

Work Plan February 25, 2014 to February 24, 2017

Light blue = Indicator of months of task under each goal; PM = Project Manager; OC/DA= Outreach coordinator/data analyst;

CCC= complex care committee

<i>Goal</i>	<i>Owner</i>	3-2014	5- 2014	7--2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
Grant Awarded	(Awarded 2/24/14)																			
Memorandum of Understanding (MOU) with The Department of Social Services and OHA																				
Draft of MOU	V. Veltri (VV), K. McEvoy (KM)																			
Final MOU	V. Veltri, K. McEvoy																			
Consultant to																				

<i>Goal</i>	<i>Owner</i>	3-2014	5-2014	7--2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
Assist Phase I																				
Identify consultant to Assist Phase 1	VV, KM																			
Personal Service Agreement with Consultant	VV, KM																			
Initial and Continuous Meetings with CMS																				
Reporting System Development	VV , consultant, PM																			
Sharing Resources Across States	same																			
Training	same																			
Refining Strategies and Updating Work Plan	same																			
Convene OWG	VV, KM, CCC*																			
Identify members	same																			
Convene meetings to gather input and feedback on all activities	Same + PM																			

<i>Goal</i>	<i>Owner</i>	3-2014	5-2014	7--2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
New Personnel																				
Meet with HR & Establish Job Specs	VV																			
Position Announcements	VV																			
Hire staff	VV																			
Train staff	VV, PM*																			
Begin case management	New staff																			
Begin outreach and education/training of stakeholders	OC/DA*																			
Focus Groups																				
PSA with vendor Center on Aging	VV, KM																			
Plan focus groups with vendor	Consultant & vendor																			
Advertise and conduct focus groups	same																			
Review findings and present to OWG	consultant																			

<i>Goal</i>	<i>Owner</i>	3-2014	5-2014	7--2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
Curriculum training - content																				
PSA with Medicare Advocacy vendor	VV, KM																			
Develop and/or adapt, refine existing curriculum	Consultant & vendor																			
Present to OWG	same																			
Develop, adapt and refine with OLCRAH Medicaid curriculum	same																			
Present to OWG	consultant																			
Visual Design Development																				
Develop and refine Design of materials	VV & existing vendor																			
Present to OWG	same																			
Final materials	Existing																			

<i>Goal</i>	<i>Owner</i>	3-2014	5-2014	7--2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
	vendor																			
Outreach Plan																				
Develop and refine plan & present to focus groups	Consultant & VV																			
Present to OWG to refine	consultant																			
Finalize plan	consultant																			
Print Materials																				
Translation by vendor	Existing vendor																			
Refine materials based on feedback	same																			
Finalize & print all materials	same																			
Data Collection & Database																				
Review and revise database with CMS advice	VV & OC/DA																			
Meet with Vendor	Same																			
Vendor makes changes	Database vendor																			
OHA Case Protocols																				

<i>Goal</i>	<i>Owner</i>	3-2014	5-2014	7-2014	9-2014	11-2014	1-2015	3-2015	5-2015	7-2015	9-2015	11-2015	1-2016	3-2016	5-2016	7-2016	9-2016	11-2016	1-2017	3-2017
Review current protocol	VV & PM																			
Adapt or refine protocol	VV & PM																			
Finalize and begin new protocol	VV & PM																			
Secure toll free-line	VV																			
Media/Advertising																				
Meet with media consultant and develop and/or revise plan	VV & OC/DA																			
Review plan with OWG	Same																			
Final media plan	Media consultant																			
Begin media campaign	same																			
Progress Reports to CMS																				
Approval of Phase I Plan	CMS																			
Refine Work Plan	VV, PM																			

