

FELLOWSHIP



ACMPE FELLOWSHIP
SUBMISSION GUIDE

ACMPE
FELLOWSHIP

TABLE OF CONTENTS

Fellowship Submission Process	3
Fellowship Submission Options	4
Descriptions & Templates	
• Strategic Business Plan	5
◦ ACMPE Fellowship Business Plan Proposal	7
◦ Draft Business Plan Template for New Business	8
◦ Draft Business Plan Template for Existing Business	10
• Historical	13
• Focus	15
• Exploratory	17
General Submission Requirements	19
Submission Specifications & Tips	20
Citation Style Guide	21
Grading	22
Appendix A: Grading forms	23

FELLOWSHIP SUBMISSION PROCESS

Demonstrate your passion for a relevant medical practice management topic or challenge that requires a dynamic solution. Get started with your Fellowship submission.

Your insights could advance the profession.

Send all submissions as a Word document attachment to fellowship@mgma.com

Step 1: Choose your problem and solution for your business plan.

Step 2: Submit and receive approval for your business plan proposal.

Step 3: After receiving approval for your business plan proposal, submit your strategic business plan submission for approval.

A team of Fellows from the ACMPE Fellowship Submission Committee will review your submissions for your ability to:

- Collect, assimilate and synthesize information into knowledge
- Conduct a professional study that is defensible to peers
- Clearly communicate in writing

Refer to the rest of this guide for requirements and specifications.

FELLOWSHIP SUBMISSION OPTIONS

To attain Fellow status, you will need to write a strategic business plan.

Please note, as part of the new Fellowship program enhancements, applicants pursuing Fellowship in 2019 will be required to submit a strategic business plan in place of the professional paper submission.

Strategic Business Plan

Starting Jan. 1, 2019, the professional paper will be replaced by a strategic business plan addressing a challenge that requires a dynamic solution in healthcare.

Topics must be timely, require critical thinking skills and be tied to the Body of Knowledge for Medical Practice Management.

Professional Papers – Available only to those with approved outlines prior to 2019

Your professional paper submission includes the objectives and results of an investigation into a medical practice management topic. You must classify your professional paper into one of the following categories:

- **Historical:** Provides a historical presentation of the development and evolution of a healthcare management issue over time.
- **Exploratory:** Presents a question or hypothesis on a healthcare management issue, presents research that may include primary and secondary research, and presents the results in a summary and analysis.
- **Focus:** Presents a healthcare management problem, issue or situation that may be concluded or unresolved.

NOTE: Applicants can continue to write and submit a professional paper until Dec. 31, 2018. If your outline was approved before Dec. 31, 2018, you will have two years to obtain an approved paper.

STRATEGIC BUSINESS PLAN DESCRIPTION

The Business Plan Identifies a relevant opportunity, topic, or challenge in medical practice leadership which requires a dynamic solution. Topics must be timely, require critical thinking skills and be tied to the Body of Knowledge.

The project summary clearly establishes what is being prepared. This should address the “elevator speech”. The executive summary provides the context to the issue, relationship to healthcare management, setting, stakeholders, and impacts. This should summarize the company, the opportunity and why it is unique, the capital requirements, competitors to think about, and the advantages the company proposed has over them.

The organizational plan includes the detailed summary description of the business, including the business model and strategy. Along with the details of the product or services proposed, the administrative plan and the operational plan to establish the timeline and milestones.

For the Marketing plan, this should include the overall brand strategy, a market analysis, the expected return on investment, and tactics for marketing implementation.

A business plan will need to include a financial documents section that outlines the financial needs, three-year income projection, financial statement analysis, and the profit and loss statement.

Innovative elements and expected business outcomes needs to address the impact of the innovative idea, the challenges and what was learned, and the proposed next steps to put the idea in action.

STRATEGIC BUSINESS PLAN REQUIREMENTS

Core Content	Solution Proposal The plan includes a full overview of the organization and its audience. It clearly defines implementation, strategy, financials, and potential problems.
Objective/ Subjective	Objective
Topic	Clearly defined
Topic Examples	Health Data Management company Mapping the National Healthcare Profile Mobile Health Management Operations and Management of Healthcare Facility / Programs
Scope	Be prepared to address issues, needs, and concerns of each constituency in the organization, the organizations management plan, the delivery of solution, etc.
Components	The plan will clearly define the organization, the opportunity, the organizational plan with SWOT analysis included, marketing strategy and the financials.
Narrative	Third Person
Bibliography/ End Notes	No
Typical Minimum	20-45 pages

ACMPE FELLOWSHIP BUSINESS PLAN PROPOSAL

Please outline below your proposed business plan. As a reminder, the objective of Fellowship in ACMPE is to demonstrate the skills and abilities that contribute to the advancement of medical practice leadership and the healthcare industry. By undertaking Fellowship, your business plan should demonstrate that you are:

- A thought leader capable of identifying key improvement areas for the sustainability and success of an organization.
- An innovative thinker able to manage change in the complex healthcare environment.
- A proven problem-solver qualified to tackle the greatest challenges in a healthcare organization.

Identify a relevant opportunity, topic, or challenge in medical practice leadership:

What is your proposed solution(s):

Which areas of the Body of Knowledge is your topic tied to?

- | | |
|--|---|
| <input type="checkbox"/> Operations management | <input type="checkbox"/> Financial management |
| <input type="checkbox"/> Human resource management | <input type="checkbox"/> Risk and compliance management |
| <input type="checkbox"/> Organizational governance | <input type="checkbox"/> Patient-centered care |

Would you like a mentor or advisor to assist with your business plan?

Yes No

Submission instructions:

Email your completed proposal to Fellowship@mgma.org. Please allow up to two weeks for your proposal to be reviewed.

Questions? Feel free to contact our certification department anytime with questions regarding this proposal or the process itself. Email us at acmpe@mgma.org or, call us toll-free at 877.275.6462, ext. 1888.

DRAFT BUSINESS PLAN TEMPLATE FOR NEW BUSINESS

1. Cover Sheet (Serves as the title page of the business plan)

- a. Problem/Opportunity must be relevant to the healthcare industry and tied to at least one area of the Body of Knowledge

2. Table of Contents (Quick reference to major topics covered in the plan)

3. Project Summary (brief, up to one-page pitch of purpose of venture)

4. Executive Summary (more extensive overview, but no longer than three pages)

- a. The Company (introductory overview - who, what, when, where, why, and how. Any unique aspects or characteristics?)
- b. Mission Statement
- c. Market Opportunity (opportunities for which the company is positioned to take advantage)
- d. Management and key personnel (who they are and strengths each one brings to the company)
- e. Competitors (direct and indirect); list their strengths and weaknesses.
- f. The Business' Competitive Advantages
- g. Financial information: capital requirements, funding sources, projections (summary of Income Statement Projections for next 3 years or until the venture shows a profit and positive cash flow)

Part I: The Organizational Plan

1. Summary Description of the Business

- a. Mission (projecting short- and long-term goals)
- b. Business model (describe the company's model and why it is unique to the industry)
- c. SWOT Analysis (strengths, weaknesses, opportunities, and threats that the company will face, both internal and external)
- d. Strategy (give an overview of the strategy, focusing on short- and long-term objectives)
- e. Strategic relationships
- f. Key stakeholders/key decision-makers

2. Products or Services

3. Administrative Plan (organizational chart, approval plan, responsibilities of assignments to teams)

4. Three-year operational Plan (including timeline and key milestones for success; possible roadblocks and strategies to address weaknesses/threats)

5. Regulatory, accreditation, and other external governing bodies that will be included.

DRAFT BUSINESS PLAN TEMPLATE FOR NEW BUSINESS, CONT.

