

ACL Business Acumen: Contracting Life Cycle Self-Assessment

Phases and Steps	Achieved and ready to share lessons learned with others	Making progress but not ready to share	Just beginning and may need help	Haven't started yet; Definitely need help	Additional Notes
Phase I: Pre-Engagement					
<p>1. Complete internal assessment to understand current strengths and weaknesses</p> <ul style="list-style-type: none"> a. Services that the organization has the capacity to deliver b. History of delivering said services c. Organizational stature in the market d. Political factors impacting the ability to deliver service <ul style="list-style-type: none"> i. Political allies ii. Political foes e. Market allies f. Market foes 	□	□	□	□	
<p>2. Develop a plan to address weaknesses</p> <ul style="list-style-type: none"> a. Assess what is needed to increase internal capacity to deliver services b. Determine internal weaknesses that prohibit organization's ability to deliver and expand on key services c. Determine what is required to address weaknesses <ul style="list-style-type: none"> i. Understand what weaknesses that can be addressed internally ii. Understand the weaknesses that will require external support to address iii. Assess your ability to seek and secure external resources to address identified weaknesses 	□	□	□	□	

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3. Determine what is required to address organizational weaknesses <ul style="list-style-type: none"> a. Need for organizational change b. Assess appetite for change from board, leadership and staff. c. Determine what is required to complete organizational change d. Develop a timeline with milestones to initiate the culture change process 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Complete assessment of subcontractors and partners to deliver services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Identify the legal structure or structures that are required to compete in the market place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Research potential legal structures that could work for your organization or coalition, taking into account existing operational structure, your ability to contract for services, and the capacity of your subcontractors and market partners. <ul style="list-style-type: none"> a. Determine the viability of each option b. Evaluate the positive and negative factors of each viable option in terms of how each potential structure fits in with your entity's internal assessment. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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7. Complete a Market Assessment <ul style="list-style-type: none"> a. Identify Payers for services <ul style="list-style-type: none"> i. How many payers are in the market ii. Is the market segmented iii. How is the payer compensated iv. What is the level of compensation that the payer receives v. What level of risk does the payer have vi. What services are required for the payer to deliver vii. What services are optional for the payer viii. What are the quality requirements of the payer ix. How has the payer performed on the quality measurements in the past x. What is the position of the payer in the marketplace b. Identify Consumers of services <ul style="list-style-type: none"> i. Determine the necessity of services ii. Determine if the consumer is also the payer iii. Determine the value of the services to the consumer c. Assess availability of services in the market d. Assess marketplace for potential competitors and threats in the marketplace e. Understand political factors that are market drivers 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8. Determine gaps in the market place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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<p>9. Determine your organization's capacity to deliver services that are needed in the market</p> <ul style="list-style-type: none"> a. Health Information Technology requirements <ul style="list-style-type: none"> i. Core data elements identified ii. Ability to securely transfer information to other entities b. Ability to bill for services c. Ability to track quality of services <ul style="list-style-type: none"> i. Understanding/incorporating payer quality systems (i.e. star quality ratings, reporting systems, etc) ii. Quality tracking must include both process evaluation and outcome evaluation measures 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<p>10. Marketing/Marketing Plan</p> <ul style="list-style-type: none"> a. Develop a menu of services that you would like to offer to the marketplace b. Develop a marketing plan to market said services to the marketplace <ul style="list-style-type: none"> i. Marketing strategy should address potential payers and consumers of said services ii. Marketing strategy should emphasize your history in the market, relationship with the consumer, political allies, and promote the proposed legal structure required to deliver said services c. Develop a value proposition for your services based on the needs in the market and status of competitors <ul style="list-style-type: none"> i. The proposed value proposition must include price. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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10. Price for services should be developed with input from several variables <ul style="list-style-type: none"> a. True cost to deliver the service (direct costs) b. Market rate for the service c. Value of the service to the payer d. Market demand for said services e. Access to proposed services in the market f. Indirect rate required to deliver said services 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11. Develop prices for services using input from several variables: price, capacity and legal structure to deliver said services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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<u>Phase II: Engagement</u>					
1. Forge relationships and partnerships in the marketplace with potential allies <ul style="list-style-type: none"> a. Educate allies about your menu of services b. Educate allies about steps taken to initiate culture change c. Educate allies about the menu of services, capacity to deliver services, and pricing structure d. Educate allies about the new legal structure (if applicable) 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Present your menu of services and price to potential payers <ul style="list-style-type: none"> a. Identify value proposition to the payer for your services b. Value proposition should include total value of services to the payer c. Highlight the role of said services to meeting the quality requirements that the payer must adhere to d. Detail how quality of services will be tracked, monitored, and reported to payer e. Present legal structure for contracting for services f. Present desired contract vehicle required to deliver services 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Present your menu of services and value of said services to potential consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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Phase III: Post-Engagement					
1. Perform Continuous Quality Improvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Assess organizational capacity to meet demands of marketplace and develop plan for expansion into new areas, building staff, scalability of services to meet growing demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3. Continue to perform marketing to potential and consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4. Perform periodic review of service costs and pricing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Continue to assess market drivers in the marketplace a. Regulatory requirements b. Political factors c. Contractual requirements d. Consumer demand e. Changes in payer base f. Changes in consumer base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Stay vigilant for new potential threats in the marketplace a. Take steps to address threats when identified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7. Stay vigilant for new opportunities in the marketplace a. Take steps to take advantage of new potential opportunities in the marketplace (ie subscribe to listservs, monitor regulations/rules, regularly attend industry conferences)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Summary Sheet for ACL Business Acumen Contracting Life Cycle Self-Assessment				
	Already Achieved	Making Progress	Just Beginning	Haven't Started
Phase I: Pre-Engagement				
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phase II: Engagement				
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phase II: Post-Engagement				
1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>