MISSOURI'S SUSTAINABILITY TOOLKIT

Self-Management Education Programs for People with Chronic Conditions

RAC
Missouri Regional Arthritis Centers

Purpose

The primary purpose of this document is to guide providers of self-management education (SME) chronic condition programs in efforts to assure high-quality services are available over the long-term. The development of sustainable operations does not occur by chance; rather, it involves strategy and planning to create the necessary organizational infrastructure and community support. This guide is a synthesis of practical experience and evidence-based strategies to help SME providers achieve sustainability. It provides a process for exploring critical issues in 10 key planning areas: revenue, marketing, referral networking, competition, service operations, evaluation, organizational support, community support, advocacy, and resource linkages. This document is designed to assist SME providers in the development of a Growth Action Plan, a brief plan written to clearly communicate prioritized strategies for sustaining its SME efforts.

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Published March 31, 2012

Sustainability of Self-Management Education Programs

Improving the health and well-being of individuals and families involves changing health-related behaviors. For people with **chronic conditions,** self-management education (SME) is a critical part of a solution to optimize health. Medical services and medications work best in conjunction with self-management skills and behaviors. Missouri has made considerable progress by increasing the **capacity** and reach of SME services, especially for people with arthritis. However, the future is uncertain. The viability of SME services will depend on the creativity and leadership of local providers. It will also depend on state-wide activities coordinated by organizations such as the Chronic Disease and Health Promotion Unit of the Missouri Department of Health and Senior Services, as well as non-profit advocacy organizations.

Capacity: (n.) the facility or power to produce, perform, or deploy (Merriam-Webster)

Chronic conditions – such as arthritis, asthma, diabetes, high cholesterol, and high blood pressure – are conditions that affect the health of an individual on a regular basis or over a long period of time

What is Sustainability?

The working definition of sustainability for this document is: *A community's ongoing capacity and resolve to work together to establish, advance, and maintain support for people with chronic conditions to improve health and quality of life through self-management skills.* Sustainability is not just about achieving public health goals; it involves creating and building momentum to maintain community-wide change by organizing and maximizing community assets and resources. Thus, sustainability planning requires an approach that involves many stakeholders who understand and can elevate the importance of self-management education across the health system. It is recommended that self-management education (SME) providers review the meaning of "sustainability" and tailor it to meet local needs and expectations.

Value of Self-Management Education

Self-management education (SME) programs aim to empower individuals with chronic conditions to take control of health and improve quality of life. These programs are designed to support and enhance existing medical treatments and the physician-patient relationship. While the format and methods may vary, SME usually provides individuals with knowledge and skills in an effort to improve quality of life by:

- addressing psychosocial problems such as frustration, pain, fatigue, social isolation etc.
- starting or maintaining physical activity/exercise
- adhering to a prescribed medication regimen
- communicating health concerns effectively with health care professionals, family, and friends
- optimizing nutrition and/or change eating habits
- developing problem-solving skills and
- setting personal health improvement goals.

SME has been proven to work well for individuals with different chronic conditions. In addition to favorable health outcomes for participants, SME helps to decrease excess health care utilization related to emergency room visits, hospitalizations, and outpatient visits.

A Successful Experience

Since 1995, the Missouri Arthritis and Osteoporosis Program (MAOP) has promoted and invested in a self-management education (SME) workshop called the Chronic Disease Self-Management Program (CDSMP), which was developed by Stanford University's Patient Education Research Center. CDSMP has been endorsed as an **evidence-based intervention** by the Centers for Disease Control and Prevention (CDC). Using a group-based process that emphasizes goal-setting, CDSMP lets participants learn self-management techniques from peer-teaching over six weekly sessions. Since 1985, MAOP has provided SME interventions focused on physical activity, behavior, and care for chronic conditions, including arthritis. MAOP is one of many Missouri organizations that promote SME programs in communities around the state.

Evidence-based intervention – program which is backed by research and data as being effective

Key Planning Areas

Planning is an essential activity for developing a sustainable self-management (SME) program. Each of the 10 key planning areas described in this document present possible strategies for a community-specific **Growth Action Plan.** There are planning questions for each strategy to guide discussion among **stakeholders** and support decision-making. The process for developing a complete Growth Action Plan will include all 10 of the key planning areas, but will not necessarily address each one in full detail. The relative importance of some key planning areas will vary by SME provider, as history, current resources, and community needs also differ. The Worksheet at the end of this toolkit can be used to help select and prioritize strategies for a Growth Action Plan.

Growth Action Plan: (n.) a brief written document for communicating priorities to sustain self-management education (SME) services offered by providers (Missouri's Sustainability Toolkit)

Stakeholders: (n.) individuals who are involved in or affected by a course of action (Merriam-Webster)

Revenue

Revenue is required to pay for professional staff, marketing, and other direct expenses related to successful SME programs. Diversification of revenue can increase the stability and sustainability of SME programs. A comprehensive Growth Action Plan will address these strategies which seek to create an ongoing and diversified stream of revenue.

1. Service Fee Schedule

Establish a fee schedule for services which can be used for charging for program participation. A fee schedule communicates the fees on a per-unit basis for available SME services/programs. It is important to recognize the association between price and perceived value when setting fees. Pricing also needs to reflect the actual cost of service provision. Sustainable practices cannot offer services below cost for an extended period of time.

Questions:

a. What are the downsides of offering services for free?
b. How much does it cost to provide services to one participant?
c. What is the market value for your services (i.e., price a participant is willing to pay)?
d. How should, or does, your fee schedule vary depending on payer?

2. Discounts and Deals

A discount or special deal can maintain the perception of quality while actually lowering the price for the buyer. Participation in program services can be encouraged by the use of vouchers, coupons, promotions, and scholarships; such discounts also assure services are affordable for participants. Discounts and deals may permit services to be available for no charge to some participants. It is important for SME providers to consider discounting in the context of a fee schedule and community needs. A mix of funding sources may allow an SME provider to offer discounts and deals.

Questions:

a. To what degree can your organization discount its fees to attract and retain participants?
b. How will discounts or promotions increase utilization of your services?
c. Who, or what organization, can provide subsidies or other deals to increase the affordability of your services?

Key Planning Areas
Revenue continued

3. Competitive Grant Application

In response to the burden of chronic conditions, public and private funding agencies invest in prevention and management strategies, including SME. SME providers can lead or partner with others to write for grants of all sizes. Grant-funded projects enhance SME program capacity and elevate awareness of SME services within the community and organization. There are many opportunities through state and national requests for proposals (RFPs) to obtain financial support for SME services. While these grants are highly competitive, proposal development can be a valuable activity for building new partnerships with SME stakeholders. It is necessary to connect with people, websites, and grant writing resources that provide up-to-date information about open RFPs.

Questions:

a. How can you improve your access to information about RFPs?
b. Who can assist you with grant writing (e.g., internal resource, contractor, other partner)?
c. To what degree does your organization have the capacity and know-how to apply for competitive grants?
d. How can you assure all requirements of the RFP are met?
e. How do you assess your probability of success for RFPs under consideration?

4. Grant Partner or Subcontractor

For many SME providers the best opportunity for new grant funding is through collaboration. The SME provider can be a partner (aka, subcontractor) to an organization with considerable grantsmanship experience (e.g., university or non-profit) which can lead the application effort. To enhance the application, it is necessary for an SME provider to develop and maintain relationships with such organizations well in advance of RFP announcements.

Questions:

a. Who is receiving or seeking grant funding for chronic conditions prevention and management in your area?
b. Who are the leaders of chronic conditions research at nearby universities or non-profits?
c. How can SME services be worked into current grant funding already in place in your community?
d. How can your SME services be featured in collaborative grant applications that focus on medical care access, health behaviors, or community development?

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In-kind: (adj.) consisting of something (as goods or commodities) other than money (Merriam-Webster)

5. Local Foundations

Given the social and economic value of SME programs to communities, local foundations (e.g., charitable trusts, hospital foundations) may offer funding or in-kind support for program activities. In comparison to national or state grantors, local foundations often work closely with grant recipients to define a fundable project without a structured RFP process. For example, an SME provider could approach a local foundation with a project to expand reach of services in the community.

Questions:

a. Who are the leaders of local foundations in your area?
b. How can you establish linkages to local foundations?
c. What part of SME programming is a local foundation likely to support?

6. Service Contracts

SME delivers value to health care organizations, health insurance companies, and employers by providing support for cost-saving efforts related to chronic conditions. This value can be recognized in a service contract that allows direct billing to the sponsor (e.g., health plan) for services rendered by an SME provider. For example, a large employer could contract with an SME provider for individual or group services for its employees, dependents, and/or retirees. Similarly, a health insurance company could offer the services of an SME provider to its members. Negotiated reimbursement rates may depend on volume and exclusivity terms of the service agreement.

