



# NWD SYSTEM: BUSINESS CASE TOOLKIT

Appendix: Additional Resources



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## Appendices

### Appendix A. Building Blocks to Business Plan Development

#### *Appreciative Inquiry Approach*

The Appreciative Inquiry approach focuses on the positive, builds on stories of impact, identifies themes that appear in these positive stories, and leads to shared images of a preferred future state providing foundation to the measurement of program change and impact. As a governing body, explore the following:

- Discover - Appreciate the best of “what is.” Engage in dialogue to identify what works well. What are your organization’s successes, strengths, and periods of excellence?
- Dream – Imagine “what could be.” Build on past achievements and successes to imagine new possibilities and envision a preferred future. For example, consider the following:
  - How do you envision people accessing LTSS?
  - What kinds of systems and structures are needed to reach full engagement of all people and payers?
  - What will success look like for each intervention? For the NWD System?
  - What are the most important ways that you and stakeholders could actively engage to create something truly exceptional for the NWD System?
- Design – Determine “what should be.” – Design brings together the stories from discovery with the imagination and creativity from dreaming. It is bringing the “best of what is” together with “what might be” to create the ideal – “what should be.” In this step, consider the following:
  - How can you take the stories that happen today and create more innovation, more positive impacts, and greater success?
  - What do you feel are the most promising areas in which to expand collaboration to reach goals for the NWD System?
  - What communication structures need to be put in place to draw attention to the investment in the NWD System?
  - What are the most important factors likely to sustain each aspect of the NWD System?
  - What additional skills or support is needed to enable you to meet your goals/objectives?

## Goals and Objectives Worksheet<sup>1</sup>

For each of your goals, use the following table to ensure your goals and the objectives within them are **SMART**: specific, measurable, achievable, relevant, and time-bound. Add as many goals or objectives as you need.

	Guidance	Description
Goal 1	<b>Specific:</b> Who? What? When? Where? Why? Which?	
	<b>Measurable:</b> Metrics and milestones. How much? What percentage?	
	<b>Achievable:</b> Do you have skills and tools to accomplish this objective?	
	<b>Relevant:</b> Does it fit with overall organizational objectives?	
	<b>Time-Bound:</b> Intermediate and final deadlines	
Objective 1 (Under Goal 1)	<b>Specific:</b> Who? What? When? Where? Why? Which?	
	<b>Measurable:</b> Metrics and milestones. How much? What percentage?	
	<b>Achievable:</b> Do you have skills and tools to accomplish this objective?	

<sup>1</sup> “Goal Setting Templates.” Smartsheet, <https://www.smartsheet.com/goal-tracking-setting-templates>. Accessed October 2019.

	Guidance	Description
	<b>Relevant:</b> Does it fit with overall organizational objectives?	
	<b>Time-Bound:</b> Intermediate and final deadlines	
Objective 2 (Under Goal 1)	<b>Specific:</b> Who? What? When? Where? Why? Which?	
	<b>Measurable:</b> Metrics and milestones. How much? What percentage?	
	<b>Achievable:</b> Do you have skills and tools to accomplish this objective?	
	<b>Relevant:</b> Does it fit with overall organizational objectives?	
	<b>Time-Bound:</b> Intermediate and final deadlines	

## Work Plan Template

You may want to build a separate work plan for the various programs or interventions offered by your NWD System, or you may want to build a combined work plan capturing all activities planned for the full NWD System.

**Goal:** *[Insert goal from goals listed here. If more than one goal, duplicate this table accordingly]*

Action Item	Person Responsible	Due Date	Expected Outcome	Evaluation
<i>[Insert short statement of actions you expect to take here.]</i>	<i>[Insert person(s) responsible for completion of the action here.]</i>	<i>[Insert expected due date here.]</i>	<i>[Insert a short statement about what you hope to accomplish or see as a result of the action here.]</i>	<i>[Note how you will evaluate success. As you implement your strategy, monitor progress.]</i>

## Appendix B. Business Plan Template – Long Version

The following table crosswalks the components of a business plan with the toolkit sections and appendices that may be useful in developing each component.

Business Plan Components	Toolkit Sections	Appendices Containing Relevant Tools
Mission, Vision, Goals, and Objectives	<a href="#">Section 1.</a> Getting Started: A Focus on Governance	A
Product Profile	<a href="#">Section 2.</a> Complete an Environmental Scan to Identify Potential Partners and Community Trends	E, F, G, H, Q
Market Analysis	<a href="#">Section 2.</a> Complete an Environmental Scan to Identify Potential Partners and Community Trends <a href="#">Section 3.</a> Developing a Compelling Value Proposition	E, F, G, H, I, J, K, L, Q
Marketing and Communications Strategy	<a href="#">Section 2.</a> Complete an Environmental Scan to Identify Potential Partners and Community Trends <a href="#">Section 3.</a> Developing a Compelling Value Proposition <a href="#">Section 5.</a> Developing a Marketing and Communications Strategy <a href="#">Section 6.</a> Successful Engagement with Potential Partners	E, F, G, H, I, J, K, L, M, N, O, P
Financial Impact	<a href="#">Section 4.</a> Managing Finances and Evaluating Contracts	
Evaluation	<a href="#">Section 7.</a> Delivering and Evaluating Success	

*[Insert your logo]*

*[Insert date and whether the plan is draft or final]*

# INSERT THE NAME OF YOUR ORGANIZATION HERE

## Business Plan

Enter the date span of this plan – could be a one-year plan, three-year plan, etc.

