

PFS Project Workplan: South Carolina, Nurse Family Partnership, and Social Finance

March 1, 2014 - December 1, 2014

Confidential and Proprietary

| Milestones | Project Component | Task | Workgroup | Facilitator | Start Date | Due Date | Status |
|--|------------------------------------|---|-------------------------------|---------------------|-------------|--------------|-------------|
| Payment metric selection | PFS Contract and Term Sheet | Identify 2-4 potential payment metrics | Outcome Measurement | ALL | 3/31 | 3/31 | Complete |
| Payment metric selection | PFS Contract and Term Sheet | Pull data | Outcome Measurement | SC | 4/7 | 5/2 | In Progress |
| Structure and legal documentation | PFS Contract and Term Sheet | Identify source of PFS outcome payment | Legal and Finance | SC | 4/7 | 5/2 | In Progress |
| Structure and legal documentation | PFS Contract and Term Sheet | Outline potential role of MCOs and clearinghouses in project | Legal and Finance | SC | 4/7 | 5/2 | In Progress |
| Long-term evaluation design | Services Launched | Identify potential metrics to be included in long-term evaluation | Outcome Measurement | ALL | 4/25 | 5/2 | |
| Program parameters | PFS Contract and Term Sheet | Refine definition of target population (e.g. eligibility criteria, etc) | Program Design and Ops | NSO | 4/7 | 5/9 | |
| Program parameters | PFS Contract and Term Sheet | Outline PFS expansion footprint (e.g., regions, expected number of mothers served, etc) | Program Design and Ops | NSO | 4/7 | 5/16 | |
| Program parameters | PFS Contract and Term Sheet | Outline referral concept | Program Design and Ops | NSO | 4/7 | 5/23 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Outline potential contracting structure and flow of success payments | Legal and Finance | ALL | 4/7 | 5/23 | |
| Payment metric selection | PFS Contract and Term Sheet | Pull additional data, if needed | Outcome Measurement | SC | 4/29 | 5/23 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Begin research on potential ROI of program | Legal and Finance | SFI | 5/2 | 5/30 | |
| Implementation | Services Launched | Outline operational staging of expansion | NSO | NSO | 5/12 | 5/30 | |
| Implementation | Services Launched | Outline community outreach concept | Program Design and Ops | NSO | 3/31 | 6/6 | |
| Implementation | Services Launched | Determine number of new staff needed at each site | NSO | NSO | 4/7 | 6/6 | |
| Arrange capital | Capital Raised | Estimate capital needs | Legal and Finance | SFI | 4/18 | 6/13 | |
| Implementation | Services Launched | Determine education dates/schedule | NSO | NSO | 5/12 | 6/13 | |
| Implementation | Services Launched | Complete appropriate expansion information forms for IAs | NSO | NSO | 5/12 | 6/13 | |
| Evaluation design | PFS Contract and Term Sheet | Develop conceptual payment evaluation methodology | Outcome Measurement | ALL | 5/23 | 6/13 | |
| Implementation | Services Launched | Determine roles of NSO/ IAs, contract/funding responsibilities | NSO | NSO | 5/23 | 6/13 | |
| Long-term evaluation design | Services Launched | Develop conceptual long-term evaluation methodology (for purposes other than triggering payment) | Outcome Measurement | ALL | 5/23 | 6/13 | |
| Implementation | Services Launched | Review client HIPAA consent forms - determine any need for change | NSO | NSO | 5/1 | 6/20 | |
| Payment metric selection | PFS Contract and Term Sheet | Assess potential impacts on potential payment metrics among newly-refined target population/footprint/conc | Outcome Measurement | ALL | 5/2 | 6/20 | |
| Arrange capital | Capital Raised | Determine timing of PFS/MCO capital drawdowns | Legal and Finance | NSO & SFI | 5/16 | 6/20 | |
| Implementation | Services Launched | Initial draft of IA contract templates | NSO | NSO | 6/2 | 6/20 | |