Questions:

a. Who are the potential customers for a service contract?
b. How are services packaged and priced for this line of business?
c. Who can introduce you to potential customers?
d. To what degree is your organization capable of supporting the development and implementation of service contracts?

7. Charitable Contributions

SME is a community service worthy of philanthropic support from individuals and corporations. It is necessary to develop a fundraising strategy with specific activities and revenue goals. Consider including an annual donation solicitation campaign or estate giving program, as well as sponsorable events like a dinner/auction, appreciation luncheon for staff and participants, golf tournament, walk, etc. Program alumni and families are potential donors and volunteers for supporting fundraising activities. In addition to generating revenue, fundraising activities should increase awareness of program goals and services. Featuring alumni success stories during fundraising activities is highly recommended.

Questions:

a. Who can assist your organization with a fundraising strategy?
b. Who is on your "short-list" of individuals or corporations likely to provide charitable contributions or sponsorships?
c. What is unique and appealing about SME to your potential donors?
d. How do you maintain regular contact with program alumni?

Alumni: (n.) a person (alumnus) or group of people (alumni) who is a former member of a specific program or activity (Merriam-Webster)

Key Planning Areas

Marketing

In the context of this plan, the primary purpose of marketing activities is recruitment of SME program participants. It is important to recognize that related marketing activities can also be used to build stakeholder support, raise awareness, solicit new partners, etc. A comprehensive Growth Action Plan will address the following strategies which seek to create coordinated marketing efforts with clear and measurable goals.

1. Key Messages

Consistent messaging is essential to any marketing effort. SME providers must establish the key messages that will be promoted in all communication materials, discussions with community members, and internal stakeholders. Well-developed key messages have four important features: believable, concise, optimistically beneficial, and able to compel action.

Questions:

a. What are a few key messages that potential participants need to know about you?
b. How can you assure key messages are understood and used by staff and volunteers?
c. How will you test key messages with stakeholders and potential participants?
d. To what extent are your key messages tailored to different audiences?

2. Collateral Materials

Printed and/or electronic collateral materials provide a vehicle through which key messages are communicated. The process of developing these materials is critical to refining and clarifying the key messages and developing a lasting brand for an SME program. Brochures, posters, flyers, and websites are some of the most common collateral materials used.

Questions:

a. What types of collateral materials are needed?
b. Who can assist with graphic design?
c. How will collateral materials be used?

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3. Presentations and Community Forums

Being available to community groups (e.g., religious organizations, civic groups, business associations) for presentations about health care and related topics can be an excellent way to build relationships with potential participants and deliver key messages to the community. These presentations can be integrated into established meetings or organized as a special event. While the main topic of the presentation can be tailored to the audience's needs, it is important that all presentations are used to promote benefits of SME services and provide opportunities for program enrollment.

Questions:

a. Which community organizations involve people who are likely to have chronic conditions?
b. What types of educational presentations would appeal to the community?
c. How many participants can be recruited from community-based presentations?

4. Earned Media

While large scale advertising campaigns can be expensive and not possible in many areas, earned media opportunities are almost always available. Earned media differs from advertising because it is not paid for and it has a higher level of credibility. Local newspapers, magazines, radio, and television stations are often looking for local stories. Personal interest stories, with testimony from program participants, are preferred by media outlets. These stories can be very powerful in engaging people to join an SME program. Promoting a series of stories about people who have successfully completed the SME program can help showcase the benefits of SME.

Questions:

a. How will you build relationships with journalists and broadcasters?
b. Which success stories do you want to share?
c. Who can provide assistance with news releases?

5. Social Media

There are a number of social media channels (e.g., Facebook, LinkedIn) available to reach people with chronic conditions as well as friends and family. The development of successful and worthwhile social media strategy involves much more than the creation of a Facebook page. First, goals for using social media need to be established. Second, social media tools may be free or low-cost, but successful social media strategies require considerable investment of time and effort to build the network, keep the content fresh, etc. It is not always necessary to create new social media channels for a message; instead, linking to existing channels can be equally powerful in connecting with an audience.

Questions:

a. What are your goals for using social media?
b. How do you measure success of social media activity?
c. How can you leverage relationships with organizations that have successfully used social media in your community?

Key Planning Areas
Marketing continued

6. Open House

Many people like to "try before they buy." Some SME providers have found that potential participants are more likely to get involved in an SME program if there is no expectation of commitment in order to get started. Thus, an open house (aka, 'session zero') can be offered so participants can get a feel for what is involved in a complete SME program. It may be useful to offer open houses at regular times during the month so referral partners know the schedule.

Questions:

a. How will an open house be promoted to the community?
b. What are your expectations for an open house in terms of participant recruitment?

7. Word-of-Mouth Campaign

One of the most powerful marketing strategies is word-of-mouth campaigning. People who have successfully completed the workshops can be ambassadors in the community and can be instrumental in promoting the workshops. It is recommended that current and past participants be involved in the recruitment of new participants, especially as these ambassadors can serve as inspiration to new participants. For example, current and past participants can provide names and addresses of friends who could benefit from SME services in order to build an organizational database for direct mail. Or, current and past participants can be part of an effort to personally invite (via telephone, email, social networks, one-on-one meetings, presentations, etc.) people who may need SME services. It is important to tap social networks of participants who have found benefit in a program and want to describe the benefits to others.

Questions:

a. What are your past participants telling others about the program?
b. How can you teach past participants to carry key messages about the program?
c. What is preventing you from having 'ambassadors' in the community?

Ambassador: (n.) an authorized or unofficial representative or messenger (Merriam-Webster)

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8. Branding

A brand is the idea or image of a specific product or service that connects with consumers. Branding allows prospective participants to perceive an SME program as the only solution to a personal problem. In the case of chronic condition management, successful branding of an SME program can imply an individual cannot live well without program services. While branding may incorporate a logo or name, it is really about the SME program's "personality" and the promises it makes to the community. The brand is what a program stands for and is known for. If it is difficult for a provider to define a brand for an SME program provided, it may be difficult for participants to define the brand too.

Questions:

a. What does your SME program stand for?
b. How will you determine what impression your program is making on the minds of past and potential participants?
c. How could your program benefit from having a brand of its own?
d. To what degree is your program's identity linked to another brand (e.g., sponsoring organization)?

9. Public Service Announcements

Public service announcements (PSA) are free advertisements, usually on radio and television intended to change the public interest by raising awareness of an issue and affecting public attitudes. PSAs may be useful in educating the community about the need for SME in successful chronic condition management.

Questions:

a. What is the process for creating and airing a PSA?
b. How will you measure the success of a PSA?
c. What specific action is your PSA trying to motivate?

10. Point of Sale Promotions

Potential participants make many purchases related to chronic condition management, including prescription medications and physician services. Signage, flyers, posters, handouts, etc. can be used to promote SME where such purchases are made. For example, pharmacies can affix a promotional flyer for SME services to prescriptions for medications that treat a chronic conditions like arthritis, diabetes, or high blood pressure. This point of sale promotion targets specific populations that will likely benefit from SME services. It is recommended a point of sale promotion be focused and time-limited (i.e., 2-4 weeks) to evaluate its performance before expanding broadly.

Questions:

a. What types of products and services do people with chronic conditions purchase?

b. How can you form an alliance to make point of sale promotions possible?

Key Planning Areas

Referral Network

A solid network of partners may be the most valuable and cost-effective way for recruiting participants and creating a sustainable enterprise over the long-term. A successful network of partners includes those who understand the value of the program and have invested resources in program development and implementation. These individuals have bought into the philosophy of the program and truly believe in the value and concept of SME. A comprehensive Growth Action Plan will address the following strategies which seek to create and maintain a referral network.

1. Identify Prospective Partners

Partners can help identify new and creative ways to implement SME, including how to reach participants. It is highly recommended that all SME providers regularly study community trends and identify prospective partners who can refer clients, patients, or customers.

Questions:

a. Who has regular access to people who would benefit from your SME services?
b. What are your recruitment goals for adding new partners to your referral network?
c. How do you develop a list of prospective partners?
d. What is your plan to approach prospective partners and invite them to be a collaborative partner, specifically making referrals to your organization?

2. Formalize Partnership Agreements

Partnerships develop in a variety of ways and take many forms. Some partnerships develop informally with various partners coming together because of perceived or actual opportunities, beneficial combination of resources, or shared common interest. Many SME providers utilize informal partnerships to establish a referral network. Sometimes partnership development is more structured and one partner invites another to join an alliance or cause. An effective referral network may be established in this manner as well. The development of an agreement or memorandum of understanding between SME providers and partners can assist in communicating roles and expectations of belonging to the referral network.

Questions:

a. What are your expectations of referral network partners?
b. What can referral network partners expect from your organization?
c. Who, within or outside of your organization, can draft an agreement or memorandum of understanding for formalizing partnership agreements?

