

School-Based Health Center

MARKETING PLAN DEVELOPMENT TOOL

The development of a strategic marketing plan for any organization or program requires the management team to work through a logic-based process:

- determine where you are now (situation analysis)
- decide where you want to go (goals)
- decide how you are going to get there (activities)
- decide what feedback you need to determine if you are staying on course (control)

The following document has been developed to guide the school-based health center (SBHC) management team through development of a marketing plan using a specific step-by-step approach. Completion of the tool will result in a basic plan which can be refined or expanded over time as new information and/or resources become available.

Task 1: Situational Analysis - In order to identify opportunities for improvement, it is important to segment your current and potential “customers” based upon selected characteristics, identify their needs, and understand your “market share”.

Step 1: Define who is eligible to receive services at the SBHC (Check one)

- Students enrolled in the school where the SBHC is located

How many children is this? _____

Data source: _____

- Students enrolled in the school where SBHC is located and designated feeder schools

Identify feeder schools: _____

How many children is this? _____

Data source: _____

- Students enrolled in any school in the school district

How many children is this? _____

Data source: _____

- All children age _____ through _____ residing in the community/county of: _____

How many children are there in this eligible population? _____

Data source: _____

Other: _____

How many children are there in this eligible population? _____

Data source: _____

Step 2: Who are you serving?

Number of users: _____

Time period for this number: _____

Step 3: Compare the race/ethnicity of the children in the eligible population to the race/ethnicity of the children served

Step 4: Compare the gender of the children in the eligible population to the gender of the children served

If possible, combine steps 3 and 4 into two charts, one for the eligible population and one for the children served, like this:

	<u>Count</u>		<u>Percentage</u>	
	Male	Female	Male	Female
Hispanic of any race				
American Indian or Alaska Native				
Asian				
Black or African American				
White				
Native Hawaiian or Other Pacific Islander				
Two or more races				
Unknown race/ethnicity				
Total				

Step 5: Define your actual service area by zip code (not necessary if the entire school district is located within one zip code)

Note: The zip code appears in patient addresses and is stored as a data element in electronic health records and billing systems. You can use your system to generate a report which gives a count of **unduplicated** users seen in the SBHC during a defined period of time, rank-ordered by zip code, like this:

Patient Origin Study Time period: _____

Zip Code	Count	Percent	Accumulated Percent
Total			

Color-coding a local zip code map to show your primary, secondary and tertiary service area might be helpful. Use your knowledge of the community to explain unusual results. Are underserved patients travelling far distances to access your services? Are there areas you could be serving but are not? Why?

- Step 6: Determine your patients' primary health needs. Using your system, generate a report which gives a count of visits rank-ordered by diagnosis code. Determine your top ten diagnoses. Do this by reviewing the report and grouping related diagnoses for which there are significant numbers. For example, a single code related to reproductive health may not fall in the top ten, but if you group all related codes, you may find the aggregate number to be significant.
- Step 7: If possible, run two additional reports from your system. First, rank-order **charges** (gross revenue) by diagnosis code and second, rank-order **payments** (cash received) by diagnosis code. Be aware that if you choose a recent time period, a significant portion of expected payments may not have been received. Group diagnoses and compare the top ten categories for frequency (Step 6), total charges and total payments. Do the rankings vary only slightly or significantly? If significantly, why?
- Step 8: Determine your payer mix and sources of patient revenue. In order to develop a marketing plan, it is important to know precisely your sources of **patient** revenue. Develop a report which gives a count of unduplicated patients seen, charges and payments by payer. Analyze this report and reflect on how your payer mix is affecting your organization's financial picture. Discuss how implementation of changes coming January 1, 2014 as a result of the Affordable Care Act may impact payer mix.
- Step 9: Identify your current and potential partners. A current "partner" is defined as an unrelated organization or individual that supplies your organization with something it needs to be successful. Potential partners include organizations or individuals that could become significant referral sources or have another significant impact on your success over the next two to three years if you were to establish a relationship. Examples are health plans operating in your service area, other providers, other schools, community agencies, local businesses, etc. This list of potential partners should not be all inclusive, but rather should be limited to two to five that would have high impact. State succinctly what each listed current and potential partner does or could supply.
- Step 10: Conduct a brief **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats (SWOT) analysis for your program based on the information above. This analysis can be a short, one-to-two page bulleted list. For strengths, examine what your SBHC does well. Is it in the number of students served? Or collaborative partnerships developed with educators at the school to promote your services? Weaknesses could also be opportunities for further growth. A SBHC weakness may be fewer male patients served than female patients. Or limited

awareness of services among parents. Opportunities for growth may be developing a partnership with a new local business to offer financial support. Examine potential Threats to your SBHC such as dwindling enrollment in the school or limited staff support. Opportunities and threats can be both short and long-term.

Task 2: Goals

Step 1: Based on the SWOT analysis, succinctly describe the problem/need you want to address through marketing. Describe how the SBHC would like to be positioned in two to three years. Use broad statements. For example: should the organization maintain or increase the number of users? If growth is desired, should the organization pursue new patients in the existing service area or attempt to expand the service area? (Note: expansion of a service area does not necessarily mean the addition of a new site). Is the SBHC known in the community and perceived positively? Does the relationship with a current partner need to be improved? Is there a major business or agency in your community that could better support you?

Step 2: What is the purpose of your plan? While work on one purpose may overlap with another, check the box that best describes what you are trying to achieve. You may want to make the chosen category more specific (example: increase utilization of male students aged 12 through 18)

- increase utilization of the SBHC
- strengthen relationships with parents and/or other community stakeholders such as local businesses
- strengthen relationships with current or potential SBHC partners
- increase awareness of the SBHC in the community and/or improve its reputation
- other _____

Step 3: Based on steps 1 and 2 above, develop between one and three goal statements. Goal statements should be outcome rather than process oriented, specific, realistic, measurable and time-framed (completed within two years). In addition, they should usually include a “baseline.” Example: The SBHC will increase the number of male patients between the ages of 12 and 18 from 230 during the period July 1, 2011 – June 31, 2012 to 400 during the period July 1, 2013 – June 30, 2014.

Task 3: Action Plan

Develop a **one or two year** action plan. Ideas should not be limited by resources known to be available. Note those items where resources beyond those currently available will be needed. It is often helpful to display the action plan in the form of a chart which includes the major activities to be undertaken, the steps inherent in accomplishing each activity, the person(s) responsible for each step, financial costs, and the due date.

Task 4: Internal Control

Decide what data and other information you will need to generate and how often. Also decide to whom a report should be distributed in order to provide feedback on progress toward the established goal(s). Assign a responsible party to generate and distribute the reports in a timely manner.