



REPLICATION WORKBOOK

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Welcome!

We are thrilled to have you at Replication! Church Health has been hosting this seminar since 2001 and we look forward to each session. We look at Replication as your first step in helping solve the inequities in healthcare in America.

During Replication, the experts at Church Health will teach you about starting and sustaining a charitable clinic.

Pursuing a calling in charitable healthcare is no small undertaking. Starting a clinic is hard, you're going to need help, you'll experience challenges - some we can predict here and others we'll never see coming. Since its founding in 1987, Church Health has experienced any and everything a charitable clinic might face. Through our Replication workshop, we will do our best to help you navigate the challenges you'll face to open a charitable clinic that is necessary and sustainable.

To paraphrase 2 Kings 10:15, "If your heart is like my heart, then take my hand."

We are glad you have a heart for charitable healthcare and are proud to take your hand as you embark on this journey!

Introduction to Church Health

Church Health is a faith-based, non-profit organization located in Memphis, Tennessee that provides comprehensive healthcare and health services to individuals with little or no access to healthcare. In the past year alone, Church Health had nearly 60,000 patient encounters. In addition, Church Health has extended training, education and outreach to countless individuals and organizations with the goal of fostering physical, emotional and spiritual well-being among patients, participants, families and the community at-large.

Our Mission

Church Health seeks to reclaim the Church's biblical commitment to care for our bodies and our spirits.

Our Purpose

To improve health and well-being so that people can experience the full richness of life.

Our History

Dr. Scott Morris, a family practice physician and ordained United Methodist minister, founded Church Health in 1987 to provide quality, affordable healthcare for working, uninsured people and their families.

In 1986, after college, seminary, medical school and his ordination as a United Methodist minister, Dr. Morris moved to Memphis, one of the poorest major cities in America. Dr. Morris knew the need would certainly be there, and if Church Health could work in Memphis, it could work anywhere.

Support from Memphis' Faith & Health Community

That same year, Dr. Morris was appointed Associate Pastor at St. John's United Methodist Church and then began to plan and raise the initial funding for Church Health. St. John's, located in Midtown Memphis, purchased the organization's first building, a dilapidated boarding house across the street from the church, and agreed to lease it for \$1 per year.

Central Church then agreed to finance the renovation of the building and its conversion to a clinic. The Plough Foundation and Methodist Hospital each provided funding to launch Church Health.

Dr. Morris and one nurse saw 12 patients at Church Health on September 1, 1987. Thanks to a broad base of financial support from the faith community and the volunteer help of doctors, nurses, dentists and other healthcare providers, Church Health has since expanded to provide medical, dental, behavioral health, optometry, physical rehabilitation, wellness and nutrition services and outreach. In addition, extensive support has been provided to faith-based and community organizations to build health ministries and wellness programs.

The Move to Crosstown Concourse

In March 2017, Church Health consolidated operations of its thirteen facilities into Crosstown Concourse, former home to a Sears-Roebuck distribution and retail center that had been rehabilitated to a glorious "vertical urban community."

Today, more than 45 businesses and 260 apartments call Crosstown Concourse home.

The Model for Healthy Living

In 2008, the Model for Healthy Living was introduced and now serves as the cornerstone for Church Health care and outreach. Health and well-being are defined not by the absence of disease, but by one's commitment to the following components: Faith, Medical, Movement, Work, Emotions, Nutrition, and Friends & Family.



Visioning

Clinic Description Worksheet –

Describe your clinic on its first day. Use the SMART Goals framework to help define the goals you will need to achieve to get there.

Draw a picture of it. What does it look like? Where is it? Who does it serve?		
Where (exactly in town) is it?	How many patients or clients do you have?	How large is your staff?

Casting a Vision and Setting Goals

Helping those in need gain access to charitable healthcare is a substantial endeavor. Creating well-crafted mission, vision, and value statements will help keep your clinic focused and grounded. In this time of uncertainty within the healthcare environment, having a clear idea of what you are doing, what you want to accomplish, and what are critical aspects of your clinic's operations will ensure long-term success.