Memorandum of Understanding: (n.) a document that describes the general principles of agreement between parties, but does not amount to a substantive contract (Collins English Dictionary)

3. Referral Intake Process

It is critical that a smooth hand-off occurs between a referral partner and an SME provider. No participant should be lost in this process. SME providers should implement a process which assists potential participants in reaching the SME service. There are many options for tools to support the process, such as paper forms, a dedicated phone line, a website, a referral intake database, etc. By collecting referral source information from all participants, SME providers can report back to these partners the volume and timing of referrals received.

Questions:

a. How can your organization assure that all referrals are both contacted directly and offered options for receiving SME services?
b. How can your current referral intake process be improved?
c. Who is responsible for coordinating partnership referrals?

4. Offer Partnership Tiers

Consider developing levels of partnership that recognize varying commitments and contributions to the SME program. The concept of creating tiers (e.g., bronze, silver, gold) can encourage partners to reach for a higher level. Tiering can also help engage new partners who may need the direct experience of working with an SME program before increasing their level of involvement with program delivery or number of referrals.

Questions:

a. How would partnership tiers work for your SME program?
b. What are the advantages and disadvantages to offering partnership tiers?

5. Public Recognition

It is recommended that SME providers publicly recognize referral network partners. This recognition can raise awareness in the community about other goods and services provided and help partners achieve broader business objectives. It may be beneficial to draw special attention to those partners who direct large numbers of participants to an SME program. Public recognition shows appreciation for partners who refer more participants, and encourages continued referrals.

a. What are the best ways to recognize the contributions your referral partners make to your SME program?
b. How can your SME generate public recognition for network partners?
c. How can public recognition help network partners achieve their primary business goals?

Referral Network continued

6. Assess Needs of Partners

Do not presume to know what results partners want from SME program involvement; ask what specific results are sought, and ask often. The process of soliciting input from current and potential partners can build trust and give partners a sense of ownership. Consider meeting with partners one-on-one 2-4 times per year or hosting referral partner meetings which are organized for the sole purpose of listening to partner feedback and needs.

Questions:

a. What is the best way to gather information from partners about their expectations of the SME program?
b. How will you involve referral network partners in the strategic planning for SME programs?

7. Provide Feedback

Many individuals and organizations have a vested interest in the well-being of a participant referred to an SME program. By providing feedback about the status of the referral (e.g., participant started the program), a sense of appreciation for the referral is reinforced and future referrals are encouraged. Providing feedback about specific participants, while adhering to privacy protection policies, can help maintain a valuable, open communication channel with referral network partners.

Questions:

a. What information do your referral network partners want about the people they have referred to an SME program?
b. What information are you able to share freely? Are there limitations on certain information that can be shared?
c. How should feedback reports be communicated?

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8. Leadership

It takes leadership to coordinate and facilitate activities and communication related to developing the partnerships that make up a referral network. It is recommended that SME providers identify 1-2 people who will be responsible for referral network development. Leadership positions need to be given specific, measurable goals for adding new partners and driving growth in participant volume via referral network partners.

Questions:

a. Who will be responsible for adding new individuals and organizations to the network of referral partners?
b. How will the partnership foster respect, trust, inclusiveness, and openness?

Key Planning Areas
Competition

SME is a consumer service business. Successful businesses have a clear understanding of what customers want and need as well as how other businesses (aka, competition) are addressing those wants and needs. It is necessary for SME service providers to regularly assess the market, specifically the competition for SME services. It is important to critically assess whether perceived competition is real. Making assumptions about what competitors are doing can lead to poor decision-making. A comprehensive Growth Action Plan will develop its strategy for sustainability in the context of current and forecasted market competition.

1. Local Competitor Identification

While collaboration and coordination is critical to optimize the limited resources available for SME, competitive forces exist in every market. Successful SME providers know who the players are and how these competitors' actions shape the health care market, especially in terms of chronic conditions prevention and management. While organizations may function with selfless intentions, competition still exists between them – typically for scarce resources (e.g., funding, staff, volunteers) and the loyalty of consumers with chronic conditions.

Questions:

a. What organizations in your area offer services similar to yours?
b. How will you assess which services participants view as being equivalent to yours?
c. Which services do your referral partners view as being similar to yours?
d. What evidence is available to suggest there is unmet need for SME services?

2. New Entrants

Identifying local competitors should include more than just existing competitors. A thorough competition assessment also identifies organizations that may begin offering SME services through partnerships, acquisition, or building new programs.

Questions:

a. What organizations could benefit from offering SME services? What is preventing them from offering the services now?
b. Who do you anticipate offering SME services in the next 5 years? Why?
c. Which organizations are interested in building loyalty or relationships with people with chronic conditions?

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3. Services Available Outside the Market

Many people travel great distances for health care services, especially specialist physician services for treating chronic conditions. The internet provides an immeasurable number of options for people to learn self-management skills and receive support (e.g., online communities). Some health plans offer telephonic health coaching or nurse care managers for people with chronic conditions. To some degree, there is competition from SME services coming from beyond the traditionally-defined geographic market boundaries. It is important to understand the strengths and weaknesses of these competitive forces and the potential effect on demand for SME services offered by your organization.

Questions:

a. How are you addressing competition coming from outside your market?
b. To what degree is the internet (e.g., websites) assisting potential or current participants?
c. How will the internet influence demand for SME service in the future?

4. Competitor Objectives and Strategies

Knowledge of a competitor's objectives facilitates a better prediction of the competitor's reaction to changes in the market (e.g., reimbursement). For example, a competitor that is focused on reaching short-term financial goals might not be willing to spend much money responding to competitive attacks by another organization seeking to recruit (and gain market share) of SME participants. Since the stated strategy of competitors may differ from actual activities, one of the best ways to determine true strategy is to follow how funds are directed, including hiring practices, promotional campaigns, capital expenditures, strategic partnerships, and mergers/acquisitions.

Questions:

a. How are your competitors investing in programs and services for people with chronic conditions?
b. What are the size and nature of investments in SME services by competitors?
c. What are the high-priority objectives of competing organizations?

5. Competitor Resources and Capabilities

A competitor's resources and capabilities determine its ability to respond effectively to threats or changes in the market. A competitor's capabilities can be analyzed according to its strengths and weaknesses in various functional areas, as is done in a SWOT (strengths, weaknesses, opportunities, threats) analysis. Strengths and weaknesses are often found internal to an organization, while opportunities and threats are external factors. It is important to evaluate each competitor's ability and speed to increase capabilities in certain areas, such as SME programs.

Questions:

a. What unique or special resources do competitors have?
b. What differentiates competitors from your organization?
c. Which competitors have financial strength?
d. Which competitors are nimble and able to change most quickly when opportunities arise?
e. To what degree are competitors using their resources and capabilities to repress growth of SME services?

Key Planning Areas
Competition continued

6. Competitor Forecast Profile

Information from an analysis of the competitor's objectives, strategy, and capabilities can be synthesized into a profile of possible moves that might be made by the competitor, which would affect SME services in the market. The competitor forecast profile can be useful in planning and projecting future demand and capacity needs for SME services.

Questions:

a. What are the potential offensive and defensive moves of leading competitors?
b. To what degree will competitors be taking participants away from your programs?

7. Collaboration with Competitors

A competitor can be converted to a collaborator. There may be opportunities to cross-refer participants between programs that are managed by competitors within a community. Many people with chronic conditions need additional or ongoing support which could be provided through a number of organizations. Working in collaboration with a competitor may help reduce cost of new participant acquisition, increase participation rates, and meet the needs of more people.

Questions:

a. Under what terms would you refer participants to another SME provider?
b. How would you structure an informal or formal alliance with a competitor?

8. Reduce Competition

Competition can lead to spreading limited resources so thin that all organizations struggle and are at-risk for closure. Consider developing strategies to reduce the competition for program participants and related community resources.

Questions:

a. How can SME service providers be consolidated?
b. Which SME providers in the area should be considered for acquisition?

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Key Planning Areas

Service Operations

SME operations depend on the availability of trained people dedicated to the well-being of people with chronic conditions. A stable group of leaders and trainers, as well as an evidence-based SME curriculum, are fundamental to sustainable service delivery. A comprehensive Growth Action Plan will address the following strategies which seek to create reliable, high-quality service for all participants.

1. Master Trainers

An organization who has developed an SME program will often train a group of master trainers at a regional or state level to help build program delivery capacity. Researching the number of existing master trainers and where master trainers are located within an area can help save time and money. Determining the number of trained individuals to meet community needs can guide plans for future leader trainings and course offerings. Typically, SME program master trainers are trained to provide leader trainings as well as participant courses. Master trainers are necessary for leader development. Identifying strong individuals as master trainers, which may include current program leaders, can help with retention of future leaders and program sustainability.

Questions:

a. How many master trainers exist in your community or region for an SME program?
b. How many master trainers do you need trained in your community or region to meet SME program needs?
c. How do you identify which existing SME leaders may be good master trainers?
d. Which individuals in your community or region would be effective as an SME master trainer?