<i>Appendix B. Business Plan Template – Long Version</i> .....	5
Executive Summary .....	6
Mission .....	7
Goals and Objectives .....	7
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Product Profile .....	8
Market Analysis .....	9
Industry Description and Outlook .....	9
Competitor Description .....	9
Risk Assessment Description .....	10

Target Markets and Projections.....	10
Marketing and Communications Strategy.....	11
Financial Impact.....	11
Evaluation .....	11

## **Executive Summary**

### **Guidance:**

*This is a concise summary of your entire plan. It conveys where you are now and where you want to go. Because the executive summary reflects both key facts and best thinking about what you hope to accomplish, it is the last section you will write. The executive summary presents highlights of the following topics:*

- 1. Purpose. A statement that explains the goals and objectives of the program, including program activities and services and their impacts and outcomes.*
- 2. Problem(s) to be addressed.*
- 3. Description of NWD partners and stakeholders the NWD System hopes to “make the case” to. Who is the partner/organization, where is it located, how many employees does it have, what is its “core” business and financial background. Explain how and why the partner/organization was identified as appropriate.*
- 4. Market analysis. Based on the assessment/scan, what health needs exist in the current market and who will the project serve? What is the partner/stakeholder’s capacity to succeed given current market conditions?*
- 5. Marketing and communications plans. Describe how you plan to market the services. What media relations and strategies will you use?*
- 6. Financial situation/needs. What are the financial requirements to initiate services and what are your revenue projections?*

Insert your executive summary here and delete the guidance above when ready.



## Mission

### Guidance:

*Provide a clear and concise statement for what you hope to accomplish overall. This mission statement is one to two sentences which reflects the purpose of your organization. It does not go into detail on what you will do, but rather is a long-term statement of intent. Why does/should it exist and what is the purpose? This purpose will drive your programs, services, and daily activities.*

Insert your mission statement here and delete the guidance above when ready.

## Goals and Objectives

### Guidance:

- *What do you want to accomplish and why?*
- *Who are the intended beneficiaries?*
- *Goals are general statements of what you want to achieve and provide programmatic direction. Objectives are clear, realistic, specific, measurable and time-limited statements of action that, when completed, will move you towards achieving the goal. Insert in the table below and add rows as needed.*

Goals	Objectives
A.	1. 2. 3.
B.	1. 2. 3.
C.	1. 2. 3.

## NWD System Description

### Guidance:

*Describe when your organization was founded and why, as well as any major organizational changes it has undergone (e.g. growth, new locations, fiscal agent/contractual changes, renovations, etc.). Describe your core strengths. Insert facts and figures as needed to best represent who you are.*

Insert a brief description here and delete the guidance above when ready.

## Product Profile

### Guidance:

*Describe your products/services. What do you have to offer the market? What are the outputs of these products/services? Do you have any data that reflects product/service value to the market?*

*Products/Services to consider: Evidence-based care transitions; Care coordination; Information, referral, and assistance/system navigation; Medical transportation; Evidence-based medication reconciliation programs; Evidence-based fall prevention programs/home risk assessments; Nutrition programs (counseling, education, and meal provision); Caregiver support; Environmental modifications; Housing assistance; Personal assistance; Chronic disease self-management; Diabetes self-management; Education about Medicare preventive benefits; Peer supports; Transitions from nursing facility to home/community; Person-centered planning; Self-direction/self-advocacy; Assessment/pre-admission review; Environmental modifications; LTSS innovations; and Transportation.*

Insert an introduction to your products and services, and delete the guidance above when ready.

Products/Services We Offer	Evidence that Products/Services Add Value
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.

## Market Analysis

### **Guidance:**

*This is a summary of your analysis. Describe the current and projected need for your proposed services as experienced by the target audiences you hope to approach including what is reflected in the data collected in the assessment/scan. Describe the project's geographic service area and the demographics of its target population, including overall size, ages, ethnicity, languages spoken, etc. What are the major providers in the area? Assess the availability of similar programs and services and discuss the comparative advantage of the services you will offer. Discuss the challenges and opportunities that you and your partners expect to face during the first several years. Challenges might include items such as anticipated declines in funds available or an increase in number of people in need of NWD supports. Opportunities might include factors such as new partnerships and collaborations or a stronger community commitment to advance or sustain NWD Systems.*

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Insert an introductory paragraph and delete guidance when ready.

### **Industry Description and Outlook**

#### **Guidance:**

*Provide a brief description of the current state of the industry overall and where it's headed. Relevant industry metrics could include size, trends, and projected growth. Potentially include Health Plans, Merit-Based Incentive Systems (MIPS) and Advanced Alternative Payment Models (APMs), Hospitals and Hospital Systems, Primary care, Accountable Care Organizations, Medicare, State Medicaid Departments, Veterans Administration Medical Centers, Skilled Nursing Facilities and Post-Acute Care Providers.*

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Insert a brief description here and delete guidance when ready.

### **Competitor Description**

#### **Guidance:**

*Think about direct and indirect competitors. Are there other companies offering similar products and services? Are there companies that are offering alternate solutions to what your organization offers? What are competitor strengths and weaknesses?*

---

Insert a brief description here and delete guidance when ready.

