Rural Health Care Services Outreach Program
Come in and sit at a table based on focus area of your Outreach grant program (see table tents @ each table)

We will get started shortly!
<table>
<thead>
<tr>
<th>TIME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 9:00 – 9:30 AM | Welcome and Introductions  
Alexa Ofori, Outreach Program Coordinator, FORHP |
| 9:30 – 10:15 AM | Getting Connected  
John Butts and Rachel Campos, Technical Assistance (TA) Provider, Georgia Health Policy Center (GHPC) |
| 10:15 – 10:30 AM | Break                                                                 |
| 10:30 – 11:45 AM | Preparing for Sustainability Planning  
Tanisa Adimu, Tamanna Patel, and Amanda Phillips-Martinez, TA Provider, GHPC |
| 11:45 – 12:00 PM | Wrap-Up and Announcements                                                          |
| 12:00 PM     | Outreach Program Breakout Meeting Adjourn                                         |
Sustainability Plan Template Outline

- **History/Background**
  - Environment Context
  - Summary of Planning Process
  - Program Description and Summary of Outcomes
  - Sustained Impact

- **Moving Forward**
  - Current Program Activities to be Continued

- **Program Structure**
  - Consortium Partners
  - Management and Staffing Structure

- **Three-Year Expense Budget Projections**
  - Budget Narrative
  - Three-Year Budget

- **Three-Year Funding Strategies**
  - Narrative
  - Funding Strategies by Activity (or Service)

- **Next Steps**

- **Partner Signatures**
RURAL HEALTH CARE SERVICES OUTREACH PROGRAM

Alexa Ofori
Program Coordinator

PROJECT OFFICERS

Sara Afayee
Patricia Burbano
Jillian Causey
Cassie Phillips
Michele Pray Gibson

RURAL PARTNERSHIP DEVELOPMENT MEETING

Rockville, MD Impacting Lives in our Local Communities January 14-16, 2020
Program Announcements

• NCC Due: February 1st

• PIMS Due: May 31st

• Sustainability Plan Due: July 30th
“Celebrations, Reflections, and Sustainability”

- Opportunity to network and make peer connections
- Reflect and celebrate successes to date, share lessons learned, and discuss sustainability
- Opportunity to gain insights from peers with a range of expertise and perspectives
Getting Connected

Introduce yourself by:
Name, Organization, State, &
15 second Description of Outreach Program
Peer Interaction: Instructions

I. Identify a table Facilitator/Timekeeper and a Reporter

II. Reflect on your answers to the following questions, taking notes as needed.

1. **What are you most proud of achieving at this point in your Outreach grant initiative?**

2. **What’s been a key learning, insight, or discovery from doing this work?**
   - Complete the following - “If there was one thing I would share with others about this work, it would be ....”

3. **What are the primary strategies you are pursuing to achieve sustainability of your Outreach grant initiative?**
III. Discuss as a group, 1 question at a time
   ○ **Facilitator** keeps time (~10 minutes per question)

IV. **Reporter** – Briefly share a top lesson learned & sustainability strategy from discussion
Time Check!

20 min
Time Check!
Time Check!
TIME'S UP!
Table Report Out

Briefly share a Lesson Learned and Sustainability strategy from your table discussion
Objectives

• **Review** the sustainability planning **process**
• Understand the difference between **planning** for sustainability and **positioning** for sustainability
• **Describe** the “**DNA**” of programs and partnerships that sustain long term.
• Briefly review the **GHPC Sustainability Framework©**
Sustainability

Programs or services continue because they are valued and draw support and resources.
Four questions are answered through the Sustainability Planning process.

1) WHAT will we do?

2) WHO do we need?

3) HOW much will it cost?