2. Leader Identification

In order to develop a diverse pool of leaders and trainers for an SME program, it is necessary to identify individuals and/or organizations within the community who have goals that are well-aligned with the SME program. Pairing a health care professional with an individual with a chronic condition to lead SME services has been shown to be an effective tactic. Consider tapping program alumni to become leaders who participate in service delivery.

Questions:

a. Which individuals in your community would be a good match for SME leadership?
b. How will you approach organizations in your community who serve a similar population to identify potential leaders?
c. How will you invite health care professionals in your community to be part of the SME program?

3. Leader Training

Most evidence-based programs have a specific curriculum for leader trainings as well as program delivery to participants. Once program leaders are identified, it is important for a master trainer and co-trainer to consider the logistics for hosting leader trainings (e.g., identification of an accessible training space, training marketing, leader registration process, training materials). Leader trainings are an important aspect of building capacity for service operations.

Questions:

a. What steps are needed to hold your SME program leader trainings?
b. How many leaders do you need trained in your community to meet the needs of each SME program?
c. To what extent do your leader trainings meet the needs of future leaders of SME programs?

4. Leader Retention

Identification of strong leaders coupled with a positive training experience (and successful implementation of the SME program) helps to increase leader retention. Frequent logistical and technical support, communication, and opportunities to network with other leaders provide leader support. Recognition and appreciation of SME program leaders' time and dedication to the program are highly valuable tools for leader retention.

Questions:

a. In what ways will you show appreciation to and/or provide recognition for leaders?
b. How do you incentivize individuals to participate at different levels of the program, such as becoming a leader?
c. What levels of support do you provide to leaders of SME programs?

5. Menu of Service Options

Offering a menu of SME services can help attract participants and increase the likelihood that community needs are met. While having too many programs may overwhelm or confuse the audience, a menu allows participants to exercise a choice. Choice can be a powerful way of engaging participants in the SME process. It is important to offer services consistently (e.g., courses) at accessible locations throughout the community.

Questions:

a. To what degree does your service menu need to be expanded or reduced?
b. How can you assure services are offered at regular intervals throughout the year?
c. What mix of different evidence-based programs would best serve the needs of your community?

Key Planning Areas
Service Operations continued

6. Consistent Course Offerings

A sustainable program will have consistent course offerings at a recognizable location in the community. Networking with other course leaders in the area can help maintain this consistent delivery, create a leadership pool, and implement the SME program at multiple locations throughout a greater region. Frequent course offerings of the same program can help balance the number of participants while maintaining SME program recommended attendance guidelines. It can be easier to market courses that are offered consistently.

Questions:

a. What courses are already occurring in your community and where are they located?
b. Who could help coordinate consistent course offerings at the same location?
c. How can you best market consistent course offerings?

7. Quality Assurance and Fidelity

Research on the effectiveness of an SME program has been used to designate the curriculum as an evidence-based program. Maintaining the fidelity, or adherence to curriculum by leaders, is essential for service consistency and, in turn, its long-term sustainability. Since modification of an evidence-based program by adding or deleting components can diminish its efficacy, some SME programs have fidelity guidelines to assist in monitoring fidelity and restricting program use to those SME providers that can measure and assure fidelity.

Questions:

a. How are existing tools used to demonstrate fidelity?
b. Who will implement fidelity assessments?
c. How can training be used to increase fidelity by program leaders?
d. What processes are in place to assure program service quality is achieved?

Efficacy: (n.) the power to produce an effect (Merriam-Webster)

Fidelity: (n.) the quality or state of being faithful; accuracy in details or exactness (Merriam-Webster)

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy

Marketing | Competition | Evaluation | Community Support | Resource Linkages

Key Planning Areas
Evaluation

Collecting data from an SME program assists with program planning, assessing program effectiveness, reporting outcomes, and, most importantly, driving quality improvement. A comprehensive Growth Action Plan will address the following strategies which seek to create a culture of data-driven quality improvement.

1. Case for Data Collection

When implementing an evidence-based program, data collection may be required by specific revenue sources, but is generally a good practice for program sustainability. The determination of necessary and desired program outcomes is important in designing an SME program data collection assessment. SME program information is frequently collected through the creation or utilization of previously established data assessment tools. Some funders or SME program developers require data assessment and may have an established tool or a list of required information to be collected by developing an assessment. Specific organizational goals established can be measured using data collection tools. Data collection is not always necessary and can be non-productive if a goal for collecting data is not clearly stated. Contracting with data analysis organizations or individuals may be a good option if data collection is appropriate and/or required.

Questions:

a. What data collection requirements exist for your SME program?
b. Which data assessment tools meet your organization's needs?
c. Where can you research if current assessment tools or analysis resources are readily available (e.g., other SME providers, state or regional license holder, funder)?
d. What questions are you trying to answer through data collection?

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy
Marketing | Competition | Evaluation | Community Support | Resource Linkages

2. Data Collection Methods

Establishing desired outcomes and identifying data analysts are two early steps in a data collection process. Multiple methods of data collection exist; it is important to choose a method that matches organization goals, the SME program, and desired goals or outcomes. Regardless of the method chosen for data collection, information gathered on evidence-based programs is typically reported to the SME license holder organization within the state or region. Communicating with SME partners is vital to ensuring all necessary data is reported, and to reduce dual data collection.

Questions:

a. Which methods of data collection are appropriate for your SME program?
b. How will you partner with other organizations providing your SME program to report data collected?
c. How will you communicate data methods chosen to the rest of your organization/partners?

3. Program Evaluation

After collecting data, there is an opportunity for internal or contracted data analysts to evaluate outcomes. SME license holder organizations may have existing data systems or other methods for evaluating data and producing data-based materials. If a program is evidence-based, there may not be a need for additional data evaluation. However, evaluation materials can be a great resource for demonstrating the usefulness and efficacy of an SME program to a community. Program evaluation reports can also be an effective application tool when applying for additional revenue sources.

Questions:

a. Who will you seek out to assist with program evaluation?
b. What methods of evaluation does an SME license holder or other partner currently use?
c. How will you communicate information from evaluation reports to SME partners and your community?

4. Communicating Outcomes

Once data is gathered and the SME program is evaluated, the final step is utilizing the information. Information gathered can assist SME providers with future program planning. For example, data evaluation can identify in which areas courses are needed, but are not yet offered. Sharing SME program outcomes with community partners and citizens, including legislators, can raise program awareness. Multiple methods exist for disseminating data reports, including electronic posting, printed materials, and e-mail sharing. To share collected information, consider hosting a community forum or holding a partner meeting.

Questions:

a. What reports have been created from data collected?
b. What can you highlight from the reports that will be impactful to your audience?
c. How can you use information gathered in future program planning?
d. With whom will you share information?
e. Which method(s) will you use to disseminate data reports?

Key Planning Areas

Organizational Support

Organizational supports include the culture, practice, and leadership within the company (or non-profit agency) in which an SME operates. When organizational supports are ideal, high-level leadership (e.g., health system CEO, health agency director) is committed to and visibly-involved in the SME program. Committed, involved leadership can monitor progress and assist in facilitating new partnerships. It is absolutely essential to build and maintain organizational support to achieve a sustainable business. It is important to realize that even the best organizational support decays when left unattended. A comprehensive Growth Action Plan will address the following strategies which seek to increase support from within the organization that the SME program operates.

1. Statement of Organizational Alignment

Support from high-level leadership for SME programs will increase if there is clear evidence that it makes sound business sense. Top leaders and other key stakeholders in an organization need to see SME as an essential strategy in improving the health outcomes for those with chronic conditions. It needs to be readily apparent in a clearly communicated way there is a perceived high return on investment from SME programs for the sponsoring organization. It is recommended that SME providers develop a brief statement of organizational alignment which clarifies the contributions of SME services to the broader mission and strategic goals of the sponsoring organization.

Questions:

a. How does the SME program contribute directly to the stated organizational mission and goals?
b. Which leaders in the organization would benefit from a better understanding of the value of SME services?
c. To what degree does the SME program help the larger organization grow revenue or reduce overall costs?

2. Champions

The support of an influential leader or stakeholder from the sponsoring organization can be very valuable in gaining buy-in across your organization. Committed champions can be instrumental in securing and sustaining funding as well as other kinds of support.

Questions:

a. Who are prospective champions within your organization?
b. What is your plan to recruit internal champions?
c. What are you asking of the people who are your program's champions?

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy

Marketing | Competition | Evaluation | Community Support | Resource Linkages

3. Clarify Roles and Organization Structure

There needs to be an internal team responsible for the various implementation tasks of the SME program. Some SME programs may struggle due to lack of clarity in the roles and organizational structure in which staff, partners, volunteers, and others work. It is highly recommended all people involved with the SME program understand current roles as well as specific ways to contribute for the growth and sustainability of the program.

Questions:

a. To what degree do team members understand how they can contribute to growth and sustainability of the program?
b. How does the current organizational structure meet the anticipated needs of SME program operations in the future?