### Risk Assessment Description

**Guidance:**

*Think about potential problems and challenges associated with your approach to a target partner. Use this information to identify which target partners to approach early versus later and develop mitigation strategies to reduce risks to success.*

Potential Problems and Challenges	Mitigation Strategies

### Target Markets and Projections

**Guidance:**

*When understanding the market, understand your potential partner’s pain points. Think about the types of products or services you plan to offer? How big is the potential market for what you hope to offer? What are the potential pitfalls of entering the particular market? What’s the cost of entry—is it prohibitively high, or can anyone enter? Examine your costs and weaknesses. Consider timing of entry. Do you need to get in early to take advantage of an emerging market? Prioritize your target partner based on likely success and gaining the greatest value and market share for your organization. Market share is your projected portion of the amount of money your potential partner may have available based on demographics and costs you were able to pull from public sources. Pricing is where you provide your pricing structure and costs of the services/products you hope to offer. Insert information in the table below and add rows as needed.*

Target Partner	Market Share	Pricing	Priority and Timing

**Marketing and Communications Strategy**

**Guidance:**

*What is your strategy for approaching each target partner? What tools and resources will you use (e.g. a slide deck, a fact sheet, send a personal note)? Include tools and resources already available and those that require development.*

Insert an overview of marketing and communications strategy and delete guidance when ready.

**Financial Impact**

**Guidance:**

*Provide a list of items needed and costs to purchase, revenue, staff costs, and profit projections for business plan term.*

Insert a paragraph or two, insert tables and charts as needed, and delete guidance when ready.

**Evaluation**

**Guidance:**

*Identify success metrics. How will you know you met your goals and objectives?*

Measuring Success
1.
2.

## Measuring Success

3.

4.

## Appendix C. Business Plan Checklist

Use this checklist to guide your business planning activities. When complete, you will have a dynamic document to move your organization toward your desired goals and objectives.

Area of Focus	Activity
Mission	<input type="checkbox"/> Convene a planning group <input type="checkbox"/> Confirm the mission of the organization to align with future business objectives
Goals and Objectives	<input type="checkbox"/> Develop goals and objectives with planning group
Product Profile	<input type="checkbox"/> Conduct a scan of NWD System products and services <input type="checkbox"/> Collect data that reflects the value of NWD System products and services <input type="checkbox"/> Identify products and services best positioned to target partners
Market Analysis <sup>2</sup>	<input type="checkbox"/> Explore potential partners who might need or want products/services <input type="checkbox"/> Gather data on industry outlook <input type="checkbox"/> Identify market trends <sup>3</sup> <input type="checkbox"/> Understand potential partners' buying habits, strengths, and needs <input type="checkbox"/> Understand size of potential partners' target markets <input type="checkbox"/> Explore potential partners' willingness to pay for products/services <input type="checkbox"/> Understand competitors in potential partners' markets <input type="checkbox"/> Analyze all findings to pinpoint potential partners to approach <input type="checkbox"/> Analyze all potential risks and develop mitigation strategies <input type="checkbox"/> Define your value by developing a plan <sup>4</sup> <ul style="list-style-type: none"> <li><input type="checkbox"/> With a project timeline</li> <li><input type="checkbox"/> With actionable steps</li> </ul> <input type="checkbox"/> Identify a person with experience in business strategy to act as a NWD Business Mentor <input type="checkbox"/> Review what you know with NWD Business Mentor
Marketing and Communications Strategy	<input type="checkbox"/> Conduct stakeholder analysis <input type="checkbox"/> Develop a marketing strategy to address stakeholder needs <input type="checkbox"/> Develop resources to address communication styles
Financial Impact	<input type="checkbox"/> Explore available resources and equipment available to support market need(s) <input type="checkbox"/> Identify resources and equipment needed to scale to market need(s) <input type="checkbox"/> Analyze available data to project revenue and profit of potential partnership(s)
Evaluation	<input type="checkbox"/> Work with planning group to identify measures of success <input type="checkbox"/> Develop mechanism to collect data on measures <input type="checkbox"/> Develop a baseline to measure impact

<sup>2</sup> Use the [External Assessment](#), [Competitor Analysis](#), and [Opportunity Assessment](#) to guide market analysis.

<sup>3</sup> Use the [Aging and Disability Business Institute's "Understanding the Landscape" resource](#).

<sup>4</sup> Use the [Aging and Disability Business Institute's "Define Your Value" resource](#).

## Appendix D. Business Plan Snapshot



### Our Problem

*[Describe the problem and existing pain points]*

### Our Solution

*[How do your services seek to address the pain points?]*

### Target Market

*[Who are you targeting with your services? Is there a specific entity with whom you would like to partner?]*

### The Competition

*[What other entities provide similar services or may also be seeking partnerships with your desired partner? How can you either partner with these competitors or demonstrate how your services provide greater value?]*

### Marketing Strategy

*[How can you most effectively engage your target audience and convey your "Value Add" and "Ask"?)]*

### Revenue and Expenses

*[Describe financial components of your services and your "Ask"]]*

### Measuring Success

*[How will you evaluate your program? How will you tangibly measure success? What performance measurement criteria will you use?]*



## Appendix E. External Assessment Template

Use this table to help organize your environmental scan. For each potential partner you identify, collect detailed information about past, present, and emerging trends, as well as relevant existing business case materials and opportunities for partnership. A potential partner is an entity with whom your organization could either create or strengthen a meaningful, mutually beneficial relationship.

Potential Partners/Stakeholders		Past Trends	Current Trends	Emerging Trends	Existing Business Case Materials Targeted at this Audience	Opportunities (what impact could your services have for this partner)?
[Insert potential partner here]	General Trends					
	Demographic Trends					
	Economic Trends					
[Insert potential partner here]	General Trends					
	Demographic Trends					

Potential Partners/Stakeholders		Past Trends	Current Trends	Emerging Trends	Existing Business Case Materials Targeted at this Audience	Opportunities (what impact could your services have for this partner)?
	Economic Trends					
[Insert potential partner here]	General Trends					
	Demographic Trends					
	Economic Trends					
[Insert potential partner here]	General Trends					
	Demographic Trends					
	Economic Trends					

## Appendix F. Competitor Analysis Template

Use this table to organize your research about your competitors.