Part II: The Marketing Plan

1. Overview and goals of the marketing strategy (brand recognition/product/service recognition; definition of what is being sold or services being delivered)
2. Market analysis
 - a. Target market and audience (identify with demographics, psychographics, and niche market specifics)
 - b. Competition (describe major competitors assessing their strengths and weaknesses)
 - c. Market trends (identify industry trends and customer trends)
 - d. Market research (describe methods of research, database analysis, and results summary)
3. Marketing Strategy
 - a. Description (budget % allocations on- and off-line with expected Return on investment)
4. Implementation of Marketing Strategy
 - a. Mode and methods for marketing (tactics for success)

Part III: Financial Documents

1. Summary of financial needs
 - a. Applying for financing and funding sources
 - b. How much capital you need
 - c. Resource costs associated/opportunity costs
 - d. Identify significant cost factors ex. Personnel Staffing – rates and hour projections
2. Pro Forma Profit & Loss and Cash Flow Projection
3. Three-Year income projection or until breakeven – if you have positive cash after 1 year only a second year is necessary; if cash flow is still negative after 3 years, when does it breakeven.
4. Projected balance sheet
5. Break-even analysis
6. Financial statement analysis

Part IV: Innovative elements and expected business outcomes

1. Why and how does this innovative idea positively impact the health of your population and community?
2. What challenges did you encounter during this process and what have you learned?
3. Next steps to put project in action

Part V: Addendum: Other factors

1. Provide additional elements and key considerations that have not been addressed in part I-IV but are essential for this new business model

DRAFT BUSINESS PLAN TEMPLATE FOR EXISTING BUSINESS

1. Cover Sheet (Serves as the title page of the business plan)

- a. Problem/Opportunity must be relevant to the healthcare industry and tied to at least one area of the Body of Knowledge

2. Table of Contents (Quick reference to major topics covered in the plan)

3. Project Summary (brief, up to one page pitch)

4. Executive Summary (more extensive overview, but no longer than three pages)

- a. The Company (introductory overview - who, what, when, where, why and how. Any unique aspects or characteristics?)
- b. Mission Statement
- c. Market Opportunity (opportunities for which the company is positioned to take advantage)
- d. Management and key personnel (who they are and strengths each one brings to the company)
- e. Competitors (direct and indirect); list their strengths and weaknesses.
- f. The Business's Competitive Advantages
- g. Financial Information: capital requirements, funding sources, projections (summary of Income Statement Projections for next 3 years). What is the projected ROI and when?

Part I: The Organizational Plan

1. Summary Description of the existing Business

- a. Brief introduction to company
- b. SWOT Analysis (strengths, weaknesses, opportunities, and threats that the existing business will face, both internal and external)
- c. Strategy (give an overview of the strategy, focusing on short- and long-term objectives)
- d. Strategic relationships
- e. Key stakeholders/key decision-makers

2. Summary Description of the new Business

- a. Business model SWOT Analysis (strengths, weaknesses, opportunities, and threats that the new business will face, both internal and external)
- b. Strategy (give an overview of the strategy, focusing on short- and long-term objectives)
- c. Strategic relationships Key stakeholders/key decision-makers

3. Products or Services

4. Administrative Plan (organizational chart, approval plan, responsibilities of assigned to teams)

5. Three-year operational Plan (including timeline and key milestones for success; possible roadblocks and strategies to address weaknesses/threats)

6. Incorporation Strategy (describe how the new business will work in conjunction with the existing business)

7. Regulatory and/or Accreditation bodies that should be included

8. Identify if there is an exit strategy.

DRAFT BUSINESS PLAN TEMPLATE FOR EXISTING BUSINESS, CONT.

Part II: The Marketing Plan

1. Overview and goals of the marketing strategy (brand recognition/product/service recognition; definition of what is being sold)
2. Market analysis
 - a. Target market and audience (identify with demographics, psychographics, and niche market specifics)
 - b. Competition (describe major competitors assessing their strengths and weaknesses)
 - c. Market trends (identify industry trends and customer trends)
 - d. Market research (describe methods of research, database analysis, and results summary)
3. Marketing Strategy
 - a. Description (budget % allocations on- and off-line with expected Return on investment)
 - b. Relationship with current business (elaborate on differences with marketing strategies and the relationship between both businesses strategies)
4. Implementation of Marketing Strategy
 - a. Mode and methods for marketing (tactics for success)

Part III: Financial Documents

1. Summary of financial needs
 - a. Applying for financing and funding sources
 - b. How much capital you need
 - c. Resource costs associated/opportunity costs
 - d. Costs allocated from original business
- e. Expectations around ROI
2. Pro Forma Cash Flow Statement (Budget)
3. Three-Year income projection
4. Projected balance sheet
5. Break-even analysis
6. Profit & Loss Statement (Income Statement)
7. Balance sheet
8. Financial statement analysis
9. Business Financial History

Part IV: Innovative elements and expected business outcomes

1. Why and how does this innovative idea positively impact the health of your population and the organization?
2. What challenges did you encounter during this process and what have you learned?
3. Next steps to put project in action

DRAFT BUSINESS PLAN TEMPLATE FOR EXISTING BUSINESS, CONT.

Part V: Addendum: Other factors

1. Provide additional elements and key considerations that have not been addressed in part I-IV but are essential for this new business model
2. Should the plan be to “contract” the business, review the alternative options, potential savings, and potential results if this action is not taken. (Note: downsizing requires a very specific business plan that address other market factors and general business requirements.

HISTORICAL PAPER DESCRIPTION

The Historical Paper provides a historical presentation of the development and evolution of a healthcare management issue over time.

The introduction establishes a topic or thesis that is adequately narrow that it may be thoroughly researched.

The background section provides the context, relationship to healthcare management, setting, stakeholders, and impacts. It identifies why the topic is an important part of historical development in the healthcare management field.

The body of the paper presents information on the involved stakeholders, chronology, key events and impacts. Research may include quantitative information such as data, charts, graphs, forms, tools and other applications, some of which may be most appropriate in an appendix. It may also include citations, quotes, reactions, and insights which occurred over time. Historical information is anticipated to be traced over a period of years or even decades, though need not be brought up to the present.

Research and evidence presented leads to the Discussion section that summarizes and evaluates the material presented and its impacts.

The paper includes a comprehensive bibliography of books, peer-reviewed journals and other relevant literary sources. Endnotes are used to identify research and citations throughout the paper, and appendices that may be appropriate to the content.

HISTORICAL PAPER REQUIREMENTS

Core Content	Historical, descriptive, review. Describes topic evolution, changes over time - typically over multiple years or decades, with some ability to look back and have a retrospective review.
Objective/ Subjective	Objective, factual, includes data-based, research & discussion.
Topic	Clearly defined
Topic Examples	Practice Models & Development, Patient Involvement Evolution, Reimbursement Shifts, Medical Records Evolution, Privacy Laws Changes, Hospital Systems Emergence
Scope	Maintain adequately narrow scope, such that may be reasonably accomplished, such as limiting by geography, physician specialty, hospital model-type.
Research Methodology	Literature search, books, peer-reviewed journals, other relevant archives. Minimal use of grey literature, newsletters, Op/Ed, biased source material.
Discussion Section	Discussion section summarizes research and may be evaluative from an historical perspective, but would not reflect unsubstantiated opinion.
Narrative	Third Person
Bibliography/ End Notes	Yes, Comprehensive
Typical Minimum	15-20 pages

FOCUS PAPER DESCRIPTION

The Focus Paper presents a healthcare management problem, issue or situation that may be concluded or may be unresolved.

The introduction clearly establishes the issue that will be investigated or focused upon, along with a research plan or Methodology that will lead to analysis and summary.

The background section provides the context to the issue, relationship to healthcare management, setting, stakeholders, and impacts. It also identifies the timeframe of the situation, whether it has concluded, is ongoing, or is a future situation that is anticipated. A literature review of books and journals and available secondary sources is appropriate, and addition of surveys, interviews or other opportunities for primary research may also be relevant.

