|  |
| --- |
| **Organization - network of 10 member health care organizations*** **Mission**- why we exist? -Improve our communities health
* **Vision** – what do we want to be? -Indispensable to our members
* **Strategic Objectives** – what is our game plan? -Provide effective and meaningful HIT solutions to members
 |
| **1. Member Needs Assessment:** What is the **job to be done** or **problem to solve**? * Implement new EHR systems w/ new software and hardware. Includes learning application and changing everyday workflows.
* Struggling with meeting timelines, burning out staff, and meeting resistance to the changes.
* HIT workforce is difficult to find.
 |
| **1a. Members Pains:** Describe the negative emotions, undesired costs, and situation that your members experience before, during or after getting the job done.* **What are your members’ main challenges?**
	+ Resistance from both staff and providers
	+ It is very expensive to hire consultants to support staff and expensive to pull current staff off of their daily work
	+ It is taking a long time to train deeper knowledge
* **What risks do your members’ fear?**
	+ Missing deadline for attestation and therefore incentive monies
	+ Wasted time and energy of their staff
* **What common mistakes do your members make?**
	+ Using their own staff experts as trainers
	+ Asking their staff to know a little about too many things when the organization needs deeper knowledge
 | **1b. Member Gains** Describe the benefits your members expect, desire, or would be surprised by; including functional utility, social gains, positive emotions, and cost savings.* **What would make your members work easier?**
	+ knowledgeable of the software functionality to improve processes
	+ Trainers that are good at training
	+ Understanding of clinical process to help with problem solving during implementation
* **How do your members measure success or failure?**
	+ Meeting deadlines for attestation
	+ Network staff satisfaction results
	+ Member staff and provider satisfaction results
 |
| Ranking Pains and Gains:1. Rank each pain according to intensity it represents for your members (high or low) and how often it occurs.2. Rank each gain according to its relevance to your members (substantial or insignificant) and how often it occurs. |
| **2. Description of Business Product or Service**:What is the business product or service that will reduce your members’ pains and increase members’ gains AND is aligned with the network’s mission, vision, and strategic objectives?**Shared IT workforce cooperative=5 clinical IT Staff + Help Desk support** |
| **2a. Relieve Pains** Describe how this product or service alleviates your members’ pains.* Will reduce risk of missing MU attestation deadlines
* Will decrease the time and energy expended by members staff and avoid staff ‘burnout’
* Will decrease resistance of staff and providers by making it easier to implement and giving opportunities for input
* Frees up their own staff from being trainers and implementers
 | **2b. Create Gains** Describe how this product or service creates member gains or reduces negative emotions.* Provides potential for improved communication
* Provides deep knowledge in multiple areas of the EHR. Such as clinical and administration
* Knowledge can be available on-demand and not idle
* Focus on implementation work increases
 |
| Ranking Pains Relief and Gain Creation1. Rank each pain reliever according to the intensity it represents for your members (intense relief or light relief).2. Rank each gain creator according to its relevance to your members (substantial or insignificant).3. Rank all products and services according to their importance to your members (crucial or trivial). |

|  |
| --- |
| **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.)
 |
| * Staff are well trained to meet needs
* Experts,
* Right thing first time
* Quick access to right person
* Simple & easy to use
* Excellent customer service
* Solid customer service
* Successful outcomes – timely, knowledgeable
* Responsive & available
* Educated
* User Friendly, Friendly
* Patient
* Flexible
* Personal
* Professional
* Courteous
* Timely
* Consistent
 | * Partnership
* Positive interaction interactive
* Buildable trust (collaboration)
* Cooperative
* Fulfilled partnership
* Trust
* Reliability
* Accountable, mutual accountability
* Shared balance successful
* Not: us – them
* Wowed
* “Perfect”
* Ownership
* We care
* Comfortable
* Save $
* ROI
* Affordable
 |
| **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?