Competitor	Existing partnerships and their successes	What service does this competitor offer?	How does this competitor utilize their resources?	Staff composition and qualifications	Financial situation	Market share
[Name of potential competitor]						

## Appendix G. Potential Partner Assessment

Use the following table to organize your research on each potential partner. Consider each partner’s characteristics and context and envision what a future partnership would look like.

Potential Partner	What is the value of this partnership?	Does this potential partner have any current partnerships?	What potential competition exists for this partnership?	What is the individual partner’s motivation for partnership?	How can our organization provide value to this potential partner?	What market trends or changes affecting this partner can your organization impact?	What resources are required for success in this partnership?	Is our organization prepared for a partnership with this organization?
<i>[Name of potential partner]</i>								

## Appendix H. Partner Prioritization Template<sup>5</sup>

Following completion of the environmental scan, use this template to map partners by quadrant by placing names in spaces associated with level of influence and interest.

		Interest			
		Low		High	
Influence	High	<b>Approach for Future Formal Partnership (In 3-5 Years)</b> <i>[Insert partner and organization names here.]</i>		<b>Approach for Immediate Formal Partnership (Years 1 and 2)</b> <i>[Insert partner and organization names here.]</i>	
	Low	<b>Informal Engagement</b> <i>[Insert partner and organization names here.]</i>		<b>Formal Engagement</b> <i>[Insert partner and organization names here.]</i>	

<sup>5</sup> Adapted from <https://www.smartsheet.com/free-stakeholder-analysis-templates>.

## Appendix I. Value Add Template

Use the following table to guide your understanding of the partners' pain points and the applicable services and value you can provide. Fill out this table for each of your potential partners. You may find it helpful to compare your responses to each of the questions across your potential partners.

<i>[Name of Potential Partner]</i>	
Guiding Questions	Responses
What service will be delivered?	
What is the service's target population? How does the service/intervention help this population?	
What makes the service you provide unique/special? Why should the partner use your services and not an alternative?	
What is the most important pain point you anticipate your service will influence for the potential partner? <ul style="list-style-type: none"> <li>• What is the current impact of this pain point for your potential partner?</li> <li>• What is the anticipated impact of this pain point?</li> </ul>	
What are the proposed results/outcomes of the partnership for the partner? For the population served? For your organization? <ul style="list-style-type: none"> <li>• How will your service impact the pain point?<sup>6</sup></li> </ul>	
Summarize the information you have gathered above to develop a succinct overview of the value of your offered service and the partnership proposed.	

<sup>6</sup> Support this with your historical service data or from literature and research of similar service impact successes.

## Appendix J. Elevator Pitch Templates

There are a variety of successful templates for crafting elevator speeches. The following table includes several templates for you to use as you develop a compelling, concise elevator pitch to convey the value of your services.

Elevator Speeches
For _____ (target customer) who _____ (statement of the need or opportunity), our _____ (product/service name) is _____ (product category) that _____ (statement of benefit). <sup>7</sup>
We help X do Y doing Z. <sup>8</sup>
Customer: _____ (who your customer is). Problem: _____ (what problem you're solving for the customer). Solution: _____ (what is your solution for the problem). <sup>9</sup>

<sup>7</sup> "How to do an Unforgettable Elevator Pitch- Geoff Moore's Positioning Statement." Flide, <https://flide.it/>. Accessed October 2019.

<sup>8</sup> "How to do an Unforgettable Elevator Pitch- Steve Blank's XYZ." Flide, <https://flide.it/>. Accessed October 2019.

<sup>9</sup> "How to do an Unforgettable Elevator Pitch- Patrick Vlaskovits & Brant Cooper's CPS." Flide, <https://flide.it/>. Accessed October 2019.

## Elevator Speeches

- Short, simple, memorable; what, how, why
- 3 keywords or phrases
- Kiss (no expert jargon)<sup>10</sup>

- Highlight the enormity of the problem you are tackling.
- Tell the audience what you provide.
- Distill the differentiation down to one, easy-to-comprehend sentence.
- Establish credibility by sharing data, your experience, or the experience of those with whom you partner.<sup>11</sup>

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<sup>10</sup> “How to do an Unforgettable Elevator Pitch- Dave McClure’s Elevator Ride.” Flide, <https://flide.it/>. Accessed October 2019.

<sup>11</sup> “How to do an Unforgettable Elevator Pitch- Dave Cowan’s Pitchcraft.” Flide, <https://flide.it/>. Accessed October 2019.



## Appendix K. Expanding on the Elevator Pitch

Use the questions in the following table to further develop your elevator pitch.