4) WHERE are the resources?
Sustainability: What

- Programs rarely sustained as originally conceived

- Services are expanded
- Services are scaled back
- New program approach evolves
Methods of Sustaining

- Earned income
- In-kind/volunteerism
- Government/public subsidy
- Other grants
- Client fees
- Third party reimbursement

Combination of Methods
Developing a Sustainability Plan

• Two phases:
  1. Pre-Planning:
     • Gathering and organizing the cost and performance data
  2. Sustainability planning
     • Using what you know to chart a path forward
# Getting Ready: Pre-planning Phase

<table>
<thead>
<tr>
<th></th>
<th>Activity 1</th>
<th>Activity 2</th>
<th>Activity 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total cost of activity</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong># of participants</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Cost per participant</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Evaluation results</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
Sustainability Plan Template
Due 7/30/2020

1. Background (incl. sustained impacts)
2. Moving Forward
3. Program Structure
4. Continuation Budgets
5. Funding Strategies

DEcision Points
Part I: Background

A. Environmental Context
B. Planning Process
C. Program Description and Summary of Outcomes
…AND Sustained Impact

Long-term effects that may or may not be dependent on the continuation of a program.
Sustained Impact

New Ways of Serving
• Culture changes
• Relationships
• Practice standards

Capacity Created
• Public awareness, perceptions and behaviors
• Training
• Assets purchased or created

Policy, Systems, Environment Change
Table Talk

Using the Sustainability Plan template (Part I), discuss either:

1) Changes that may impact sustainability - positively or negatively

--OR--

2) Sustained impacts that seem most relevant to your program
Part II: Moving Forward

• **Current Program Activities to be Continued**
  – Identify the activities that your consortium will continue from your Outreach grant
  – Provide justification: Why should these activities be continued?
What will we do?

- Have we been able to *accomplish* what we planned to do?
- Are we having positive *outcomes*?
- What makes us *most proud* about what we have done?
- What *lessons* have we *learned*?
What will we do?

Establish criteria to *objectively* determine which program activities should continue
Part III: Program Structure

- Consortium Partners
- Staffing & Management Structure
Who do we need to move forward?

Assess three key features of your program structure:

1. **Management/Coordination:** The method you have utilized to oversee the various components of your program.
   - Required management function to sustain prioritized activities?

2. **Staffing Structure:** The number and function of current staff.
   - Expertise and paid staff needed to sustain prioritized activities?

3. **Collaboration Among Partners:** Scope of partnerships, role of partners, communication among partners.
   - Do we need to sustain current partners and/or add new ones?
Part IV: Continuation Budget

• Three-Year Budget Projections
• Budget Narrative
Part V: Three-Year Funding Strategies

• Description of overall funding strategies
• Funding strategies for each service or activity
Example: Three-Year Budget Projections (costs per activity)

Community Diabetes Prevention and Management Program Case Study

<table>
<thead>
<tr>
<th>Activity: Self-Management Education</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>$25,300</td>
<td>$26,059</td>
<td>$26,841</td>
<td>$78,200</td>
</tr>
<tr>
<td>Office Space</td>
<td>$1,600</td>
<td>$1,600</td>
<td>$1,600</td>
<td>$4,800</td>
</tr>
<tr>
<td>Facility Rental</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$1,200</td>
<td>$3,600</td>
</tr>
<tr>
<td>DSME Booklet</td>
<td>$4,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$6,000</td>
</tr>
<tr>
<td>Incentives (Gym memberships)</td>
<td>$2,734</td>
<td>$2,733</td>
<td>$2,733</td>
<td>$8,200</td>
</tr>
<tr>
<td>Incentives (Other)</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$6,000</td>
</tr>
<tr>
<td>Food</td>
<td>$1,834</td>
<td>$1,833</td>
<td>$1,833</td>
<td>$5,500</td>
</tr>
<tr>
<td>Equipment</td>
<td>$2,500</td>
<td>$500</td>
<td>$500</td>
<td>$3,500</td>
</tr>
<tr>
<td>Supplies</td>
<td>$734</td>
<td>$733</td>
<td>$733</td>
<td>$2,200</td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td>$41,902</td>
<td>$37,658</td>
<td>$38,440</td>
<td>$118,000</td>
</tr>
</tbody>
</table>
# Example: Three-Year Budget Projections (line items and totals)

