanation.

| **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) |
|  |

# 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, network leadership and staff at a minimum and other partners, members and customers who may be beneficial.
* Complete this self-assessment by 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, and 1=unaware of need/not started)
* After completing this assessment, find and highlight those that are rated a 3 or below.
* Use the conversation from page 10-13 of the “Opportunities for Sustainability; A Guide for Action Planning” to identify the top three **Opportunities for Sustainability.**

| **Sustainability Action Planning Assessment Questions** |
| --- |
| **Strategic Thinking** | **Self-Rating5 4 3 2 1** |
| Network mission and vision are complete and have been communicated organization-wide. | 5 4 3 2 1 |
| The 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-Rating5 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 |

| **Operations Review** | **Self-Rating5 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 |

| **Financial Outlook** | **Self-Rating5 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 |

# Opportunities for Sustainability Action Plans

These are your “Action Plans for Sustainability”. Use the included form to develop one action plan for each of the three selected OFSs.

The “Actions Plan Summary” is a tool designed for helping a network track progress. Please use the included form.

| **Action Plan Summary** |
| --- |
| **Selected OFS:** | **Key Actions for Change:** | **When/Date:** | **Status:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

| **OFS Action Plan #1** |
| --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)***Selected Key Opportunity for Sustainability (OFS):** *(write out OFS question)* |
|  |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:**  | **Start Date and Anticipated Completion Date:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| **OFS Action Plan #1** |
| --- |
|  **Action Item #** |  **Needed Resources:**  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Action Item #** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

| **OFS Action Plan #2** |
| --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)***Selected Key Opportunity for Sustainability (OFS):** *(write out OFS question)* |
|  |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:** | **Start Date and Anticipated Completion Date:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| **OFS Action Plan #2** |
| --- |
|  **Action Item #** |  **Needed Resources:**  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Action Item #** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

| **OFS Action Plan #3** |
| --- |
| **Business Plan Category:** (*for selected OFS, list business plan category)***Selected Key Opportunity for Sustainability (OFS):** *(write out OFS question)* |
|  |
| **Actions to Change this OFS:** *(3-5 actions over 6-12 months)* | **Who Will Implement:** | **Start Date and Anticipated Completion Date:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

| **OFS Action Plan #3** |
| --- |
|  **Action Item #** |  **Needed Resources:**  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Action Item #** | **Plan for Monitoring and Review:** | **Information and Message:** | **Measure or Evidence of Success:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |