



Step 1: Prepare

Understand the
Business Environment
and Your Place
Within It

Contents

INTRODUCTION	1
STRATEGIC PLAN	2
A. Vision and Mission	3
B. Environmental Scan	6
Federal, State and Local Government	7
Payers	7
Competitors & Collaborators	8
Demographics	8
Economy	9
Technology/System Requirements and Capabilities	9
C. SWOT Analysis	11
D. Champions	13
Payers	16
Community Partners	16
Individuals Served and/or their Representatives	17
Government Entities	17
CONCLUSION	19
RESOURCES	19
APPENDIX	20

BUSINESS ACUMEN describes an organization’s ability to understand and address business conditions in a way that leads to the organization’s desired financial and operational outcomes. For community-based organizations (CBOs) serving people with disabilities, strong business acumen will improve the organization’s ability to sustain or even grow their programs. The HCBS Business Acumen Center is devoted to providing resources to disability-focused CBOs to facilitate successful business practices. The Disability Network Business Strategies Roadmap is one such resource.

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Step 1: Prepare

Understand the Business Environment and Your Place Within It

All organizations need to adapt to changing environments in order to thrive. Community-based organizations (CBOs) serving people with disabilities may need to grow due to demand, they may need to become more efficient due to rising costs, or they may need to rapidly adjust to a new payer system. Simply put, things change. Organizations change. Systems change. Perhaps you have heard that the method in which home and community-based services (HCBS) will be delivered in your state is about to change. Perhaps the state is planning to utilize Managed Long Term Services and Supports (MLTSS) where health plans are held accountable for the delivery of care and services. Maybe you have seen changes in utilization from your current payers and want to diversify your portfolio. In any circumstance, a clear vision for your organization along with a mission that defines distinct business objectives will be the base from which your planning will occur.

Regardless of the impetus for change, successful organizations will need to review their organization's vision and mission, operating practices and financial position to help identify the best path forward. As Jim Collins states in *'Good to Great and the Social Sectors'*¹, the critical question that businesses in the social sector must ask themselves is: "How effectively do we deliver on our mission and make a distinctive impact, relative to our resources?" Information about your rules and regulations, competitors, collaborators and customers will help you understand the current and anticipated environment you work within. Discussions with community leaders can help you fill in gaps in information, tie pieces together and connect you to resources, all of which will help you develop an effective strategic plan for your organization. This resource will help you identify the information you need to collect so that you are prepared to develop your strategic plan.

Things to consider as you review this module:

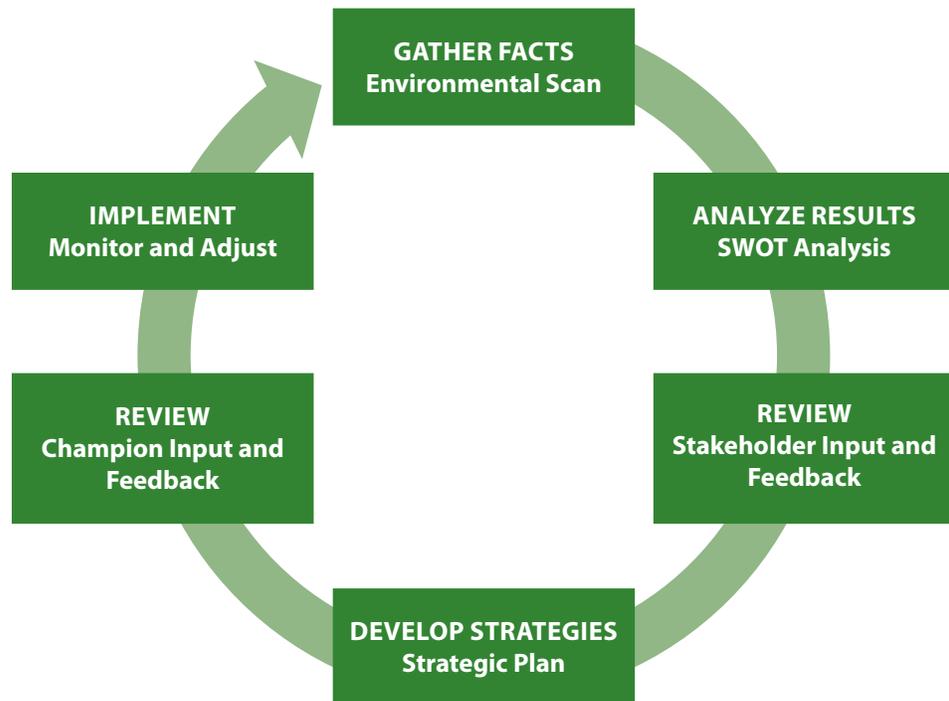
- What is the goal of your organization?
- What is the vision for your organization?
- How will your organization's mission support this vision?
- Who can best help you build a fully informed and effective strategic plan?

¹ Collins, J. (2005). *Good to Great and the Social Sectors*. Boulder: Jim Collins

Strategic Plan

A strategic plan guides the work that your organization will do. You will use the business intelligence about your internal and external environment to create the strategies that will drive your organization to success. The completion of an environmental scan, a strengths, weaknesses, opportunities, and threats (SWOT) analysis, and input from champions and other stakeholders are ways to collect the relevant and reliable information that you will base your decisions on. [Figure 1: Strategic Planning for Continuous Improvement](#) highlights the key steps you will take when you develop your strategic plan.

Figure 1: Strategic Planning for Continuous Improvement



The purpose of this document is to help you identify the materials, people, and facts that will help you develop a strategic plan. The templates provided throughout this document can be used to capture the content that you will use when you develop the plan with your team.

To prepare you for the development of your strategic plan, this resource will describe how to:

- A. Review, revise or develop an organization vision and mission
- B. Conduct an environmental scan
- C. Conduct a SWOT analysis
- D. Identify champions

A. VISION AND MISSION

A vision statement is a short, succinct, and inspiring statement of what your organization intends to become and/or achieve at some point in the future. The vision refers to intentions that are broad, all-inclusive and forward-thinking.²

A mission statement describes your organization's core purpose and focus. The purpose and focus of your organization is likely to remain constant and as such, your mission statement serves as a guide during decisions. It acts as a filter to separate what is important from what is not and it communicates a sense of direction to your entire organization.³

Together your vision and mission statements need to describe the business goals for your organization—what you hope to achieve. The mission statement will specifically serve as a guide for strategic decision-making across your organization. It should be inspiring, compelling and understandable. It should make people want to support what you do.

To develop a clear vision for your work:

- Imagine that it is three, five or even ten years from now. Craft a statement that captures what you would like to see for your organization;
- Identify the results you want to achieve and the strategies and activities that will lead to those results; and
- Describe your “niche”, or how you fit within your community and how the community perceives you.

The questions in [Table 1: Vision Development Template](#) can help you envision the future for your organization.

“Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world.”

—Joel Barker

A vision describes the future state of what your organization wants to see for itself, a group of people, your industry or community. A mission describes how your specific organization will work to fulfill the vision.

² “Corporate Vision, Mission, Goals and Strategies,” by Vadim Kotelnikov

³ <http://www.businessdictionary.com/definition/mission-statement.html>

Table 1: Vision Development Template⁴

Identify	Document
What will be your organization's: (be as specific as possible) a. Relative rank in your industry b. Financial success c. Product or service quality d. Contribution to the community	
What will your most important product lines or services be?	
What products or services will you refuse to offer?	
What will the right size for your organization be?	
How will the customer ⁵ experience at your business take place? What will make that experience unique?	
Who will your customers be? How will you find them?	
If your customers were asked to list three noteworthy things about your business, what would they be?	
How will your community view your business?	
What will your payers say about you?	
What will industry experts say about you?	

⁴ <https://www.inc.com/magazine/20110201/getting-started-on-a-vision.html?nav=next>

⁵ Customers may include the people your organization serves, their families and friends, payers, funders and others.

Examples of vision statements:

- Our organization envisions a day when all people, despite their challenges, are fully engaged in their communities and living a good life.
- Our organization will advance the integration, growth and interdependence of people with disabilities in their home communities in ways that promote their ability to have positive control over the lives they have chosen for themselves.
- Our Partner Collaborative envisions a state system that provides integrated, high quality and efficient services for individuals in need of support.

With the vision for your organization in hand, you can now craft a mission statement that specifically speaks to how your organization will accomplish the vision.

To develop a clear mission for your work:

- Articulate a statement that describes how your organization will work towards achieving what you described in your vision;
- Describe the strategies and activities that will lead to those results; and
- Describe your “niche”, or how you fit within your community.

Table 2: Mission Development Template

Identify	Document
What do we do?	
How do we do it?	
Whom do we do it for?	
What value are we bringing?	

Examples of mission statements:

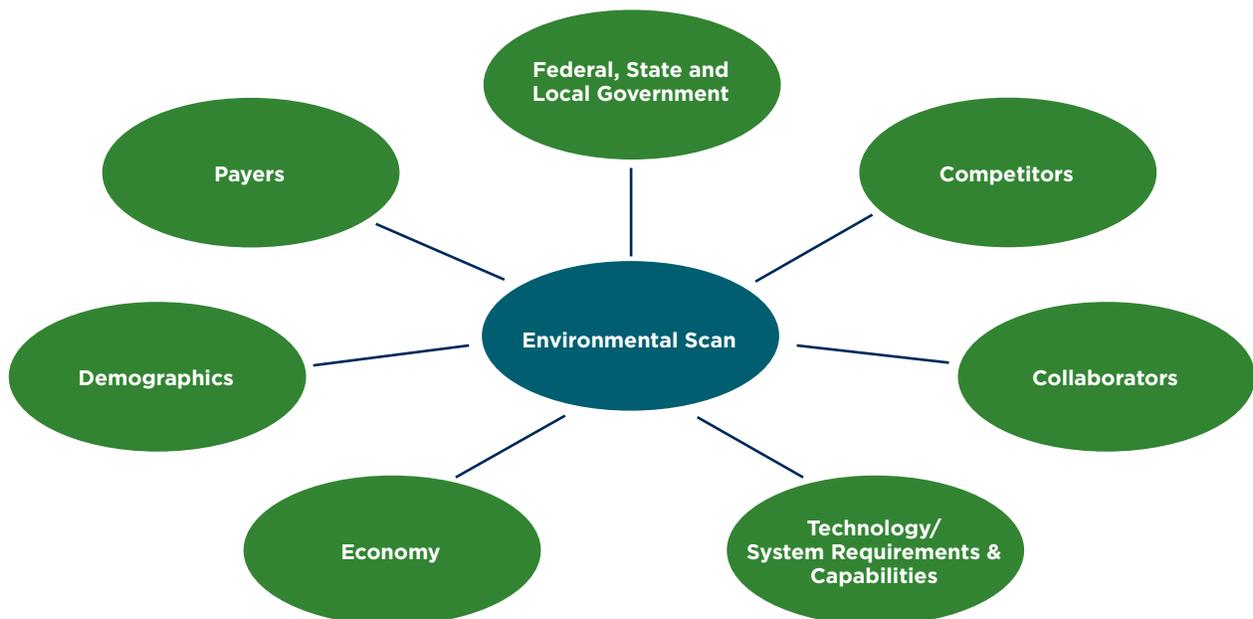
- Our mission is to improve collaboration between community resources, healthcare entities and families to meet the goals of individuals with disabilities.
- Through the development of and advocacy for innovative approaches in supporting families, our organization will advance the integration, growth and interdependence of people with disabilities in their home communities in ways that promote their ability to have positive control over the lives they have chosen for themselves.
- Our Partner Collaborative will strengthen and prepare the State's Long Term Supports and Services (LTSS) system for the evolution of integrated, high quality and efficient services for individuals in need of support.

Together, the vision and mission for your organization provides clarity about what your organization does and where it sees its future. The details you put into your vision and mission statements will be used to communicate the overarching goals and priorities of your organization to customers, payers, partners and others and will be the basis for organizational decisions. Use the vision and mission statements to identify what information is needed to develop your strategic plan. Completion of an environmental scan will help you understand the factors around you that will impact your goals.

B. ENVIRONMENTAL SCAN

An environmental scan is a structured way to identify, collect and evaluate information about the forces that impact your business. The environmental

Figure 2: Components of a CBO Environmental Scan



scan for most CBOs will include information about federal, state and local government; payers including managed care organizations, health systems and private citizens and others; CBOs and other service providers who may be competitors or collaborators; technology/system requirements; demographics; and the economy. The current or emerging state of each of these factors may impact the direction your organization takes.

Federal, State and Local Government

Policymaker priorities change over time. Since LTSS is primarily funded by Medicaid, an understanding of how federal, state and local leaders are thinking about the delivery of Medicaid in general and LTSS in particular will enable you to anticipate and plan for how you will be a part of the system. A review of the laws and regulations that impact and guide your work and the work of those you seek to partner with can help you identify opportunities for alignment between your services and the expectations of your potential payers. For example, in a state that utilizes MLTSS, state and federal regulations, managed care organization (MCO) contracts and requests for proposals will outline the expectations of the health plans you seek to work with.

Questions to answer:

- What are the preferences and priorities of key policymakers and political leaders?
- Is the change a part of a political campaign? Who is driving it?
- Are major transitions in political leadership about to take place?
- What is the mood and priorities of the public at large?
- Are there any federal, state or local policies or regulations that could impact your efforts to pursue partnerships with the healthcare sector (e.g. HCBS settings rule (specifically scope of practice), service restrictions or reimbursement opportunities)?
- Is your state using or transitioning to MLTSS?
- Are there new developments in policy that impact HCBS?

Payers

Revenue is the life-blood of an organization. Payers for CBO services may include, but are not limited to, managed care entities, accountable care organizations, State and county governments or private pay clients. An evaluation of all potential payers will help you determine where you need to build or further develop relationships. It will also provide insight into how they work and their unique needs and priorities. This information will help you customize strategies to maximize those relationships.

Questions to answer:

- What potential sources of funding are available in your community and state? i.e. managed care, the state, the county, the Veterans Association (VA), private citizens etc.?
- What is the “payer culture”—the shared values, attitudes, standards, and beliefs of that organization?

- What are the priorities and initiatives of funding sources? What are their challenges?
- Who are potential collaborators? Who are competitors?
- What are the requirements of the payers you hope to work with? How can your services help payers meet their requirements?
- For private citizens, what are their needs? What services and outcomes do they want to achieve? What are they willing to pay for?

Competitors & Collaborators

An assessment of the market requires that you identify and understand the current market trends that will impact your organization. Part of this requires that you evaluate the strengths and weaknesses of your competition and potential collaborators. For example, you may be able to develop a program that payers need by partnering with a CBO that complements your service (e.g. a specialized behavioral health provider and a CBO providing relocation services). On the other hand, a new provider that offers the same service, to the same population in the same geographic region may present as a new competitor. You will want to understand their strengths and weaknesses in order to identify how you differ or where your value proposition to payers and clients lies.

Questions to answer:

- What organizations in your community do work similar to you or serve similar populations?
- Are they potential (or current) partners?
- How are you similar to these organizations?
- How are you different?
- What capacity do these organizations bring to your community?
- What is your organization's unique capacity?
- What is the potential for forming partnerships or a provider network?
- What are the opportunities for and barriers to establishing a network?

Demographics

Your organization may have a strong history serving a specific population. However, the services you provide may also be applicable to other populations. An evaluation of the demographics of the area you serve may highlight changes in ages, disabilities or socio-economic statuses of your current or potential clients. For example, as the family caregivers of people with disabilities begin to age, they may no longer be able to continue to provide care or they may even require care themselves. You might be able to fill that gap.

Questions to answer:

- What new populations emerging in your community would benefit from the services you offer?
- What are the projections for population growth by age, race and ethnicity and how will this impact your business?

- How do you adapt how you provide services in order to meet the needs of a new population?
- Are you expecting the demand for your services to increase or decrease over time?
- How are needs changing as family caregivers age?

Economy

Changes in the economy can indicate changes in people's finances, spending habits and how public dollars are utilized. Changes in Medicaid beneficiaries in your area can indicate an opportunity to contract with those responsible for the management of those dollars whereas, a new business in town may draw people to the community and an opportunity to provide services to private-pay clientele.

Questions to answer:

- What is the general economic condition of your state and community, including the fiscal conditions of your state and locality?
- To what extent do changing economic conditions affect demand for the types of services you offer and the availability of resources to support your work?

Technology/System Requirements and Capabilities

Technology systems continue to evolve. Most health, and an increasing number of social service entities, utilize an electronic platform to maintain information and share data. A look at how your current processes work in comparison to potential payers or partners will enable you to identify gaps or opportunities for process/system improvements. When complementary, the systems you use will better enable you to meet and report on contract requirements. For more on technology, please refer to **Step 3: Stabilize**.

Questions to answer:

- What data do current or potential payers receive (or want to receive) from you?
- What systems will you use to demonstrate your value?
- What systems do current or potential payers use?
- Do you have the ability to collect and transfer data in real time?
- What systems do you use to measure quality and performance?
- What are the expected requirements to ensure data security and confidentiality of protected information?

Document your findings as you gather information in each of these areas.

[Table 3: Environmental Scan Template](#) provides a basic framework to capture the information you collect.

Table 3: Environmental Scan Template

	Past Trends	Current Trends	Emerging Trends
Federal, State and Local Government			
Payers			
Competitors			
Collaborators			
Demographics			
Economy			
Technology/System Requirements and Capabilities			

The length of time it takes to complete an environmental scan will vary by organization and is dependent on the complexity of the organization, environment, objectives and resources available. Consider utilizing a team, including your board of directors and staff, to collect the data needed. Use a project manager to oversee the entire process, but assign individual contributors with specific elements. Have each person on the team conduct their research prior to meeting so that you can discuss and brainstorm issues that arise. This will help you complete the scan efficiently. Review your vision statement with this team to see if there is additional information you need to collect or organizations or agencies that you need to talk to in order to fully inform your work. Discuss and analyze the results of the environmental scan with your board of directors prior to finalizing to further ensure that there are no gaps in information.

C. SWOT ANALYSIS

A strengths, weaknesses, opportunities and threats (SWOT) analysis is used to assess your organization's abilities and general position in relation to the findings of your environmental scan. This is an opportunity to identify all the major factors that affect your organization's operations and subsequently formulate a response strategy. Be sure to include a variety of people during this portion of the process. You will need a broad range of perspectives to provide an accurate picture of your organization's position and capabilities. Section D. Identify Champions discusses this further.

During the review of your environmental scan results, look at the internal workings of your organization and identify the strengths (e.g. history of serving your population, knowledge of community resources) and weaknesses (e.g. inability to meet payer requirements, costs that exceed revenue) of your organization.

To paint an accurate picture of where your strengths and weaknesses lie, gather information from your:

- Current strategic plan;
- Budget/financial statements/audit reports;
- Quality tools/metrics and other reporting systems;
- Organizational charts; and
- Policy, procedure and process materials.

Utilize the information you have available to fully understand your current internal environment and capabilities. Do your current strategies, reports and procedures align with the trends identified in the environmental scan? Are there gaps or issues that need to be addressed?

Once you have a baseline understanding of your current strengths and weaknesses, you can evaluate any opportunities for your organization (e.g. new population, new geographic area, ways to demonstrate how management of social determinants of health⁶ impact potential payers), and the threats (e.g. new organizations entering the system) that may impact your success.