A mission statement describes the purpose for which your organization exists. With a well-crafted mission statement, you can consider every proposed activity and compare it to your mission statement. This will keep you clear-headed, focused, and out of trouble. It answers the question, "Why did we start this organization?"

A vision statement describes what your community would look like if you completed your mission statement. Often, vision statements can feel unattainable. What they do, though, is keep you looking forward and working towards an ultimate goal. It answers the question, "How would we know that we completed our mission?"

Value statements reflect the core of your work. These items are the things that keep you grounded and firmly adhering to what the organization believes in. Mission and vision statements frequently change; value statements typically don't change. These statements answer the question, "What does our organization believe in?"

The Benefits of a Well-Defined Mission, Vision, and Values Statements:

- A well-defined mission statement will motivate Board, staff, volunteers, and donors
 - It is a beacon that will attract people and resources to your cause, and ensure they will be the right people and resources
 - Make your mission statement compelling and clear. It will be your best public relations tool
- A good vision statement will provide motivation
 - It should tell the story of how the organization will impact the community
 - It can provide a larger context for the organization and keep it focused
- Values help make tough decisions
 - It helps with focus, like a mission statement
 - When making tough decisions, the organization can ask itself, "Will doing this be in line with our values?"

Vision and Goal Setting Worksheet

Take a few minutes for quiet reflection as you consider the following questions:

Why am I here today? Why is charitable healthcare important to me?

What does my community need?

Why am I someone who can deliver that?

How does my charitable clinic meet this— and other— community needs?

What might be the greatest joy I can experience from fundraising?

What is my most pressing need in making this happen? Besides money?

Orienting ourselves toward our vision

Using your notes above, try to distill your thoughts into a one- or two-sentence statement that reflects the ultimate vision you have for your clinic. This should be aspirational, as though you have already achieved all your goals.

My Vision

Volunteerism

Volunteers are the lifeblood of Church Health. We're able to best serve those in-need because of the service provided by people like you who are connected to our mission of health and healing. Our volunteers come from all walks of life, but their common commitment and motivation enables Church Health to grow and impact more people right here in Memphis.

Within Church Health, every current job has been done by a volunteer at some point in our history. Additionally, it's important to remember that all volunteers are potential donors. Across our organization, volunteers serve Church Health functions in:

- Medical/Dental- Providers serve as volunteers on and off-site in specialty and primary care capacities (many volunteer providers are retired physicians)
- Non-medical- People volunteer for Church Health in *Enduring* (commit to schedule for at least 6 months) or *Recurring* (on-call list) capacities. We often have groups (business, schools, community groups) volunteer for a day or two.
- Interns- Interns serve 8-10 hours a week with a specific department for a semester (Spring, Summer or Fall). We find interns through a formal recruitment and application process. These volunteers have stricter guidelines and are given greater responsibilities.

Here are FIVE tips to help you **create successful volunteer positions**. It takes time and effort to create good volunteer roles, but worth the effort.

- Work with your team to create ideas for MEANINGFUL opportunities. Hint- it's not the activity no one wants to do!
- Make sure the volunteers understand what they're doing and why they are doing it.
- TRAIN & MAINTAIN. Start slow, as the volunteer grows, so can the position.
- SCHEDULE the best time for the volunteers to be with your team.
- Identify the team member who will SUPERVISE the volunteers and organize their shift.
- Make them feel like a part of the team. Find simple ways to show APPRECIATION and always greet them with a smile and a big THANK YOU!

When **Recruiting Volunteers**:

- You want to have you information easily accessible on a website or flyer
- Build relationships with local organizations
- Recruit from social media, career and school fairs, churches, professional organizations etc.

Showing appreciation helps you retain and gain volunteers. Volunteers that love being at your organizations tell their friends and family!

- Check in with volunteers
- Use Surveys to understand their experiences
- Send out birthday or holiday cards
- Have an appreciation event (doesn't have to be anything fancy, just show that you care)
- Put volunteers on your social media

Lesson Learned: Inconsistency in the experience volunteers had at Church Health resulted in variation in the opinions they formed about volunteering and our work. A centralized system

helped us give every volunteer a positive experience. ALL volunteers fill out a volunteer application online and are put into our volunteer database. This way the volunteer coordinator can track progress of all volunteers and show appreciation across the board. You may not have a database to track volunteers yet but tracking in some way is important. Start an excel sheet!