Question	Sub-Questions	Response
<p><b>What service are you proposing to the potential partner?</b></p>	<ul style="list-style-type: none"> <li>▪ Who is the target population of the service?</li> <li>▪ Describe the service. What does it entail? Who will be providing the service?</li> <li>▪ What makes the service you provide unique/special?</li> </ul>	
<p><b>Why does the potential partner need your service?</b></p>	<ul style="list-style-type: none"> <li>▪ What specific pain points does your service address?</li> <li>▪ If nothing changes, what are the anticipated impacts of the pain points on your potential partner?</li> </ul>	
<p><b>What value do your services provide to the potential partner?</b></p>	<ul style="list-style-type: none"> <li>▪ How does the service or intervention help the target population? Be specific and infuse data to enhance your message.</li> <li>▪ What is your program's current and projected impact on these pain points?</li> <li>▪ How is what you offer different from (and more valuable than) what the potential partner could do themselves or achieve in another way?</li> </ul>	

Question	Sub-Questions	Response
<p>What is your “Ask” of the potential partner?</p>	<ul style="list-style-type: none"> <li>▪ What are you specifically requesting from your potential partner?</li> <li>▪ If your partner agrees, what changes can they expect to see? For example, if you are seeking additional funding, what is the projected impact of that funding?</li> </ul>	

## Appendix L. Data Gathering Tools

Use this resource to help you identify useful data points to “wow” your audience and highlight the importance of your services. Combining data and personal stories into your pitch can help you effectively communicate your proposed intervention’s value add to potential partners. Use the Personal Story Capture Tool to identify and describe personal stories that demonstrate the impact of the NWD System.

### *Identifying Data Sources and Reference Points*

Resource	Potential Data Points to Reference
NWD Reference Document Data Points	
Internal Program Data	
Stories	
Other Publicly Available Data	

## *Personal Story Capture Tool*

<b>Item</b>	<b>Description</b>
<b>Story about your state's NWD System</b>	<i>[Insert the story about the NWD System when it was at its best. Describe the system, how it is effective, how it impacts people, how it is communicated/marketed, and how you know it is successful.]</i>
<b>Story Illustrating Person-Level Impact of the NWD System</b>	<i>[Insert a person story that illustrates the system.]</i>
<b>Personal Story Illustrating Need for the NWD System</b>	<i>[Insert a person story that illustrates the need for the NWD System. What negative circumstances could the NWD System prevent?]</i>
<b>Themes</b>	<i>[Insert bullets that describe the core theme(s) of the story highlighting the success elements – what works and is important to advance and sustain and what you can build upon.]</i>

## Appendix M. Marketing and Communication Plan<sup>12</sup>

Use the table below to prioritize and describe your target audiences, potential partners, and stakeholders. Feel free to add as many rows as necessary. Use the “Notes” section to describe your target audiences and their priorities. Then, determine a few key messages for each group and identify tools and strategies for sharing those messages.

After completing the table below, create a [Work Plan](#) specific to your Marketing and Communications plan. Identify specific tasks to engage each target audience you prioritize, owners for each of those tasks, and deadlines.

Potential Partner, Stakeholder, or Target Audience	Notes	Key Messages	Tools	Appropriate Communication Channels and Budgets	Frequency of Communication
<b>[Potential partner/stakeholder #1]</b>	<i>[Describe the potential partner/stakeholder group and its priorities. Why do you want to partner with and/or influence this group? What is this group interested in? What pain points or challenges does it have? What other key stakeholders influence this group? What makes this audience a priority?]</i>	<i>[How do you want to be perceived by the target audience? What key takeaways are your priorities for this audience? How do you envision a potential partnership?]</i>	<i>[Do you have appropriate existing tools? What tools will you need to create? What medium (e.g., pitch deck, one-pager, etc.) can most effectively convey your message to this audience?]</i>	<i>[What communication channels (e.g., 1:1 meeting, online presence, TV/print marketing, etc.) would be appropriate for this group? Do you have an existing relationship with your target audience? Which of your staff or contacts might be most appropriate to approach the partner, and what might be the most effective approach? How much will these strategies cost?]</i>	<i>[How often will you attempt to engage?]</i>

<sup>12</sup> Adapted from: “Ultimate Tool Kit: Free Communication Strategy Templates, Examples, and Expert Tips.” Smartsheet, <https://www.smartsheet.com/communications-strategy-how-to-templates>. Accessed October 2019.

Potential Partner, Stakeholder, or Target Audience	Notes	Key Messages	Tools	Appropriate Communication Channels and Budgets	Frequency of Communication

## Appendix N. Example Meeting Follow-Up Template

This resource will help you develop a follow-up message to send to potential partners. Follow-up is important to establish a beneficial connection for both the present and the future.

<b>1. Reintroduce your program.</b>
<b>2. Highlight important components of your NWD System.</b>
<b>3. Reiterate the value your program adds to the individuals you serve and to your partner.</b>
<b>4. Conclude with the commitments you determined during the meeting and next steps.</b>

## Appendix O. Marketing Tool Templates

*Note to states: When this toolkit is published, we will attach the infographic, pitch deck, and memo templates shared with you all for the collaborative.*