Finally, put all of the pieces together ([Table 4: SWOT Analysis Template](#)) and review your analysis for accuracy and completeness. Do your strengths create any new opportunities? Are there weaknesses that were initially perceived to be minimal, now a problem in light of new threats?

FINANCIAL CAPABILITIES

Financial accountability is the cornerstone of an organization's success. Closely evaluate your organization's financial capabilities during the SWOT evaluation.

- **What is your budget?**
- **What market share or growth can you expect?**
- **What quality outcomes or measures may impact your finances?**

When you get to strategic planning you will want to prioritize areas that maximize resources.

See Step 3: Stabilize for more information on Budget and cost allocation.

⁶ **Social Determinants of Health**—life-enhancing resources, such as food supply, housing, economic and social relationships, transportation, education, and health care, whose distribution across populations effectively determines length and quality of life.

Table 4: SWOT Analysis Template

	General Trends <small>(from Environmental Scan)</small>	Internal Environment		External Environment	
		Strengths	Weaknesses	Opportunities	Threats
Federal, State and Local Government					
Payers					
Competitors					
Collaborators					
Demographics					
Economy					
Technology/ System Requirements and Capabilities					

With a complete SWOT analysis built on facts and findings from your environmental scan in hand you can now vet your findings with others who have an interest in your work.

D. IDENTIFY CHAMPIONS

To ensure that your interpretation of the environment is correct and complete, you will want to involve people who can influence, are interested in and are ultimately impacted by the work that you do. These people are oftentimes referred to as stakeholders. Stakeholders are people or entities who have an interest or concern in your business. However, they are not all created equal. Some stakeholders have greater influence and interest in your work than others. These people, called champions can help you meet certain objectives and promote your success. Champions believe in your business and will help others believe in it as well. We will talk about both stakeholders and champions throughout this section since each contributor has value and serves a purpose—but the intent is to help you find the people who will have the greatest impact on your business.

The team that will help inform your strategic plan will include people who help you plan, people who connect you to the people and resources you need, and finally people who will do the work with you.

Identify the people who will:

Help you plan

- Who understands the broader landscape?
- Who understands the intricacies of the challenges or opportunities you might embark on?

Connect you to others

- If you are building new relationships, who can help you find and connect with the right people?
- Who can make sure that you are communicating in the right ways to the right people at the right time?

Do the work

- Who is going to be responsible for seeing the change through?
- Who needs to update processes? Make decisions? Communicate with those around you?

Any of these people might come from unexpected or unconventional places. Stakeholders and champions in particular can help you plan and connect you to others. Think about your objectives and challenges and who can help you best meet them. Do not limit yourself to the stakeholders that you currently engage. Business leaders, community leaders, or university faculty might all be able to share a new perspective, resource or collaboration.

Engage People to Inform your Strategic Plan

Identify where groups of stakeholders might be. Representatives from States, health plans and other potential collaborators or payers often attend national conferences such as the HCBS⁷, NCIL⁸, and AHIP⁹ conferences.

⁷ <http://www.advancingstates.org/>

⁸ <https://www.ncil.org>

⁹ <https://www.ahip.org/events/>

A review of the environment from the perspective of stakeholders and champions will help validate or further inform your understanding of the business environment and your role within it. Make sure that you have the right mix of people at the table. New potential payers such as health plans or hospital systems can help you identify and understand needs; government entities can provide insight into new requirements; technology experts can provide recommendations on data exchange; and other CBOs may identify opportunities to collaborate to increase capacity, efficiencies or reduce cost.

To find an appropriate mix of stakeholders that add value to your business objectives:

- Review the results from your SWOT analysis. Where were your gaps, opportunities and threats? Identify the experts in those areas who can help inform your business strategy.
- Consult with organizations that either are or have been involved in similar efforts, work with the target populations or in the area of concern.
- Identify someone from the key areas reviewed during the environmental scan to ensure that the feedback and insight you receive is well-rounded.

Table 5: Stakeholder Matrix identifies potential candidates from people and organizations who may be interested in or impacted by your work.