| Program parameters | PFS Contract and Term Sheet | Finalize definition of target population, footprint, and referral process | Program Design and Ops | NSO | 5/2 | 6/27 | |
| Payment metric selection | PFS Contract and Term Sheet | Select payment metrics | Outcome Measurement | ALL | 6/20 | 6/27 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Outline early termination framework | Legal and Finance | SC & SFI | 5/16 | 7/2 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Outline partner communication framework | Legal and Finance | SC & SFI | 5/16 | 7/2 | |
| Communications plan | Services Launched | Determine communications strategy | ALL | ALL | 6/1 | 7/2 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Execute PFS data sharing agreements between organizations | Legal and Finance | SC | 6/1 | 7/2 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Develop initial financing and contract terms (term sheet), including performance-based payment curve and ti | Legal and Finance | SFI | 6/6 | 7/2 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Outline governance framework | Legal and Finance | ALL | 6/13 | 7/2 | |
| Evaluation design | PFS Contract and Term Sheet | Identify Evaluator | Outcome Measurement | ALL | 6/13 | 7/11 | |
| Evaluation design | PFS Contract and Term Sheet | Identify Validator | Outcome Measurement | ALL | 6/13 | 7/11 | |
| Implementation | Services Launched | Outline detailed community outreach process | Program Design and Ops | NSO | 6/13 | 7/11 | |
| Payment metric selection | PFS Contract and Term Sheet | Estimate cost-benefit and outcome probabilities | Outcome Measurement | ALL | 6/27 | 7/11 | |
| Evaluation design | PFS Contract and Term Sheet | Outline detailed evaluation methodology for payment | Outcome Measurement | SC & NSO | 6/13 | 7/25 | |
| Long-term evaluation design | Services Launched | Design long-term evaluation | Outcome Measurement | ALL | 6/13 | 7/25 | |
| Payment schedule | PFS Contract and Term Sheet | Identify outcome price range | Outcome Measurement | SC & SFI | 7/11 | 8/1 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Draft PFS contract | Legal and Finance | SFI | 7/2 | 8/15 | |
| Arrange capital | Capital Raised | Finalize subcontracts (e.g., IAs, mgmt, finance, etc) | SFI/NSO | SFI/NSO | 7/2 | 8/15 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Finalize evaluator and validator contract | Legal and Finance | ALL | 7/11 | 8/15 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Finalize term sheet | Legal and Finance | ALL | 8/1 | 8/15 | |
| Evaluation design | PFS Contract and Term Sheet | Develop any needed baseline data for payment or long-term evaluation (or backup evaluation) | Outcome Measurement | SC & NSO | 7/25 | 8/22 | |
| Structure and legal documentation | PFS Contract and Term Sheet | Finalize PFS contract | Legal and Finance | ALL | 8/15 | 8/29 | |
| Arrange capital | Capital Raised | Set up and manage accounts | SFI | SFI | 7/1 | 9/1 | |
| Implementation | Services Launched | Conduct initial training, hiring, and capacity building | Program Design and Ops | NSO | 5/2 | 10/29 | |
| Arrange capital | Capital Raised | Arrange capital | SFI | SFI | 8/29 | 10/29 | |
| Communications plan | Services Launched | Announce project | ALL | ALL | 8/29 | 10/29 | |
| Implementation | Services Launched | Launch community outreach campaign | Program Design and Ops | NSO | 6/27 | 11/28 | |
| Implementation | Services Launched | Implement MCO incentive statewide | Program Design and Ops | SC | 4/7 | 12/1 | Timing TBD |
| Implementation | Services Launched | Conduct additional training, hiring, and capacity building | Program Design and Ops | NSO | 10/29 | 12/1 | |
| Implementation | Services Launched | Launch operations (e.g., pilot, full services) | Program Design and Ops | NSO | 12/1 | 12/1 | |

Final Decision for a Milestone