*Infographic*

*Pitch Deck*

*Memo*



## Appendix P. Grantee Marketing Tool Examples

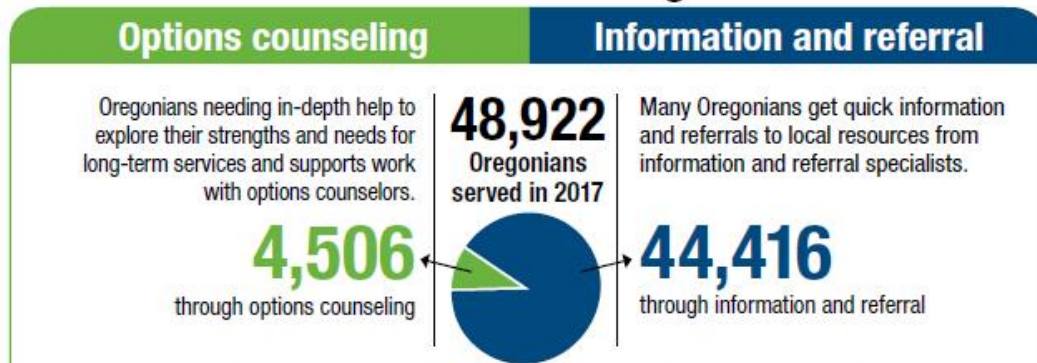
### Oregon: Audience: State Leadership



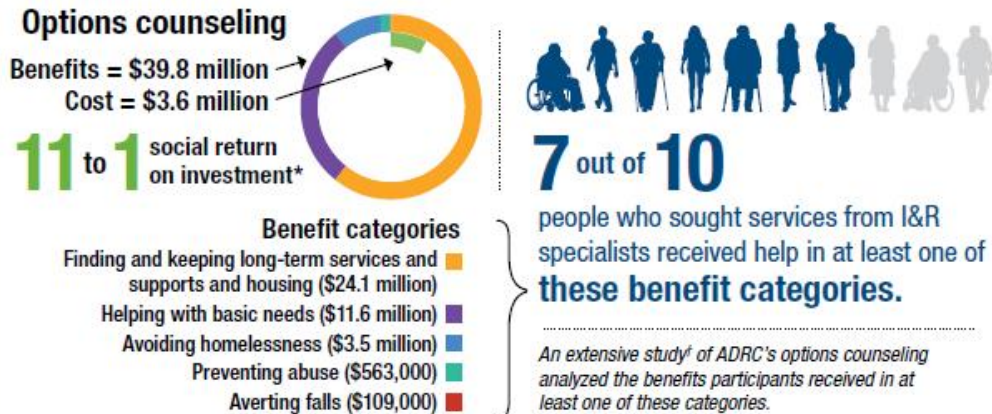
## Providing high-value aging and disability services

ADRC's free information and referral (I&R) and options counseling services connect Oregonians — regardless of age, income or disability status — to the information and services they need most.

### How ADRC serves Oregonians



### ADRC's benefits far outweigh its costs



*Options counseling benefits alone equaled more than seven times ADRC's total program costs.*

\* Social return on investment (SROI) measures financial and social values not currently reflected in conventional financial accounts. SROI can identify how effectively an organization uses its capital and resources to create value for the community.

† Hamilton B, Jensen K, Chussil M. 2018. Social return on investment: the business case for Oregon's ADRC. Compelling Reason, LLC.

## The ADRC program is a proven value

Options counseling saves consumers and the system money. It maximizes the use of personal resources and reduces Medicaid spending.

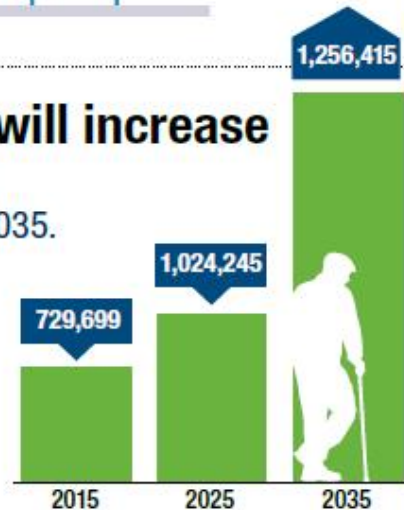


## The need for ADRC services will increase

Oregon's population is aging rapidly. The number of people age 65 and older will nearly double by 2035.

### Funding for the ADRC of Oregon must increase to:

- Keep up with the growing need for long-term services and supports, and
- Continue to provide high-value ADRC services that save consumers and the state money.



Source: Oregon Health Care Association 2018 Report [Internet LLM Association Publications – Association Publications for all. Made with FlippingBook; [cited 2019 Aug 19]. Available from: <http://associationpublications.com/flipbooks/ohca/Report18/index.html>



[www.ADRCoforegon.org](http://www.ADRCoforegon.org) • 1-855-ORE-ADRC (673-2372)

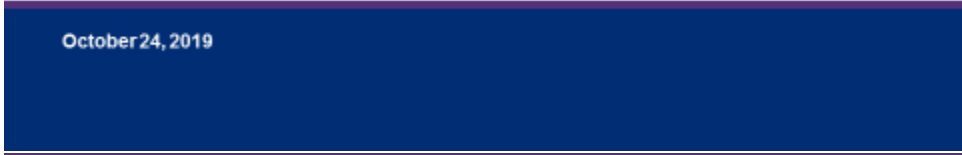
You can get this document in other languages, large print, braille or a format you prefer. Contact Aging and Disability Resource Connection (ADRC) at 503-945-6237 or email [ADRC.info@dhs.oregon.gov](mailto:ADRC.info@dhs.oregon.gov). We accept all relay calls or you can dial 711.

DHS 2524 (09/19)

*New York: Audience: Managed Care Plans*



**NY Connects**  
Your Link to Long Term Services and Supports



October 24, 2019



October 24, 2019

1

**Our Current Service Delivery System is Expensive!**

Health care costs in New York State total **\$193 billion**



Source: Kaiser Family Foundation <https://www.kff.org/statedata/>



October 24, 2019

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**New York Ranks Low in the Following Outcome Measures for the 65+ Population:**

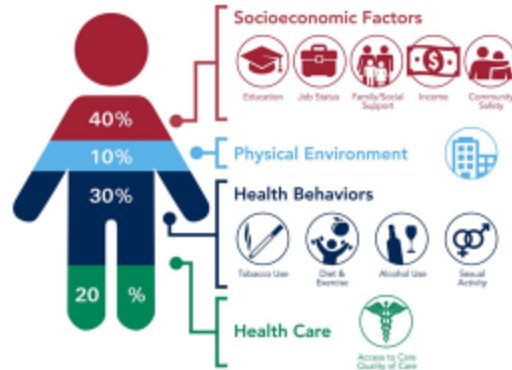
- **Frequent mental distress**
- **Poverty**
- **Hospital deaths**
- **Hospice care**
- **Hospital readmissions**
- **Excessive drinking**



America's Health Rankings, United Health Foundation  
[https://www.americashealthrankings.org/lowvalue/selectedmeasures/hospital\\_readmissions\\_65plus\\_ny](https://www.americashealthrankings.org/lowvalue/selectedmeasures/hospital_readmissions_65plus_ny)



## Key Drivers of Cost, Quality, and Outcomes



Source: Institute for Clinical Systems Improvement; Going Beyond Clinical Walls: Solving Complex Problems, 2014. Graphic designed by ProMedica

## There is a Growing Demand for Long Term Services and Supports (LTSS)



22.2% of adults in NYS are disabled.