Table 5: Stakeholder Matrix

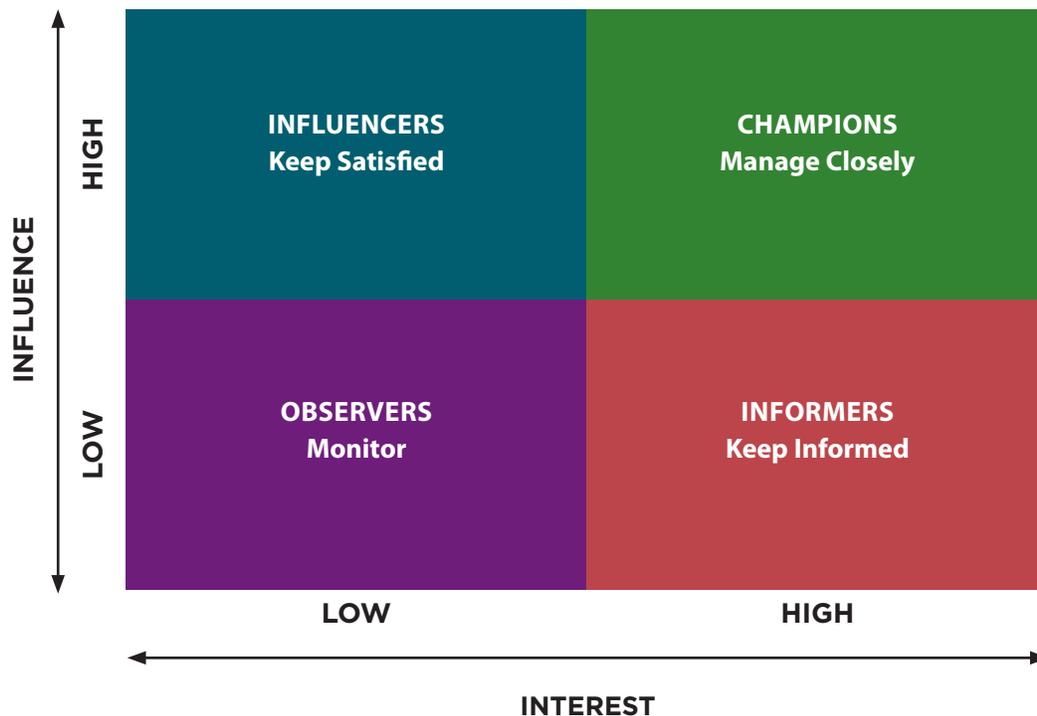
Potential Stakeholders			
<p>PAYERS</p> <ul style="list-style-type: none"> ■ Medicaid ■ Managed Care Organizations ■ Accountable Care Organizations ■ Private insurance carriers ■ Facilities (hospitals, physician practices, health systems, community health centers, adult day centers, skilled nursing facilities, etc.) ■ Fee-for-service purchasers 	<p>COMMUNITY PARTNERS</p> <ul style="list-style-type: none"> ■ Centers for Independent Living ■ Area Agencies on Aging ■ Social service providers (nutrition, housing, transportation, education services, etc.) ■ Healthcare provider organizations (nurse association, medical associations, etc.) ■ Legal Aid ■ Schools/universities ■ Churches ■ Law enforcement ■ Nonprofits ■ Businesses ■ Chamber of Commerce ■ United Way ■ Intellectual and/or Developmental Disabilities (I/DD) organizations 	<p>INDIVIDUALS SERVED AND/OR THEIR REPRESENTATIVES</p> <ul style="list-style-type: none"> ■ Specific advocacy groups: (National Council on Independent Living; Association of Rural Centers for Independent Living; AARP; The Arc; Alzheimer’s Association; American Council of the Blind; American Association of People with Disabilities; National Organization on Disability; Self Advocates Being Empowered; People First; TASH etc.) ■ Protection and Advocacy ■ Individual users of CBO services and their families 	<p>GOVERNMENT ENTITIES</p> <ul style="list-style-type: none"> ■ County Government ■ State legislature (elected officials in state House and Senate) ■ State Government Departments (Vocational Rehabilitation, Health and Human Services, Aging and Disability Services) ■ State Disability Councils (Rehabilitation, Independent Living, Intellectual and/or Developmental Disability, Mental Health, Assistive Technology, Traumatic Brain Injury) ■ Mayor’s office

Once you identify a list of potential stakeholders to engage, review it for gaps. Gaps may exist across stakeholder categories (e.g. people you serve, their families and caregivers are represented, but not payers) or within specific stakeholder categories (e.g. existing payers are represented, but not new or potential payers). If there has been a shift in demographics, you will want to ensure that your stakeholder group appropriately represents those you serve. Consider the racial, ethnic, geographic and disability mix amongst your stakeholders.

To ensure that your work is informed by those who will have the greatest impact on your success, review each candidate in relation to their level of influence and interest in your work. The individual combination of interest and influence will help you identify those with the most potential to act as a champion for your organization.

Stakeholder Management takes time and resources. Prioritize those who will make the most impact in order to align resources appropriately.

Figure 3: Identifying Champions: Influence vs. Interest¹⁰



High Influence, High Interest: Some stakeholders have a lot of influence and are very interested in your organization. It is vital to understand the viewpoints of your high influence, high interest stakeholders—specifically the potential activities they support and the objections they might raise. Engage, communicate, and work with them closely. Consistently update and receive input from them. High influence, high interest stakeholders can be your greatest champions!

High Influence, High Interest stakeholders make the best champions.

¹⁰ Jonathan Boutelle, "Understanding Organizational Stakeholders for Design Success," Boxes and Arrows, <http://boxesandarrows.com/understanding-organizational-stakeholders-for-design-success/>

Low Influence, High Interest stakeholders provide the contextual information you need to make your case with high influence stakeholders.

Low Influence, High Interest: Other stakeholders might have a lot of interest, but little real influence. Such stakeholders can be valuable sources of information: they can provide relevant resources and materials, inform you on the history of past experiences and help you identify challenges or obstacles you may encounter. These are good people to meet with first to gather information and refine strategies. Keep these stakeholders informed.

High Influence, Low Interest: Stakeholders with high influence, but low interest need to be broadly satisfied. They will not pay attention to the fine print of your business needs since they do not perceive the work to affect them. However, they can influence the success of your organization. The goal of your interactions with this type of stakeholder should be to give them enough information about your organization that they will not create obstacles.

Low Influence, Low Interest: You should spend less time with stakeholders who have little influence and little interest in your business. They are not interested in what you are doing, and are not in a position to help you do it. Monitor these stakeholders.

Champions can help move your work further than you can do on your own. They provide insight and feedback, help to build connections, and positively spread the word about your organization. Wherever possible identify at least one champion from each group interested or impacted by your work. Identify how they will add value and how you would like them to influence the success of your organization. Identify meaningful ways for each prospective champion to contribute to the work and outcomes you have identified. Meaningful interactions with clearly defined expectations will inform your work and allow your champions to feel heard and respected.

Consider what it is that you want to know or the specific ways in which each champion can help your organization meet its objectives. Are they connected to a payer? Do they fill a specific gap, such as an understanding of how to utilize and manage data? Do they have a resounding strength such as respect in the community or are they a great storyteller that can speak to your work?

Each champion contributes something different based on their expertise, resources and reputation. Utilize their strengths to inform your work and advance your efforts.

Payers

Payers provide the funding that allows your organization to provide services.

Ways payers inform your work:

- Identify needs.
- Identify gaps in services. Explore how your services may fill those gaps.
- Identify and describe expectations. This may include standards for quality, delivery of data, and reimbursement rules.

Community Partners

Community partners provide the resources and collaboration that contribute to the delivery of your services and ultimately your bottom-line. Partners are organizations that you collaborate with in joint ventures or shared investment opportunities.

Ways community partners inform your work:

- Identify common challenges, goals or desired outcomes.
- Identify areas for collaboration. This may be in common areas where you increase efficiencies or complementary areas where you maximize each other's strengths.

Individuals Served and/or their Representatives

The people who use your services provide the revenue and cash flow your business needs to operate. You must understand what it is that the people who use your services want and address their needs on an ongoing basis. Individuals using your services, as well as their family members and caregivers, will hold your organization accountable for the provision of quality services and supports.

Ways individuals served and/or their representatives inform your work:

- Describe needs and preferences—what they would like to see in your organization—how to successfully navigate change.
- Share concerns.

Government Entities

Government entities determine the expectations of the delivery system. They are invested in the overall success and can help you understand your role within their vision.

Ways government entities inform your work:

- Share requests for proposals, contracts, regulations and any other guidance documents.
- Describe the objectives of the delivery system.
- Identify gaps and priorities.

[Table 6: Stakeholder/Champion Identification Table](#) can help you organize your stakeholder and champion list.

CONCLUSION

All organizations will need to adapt to changes over time. Strong organizations continuously adapt to changes in their environment. The first step in adapting to change is preparing for the change through information gathering and analysis. Organizations that take the time to carefully review their vision and mission, complete a thoughtful environmental scan and SWOT analysis, and clearly identify and engage their stakeholders and champions will be prepared to develop and implement a strong strategic plan.

RESOURCES

The HCBS Clearinghouse (hcbs.org) contains resources about the development of business relationships between community-based organizations that serve persons with disabilities and health plans and other integrated health services. To explore more resources related to business acumen for disability organizations, visit hcbs.org and conduct a keyword search of “business acumen”.

APPENDIX

The following templates can help you and your team document your findings and ideas as you develop your organization's vision and mission; conduct an environmental scan and SWOT analysis for your organization and identify champions to inform and support your work:

- Vision Development Template
- Mission Development Template
- Environmental Scan Template
- SWOT Analysis Template
- Stakeholder Matrix
- Identifying Champions: Influence vs. Interest
- Stakeholder/Champion Identification Table

Vision Development Template

Identify	Document
What will be your organization's: (be as specific as possible) a. Relative rank in your industry b. Financial success c. Product or service quality d. Contribution to the community	
What will your most important product lines or services be?	
What products or services will you refuse to offer?	
What will the right size for your organization be?	
How will the customer experience at your business take place? What will make that experience unique	
Who will your customers be? How will you find them?	
If your customers were asked to list three noteworthy things about your business, what would they be?	
How will your community view your business?	
What will your payers say about you?	
What will industry experts say about you?	

Mission Development Template

Identify	Document
What do we do?	
How do we do it?	
Whom do we do it for?	
What value are we bringing?	