Before the Doors Open

There's a lot of work to be done before your clinic is open and serving patients. In the experience of Church Health, focusing on four specific issues is the best use of your time.

Organize your business

One of your first steps is to organize the business of your clinic. Church Health is a 501(c)3 nonprofit, as are nearly all free and charitable clinics. Decide whether your clinic should be an independent nonprofit or have an affiliation. Churches and hospitals are the most likely candidates to be your affiliate.

Church Health decided to organize as an independent nonprofit because it was (and still is) important to us to build relationships with all churches.

Plan early on for your organization and start your IRS approvals early as they can take some time. To begin approvals, you need to know who are your initial three board members, your purpose, and the activities your clinic will pursue.

Team building

Collaborating with the right people who have diverse skills is crucial to your clinic's success. Your planning team will determine what kind of clinic you're going to open - determine early on who will be the planning team leader.

Often, successful clinic planning teams are lead by a charismatic door opener in the community, someone who has a vision and wants to work hard to make it come true. These characteristics are not necessarily associated with a specific skill set or professional experience.

Securing legal counsel is important to ensure people involved with your clinic (volunteers, staff, opinion leaders, etc.) are properly informed. Clinics can usually find a volunteer attorney - which is a great and valuable service, but may have to pay application, permit, and other legal fees.

Cultivate relationships with people at area hospitals and your area health department. They will help you make connections and develop relationships with physicians and other providers who may be volunteers at your clinic.

Finally, a financial advisor - volunteer or otherwise - will help you address your budgets. As an example, here are the first budgets from Church Health:

Financials: Years 1 and 2

Introductory Budget by Division Years 1–2

Division	FY 1988	% of Revenue	FY 1989	% of Revenue
Total revenue	\$148,769	100.0	\$572,919	100.0
Total medical care	(\$74,607)	50.1	\$383,415	49.5
Total dental care	(\$2,389)	1.6	\$23,437	4.1
Total counseling & education	(\$8,066)	5.4	\$38,257	6.7
Total general & admin	(\$94,894)	63.8	\$120,917	21.1
Total expenses	(\$179,956)	121.0	\$466,026	81.3
Revenue over (under)	(\$31,197)	(21.0)	\$106,896	18.7

Balance Sheet for Years 1–2

Assets	FY 1988	% of Assets	FY 1989	% of Assets
Cash	\$15,538	4.5	\$49,766	10.9
Short-term investments	\$162,568	46.6	\$232,066	50.9
Property and equipment	\$170,857	49.0	\$174,025	38.2
Total Assets	\$348,963	100.0	\$455,857	100.0
Fund Balances				
Unrestricted	\$342,463	98.1	\$433,164	72.0
Restricted for other	\$6,500	1.9	\$168,052	28.0
Total Fund Balances	\$348,963	100.0	\$601,216	100.0

Monthly Budget: Year 3 (Abbreviated, \$000s)

Item	Jul	Aug	Sep	Oct	Nov	FY	% of Total
Revenue							
Cash Contributions	29	50	54	14	33	764	68.40
Donated Assets & Rent	2	2	2	2	2	21	1.87
Donated Services	6	13	19	8	5	105	9.40
Third-Party Reimbursements	13	14	9	6	9	106	9.52
Patient Receipts	6	7	8	6	8	90	8.08
Interest Income	2	3	3	3	2	29	2.02
Total	58	88	95	38	59	1,116	100
Medical Care Expenses							
Salaries	9	27	42	16	16	245	21.96
Donated Services	5	10	15	7	5	85	7.58
Payroll Taxes	1	2	2	1	1	15	1.30
Staff Development	0	0	0	0	0	0	0.01
Insurance	1	2	2	2	1	20	1.53
Licenses, Dues, Subscriptions	0	0	0	0	1	1	0.06
Lab & X-Ray	1	0	0	0	0	4	0.32
Supplies	0	1	2	2	0	15	1.31
Utilities	0	0	0	0	0	4	0.38
Telephone	1	0	1	1	1	7	0.80
Security	0	0	0	0	0	0	0.03
Postage	0	0	0	0	0	1	0.07
Printing & Publication	0	0	0	0	0	3	0.15
Repairs & Maintenance	0	0	0	0	0	3	0.30
Donated Rent	1	1	1	1	1	9	0.79
Depreciation	0	0	1	0	1	9	0.81
Other	0	0	0	0	0	0	0.05
Total	18	45	66	29	25	416	37.23
% of Total Revenue	32	0.67	70	76	43	37.23	