## Community Diabetes Prevention and Management Program Case Study

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Activity #1: Self-Management Education</th>
<th>Activity #2: Diabetes Prevention Classes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>$78,200</td>
<td>$69,100</td>
<td>$147,300</td>
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<tr>
<td>Office Space</td>
<td>$4,800</td>
<td>$4,800</td>
<td>$9,600</td>
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<tr>
<td>Facility Rental</td>
<td>$3,600</td>
<td>$3,600</td>
<td>$7,200</td>
</tr>
<tr>
<td>Booklets</td>
<td>$6,000</td>
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<tr>
<td>Incentives (Gym memberships)</td>
<td>$8,200</td>
<td>$6,700</td>
<td>$14,900</td>
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<tr>
<td>Incentives (Other)</td>
<td>$6,000</td>
<td>$8,000</td>
<td>$14,000</td>
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<tr>
<td>Supplies</td>
<td>$2,200</td>
<td>$1,800</td>
<td>$4,000</td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td><strong>$118,000</strong></td>
<td><strong>$104,700</strong></td>
<td><strong>$222,700</strong></td>
</tr>
</tbody>
</table>
Example: Three-Year Budget Projections (costs per activity)

Community Diabetes Prevention and Management Program Case Study

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<td>$38,440</td>
<td>$118,000</td>
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</table>
Example: Activity Budget + Funding Strategies

Community Diabetes Prevention and Management Program
Case Study

<table>
<thead>
<tr>
<th>Activity: Self-Management Education</th>
<th>Three-Year Budget</th>
<th>Funding Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>$78,200</td>
<td>$37,500 – Medicare reimbursement $40,700 – Additional grant funds</td>
</tr>
<tr>
<td>Office Space</td>
<td>$4,800</td>
<td>Donated by FQHC</td>
</tr>
<tr>
<td>Facility Rental</td>
<td>$3,600</td>
<td>Donated by Health Department</td>
</tr>
<tr>
<td>DSME Booklet</td>
<td>$6,000</td>
<td>Charged to participants</td>
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<tr>
<td>Incentives (Gym memberships)</td>
<td>$8,200</td>
<td>Donated by YMCA</td>
</tr>
<tr>
<td>Incentives (Other)</td>
<td>$6,000</td>
<td>Contribution from hospital</td>
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<tr>
<td>Food</td>
<td>$5,500</td>
<td>Provided by Cooperative Extension Service</td>
</tr>
<tr>
<td>Equipment</td>
<td>$3,500</td>
<td>Donated by YMCA</td>
</tr>
<tr>
<td>Supplies</td>
<td>$2,200</td>
<td>Donated by FQHC</td>
</tr>
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<td><strong>Total Cost</strong></td>
<td><strong>$118,000</strong></td>
<td></td>
</tr>
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</table>
What’s Next

• “Get Ready” for Sustainability Planning by gathering key costs and performance data
• Support from your TA Provider
• Final plan is due July 30, 2020 in EHB
Only asking the **what**, **who** and **how much** of sustainability planning assumes a minimum bar has been met.
It matters because...

• Absorption of grant-funded activities and staff is most common (by far)
• Partner support
• Other public grant funding
• Reimbursement
PLANNING VS. POSITIONING
Positioning

• Understand why or why not organizations sustain
• There are dynamics that influence sustainability
• Organizations must understand these dynamics in order to position themselves for sustainability
The “DNA” of Programs and Partnerships that Sustain
What We Have Learned

• Literature reviews
• Sustainability Assessments of past FORHP grantees in 2009 and 2019
• Sustainability support to grantees
Challenges to Long-Term Sustainability

• Program
  – Patient engagement is difficult
  – Implementation challenges

• Organizational
  – This is more work, requiring more staff

• Partnership
  – Sorry, what are you doing again? Am I supposed to be doing something? What’s in it for me, exactly?

• Systems
  – No payment/reimbursement mechanism
WHY Did the Initiative Sustain?  
What Factors Drive Sustainability?

Focus Area?

Program Approach?

Organization Type?