Environmental Scan Template

	Past Trends	Current Trends	Emerging Trends
Federal, State and Local Government			
Payers			
Competitors			
Collaborators			
Demographics			
Economy			
Technology/System Requirements and Capabilities			

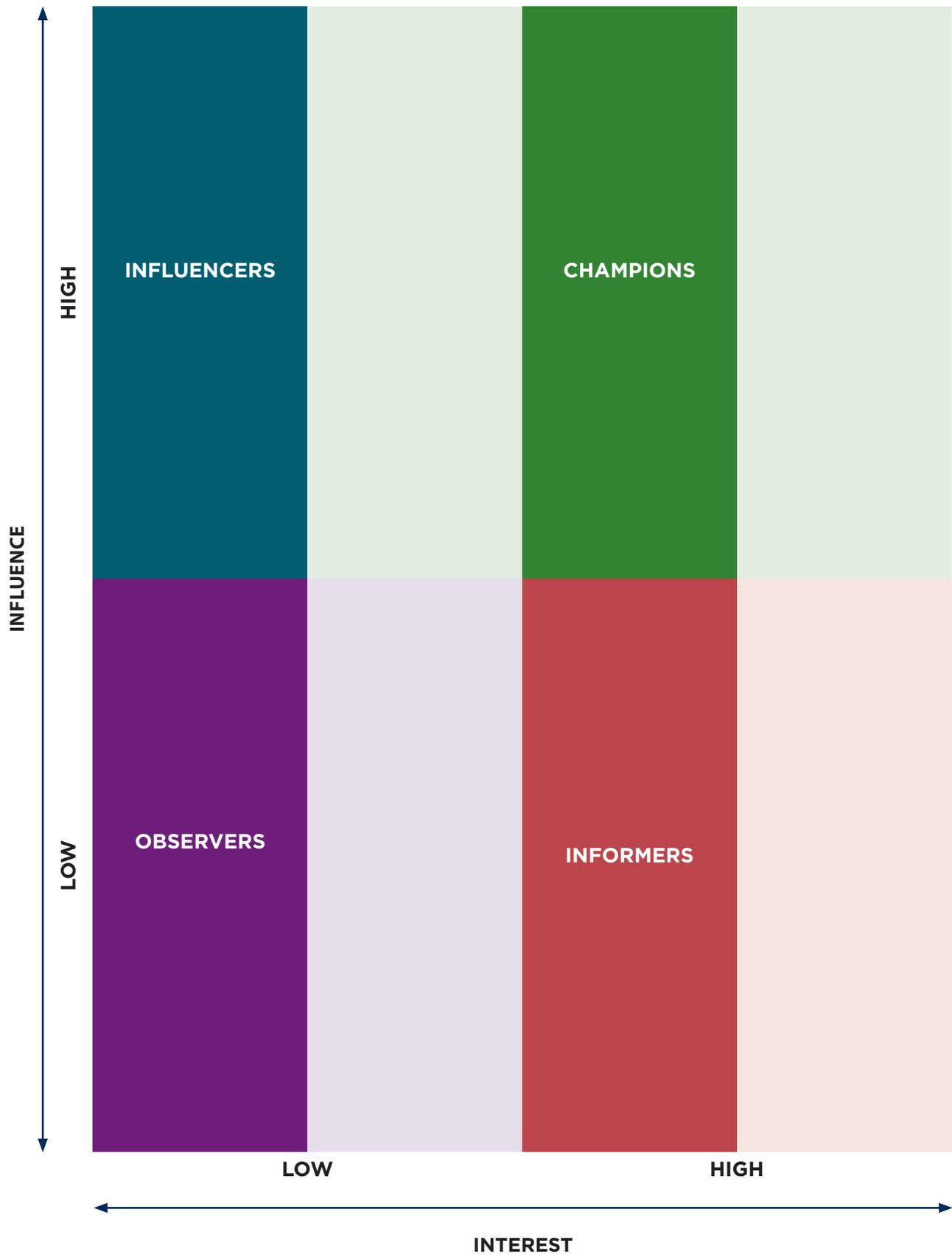
SWOT Analysis Template

	General Trends (from Environmental Scan)	Internal Environment		External Environment	
		Strengths	Weaknesses	Opportunities	Threats
Federal, State and Local Government					
Payers					
Competitors					
Collaborators					
Demographics					
Economy					
Technology/ System Requirements and Capabilities					

Stakeholder Matrix

Potential Stakeholders			
PAYERS	COMMUNITY PARTNERS	INDIVIDUALS SERVED AND/OR THEIR REPRESENTATIVES	GOVERNMENT ENTITIES

Identifying Champions: Influence vs. Interest



Business Acumen for Disabilities Grant

The Business Acumen for Disabilities Grant is provided by the Administration for Community Living to ADvancing States in collaboration with national partners.¹¹ The HCBS Business Acumen Center is dedicated to providing resources to sustain disability organizations. To learn more, visit hcbsbusinessacumen.org

¹¹ Grant Partners include: ADvancing States, American Association on Health and Disability (AAHD), American Network of Community Options and Resources (ANCOR), MERCER Health & Benefits, National Association of State Directors of Developmental Disabilities Services (NASDDDS), National Council on Independent Living (NCIL), National Disability Rights Network (NDRN), Sage Squirrel Consulting, and the University of Minnesota – Institute of Community Integration.



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