Determine Your Location

Finding and preparing a building that can deliver high-quality healthcare to people in need is rarely a simple task. Start your search by developing a deep understanding of who you want to serve and where they live. It's important you focus on a location that is:

1. **Easy to find** - Your sign and entry should be easy to see from the street. You might find a nice location in an office complex, but if it is complicated to navigate, you could create an unnecessary burden for your patients.
2. **Accessible** - Understand how your patients will travel to your clinic. Are there bus stops nearby? Is the location you're entering close to a city center? Make sure the people served by your clinic will be able to get there.
3. **Visible** - Not only should people be able to see your sign from the street, it should be clear and distinct. Having an identity that is easy to understand is great for patients and anyone who might get involved with your clinic as a volunteer.

You don't want to enter a lease too early and create undue financial pressure, but it's never too early to start scouting locations and understanding potential options.

Record Keeping

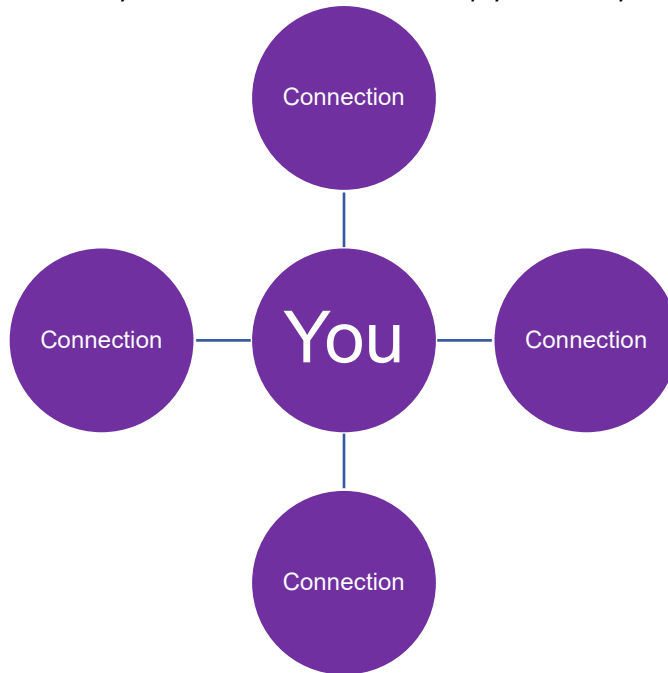
Startups often overlook documentation, which is a big mistake. Documentation is simple in the digital age and it makes it easy to keep track of anyone who ever gives your clinic anything. Whether it's one hour on a Saturday afternoon cutting your grass, an old pair of crutches, or \$1 million, you want to keep records of everyone who supports your clinic. You want to do this from day one.

You won't have a robust human resources function in the beginning, but it's important to track salaries and benefits. Get an accountant involved from the start to help keep financial records and get a full audit early. From the beginning, your clinic will be seeking foundation money.

Network Mapping Instructions

In this exercise, first you will work by yourself and then with your project team to map your current networks. This will help you identify opportunities for new sources of talent, funding, marketing and other key resources.

You will be creating a web of your connections that will help you move your plan forward.



Instructions:

1. Draw a circle with your name in the middle for your first node
2. Draw circles around your name and write-in the names of individuals and/or organizations working directly with the project
3. Draw lines back to your circle to demonstrate your connection
4. Repeat this process until you cannot possibly think of any more connections; connections can provide any type of support (informational, educational, financial, etc.)
5. Think about the resources or other connections you most need access to. Now identify individuals within the network you've created who may be able to connect you to those resources.
6. Add these resources and other connections to your map as additional nodes, again drawing lines back to the related node.

