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| **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 |  |  |