 |
| * Newsletter
* Phone
* Website
* Social media
* Lunch & learn
* Email
* Email/phone
* Videoconferencing
* T1 fiber network
* Point person
* Forum scheduled visits
* Table group meeting format round table
* Personal delivery/individual sales call
* Coaching
* Individual/small group
* 1 on 1 meeting, 1 on 1, face to face
* Remote – in-person
* Board meeting
* Dept. mgmt. meetings
* MU teams
* Shared info space, Share Point, SharePoint, Shared folders/server based
* Use contact log, Ticket system, Help desk or ticket system
 | * Kick off educational session
* Just in time training
* Remember there is ‘No wrong way to access’
* Utilize SLA to set expectations of services
* Clear common message
* Include in marketing sheet
* Be intentional on who needs to know
* Remember to address ‘What’s in it for me?’
* Engage learning styles
* Be sure to feed them
* Introduce the shared staff face to face to members
* Recognize 3 hospital cultures- different by shift
* Remember to say it 7 times; the how-to of service
* Remember CEOs don’t rely on email
* Provide agenda in advance + minutes for meetings
* Utilize to-do assignments in training
* Include communication in planning
* Implement customer satisfaction survey, use email for feedback – how are we doing?
* Share performance measures
* Create and communicate value statement of the cooperative, provide value statement in advance of commitment
* Provide regularly scheduled, monthly status updates
 |
| **5. Key Initiatives:*** What are the key initiatives (actions) needed to develop, implement, support and/or provide this product or service?
 |
| * Initiate planning/steering/oversight committee,
* Agree on budget
* Design fee structure
* Create concept development process
* Develop project plan or work plan, use a development model
* Back up experts (RECs) other system or hospital
* Create knowledge user library and/or self-help library, FAQs/Info sheets
* Develop staff recruitment and retention plan
* Training plan for end users
* Design training or instructional materials
* Hire people/good management team
* Consider HR contracting for IT resources
 | * Assess resources
* Implement a CRM system and or ticket system of triage system & multiple access methods, ticketing system, Ticket/request system/tracking and reporting
* Implement Hardware/software needed for ticket system
* Design SLA process
* Create Policies and develop standards
* Create office/support at one site
* Define scope of work for shared staffing versus fee for service
* Confirm network Firewall
* Expand broadband as needed
* Design remote connectivity options
 |
| **6. Key Resources:*** 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?
 |
| * Leadership
* Funding system, member commitments, $, funding, grants, dues, fee for service
* People, Staffing, Staff, FTEs
* Clinical IT staff
* Trainers/system
* Project lead manager
* Super users (end user/customer)
* Marketing plan
* Feedback/survey
* Space for IT support
* Reporting mechanisms
* Knowledge management system
* Knowledge/access to multiple systems
 | * CRM ticket system, ticketing system
* Remote desktop support tools
* Process flow
* Technology
* Equipment
* Server support
* Hardware, software
* Physical plant
* Platform (EHR)
* Telephone/web-ex
* Infrastructure
 |
| **7. Key Partners**:* Who are the key partners that are needed to develop, implement, support and/or provide this product or service?
 |
| * Member organizations – c-suite, board members, clinic hospital staff, members, partners, network members
* Trainers
* Steering committee
* In-house staff
* Providers, clinicians/provider/physicians
* LTC organizations
* Pharmacy departments or organizations
* Health care systems/regional hub
 | * National Rural Health Resource Center
* Regional Extension Centers
* Colleges/Univ. – HIT programs
* College/education partners
* Vendor relationships – seeking win-win
* Vendor
* Project officer
* Internet/cable service providers
* Hardware/software
* Data/broadband vendor/provider
* Banker
* Grantor
 |

|  |  |
| --- | --- |
| **8. Development and On-going Costs**Describes and estimates all costs related to the product or service. * Look to the Key Initiatives and Resources for identifying specific development costs.
* Estimate one-time purchases.
* Estimate on-going costs related to recurring fees and purchases, and human resources.

**Forecast Assumptions**:* **10 member organizations**
* **5 FTE – shared IT staff**

**Development / Start-up one-time costs*** Purchase new ticket system hardware/software
	+ Assume $10 k purchase ticket system
	+ Assume $2k per license and 6 licenses

**Ongoing FTE costs for IT staff and annual ticket system*** FTE salary = $50k
* Benefits = 1.25 salary multiplier
* Indirect = 1.25 multiplier on Salary+Benefits
* Annual salary increase year 2 and year 3 = 2%
* On-going ticket system training and maintenance assume .5 FTE w/ benefits + indirect/year
 | **9. Expected Income:**1. Identify the type of payment for your product or service. - This will drive your assumptions for unit price and frequency.

Examples of types of payments 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).1. Estimate how much per unit (price) and how often (frequency) your members are willing to pay.

 **Forecast Fee and Pricing Assumptions**: * License (shared staffing) Fee uses an FTE as a unit
* Contracted Pricing uses a per hour as a unit
* 2080 work hours/year x 5 = 10,400 total hrs
* Assume Licensed time = 80% of total hours
* Assume Contract time = 20% of total hours
* Set licensing fee at FTE 100% cost w/ benefits + indirect, $78k, in year 1, fixed for 3 years
* Set contracting member discount rate at 60% of retail$100/hr, estimate $60/hr, fixed for 3 yrs
* Set start-up fee at 50% actual, due in year 1
* Set year 1 slow start at 75% potential of contracted services
 |
| 1. **Startup Cost year 1 = $22k**

Purchase and licensing $10k + (6\*$2k) = 22k1. **Ongoing FTE cost = $390k**

Unit Cost=($50k \*1.25)\* 1.25 = $78k/ FTE$78k/FTE \* 5 FTE = $390k yr 1$390k \* 1.02 = $400k yr 2$400k \* 1.02 = $407k yr 31. **Ongoing ticket system cost=$40k**

1 FTE $78k \* .5 = 40k | 1. **Startup Fee year 1 = 11k**

($22k \* 50% ) = $11k1. **Total License Fee of Shared Staff = $390k**

$390k total FTE cost each year 1-31. **Possible Contracted Income = $120k**

20% of 10,400 hrs/ /year = 2000 hrs/yr 2000 hrs/yr \* $60/hr = $120k/yrYear 1 = $120\*.75 = $90k/yrYear 2-3 = $120k \* 1.0 = $120k/yr |
| **Network** | **Income** | **Cost** | **$ Income (loss)** | **% income (loss) to annual cost** |
| **Year 1** | $11k +$390k + $90 **=$491k** | $22k+390k + 40k  **= $452k** | **$491k -$452k** **=$39k** | **$39k/$452k = 8%** |
| **Year 2** | $390k + $120 k**= $510k** | +$400k + $40k **= $440k** | **$510k - $440k** **=$70k** | **$70k/$440k = 16%** |
| **Year 3** | $390k+ $120 k**= $510k** | $407k + $40k **= $447k** | **$510k - $447k** **= $63k** | **$63k/$447k = 14%** |
| Per Member Payment to Network: |
| Start-up  | = $ 11k /10 members | = $ 1,100/year |
| Shared Staffing  | = $390k /10 members | = $39,000/year |
| Equal share of Contract Service | = $ 90k /10 members | = $ 12,000/year |
| **Total Yr1 Per Member Payment to Network= $52,100/yr** for access to 5 FTE clinical IT staff + 200 hrs of contracted services + Help Desk ticket system |