4. Patient Care Team Integration

For SME programs that are based in health care systems, organizational support may be enhanced through integration with patient care teams. There is considerable variability in what constitutes a patient care team. In some organizations it includes both clinical providers and non-clinical support staff; other organizations include family members. Regardless of the model, a well-functioning team serving the best interests of a person with chronic conditions should include SME programming. It is recommended that SME providers explore ways to become full members of patient care teams and participate in the planning and coordination of services.

Questions:

a. What role does SME have on patient care teams at your organization?
b. To what degree is SME part of routine primary care? Discharge planning?
c. What are the advantages and disadvantages of including SME providers on patient care teams?
d. Who should be approached to explore new ways for including SME providers on patient care teams?

5. Volunteer Management

Many SME programs depend on volunteers for service delivery and/or program administration. Building and maintaining a base of committed volunteers takes work. Volunteers must be invited, assessed for good fit, trained, assigned work duties, and thanked. Although there is considerable effort involved, volunteers add to the sustainability of an SME program in many ways, such as overall cost reduction and ongoing community involvement.

Questions:

a. What are the opportunities for your SME program to incorporate volunteer service into its model of service delivery?
b. How do you assure the volunteer experience is enriching and encourages a long-term relationship with the program?
c. What are your plans to minimize a potential loss of volunteers?
d. What are the skills and personal attributes needed to recruit and successfully manage a group of volunteers?

Key Planning Areas
Organizational Support continued

6. Succession Planning

Sustainability is fragile when SME program leadership hinges on one person. If, or when, the leader leaves, the program is placed at risk. In order to assure the long-term viability of an SME program, leadership development and succession planning must be dealt with proactively. Having the support of another individual, including organization administrators, can be beneficial when considering succession planning.

Questions:

a. How is your organization cultivating leadership for the future?
b. What are the opportunities for growth and development of staff and volunteers?
c. How can you assure program survival if the current leader were to suddenly depart?

7. Participant Advisory Council

It is critical for a person with a chronic condition to be very involved in self-care. Participant input is essential for improving SME practices, policies, and overall service delivery. A participant advisory council is one way to incorporate participant input into the planning and evaluation of SME services.

Questions:

a. To what degree are SME program participants involved in leadership?
b. What are the best ways to incorporate the guidance of participants in planning and evaluation?

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy
Marketing | Competition | Evaluation | Community Support | Resource Linkages

8. Staff Training and Education

Within health care systems and public health agencies, there are many staff that care for people with chronic conditions. SME providers can play a vital role in staff training and education, especially in terms of quality assurance, risk management, and care coordination. Through workshops, presentations, etc., SME providers can expand program relevance and utility, thereby generating wider and deeper support for their services. The referral network may also be expanded through staff training and education.

Questions:

a. What are the specific training and education needs related to chronic conditions?
b. How can your SME program staff address these training and education needs?
c. To what degree can funding be secured for your program's work in staff training and education?
d. What are your first steps to offering a training program to staff employed by your health system or public health agency?

Key Planning Areas

Community Support

Sustainability involves creating and building momentum to maintain community-wide change by organizing and maximizing community assets and resources. The cultivation of community support may take time, but the development of such support can be planned. A comprehensive Growth Action Plan will address the following areas that can contribute to broad and influential support across the community.

1. Advisory Council

Establish a formal group of community members for advising SME program leadership and staff about operations and strategies for growth. In addition to expanding access to subject matter expertise, an advisory council can help set priorities and maintain accountability for key goals.

Questions:

a. Who are the chronic conditions experts in your area?
b. What are the best ways to establish an advisory council?
c. What are your expectations for advisory council members?
d. Who can assist with the formation of an advisory council?

2. Community Health Coalition Participation

A community coalition is an alliance of stakeholders with a shared interest in health improvement, specifically for prevention or management of chronic conditions. Effective coalitions mobilize diverse talents, resources, and strategies; limit duplication of strategies and services; and work as vehicles for exchanging knowledge and ideas. The coalition may be focused on one or more chronic condition(s). Active participation in coalition activities, especially in a leadership role, helps raise awareness of SME services and helps connect SME to other health programs and services. The development of a community health coalition should be explored if an effective one does not currently exist.

Questions:

a. Which health coalitions in your area are focused on the needs of people with chronic conditions?
b. How do coalitions in your area support SME services?
c. What are your plans to link your organization into established or new coalitions?

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy

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Testimonial: (adj.) an open acknowledgement or firsthand authentication of a fact (Merriam-Webster)

3. Local, Influential Leaders

It is critical that support from influential community members be nurtured. Testimonials and endorsements from community leaders can give SME services immediate credibility and broad exposure. Consider educating well-known people from news media, sports, schools, businesses, and politics about how SME services impact the community. Offer them specific opportunities to get involved, including by being a volunteer, spokesperson, or advocate.

Questions:

a. Who are some of the most influential members in the community?
b. How are they connected to chronic conditions prevention and management?
c. How can you secure endorsements from influential, credible people?

4. New Partnerships

Building partnerships with different organizations, institutions, and businesses can increase organizational impact and unleash new energy, creativity, and insights. When partnering with others, an organization or individual can gain access to different skills, share responsibilities and resources, and can reach a larger audience. Furthermore, policymakers trust and respect different groups within the community. Partnering with others can improve your SME program's strength and credibility. In potential partners, examine levels of interest in SME and their capability to disseminate information to the community. While partnerships begin with exploration of mutual interests, successful partnerships establish clear goals with timelines early in the development process.

Questions:

a. Who are your prospective partners – organizations, institutions, or businesses – who would benefit from your programs and services?
b. Who has access to large numbers of potential SME program participants?
c. What are some mutually beneficial projects for prospective partners?
d. How and when will you approach prospective partners?

5. Expert Presentations and Training Programs

Community support can be developed by hosting presentations which educate or train community members (e.g., health care workers, public health practitioners, policy-makers) about the value and methods of SME. Such events build and reinforce the expertise and credibility of the SME program in community health improvement. The presentations can feature local experts or invited guests who can share ideas, discuss current research, and facilitate dialogue about chronic conditions prevention and management. Utilizing SME program alumni to assist in presentations and training can assist in making more connections with community members and giving "real-life" examples of the value of SME programming.

Questions:

a. What types of presentations or training programs would appeal to organizations and individuals in your community?
b. What unique expertise can your organization share with others?
c. Which program alumni have had positive experiences with SME programs in your community and may be willing to talk about those experiences?

Key Planning Areas
Advocacy

Sustainability of SME services depends on supportive local, state, and federal policies. SME providers should be actively involved in advocating for the needs of people with chronic conditions. Advocacy efforts may take many forms, from supporting other organizations to driving the passage of legislation. At its core, advocacy involves making a plea and taking action for a cause. The cause, in this case, is the self-reliance of people with a chronic condition. The advocacy-related activity of policy development generally involves research, analysis, consultation, and synthesis of information to produce recommendations for influencing decisions by governments. But, policy development may also aim to influence decisions of health care systems, non-profit organizations, and corporations which affect the health and well-being of those with chronic conditions. A comprehensive Growth Action Plan will address the following areas which can contribute to advocating with and for individuals with chronic conditions.

1. Join Policy Development Organization

Advocacy is a team-based activity that draws on the skills, expertise, and relationships of a broad group of people and organizations. Consider joining an established team focused on advocacy. There may be a number of organizations committed to local, state, or federal health and social policies who would benefit from the expertise and perspective of an SME provider. Participation in such organizations enables experiential learning about the process of policy development. Membership also provides opportunities to integrate SME services and principles into cross-cutting policies in a variety of settings.

Questions:

a. What organizations in your area are advocacy leaders?
b. What are membership requirements for various advocacy organizations you know?
c. What policy changes may improve the health and well-being of people with chronic conditions?

2. Community Needs Assessment

A community needs assessment is a structured process for defining needs of a particular group or community. Properly conducted in an open and participatory manner, the process and resulting report(s) can provide critical insight into the core problems related to chronic conditions prevention and management and build stakeholder support at the same time.

Questions:

a. Who has expertise to conduct a community needs assessment?
b. How can the results of a needs assessment support your advocacy efforts?

3. Develop Talk Points

In order to advance advocacy efforts, it is necessary to effectively communicate the value of SME services and community need for these services. A set of brief "talk points" (key messages), which can be used in different settings with a variety of individuals, can help promote coherent, consistent communication. Advocacy talk points may be developed from key messages related to marketing efforts.

Questions:

a. What key words describe your SME program?
b. Why should the community care about the success of your program?
c. Who should be involved in the development of key messages about your program?

4. Educate Elected Officials

Elected officials are influential members of a community who are generally available to meet with constituents. SME providers should consider options to educate elected officials, at all levels of government, about the special contributions of SME in supporting people with chronic conditions and lowering costs of medical care. When possible, meetings with elected officials should include an "ask" for specific support or actions to advance marketing or advocacy efforts.

