

|  |
| --- |
| **Year One -**  Workplan |
| **Business Plan Section** | **Objective** | **Activities/Strategies** | **Date / Timeline:** | **Key Person(s) Responsible**  |
| Needs Statement | Develop a clear and concise statement of the need | * Complete Readiness Assessment
* Review Readiness Assessment
* Draft summary of needs statement based on Readiness Assessment Findings
* Convene partners and planning group members to review, edit, and finalize needs statement
 |  |  |
| Collaborating Partners | Create an SBHC collaborating partnership description  | * List the name, title, and contact information for each partner organization’s liaison
* Indicate each member’s role and responsibilities (convener; local education agency, medical sponsor; behavioral health provider; other service provider(s); community, student, parent advisors; etc.
* Decide which partner organizations to include in the SBHC MOU
 |  |  |
| Vision and Mission Statement | Develop a clear and concise statement of the SBHC’s mission and vision | * Review collaborating partners’ vision and mission statements and assess compatibility
* Convene partners, planning group members, parents, and students in a group vision and mission statement activity
 |  |  |
| Goal Statement and Y1 Objectives | Develop a goal and supporting objectives to drive the SBHC’s programmatic direction | * Define a goal statement with desired outcomes and accomplishments the SBHC will achieve in the first three years
* Create Y1 Objectives that arespecific, measurable, realistic, and time-bound (SMART) actions to support goal statement in year 1
 |  |  |
| Services and Staffing | Determine SBHC services and required staffing | * Specify the services available at the SBHC, based on the market analysis data
* Create a staffing matrix, including positions, qualifications, responsibilities, and weekly hours
* Define management and supervisory structure for SBHC staff
* Determine hiring plans and partner involvement for each position
 |  |  |
| Location, Facilities, and Equipment | Develop an SBHC facilities plan | * Identify possible location(s) in or on school grounds to accommodate the SBHC and services to be provided
* Select the SBHC location
* Determine renovation or capital improvements needed
* Describe physical location(s) for SBHC service delivery
* Describe square footage of location(s) for SBHC service delivery (including number and functions of rooms).
* Include architectural drawing(s) of SBHC space(s)
* Develop list of SBHC equipment
 |  |  |
| Marketing and Outreach  | Develop an SBHC marketing and outreach plan | * Conduct marketing training for collaborating partners
* Translate SBHC services into marketing terms (audiences, gatekeepers, messaging) and concepts (product, placement, price, promotion)
* Develop messages/taglines for each audience (school staff, parents, students)
* Develop promotional materials/vehicles/strategies for each audience (school staff, parents, students)
* Employ promotional materials and strategies with each target audience (school staff, parents, students) to drive SBHC enrollment, utilization, and outcomes
 |  |  |
| Pro-Forma Summary | Complete an SBHC financial projection for year one | * Educate collaborating partners on costs and revenue associated with an SBHC
* Train collaborating partners on how to use a Pro-forma business plan to project SBHC expenses and revenue over four years
* Complete a year-one SBHC Pro-forma business plan to implement
 |  |  |
| Optional Sections – beyond year one |
| Exit Planning | Determine ahead for potential change(s) in services or sponsorship to ensure continuity of care | * Agree on notice each partner will provide (minimum of 3 months notice and six months preferred)
* Determine transition plan (time, transfer of patients, payment of debtors, notification of funders, assets including space, equipment, records, etc.)
* Include in MOU
 |  |  |
| Executive Summary | Highlight key points from the Y1 SBHC Business Plan | * Distill business plan essentials into an abbreviated, one-page document for easy comprehension
* Create Executive Summary after all other business plan sections are complete
 |  |  |
| Market Analysis | Prepare an SBHC market analysis | * Describe SBHC target audience(s)
* Describe current and projected needs of the target audience(s) from readiness assessment data and other data collection activities (surveys, focus groups, interviews)
* Describe geographic service area and demographics of the target audience(s)
* Include availability of similar programs
* Discuss comparative advantage(s) of SBHC services
* Discuss challenges and opportunities the SBHC will face in the first year
 |  |  |
| Risk Management | Consider risks the SBHC may encounter and a plan to reduce them. | * Provider background checks
* Basic safety training (CPR, Blood-borne pathogens, etc.)
* Hostility
 |  |  |