37% of those 65+ in NYS are disabled.



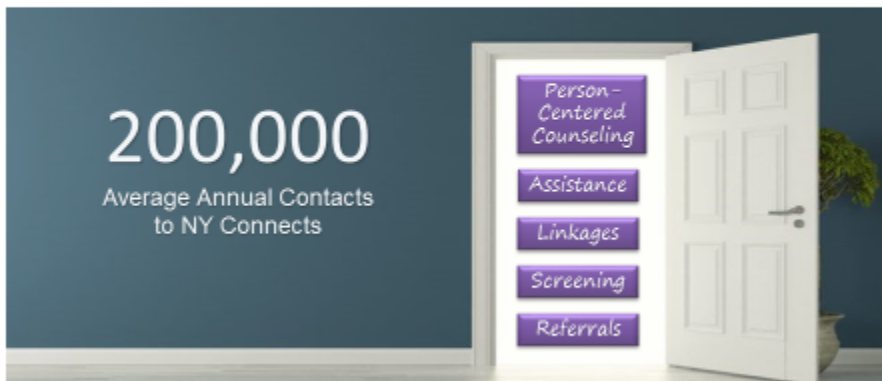
52% of those 65+ will develop a disability requiring LTSS.



Disability Health Care Expenditures in New York total \$40.1 billion per year.

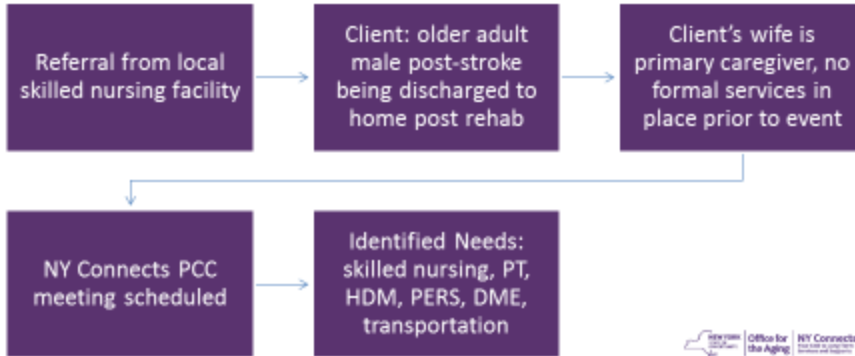
1. Centers for Disease Control <https://www.cdc.gov/ncbddd/disabilityandaccess/data/2017/2017-nys-ltss.html>  
 2. AARP LTSS State Scorecard 2017 Edition

## NY Connects No Wrong Door (NWD) Provides Seamless Linkages to LTSS



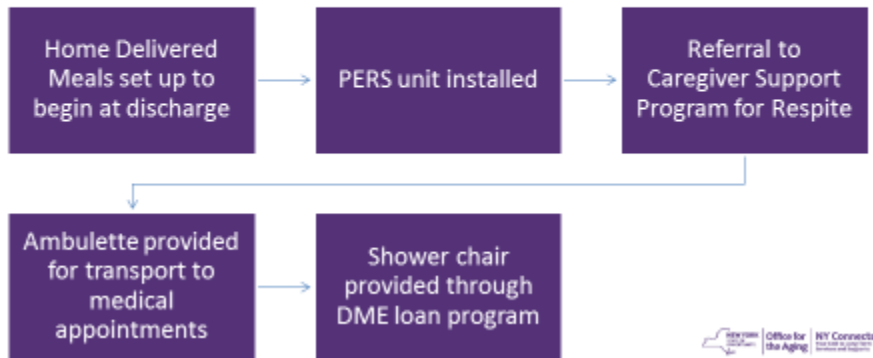
# Mr. B's Story

## NY Connects NWD Referral:



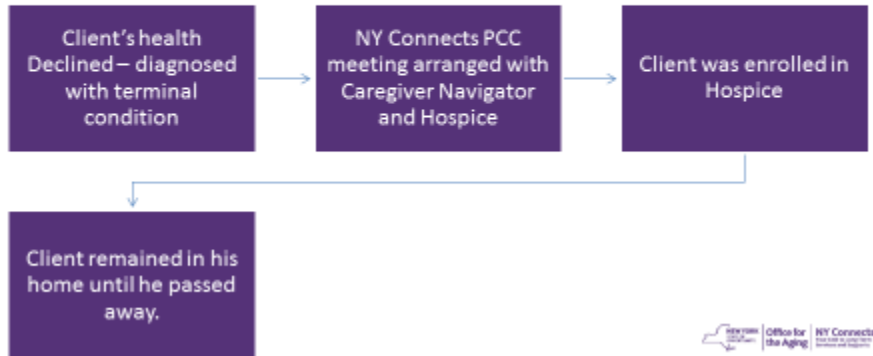
# Mr. B's Story

## NY Connects NWD System Process:



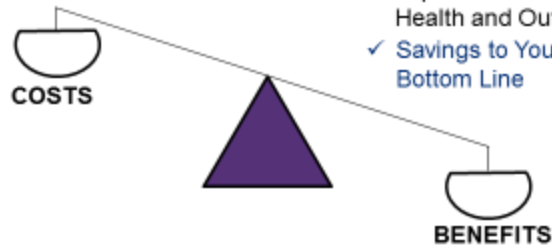
# Mr. B's Story

## NY Connects NWD System Outcomes:



## Partnering with NY Connects: the benefits outweigh the costs!

- ✓ Reduced Unnecessary Hospital Utilization
- ✓ Improved Member Health and Outcomes
- ✓ Savings to Your Bottom Line