Questions:

a. Which elected officials are at the top of your priority list?
b. What is your plan to secure meetings with elected officials?
c. What information will you share?
d. How can elected officials help advance the sustainability of SME services in your area?

Key Planning Areas

Resource Linkages

SME providers are part of a system – a system of other SME providers – working in harmony to support people with chronic conditions and prevent costly complications. Resources are available to support service delivery, staff training, program innovation, etc. While focused on the needs of people with arthritis, the Missouri Arthritis and Osteoporosis Program is one of these vital resources in Missouri for all SME providers. Sustainability is compromised if/when SME providers operate too isolated from other health care providers or organizations that share enthusiasm and expertise for chronic conditions prevention and management. A comprehensive Growth Action Plan will address the following ways in which an SME provider can build and maintain linkages to state and national resources that support individuals with chronic conditions.

1. Active Participation with Missouri Arthritis and Osteoporosis Program

The Missouri Arthritis and Osteoporosis Program (MAOP) is responsible for assisting SME providers statewide. While the focus of MAOP is on people with arthritis, it is committed to serving SME providers across the broad spectrum of chronic conditions. There are substantial commonalities among SME services for people with and without arthritis. MAOP can link SME providers to one another, facilitate staff training, provide technical assistance, guide program planning, etc. Leadership and advocacy roles are also available to SME providers through MAOP. It is recommended that all SME providers get involved with MAOP. This involvement could include, but is not limited to, attending regional and statewide partner meetings, joining email distribution lists, and meeting with MAOP staff to discuss needs.

Questions:

a. To what degree is your organization involved with MAOP?
b. How can MAOP better serve your organization?
c. Who is your organizational liaison to MAOP?

Revenue | Referral Network | Service Operations | Organizational Support | Advocacy
Marketing | Competition | Evaluation | Community Support | Resource Linkages

2. Program Curriculum Originators

Many SME providers implement specific curriculum, backed by years of research and development efforts. For example, the Chronic Disease Self-Management Program was developed by Stanford University's Dr. Kate Lorig and colleagues. Under the licensing agreement with Stanford, SME providers receive support and guidance about implementing the program. It is recommended that SME providers connect with the program curricula originators and maximize the value of this relationship.

Questions:

a. To what degree does your organization collaborate with developers of the curriculum you are using?
b. Has your staff discussed implementation challenges with curriculum developers?

3. Professional Association Memberships

Professional associations take on the responsibility of educating members about current news relevant to shared interests. It is recommended that SME providers join and participate in professional associations which address needs of people with specific chronic conditions. For example, SME providers may join a non-profit like the Arthritis Foundation to access the latest scientific information and network with health care providers who are also dedicated to the well-being of people with arthritis. Getting involved in the leadership of a professional association may also help raise the profile of an SME provider among peers and potential collaborators.

Questions:

a. Which professional associations are a natural fit for your organization?
b. To what degree are you already involved in professional associations?
c. How has membership in certain professional associations been helpful to your organization?

4. Department of Health and Senior Services, Section for Chronic Disease and Health Promotion

Working in connection with the Centers for Disease Prevention and Control, the State of Missouri maintains a public health approach to chronic conditions prevention and management through the Section for Chronic Disease and Health Promotion at the Department of Health and Senior Services (DHSS). Staff from the categorical programs (e.g., asthma, diabetes, heart disease) can offer technical assistance and a variety of resources to SME providers. DHSS can also link SME providers to one another and support planning activities with public health surveillance data. It is recommended that SME providers get connected with DHSS staff related to conditions served, attend meetings, and join email distribution lists to obtain access to key resources, including funding opportunities.

Questions:

a. How are you connected with DHSS staff and programs that are responsible for populations that you serve?
b. What resources do you think DHSS can provide to you?

Creating a Growth Action Plan

What is a Growth Action Plan? A Growth Action Plan is a brief written document for communicating priorities to sustain self-management education (SME) services offered by providers. The strategies and activities included in a Growth Action Plan reflect the needs of SME providers and community stakeholders to establish, advance, and maintain support for people with chronic conditions over the long-term. Since the achievement of long-term success requires action today, the Growth Action Plan focuses SME providers on a few activities in high priority areas for which progress is possible and measurable in the near future (i.e., 1 or 2 years).

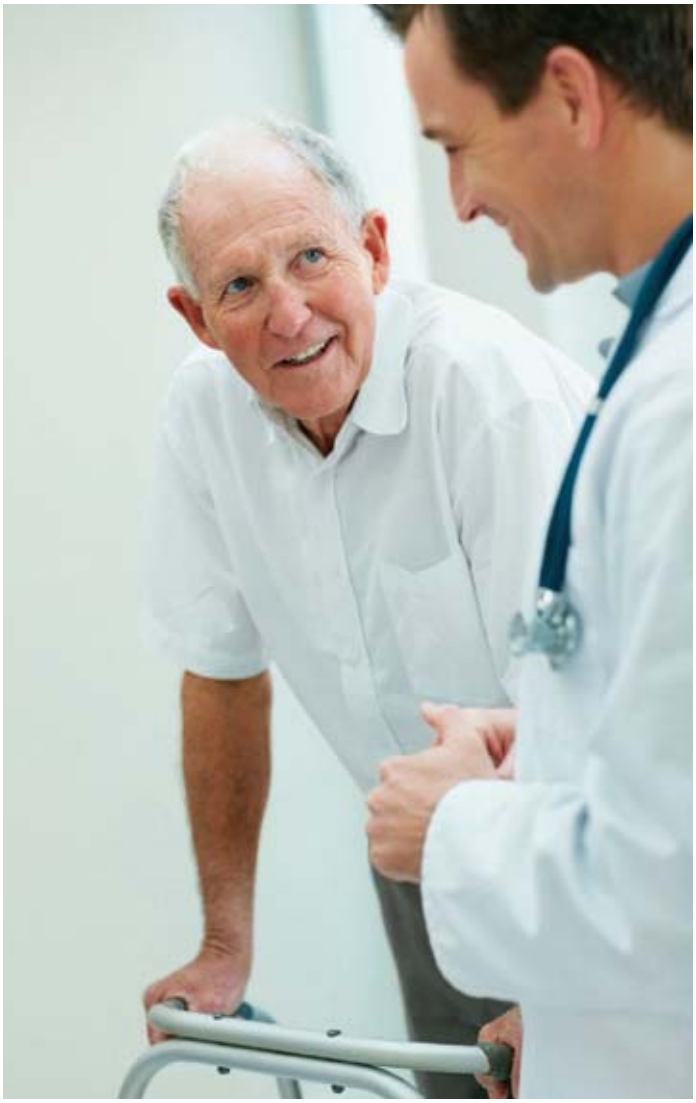
Steps for Building a Growth Action Plan

1. Form a small group (i.e., 3-8 people) of staff, internal stakeholders, and community partners who can provide a global perspective for your organization.
2. Discuss the meaning of "sustainability" and tailor it to meet local needs and expectations.
3. Review the 10 key planning areas and prioritize them (e.g., rank-order) according to need and potential to contribute to SME program sustainability.
4. Beginning with the highest priority planning area, choose 1 or 2 strategies that will be worked on during the next year. Discuss activities related to these strategies that, when completed, will show meaningful progress toward sustainability.

   Note: A comprehensive Growth Action Plan would address all 10 of the key planning areas, but will not necessarily dive into full detail for each. The relative importance of some key planning areas will vary by SME provider, as history, current resources, and community needs differ. The strategies selected for a Growth Action Plan should reflect the needs and resources of an SME provider as well as its community.
5. Write down decisions about priorities, selected strategies, proposed activities, and immediate next action steps. Refer to the Worksheet at the end of this toolkit for guiding and documenting the decision-making process.

   Note: When developing next action steps, focus on feasibility. It is important that individuals and/or teams are confident that the action step is possible.
6. Compile decisions about priorities and planned activities into a brief written document called a Growth Action Plan.

Feasibility: (adj.) Capable of being done or carried out successfully (Merriam-Webster)



It is important that individuals and/or teams are confident that the next action step is possible.

Getting Involved with State-Level Priorities

Progress toward sustainable self-management services is achieved through the work of individual self-management education (SME) providers as well as coordinated state-level and national efforts. The Missouri Arthritis and Osteoporosis Program (MAOP) is committed to advancing SME providers and related evidence-based programming across the state.

As the leading cause of disability in the state, arthritis remains the top health condition promoted by MAOP and its partners. But, MAOP recognizes its role and potential contributions to advancing SME access for people with asthma, diabetes, heart disease, and other chronic conditions.

Over the next 5 years, MAOP leadership will be pursuing 10 strategies intended to support the sustainability of SME services statewide. SME providers interested in these strategies are encouraged to contact MAOP staff to learn more about getting involved at the state and local level.

