

Year 1 Business Plan Checklist

Business Plan Section	Objective	Activities/Strategies
Vision and Mission Statement	Develop a clear and concise statement of the SBHC's mission and vision	<ul style="list-style-type: none"> • Convene planning team in vision and mission development • Ensure alignment with needs assessment priorities
Goal Statement and Y1 Objectives	Develop goals and supporting objectives to drive the SBHC's programmatic direction	<ul style="list-style-type: none"> • Define a goal statement with desired outcomes and accomplishments the SBHC will achieve in the first three years • Create Y1 objectives that are Specific, Measurable, Realistic, and Time-bound (SMART) actions to support goal statement
Services and Staffing	Determine SBHC services and required staffing	<ul style="list-style-type: none"> • Specify the services available at the SBHC • Create a staffing matrix, including positions, qualifications, responsibilities, and weekly hours • Define management and supervisory structure for SBHC staff • Determine hiring, recruitment, and onboarding plans and policies
Location, Facilities, and Equipment	Develop an SBHC facilities plan	<ul style="list-style-type: none"> • Identify possible location(s) in or on school grounds to accommodate the SBHC and services to be provided • Select the SBHC location • Determine renovation or capital improvements needed • Describe physical space allocation(s) for SBHC service delivery • Describe square footage of location(s) for SBHC service delivery (including number and functions of rooms). • Include architectural drawing(s) of SBHC space(s) • Develop list of SBHC equipment

Memorandum of Understanding	Allocate partner responsibility and develop an MOU and SBHC consent form	<ul style="list-style-type: none"> • Create an MOU and SBHC consent form informed by SBHC needs and SBHC operator and school legal counsel
Marketing and Outreach	Develop an SBHC marketing and outreach plan	<ul style="list-style-type: none"> • Conduct marketing training for collaborating partners • Translate SBHC services into marketing terms (audiences, gatekeepers, messaging) and concepts (product, placement, price, promotion) • Develop messages/taglines for each audience (school staff, parents, students) • Develop promotional materials/vehicles/strategies for each audience (school staff, parents, students) • Employ promotional materials and strategies with each target audience (school staff, parents, students) to drive SBHC enrollment, utilization, and outcomes
Market Analysis	Prepare an SBHC market analysis	<ul style="list-style-type: none"> • Describe SBHC target audience(s) • Describe current and projected needs of the target audience(s) from readiness assessment data and other data collection activities (surveys, focus groups, interviews) • Describe geographic service area and demographics of the target audience(s) • Include availability of similar programs • Discuss comparative advantage(s) of SBHC services • Discuss challenges and opportunities the SBHC will face in the first year
Pro-Forma Summary	Complete an SBHC financial projection for year one	<ul style="list-style-type: none"> • Educate collaborating partners on costs and revenue associated with an SBHC • Develop a pro-forma to project SBHC expenses and revenue over 4-5 years

		<ul style="list-style-type: none"> • Complete a year-one SBHC pro-forma
Exit Planning	Determine ahead for potential change(s) in services or sponsorship to ensure continuity of care	<ul style="list-style-type: none"> • Agree on notice each partner will provide (minimum of 3 month notice; six months preferred) • Determine transition plan (time, transfer of patients, payment of debtors, notification of funders, assets including space, equipment, records, etc.) • Include in MOU
Risk Management	Consider risks the SBHC may encounter and a plan to reduce them	<ul style="list-style-type: none"> • Provider background checks • Basic safety training (CPR, Blood-borne pathogens, etc.) • Hostility
Executive Summary	Highlight key points from the Y1 SBHC Business Plan	<ul style="list-style-type: none"> • Distill business plan essentials into an abbreviated, one-page document for easy comprehension • Create Executive Summary after all other business plan sections are complete