Your Brand and The Art of the Ask

Creating a comprehensive development plan, a joint responsibility of the Executive Director and Board of Directors, is essential to the long-term success of your clinic. Your development plan will create a road map of clinic needs to ensure financial health and sustainability.

The following elements are essential:

A fundraising chairperson and committee to work closely with the executive director and/or development director

- A well-designed one year budget
- A proposed 1-3 year budget
- Designated dates for the fiscal year
- Timeline for your fundraising plan
- Current funding base (money already committed)
- Identification of funding sources
- Case statement

Investors in your clinic will want to see your development plan as a major part of your overall business plan. They will want assurance you have considered the long-term needs for clinic sustainability, not simply the startup phase.

There should be careful consideration concerning the various funding sources available:

Local and National Foundations

Information about most foundations is readily available and covers what type of charities they are inclined to support, how to make application for funding, by what date you should do so, and when money is dispersed. Typically grants and gifts from foundations require a significant amount of lead-time and formal nonprofit recognition by the IRS. Though time consuming and difficult to maneuver, foundation gifts can be very lucrative, and some even renew annually. Remember, while you may appear to fit the criteria for a national foundation grant, such support generally comes only after cultivation and relationship building.

Government Grants

Healthcare is a primary concern of government grants and can be lucrative. State Associations of Free and Charitable Clinics are great sources of information about government grants. When seeking grant funding, take time to understand the reporting requirements in the event you are awarded funding. Be sure your clinic is able to handle the reporting requirements that may take significant staff time and/or technology resources.

Local businesses

The corporate and small business community can be valuable source of funding for your clinic.

Individuals

Individual donors are often the most valuable and accessible source of funding for charitable clinics.

Allow adequate time and include the entire Board of Directors in preparing a Priority Prospect List of individuals likely to invest in the ongoing work of the clinic. A good priority prospect list should include names and an estimated amount of the person's capability of giving.

This list should incorporate a broad base of possible investors, that is, a good mixture of large and small contributions. Planned giving should be considered for those individuals who care to make a significant contribution to the clinic from their life's assets.

You should attempt to establish a balanced mix of recommended income sources to cultivate stable funding base.

Marketing and Communications

An impactful image and brand are key to successfully opening and sustaining your clinic. Your brand is much more than a website or social post. It is the representation of your entire organization to the public. Branding is about communicating and promoting everything associated with your organization.

A well-branded clinic will have more success with fundraising and will be able to help more people through the use of those funds.

How does one go about branding their clinic?

The process is similar to building a for-profit brand. Below are some key points to consider during this process.

The Name

The most important part of your brand is the name of your organization. This is how people will recognize you. It helps to have a unique name so that people know exactly who you are and what you do. The American Cancer Society doesn't need to explain what it does, it's self-evident. Name recognition is half the battle when it comes to branding.

If, however, your organization's name does not clearly state who you are patients and donors will be confused. Compassionate Friends or Concern America may be worthy organizations, but it is difficult to tell what they do just from their names alone. In these cases, it takes a strategic approach and a bit of money to build brand equity. If this is your situation, develop a tagline that sets you apart and hints at what you stand for. Use it on every piece of communication to help build recognition for your cause or mission.

The Logo

The logo identifies you to donors and others and can even be used to help further your cause. For example, the Breast Cancer Society has the logo of a pink ribbon. This pink ribbon is now immediately recognized as being related to the Breast Cancer Society. The more often people see your logo, the more often they are going to think of your organization.

Creation of a logo can be an expensive undertaking if a professional firm is contracted for this purpose. On the other hand, this may be a project that a college or graduate student could take on as a school project. Some clinics have also found professional resources through Board of Director connections. In either event, the importance of the logo merits use of a skilled individual to assist in this endeavor.

The Package

The package in this sense does not refer to a tangible item. Packaging is how your organization puts itself together visually. It is how you present yourself to others.

Questions to ask about brand packaging:

- How is my organization “wrapped” or presented to the outside world?
- Does your direct mail have a similar look or feel to your brochures or annual report?
- Are there common denominators that “brand” your organization?