Medical Homes: (n.) not simply a place, but as a model of the organization of primary care that delivers the core functions of primary health care (Agency for Healthcare Research and Quality)

Partnership and Advocacy

1. **Coordinating a Leadership Council:** MAOP shall develop and maintain a council of leaders from SME service organizations. The primary purpose of the council is to discuss and guide partnership and advocacy efforts.
2. **Developing a Reimbursement Policy:** Working with input from multiple stakeholders, MAOP shall develop model policies for government, health plans/insurers, employers, and hospitals/health systems regarding reimbursement for SME services.
3. **Facilitating Regional Collaborations:** MAOP recognizes the power of relationships among local organizations dedicated to SME. Building from its successful Regional Arthritis Center model and other convening organizations in each region (e.g., Area Agency on Aging, University of Missouri Extension), MAOP shall develop mechanisms to form and foster new regional collaborations.

Efficient and Effective Operations

4. **Creating a Shared Brand with Centralized Referral:** MAOP shall explore the development of a shared brand that could serve as an umbrella under which SME providers could operate. By operating under a common brand, SME providers may benefit by sharing certain administrative functions, such as centralized referral (e.g., a shared website or toll-free phone number for program registration).
5. **Sharing Best Practices Among SME Service Providers:** SME service providers benefit from sharing ideas, challenges, solutions, marketing tools, etc. with one another. MAOP shall develop a mechanism, such as an online community or resource bank, that enables easy sharing among SME.
6. **Setting Standards for SME Service Delivery:** Concerns about quality and effectiveness can be addressed proactively through evidence-based standards for SME service delivery. MAOP will study options for setting and promoting such standards, including how standards may be used for reimbursement policies.

Communications

7. **Developing and Implementing a Communication Strategy:** MAOP and its partners have identified a need for coordinating statewide communications about (a) the value of SME services, (b) successful efforts toward sustainability by SME providers, and (c) opportunities for partnership across organizations dedicated to chronic conditions prevention and management. MAOP shall develop and implement a communication strategy to address these needs.
8. **Reporting Results Publicly:** MAOP believes that public access to current information about the reach and benefit of SME services will help increase support among decision-makers. Therefore, MAOP shall examine and test options for reporting process and outcome indicators to the public.

Growth

9. **Integrating SME with Medical Homes:** Primary care providers are adopting the medical home model of care. This trend is due, in part, to anticipated changes in medical care financing via accountable care organizations (ACOs). MAOP will work with professional associations and health plans to integrate SME services (as well as organizations that provide SME) into medical homes.
10. **Securing Funds via State and Federal Grants:** MAOP will pursue grant funding from state and federal sources, including other chronic conditions programs supported by the CDC and/or State of Missouri (e.g., diabetes). In its grantsmanship activities, MAOP seeks funding specifically for building capacity of SME providers and expanding service reach to at-risk populations.

The Missouri Arthritis and Osteoporosis Program (MAOP) is committed to advancing SME providers and related evidence-based programming across the state.

Summary

Sustainability does not happen by chance; it must be planned and practiced.

Successful management of chronic conditions is achieved through the combination of a prepared, proactive medical care team and an informed, motivated patient. Neither alone can reliably produce improved health outcomes. Self-management education (SME) supports the development of an informed, motivated patient that is capable of solving problems, setting goals for positive health behaviors (e.g., diet, exercise), communicating effectively with health care providers, and much more. SME is not just a service that improves quality of life for individuals; SME is a cross-cutting movement that delivers value to stakeholders from public health and medicine.

While research studies have demonstrated the effectiveness of evidence-based SME programs, the sustainability of these services is questionable due to organizational and environmental factors. Proactive SME providers who are using this document recognize the vital role of planning in assuring high-quality SME services are available over the long-term. Sustainability does not happen by chance; it must be planned and protected.

The Missouri Arthritis and Osteoporosis Program is committed to advancing SME providers and related evidence-based programming across the state. However, work at the state and national level is not sufficient to sustain SME services. As experienced experts with community-based support, SME providers hold solutions to the challenges facing the prevention and management of chronic conditions. For many SME providers, the Growth Action Plan, developed with ideas and guidance from this document, can identify leadership priorities and organizational responsibility to take charge of destiny and contribute to an emerging movement in which people with chronic conditions are supported to take care of themselves.

Successful management of chronic conditions is achieved through the combination of a prepared, proactive medical care team and an informed, motivated patient.

Growth Action Plan Worksheet

How to Use the Growth Action Plan Worksheet

- Using input from multiple stakeholders, choose 1-2 strategies from **within the ten key planning areas** to work on during the next year. In the index below, mark the box to the left of the strategy you have chosen to work on. Space is provided to add your own strategy.

  Note: It is recommended that at least one strategy be selected for each key planning area. However, the needs, experiences and priorities for self-management education (SME) providers can differ considerably.
- On the next pages (45-47), mark the box to the left of the strategy you have selected, and then write-in the first major activity. Please designate a strategy number (i.e. 7.2) for each action step/timeline and include an estimated date for completion.
- Indicate your level of confidence in achieving the activity by the date selected. Consistent with self-management goal-setting, activities should have a high level of confidence (score of 7 or greater) to be included in the Growth Action Plan.
- It is recommended that this worksheet be updated twice per year.

#1: Revenue

- ❑ 1.1 Service Fee Schedule
- ❑ 1.2 Discounts and Deals
- ❑ 1.3 Competitive Grant Application
- ❑ 1.4 Grant Partner or Subcontractor
- ❑ 1.5 Local Foundations
- ❑ 1.6 Service Contracts
- ❑ 1.7 Charitable Contributions
- ❑ 1.8 _____

#2: Marketing

- ❑ 2.1 Key Messages
- ❑ 2.2 Collateral Materials
- ❑ 2.3 Presentations and Forums
- ❑ 2.4 Earned Media
- ❑ 2.5 Social Media
- ❑ 2.6 Open House
- ❑ 2.7 Word-of-Mouth Campaign
- ❑ 2.8 Branding
- ❑ 2.9 Public Service Announcements
- ❑ 2.10 Point of Sale Promotions
- ❑ 2.11 _____

#3: Referral Network

- ❑ 3.1 Identify Prospective Partner
- ❑ 3.2 Formalize Partnership Agreements
- ❑ 3.3 Referral Intake Process
- ❑ 3.4 Offer Partnership Tiers
- ❑ 3.5 Public Recognition
- ❑ 3.6 Assess Needs of Partners
- ❑ 3.7 Provide Feedback
- ❑ 3.8 Leadership
- ❑ 3.9 _____

#4: Competition

- ❑ 4.1 Local Competitor Identification
- ❑ 4.2 New Entrants
- ❑ 4.3 Services Available Outside the Market
- ❑ 4.4 Competitor Objectives and Strategies
- ❑ 4.5 Competitor Resources and Capabilities
- ❑ 4.6 Competitor Forecast Profile
- ❑ 4.7 Collaboration with Competitors
- ❑ 4.8 Reduce Competition
- ❑ 4.9 _____

#5: Service Operations

- ❑ 5.1 Master Trainers
- ❑ 5.2 Leader Identification
- ❑ 5.3 Leader Training
- ❑ 5.4 Leader Retention
- ❑ 5.5 Menu of Service Options
- ❑ 5.6 Consistent Course Offerings
- ❑ 5.7 Quality Assurance and Fidelity
- ❑ 5.8 _____

#6: Evaluation

- ❑ 6.1 Case for Data Collection
- ❑ 6.2 Data Collection Methods
- ❑ 6.3 Program Evaluation
- ❑ 6.4 Communicating Outcomes
- ❑ 6.5 _____

#7: Organizational Support

- ❑ 7.1 Statement of Organization Alignment
- ❑ 7.2 Champions
- ❑ 7.3 Clarify Roles and Organization Structure
- ❑ 7.4 Patient Care Team Integration
- ❑ 7.5 Volunteer Management
- ❑ 7.6 Succession Planning
- ❑ 7.7 Participant Advisory Council
- ❑ 7.8 Staff Training and Education
- ❑ 7.9 _____

#8: Community Support

- ❑ 8.1 Advisory Council
- ❑ 8.2 Community Health Coalition Program
- ❑ 8.3 Local, Influential Leaders
- ❑ 8.4 New Partnerships
- ❑ 8.5 Expert Presentations and Training Programs
- ❑ 8.6 _____

#9: Advocacy

- ❑ 9.1 Join Policy Development Organization
- ❑ 9.2 Community Needs Assessment
- ❑ 9.3 Develop Talk Points
- ❑ 9.4 Educate Elected Officials
- ❑ 9.5 _____

#10: Resource Linkages

- ❑ 10.1 Active with MAOP
- ❑ 10.2 Program Curriculum Originators
- ❑ 10.3 Professional Association Memberships
- ❑ 10.4 _____