## NY Connects NWD: *Person-Centered and Value-Based*



1-800-342-8972



[www.nyconnects.ny.gov](http://www.nyconnects.ny.gov)

Contact: Amy Hegener/[amy.hegener@aging.ny.gov](mailto:amy.hegener@aging.ny.gov)/518-408-1856





## Options Counseling: The Power of a Personalized Experience



Susan contacted the ADRC of Portage County on behalf of her parents. Her mother needed care during the day, and Susan was looking for an assisted living facility where both her parents could move to remain together. Through options counseling, the ADRC informed Susan about their options, which included adult day services. They decided to try this option first because it was not only the least restrictive but also the least costly. They discovered it was an excellent option for their needs. Because of options counseling through the ADRC, moving to assisted living was delayed for not one, but two people.

Mary called the ADRC of Washington County on behalf of her elderly parents. Her father was in a nursing home for rehabilitation and expected to return home soon. Her mother had mild to moderate dementia. Mary was the primary caregiver for her parents. Although Mary lived close, she was not always able to provide care and it was important to her and her parents that they remain in their own home. An options counselor at the ADRC helped connect Mary and her parents to a variety of community services like home-delivered meals, supportive home care for lawn care and other home maintenance, a medication machine, respite, and more. Options counseling helped connect this family with the assistance needed. This help empowered Mary to continue to care for her parents in their home.






\*Stories from 2015 Status Report  
(names changed for confidentiality)

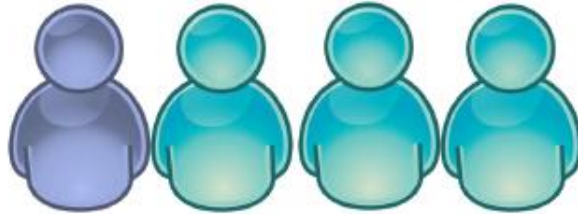
By receiving options counseling at a local ADRC, people are 89% more likely to access privately paid resources rather than utilizing services through Medicaid funded long-term care programs.



# Wisconsin ADRC Facts

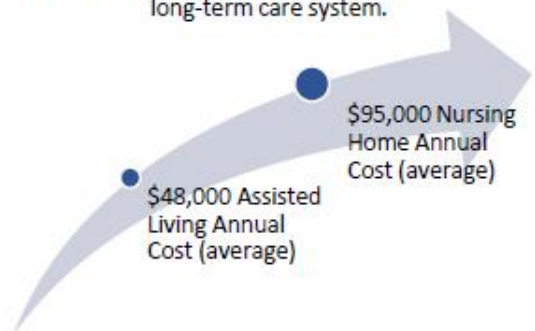
-  Serving older adults and people with disabilities throughout Wisconsin.
-  ADRCs will serve over 160,000 Wisconsin residents in 2019.
-  There has been a 22% increase in ADRC customers and continuing growth is expected.

ADRCs have local community professionals providing individualized resource counseling in order for customers to make informed decisions about their long-term care needs.



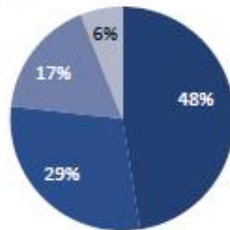
One out of four ADRC customers report that the ADRC helped them stay in their own home when they would have otherwise gone to a nursing home or assisted living facility.

Options Counseling is designed to help individuals prolong their own personal resources while also providing streamlined access to Wisconsin's long-term care system.



## Who is Contacting the ADRC?

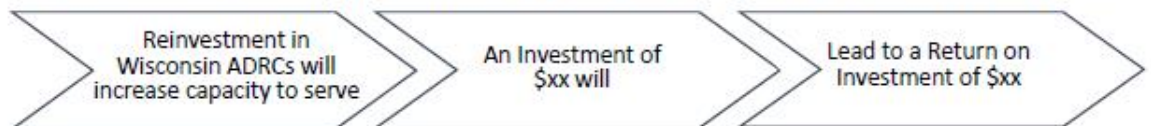
-  Individual/Self (47%)
-  Other: Guardian, POA, Friend, Relative, etc. (29%)
-  Partner Agency (17%)
-  Caregiver (6%)



## ADRCs are Effective and Unique

- Only provider of local, unbiased decision support
- ADRCs have local offices in every county throughout Wisconsin
- Phone calls made to an ADRC are answered by a live person
- Two out of five ADRC customers meet face to face with ADRC professionals in their own homes or community
- There are **no** income or asset requirements to utilize ADRC services
- The mission of the ADRC is to help people prevent or prolong the need for costly services and supports

## ADRCs: A Meaningful and Impactful Investment for Wisconsin



DRAFT September 25, 2019 v.7  
Add references



WISCONSIN DEPARTMENT  
of HEALTH SERVICES