You can work with marketing communications professionals or volunteers to ensure every communication looks like you or looks like your brand. Ensure that ALL materials distributed on behalf of the clinic are uniform and are pre-approved by the organization. Cheap, poorly designed materials can diminish your credibility. While the community expects you will be a good steward of your resources, a professional appearance will be expected and will serve you well. Hire specialists or ask design students or volunteers for assistance. Consistency is the key to a powerful brand!

The Experience

You have heard that first impressions are everything. This is true! From the patient walking in your door to the person handing you money, how they experience the clinic, the Board, and the staff is important. First impressions prove to be lasting impressions. Clinic-wide training in the experience and expectations of all involved will provide great dividends for the clinic.

You have defined your brand, now live it, refine when necessary and live it again!

In this competitive marketplace, clinics need to differentiate themselves from lesser alternatives. With so much being put out into the world in the way of ads and information, it is important for you to stand out. It’s an investment in your organization’s growth and in those you serve.

Making the Ask

During this activity, you will start becoming fluent in telling the story of your clinic. You will learn to share your passion for charitable healthcare in a way that centers on your clinic serving your community. Ultimately, you'll begin recognizing the cohesion of your story with others on your team and how they can build upon one another.

Self-reflection

Answer the question, "Why does this matter to me?" Think about personal motivation for your involvement with the clinic and your belief for how it should contribute to the community.

Recruit a planning team member

Pick someone from your planning team and think about how you're going to offer that role to them - and why they should accept.

Draft a message for a hospital CEO

Combining your personal story with the specific needs and interests a hospital and its leadership might have in supporting a charitable clinic.

Ask for money for capital, operating, startup budget

You have a meeting with a donor, and no one else with the clinic can attend. Create talking points using everything above to ask the donor for money for capital, operating, or startup budget.

Your Clinic Three Years from Now

Revisit your Vision Casting, Clinic Description, and Network Mapping activities to create a second draft for your vision that is more clear and informed.

How has the vision for my clinic changed?

What will my clinic look like in three years? Where are we located? What services do we provide?
How would I describe our fundraising activity?

Choose one person from your network map or planning team and describe how they helped the clinic realize its vision and progress during these three years. When did they get involved with the project? What specific things did they do to help us achieve our goals?

How would you revise the initial ask you made of that person to help get them on the path of making their three-year contribution a reality?

A proven path to delivering high-quality health care

The Replication workshop process will help launch your clinic based on the milestones and success of Church Health, which means:

Employing a full-time medical provider

Having full-time operating hours (see the Church Health example)

Effectively using an electronic health record (EHR or EMR)

Following Church Health's best practices

Collaborating with faith communities in your area

Authoring a formal business plan for the clinic

Establishing a team based on Church Health's Leadership Composition and Structure in Clinic

Development guidance

Contributing to the network of clinics our consultants support by sharing best practices, outcome data, and emotional support

New clinic projects generally take between 18-36 months.

Telling the Story of Your Clinic

Imagine your clinic three to five years from now. What's happened in that time? What were your biggest successes and most significant learnings? Use this newspaper front-page template to tell the story of your clinic's future to your Replication Group.

Headline	
Subhead	
Picture of your clinic	How does your clinic serve the community?
	What is the long-term vision for the clinic?
	Who has been crucial to your clinic's success?

Good Luck!

It has been our pleasure to host you and your team at Replication! Remember, success is going to start with you. While you're on this road, remember to make time for yourself. Here are 15 things you can do to take care of yourself:

Body

- Eat breakfast every day for a healthy start
- Do a physical activity you enjoy
- Drink more water
- Enjoy fruits and vegetables while limiting sweets
- Get the right amount of sleep

Mind

- Read for fun
- Listen to music
- Try a new food or recipe
- Limit screen time
- Feel better about yourself

Spirit

- Practice mindfulness
- Read an inspirational book
- Talk with friends and family
- Enjoy a meal with others
- Take a walk

These are inspired by Plan To Get Healthy, a health coaching tool for families created by Church Health.

May God bless you as you serve your community with high-quality charitable healthcare!