Active Strategies	Confidence Level	Active Strategies	Confidence Level

#1: Revenue

❑ 1.1	Service Fee Schedule	1 2 3 4 5 6 7 8 9 10	❑ 1.5	Local Foundations	1 2 3 4 5 6 7 8 9 10
❑ 1.2	Discounts and Deals	1 2 3 4 5 6 7 8 9 10	❑ 1.6	Service Contracts	1 2 3 4 5 6 7 8 9 10
❑ 1.3	Competitive Grant Application	1 2 3 4 5 6 7 8 9 10	❑ 1.7	Charitable Contributions	1 2 3 4 5 6 7 8 9 10
❑ 1.4	Grant Partner or Subcontractor	1 2 3 4 5 6 7 8 9 10	❑ 1.8	_____	1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#2: Marketing

❑ 2.1	Key Messages	1 2 3 4 5 6 7 8 9 10	❑ 2.7	Word-of-Mouth Campaign	1 2 3 4 5 6 7 8 9 10
❑ 2.2	Collateral Materials	1 2 3 4 5 6 7 8 9 10	❑ 2.8	Branding	1 2 3 4 5 6 7 8 9 10
❑ 2.3	Presentations and Forums	1 2 3 4 5 6 7 8 9 10	❑ 2.9	Public Service Announcements	1 2 3 4 5 6 7 8 9 10
❑ 2.4	Earned Media	1 2 3 4 5 6 7 8 9 10	❑ 2.10	Point of Sale Promotions	1 2 3 4 5 6 7 8 9 10
❑ 2.5	Social Media	1 2 3 4 5 6 7 8 9 10	❑ 2.11	_____	1 2 3 4 5 6 7 8 9 10
❑ 2.6	Open House	1 2 3 4 5 6 7 8 9 10			

Next Action Steps(s) and Timeline:

#3: Referral Network

❑ 3.1	Identify Prospective Partners	1 2 3 4 5 6 7 8 9 10	❑ 3.5	Public Recognition	1 2 3 4 5 6 7 8 9 10
❑ 3.2	Formalize Partnership Agreements	1 2 3 4 5 6 7 8 9 10	❑ 3.6	Assess Needs of Partners	1 2 3 4 5 6 7 8 9 10
			❑ 3.7	Provide Feedback	1 2 3 4 5 6 7 8 9 10
❑ 3.3	Referral Intake Process	1 2 3 4 5 6 7 8 9 10	❑ 3.8	Leadership	1 2 3 4 5 6 7 8 9 10
❑ 3.4	Offer Partnership Tiers	1 2 3 4 5 6 7 8 9 10	❑ 3.9	_____	1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

Active Strategies	Confidence Level	Active Strategies	Confidence Level

#4: Competition

- ❑ 4.1 Local Competitor Identification 1 2 3 4 5 6 7 8 9 10
- ❑ 4.2 New Entrants 1 2 3 4 5 6 7 8 9 10
- ❑ 4.3 Services Available Outside the Market 1 2 3 4 5 6 7 8 9 10
- ❑ 4.4 Competitor Objectives and Strategies 1 2 3 4 5 6 7 8 9 10
- ❑ 4.5 Competitor Resources and Capabilities 1 2 3 4 5 6 7 8 9 10
- ❑ 4.6 Competitor Forecast Profile 1 2 3 4 5 6 7 8 9 10
- ❑ 4.7 Collaboration with Competitors 1 2 3 4 5 6 7 8 9 10
- ❑ 4.8 Reduce Competition 1 2 3 4 5 6 7 8 9 10
- ❑ 4.9 _____ 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#5: Service Operations

- ❑ 5.1 Master Trainers 1 2 3 4 5 6 7 8 9 10
- ❑ 5.2 Leader Identification 1 2 3 4 5 6 7 8 9 10
- ❑ 5.3 Leader Training 1 2 3 4 5 6 7 8 9 10
- ❑ 5.4 Leader Retention 1 2 3 4 5 6 7 8 9 10
- ❑ 5.5 Menu of Service Options 1 2 3 4 5 6 7 8 9 10
- ❑ 5.6 Consistent Course Offerings 1 2 3 4 5 6 7 8 9 10
- ❑ 5.7 Quality Assurance and Fidelity 1 2 3 4 5 6 7 8 9 10
- ❑ 5.8 _____ 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#6: Evaluation

- ❑ 6.1 Case for Data Collection 1 2 3 4 5 6 7 8 9 10
- ❑ 6.2 Data Collection Methods 1 2 3 4 5 6 7 8 9 10
- ❑ 6.3 Program Evaluation 1 2 3 4 5 6 7 8 9 10
- ❑ 6.4 Communicating Outcomes 1 2 3 4 5 6 7 8 9 10
- ❑ 6.5 _____ 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

Active Strategies	Confidence Level	Active Strategies	Confidence Level

#7: Organizational Support

- ❑ 7.1 Statement of Organization Alignment — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.2 Champions — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.3 Clarify Roles and Organization Structure — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.4 Patient Care Team Integration — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.5 Volunteer Management — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.6 Succession Planning — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.7 Participant Advisory Council — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.8 Staff Training and Education — 1 2 3 4 5 6 7 8 9 10
- ❑ 7.9 _____ — 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#8: Community Support

- ❑ 8.1 Advisory Council — 1 2 3 4 5 6 7 8 9 10
- ❑ 8.2 Community Health Coalition Program — 1 2 3 4 5 6 7 8 9 10
- ❑ 8.3 Local, Influential Leaders — 1 2 3 4 5 6 7 8 9 10
- ❑ 8.4 New Partnerships — 1 2 3 4 5 6 7 8 9 10
- ❑ 8.5 Expert Presentations and Training Programs — 1 2 3 4 5 6 7 8 9 10
- ❑ 8.6 _____ — 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#9: Advocacy

- ❑ 9.1 Join Policy Development Organization — 1 2 3 4 5 6 7 8 9 10
- ❑ 9.2 Community Needs Assessment — 1 2 3 4 5 6 7 8 9 10
- ❑ 9.3 Develop Talk Points — 1 2 3 4 5 6 7 8 9 10
- ❑ 9.4 Educate Elected Officials — 1 2 3 4 5 6 7 8 9 10
- ❑ 9.5 _____ — 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

#10: Resource Linkages

- ❑ 10.1 Active with MAOP — 1 2 3 4 5 6 7 8 9 10
- ❑ 10.2 Program Curriculum Originators — 1 2 3 4 5 6 7 8 9 10
- ❑ 10.3 Professional Association Memberships — 1 2 3 4 5 6 7 8 9 10
- ❑ 10.4 _____ — 1 2 3 4 5 6 7 8 9 10

Next Action Steps(s) and Timeline:

ACKNOWLEDGEMENTS

Development Process

This document was created using input and feedback from volunteer advisory board members of the Missouri Arthritis and Osteoporosis Program and self-management education program stakeholders around the state. Small focus groups were conducted via conference call in October and November 2011 to gather information regarding priority areas for sustaining self-management education (SME) programs, expertise about their operations, and common needs of people living with different chronic conditions. Stakeholder input was solicited multiple times during the project to incorporate stakeholder ideas about the outline, narrative, and design/layout (e.g., color, artwork) of this document.

Acknowledgements

This toolkit could not have been created without the time and expertise of more than 70 individuals across the state of Missouri. The Missouri Arthritis and Osteoporosis Program is grateful for representatives of the following who participated on committees, workgroups and focus groups which contributed to the development of this document.

Area Agencies on Aging
Catholic Charities Community Services
Central Missouri Regional Arthritis Center; University of Missouri – School of Health Professions
Clay County Public Health Center
Douglas County Health Department
Eastern Missouri Regional Arthritis Center; Arthritis Foundation – Eastern Missouri
Grace Hill Health Centers, Inc.
Harrison County Health Department
Joplin Community Clinic
Kansas City Area Regional Arthritis Center; Saint Luke's Hospital
Kansas City, Missouri Health Department
Macon County Health Department
Missouri Arthritis Advisory Board
Missouri Department of Health and Senior Services
Center for Local Public Health Services
Diabetes Prevention and Control Program
Heart Disease and Stroke Program
Rural Health Clinics
WISEWOMAN
Northeast Missouri Regional Arthritis Center; A.T. Still University
Northwest Missouri Regional Arthritis Center; Heartland Health
Southeast Missouri Regional Arthritis Center; Saint Francis Medical Center
Southwest Missouri Regional Arthritis Center; Mercy – SGC
Truman Medical Centers
University of Missouri Extension

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Citation

When citing this document, please use the following recommended citation:

Missouri Arthritis and Osteoporosis Program (2012). *Missouri's sustainability toolkit: Self-management education programs for people with chronic conditions.* Columbia, MO: March 31. [A portion of funding for this project was provided under the American Reinvestment and Recovery Act of 2009 Communities Putting Prevention to Work: Chronic Disease Self-Management Program and the United States Administration on Aging]

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