Resource Type?
The DNA of Sustainability

• Not driven by organizational type or focus area
• A reimbursable service helps, but it is rarely enough

“DNA” is less about fixed characteristics (e.g., organization type or program focus area) and more about behaviors and strategies
The DNA of Those Who Sustain

Leadership

Use data to show impact

Collaboration

Aligned to need and demand

Attuned to policy and payment context
Leadership

"We start with a pilot program or a grant, our director has found ways to sustain and keep going if we see that there's value in it, if we want to be able to help the people that we're serving in the best way that we can and try to think outside the box in how we can do that."
Collaboration

“In rural [State] when a community needs something, we pull together and we make it happen...From the very beginning, our partnership looked at it from a big picture perspective. "How can we make this work?"
Aligned with Need and Demand

It was a community planning exercise where we gathered input from participants from 45 different agencies. But once we had their input, then we followed up with research to see, ‘Okay. Can we substantiate what they're telling us? We found yes, absolutely there was a huge need...

and we have seen the services being used more and more. Our patient population has grown more and more. These services set us apart and spur our growth.”
Use Data to Demonstrate Impact

“We realized that we needed to track our program and do strenuous data collection. We looked at the investment into transportation - if we could get a patient to the clinic for a covered service using a taxi voucher, and we analyzed the cost of the voucher and the billable service, our ROI was 600%. So spending a little money on transportation pays us back in spades.”
We know that CHWs can save you money and get better outcomes. A CHW on staff at the FQHC, even if they are not billing for the service, they are part of helping the clinic bring in more funds because of the PCMH status. That is how we changed our tune on sustainability of CHWs with FQHCs.”
Discussion

Your reaction to the findings?

How do the findings resonate with your experience?
SO WHAT DOES THIS MEAN FOR ME?
GHPC Sustainability Framework©

• A framework for:
  – Positioning organizations and programs for sustainability
  – Identifying resources for sustainability
GHPC Sustainability Framework© Continued
Positioning for Sustainability

Strategic Vision
- The organization has a clearly defined vision for what it hopes to achieve
- All those associated with the organization share the vision
- All activities are aligned with the vision

Collaboration
- Stakeholders are included in program planning and implementation
- Partners play an integral role and have a shared interest in the outcomes
Positioning for Sustainability

Leadership

- The ability to:
  - Inspire others to create and achieve a shared vision
  - Understand the relationship between short-term activities and their impact on long-term success
  - Exert influence in leveraging support and resources

Relevance & Practicality

- Approach based on clear assessment and understanding of the need
- Approach is tailored to the environment (cultural, political, economic)
Positioning for Sustainability

Evaluation/Return on Investment

- Evaluation generates data necessary to monitor and manage implementation and measure program impact
- Organization is able to demonstrate social, economic, and health benefits to the community it serves

Communication

- Organization defines perceptions, translates successes, and creates awareness through effective communication
- Information is exchanged among partners and stakeholders through structured and informal channels
Positioning for Sustainability

Efficiency & Effectiveness
- Organizational operations maximize the ability of those being served to participate and produce intended results
- Program approach is based on the success and challenges of similar initiatives
- Organization draws from and contributes to existing community resources

Capacity
- Program is adequately staffed by personnel with the necessary skills and knowledge
- Organization has experience with projects of similar programmatic focus or scope
Application of the Framework

- Assess sustainability potential
  *Formative assessment*
- Identify areas of strengths and weaknesses
- Capacity building
- Sustainability planning
Formative Assessment

- Scoring tool for subjective assessments
- Measurement of progress over time
- A good conversation starter
- Build greater understanding of the critical areas of strategy, capacity, and action necessary for sustainability
- Develop an action plan for improving your sustainability potential
## Formative Assessment Tool

<table>
<thead>
<tr>
<th>Collaboration</th>
<th>Pre-Awareness</th>
<th>Awareness</th>
<th>Interaction</th>
<th>Mastery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partnerships include stakeholders necessary for the successful planning, implementation, and/or continuation of programs and services</td>
<td>Partnerships formed in order to fulfill funding</td>
<td>Partnerships based on previous relationships that may/may not be appropriate to address the problem</td>
<td>Partnerships assessed and expanded to include organizations that can address the problem</td>
<td>Partnerships include all organizations needed to strategically address the problem</td>
</tr>
</tbody>
</table>
Formative Assessment

• You can find the quick course here: https://chsdteam.talentlms.com/unit/view/id:991
• Posted to www.ruralhealthlink.org
• Your TA Provider can help!
Table Talk

Reflecting on the “DNA” as well as the components of the Sustainability Framework and your hoped-for sustained impacts:

- What have you been doing really well in positioning for sustainability?

- What do you need to focus on in the next 3-6 months to better position your Outreach initiative for sustainability?

- What is the first step you will take when you get home?