The body of the paper details the problem or concern and may represent various focus options, which specifically may be past, present or future, including:

- A situation in which the author is personally involved:
- A situation occurring elsewhere; or
- A topic of concern for a sector or the industry, overall

The body of the paper describes and identifies solutions or lack of solutions, opportunities and roadblocks. If presented as a case study with an outcome, the paper should address the Pros/Cons involved with all steps, including 1) doing nothing, 2) all alternatives that were addressed or should have been addressed, and 3) what happened, along with an analysis and review of the process. If presented as a situation that may require resolution in the future, the paper should follow similar steps as to the potential consequences including 1) doing nothing, 2) options and alternatives that may go into a business plan or other future planning, and 3) what is anticipated to happen.

Research and evidence presented leads to the discussion section, which summarizes and evaluates the material presented and its impacts.

The paper includes a bibliography of books, peer-reviewed journals, to the extent they are available on the topic. Research may include primary research, web research or other unpublished sources due to the currency of the topic. Endnotes are used to identify fully research and citations throughout the paper, and appendices may be appropriate to the content.

FOCUS PAPER REQUIREMENTS

Core Content	Problem-solving in nature, practical, reality-based Topic provides analysis of issue or concern that may be current, ongoing and unresolved. Provides an in-depth study or drill-down on the situation, case or issue. Provides insight into the stakeholders and impacts. Utilizes available research to illuminate the study and discussion.
Objective/ Subjective	Subjective or objective, problem-solving, and may be past, present or future, and yet unresolved.
Topic	Clearly defined
Topic Examples	Situational or case studies of specific problems or issues: Planning or designing for change, Tools, technology, consultants, Regulatory impacts & changes,
Scope	Topic or situation may be from personal experience but should involve some extrapolation as to how this relates to other health care professionals and medical managers, as well as use the experience of others.
Research Methodology	Literature search adequate to present Background. Use of primary data, unpublished documents, interviews and other current resources may be relevant to the study.
Discussion Section	Discussion section clearly outlines the problem or situation and reviews the tools, methods, and research that have or will be brought to bear on the situation. The summary provides information on the timeframe for conclusion or resolution of the issue.
Narrative	Third Person
Bibliography/ End Notes	Yes

EXPLORATORY PAPER DESCRIPTION

The Exploratory Paper presents a question or hypothesis on a healthcare management issue, presents research that may include primary and secondary research, and presents the results in a summary and analysis.

The introduction establishes a clear question statement or hypothesis, along with a research plan or methodology that leads to an answer or conclusion.

The background section provides the context, relationship to healthcare management, setting, stakeholders, and impacts. It additionally provides the reason the topic needs exploration and a clearly defined methodology for conducting the research or exploration. A literature review of books and journals and available secondary sources is appropriate, and addition of surveys, interviews or other opportunities for primary research may also be relevant.

The body of the paper details the problem or concern that was explored and proposes solutions. The topic may represent various study options including:

- A situation the author experienced
- A problem or concern that occurred elsewhere
- A topic of concern for the sector or industry, overall

It provides the steps involved to evaluate solutions to the problem, and describes the alternatives that were considered, the external information (such as surveys) that were used to help that decision-making. Research may include various analyses, including financial, satisfaction ratings, or interviews with those internal or external to the problem that may have been consulted on the problem. The paper may describe in-depth a case that has occurred in the past, whether or not the author was a participant. The paper may involve innovations or use of tools that are exploratory.

Research conducted or planned leads to the discussion section, which summarizes and evaluates the material presented and its impacts.

The paper includes a bibliography of books, peer-reviewed journals, to the extent they are available on the topic. Research may include primary research, web research or other unpublished sources due to the currency of the topic. Endnotes are used to identify fully research and citations throughout the paper, and appendices may be appropriate to the content.

