

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	
<b>Program parameters</b>	<b>PFS Contract and Term Sheet</b>	<b>Finalize definition of target population, footprint, and referral process</b>	<b>Program Design and Ops</b>	<b>NSO</b>	<b>5/2</b>	<b>6/27</b>	
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	
<b>Payment metric selection</b>	<b>PFS Contract and Term Sheet</b>	<b>Estimate cost-benefit and outcome probabilities</b>	<b>Outcome Measurement</b>	<b>ALL</b>	<b>6/27</b>	<b>7/11</b>	
<b>Evaluation design</b>	<b>PFS Contract and Term Sheet</b>	<b>Outline detailed evaluation methodology for payment</b>	<b>Outcome Measurement</b>	<b>SC &amp; NSO</b>	<b>6/13</b>	<b>7/25</b>	
<b>Long-term evaluation design</b>	<b>Services Launched</b>	<b>Design long-term evaluation</b>	<b>Outcome Measurement</b>	<b>ALL</b>	<b>6/13</b>	<b>7/25</b>	
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	
<b>Evaluation design</b>	<b>PFS Contract and Term Sheet</b>	<b>Develop any needed baseline data for payment or long-term evaluation (or backup evaluation)</b>	<b>Outcome Measurement</b>	<b>SC &amp; NSO</b>	<b>7/25</b>	<b>8/22</b>	
<b>Structure and legal documentation</b>	<b>PFS Contract and Term Sheet</b>	<b>Finalize PFS contract</b>	<b>Legal and Finance</b>	<b>ALL</b>	<b>8/15</b>	<b>8/29</b>	
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	
<b>Arrange capital</b>	<b>Capital Raised</b>	<b>Arrange capital</b>	<b>SFI</b>	<b>SFI</b>	<b>8/29</b>	<b>10/29</b>	
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	
<b>Implementation</b>	<b>Services Launched</b>	<b>Launch operations (e.g., pilot, full services)</b>	<b>Program Design and Ops</b>	<b>NSO</b>	<b>12/1</b>	<b>12/1</b>	

Final Decision for a Milestone