EXPLORATORY PAPER REQUIREMENTS

Core Content	<p>Hypothetical/conclusive; question/answer.</p> <p>Proposes question or thesis, to be answered Research plan & methodology is defined & may include surveys, interviews</p>
Objective/ Subjective	<p>Subjective or objective question, which proposes to test an idea, investigates, and reports results.</p>
Topic	<p>Clearly defined</p>
Topic Examples	<p>Non-physician practitioners for efficiency, Patient satisfaction strategies, Patient access to medical records repercussions, Cost analyses of purchase/lease alternatives</p>
Scope	<p>Question or thesis posed should be answerable, utilizing the research of others as well as some primary research if practical. Decision making may be based on results of the tested thesis.</p>
Research Methodology	<p>Literature search adequate to present Background & substantiate results. Use of surveys & interviews whether fully scientific or not is encouraged. Opinion used, but cited as such.</p>
Discussion Section	<p>Discussion section re-visits thesis or question and presents results, adding new data or information to the literature. Summary may provide recommendations to other managers.</p>
Narrative	<p>Third Person</p>
Bibliography/ End Notes	<p>Yes</p>

GENERAL SUBMISSION REQUIREMENTS

Anonymity

The Fellowship paper process is anonymous. All submissions are written in third-person narrative regardless of whether or not the author was personally involved. No identifying information should appear that would specifically disclose the names of individuals or organizations involved in the topic of the paper.

Originality

The work must be your original creation. If you wrote the paper in relation to some other activity, you must disclose this information to the Professional Papers Committee in advance to confirm suitability. Excerpts from references must be appropriately noted.

Editorial assistance

We recommend that you see editorial assistance for grammar, spelling, sentence structure, etc. However, the experiences and conclusions state in your paper must be your own. Writing or research done by anyone other than you is unacceptable.

Deadlines

The ACMPE Professional Papers Committee accepts outlines and manuscripts for review throughout the year between January-October. However, to be recognized as a new Fellow at the Convocation held in conjunction with the MGMA Annual Conference, you must submit your final manuscript or business plan for review no later than the deadline established each year.

You have two years from the date your outline or proposal is accepted to submit your manuscript. Otherwise, you must resubmit your outline or proposal to the committee chair for approval before you can submit your manuscript.

SPECIFICATIONS

Word document formatted to 8 ½ by 11 inches

Use 1 ½ inch margins on left, 1 inch margin on right, double-spaced

Include your title page and submission in one Word document

TIPS

Exploratory and Historical Papers: Any discussion based upon personal experience should be minimal

Focus Papers: Includes research, but will most likely also include personal experience in 3rd person

Be careful with direct quotations: use them sparingly

Reader friendly: headers, subject lines, graphic devices

Use a proof reader, or two

CITATION STYLE GUIDE

ACMPE currently accepts any academic style for citing and formatting footnotes, endnotes and bibliographies, including American Psychological Association (APA), Modern Language Association (MLA), National Library of Medicine (NLM), and The Chicago Manual of Style.

ACMPE simply requires that the author choose a style and be consistent in using it. For example, MGMA Connection uses the National Library of Medicine citation guide for journals, whereas MGMA book publications are edited according to The Chicago Manual of Style –16th edition for text editing, notes and bibliographies.

Popular citation style guides include:

- APA Style — American Psychological Association
- Chicago Manual of Style – 16th edition
- MLA Style — Modern Language Association
- National Library of Medicine – citing medicine

REFERENCE MANAGEMENT TOOLS

As you conduct your research, you will find it helpful to log (or import) your references into a software program called a “citation or reference manager.” You simply enter or import your information, and in a click, the software formats a bibliography, footnotes, notes, in-text citations, and so on, in whatever citation style you select. There are a number of programs available for purchase, as well as several “shareware” offerings out there. Some of the free programs have storage limitations, then require payment for more storage or group sharing.

Wikipedia does a great job of comparing/contrasting these programs on a page titled, “Comparison of reference management software,” which notes the following:

- Familiar commercial products include: RefWorks, EndNote and Reference Manager.
- Noteworthy shareware products include: Zotero, Citavi, CiteULike, Mendeley, and EasyBib. (Not shown on Wikipedia’s list, EasyBib allows look-up from WorldCat, a database of nationwide library holdings) You’ll find that interfaces vary in complexity and formatting features offered. (You might try EasyBib first to get an idea of how a citation manager works. This basic web version has some pop-up ads, but is still a helpful tool.)

Call toll-free, at 877-275-6462, ext. 1887, or e-mail infocenter@mgma.com with any citation questions.

GRADING

Each submission is sent to three anonymous graders who grade your paper independently. They will provide clear and constructive comments to give you the most valuable feedback possible.

Passing Grade

Outline: Two out of three graders

Manuscript: Two out of three graders must give a B or better score

Business Plan: Must have at least 80 out of 100 to become Fellow; if scored from 70-80, referred back for clarification and team lead reviews; if scores less than 70, referred to mentor; re-evaluated by different team

Request for resubmission

If the Committee does not approve your outline or manuscript and business plans, it will share with you the scope of improvements needed. Use the constructive comments to improve the quality of your work and submit another draft. Though it is possible to achieve final approval on a first draft, authors must often submit more than one draft.

APPENDIX A: GRADING FORMS

Name:	Team number:	Grader number:	Date:
Determine the extent to which this paper contains the following key elements (by circling yes or no). Check for the inclusion of each element. Give a score based on the number of elements present (if 50% missing, subtract 50% off component total).			
Required Components for Business Plan for New Organization			
Topic/problem/opportunity:			
Title:			
Is succinct and clear	YES	NO	COMMENTS:
Is tied to at least one area of the body of knowledge	YES	NO	
Presented on coversheet	YES	NO	
Table of contents exists and provides quick reference to all major aspects of plan	YES	NO	
Project summary exists, is no longer than one page, and presents the "elevator speech" for why this topic/problem/opportunity is relevant to the organization	YES	NO	
Component Total: /5			
Executive summary: The section adequately summarizes the content and purpose of the finished plan, covering all key points including:			
The Company (introductory overview - who, what, where and why it is unique)	YES	NO	COMMENTS:
Market Opportunity (opportunities the company is positioned to take advantage of)	YES	NO	
Mission Statement	YES	NO	
Management (who they are and strengths each one brings to the company)	YES	NO	
Competitors (direct and indirect)	YES	NO	
The company's competitive advantages	YES	NO	

Financial information (capital requirements, funding sources, projections, summary of income statement projections for next 3 years)	YES	NO	
Component Total: /15			
Part I: Organizational plan:			
Summary description of the business (includes mission, business model, SWOT analysis, strategy, strategic relationships, key stakeholders/decision-makers)	YES	NO	COMMENTS:
Products/services involved	YES	NO	
Administrative plan (Includes organizational chart, approval plan, responsibilities assigned to teams)	YES	NO	
Operational Plan (includes timeline & key milestones for success; possible roadblocks and strategies to address weaknesses/threats)	YES	NO	
Regulatory and accreditation bodies	YES	NO	
Component Total: /15			
Part II: Marketing plan/Implementation/Strategy:			
Overview and goals of the marketing strategy (brand recognition, product/service recognition, definition of what is being sold or services being delivered)	YES	NO	COMMENTS:
Target market and audience (identifies demographics, psychographics, and niche market specifics)	YES	NO	COMMENTS:
Competition (describes major competitors assessing their strengths and weaknesses)	YES	NO	
Market trends (identifies industry trends and customer trends)	YES	NO	

Market research (describes methods of research, database analysis, and results summary)	YES	NO	
General description (budget % allocations on- and off-line with expected return on investment)	YES	NO	COMMENTS:
Mode and methods for marketing (tactics for success)	YES	NO	COMMENTS:
Component Total: /20			
Part III: Financial plan			
Summary of financial needs	YES	NO	COMMENTS:
Pro Forma Cash Flow Statement (Budget)	YES	NO	
Three-Year income projection or breakeven	YES	NO	
Projected balance sheet	YES	NO	
Break-even analysis	YES	NO	
Financial statement analysis	YES	NO	
Component Total: /20			
Part IV: Innovative elements and expected business outcomes			
Expressed how the innovative idea positively impacts the healthcare industry or the organization.	YES	NO	COMMENTS:
The challenges encountered during process defined.	YES	NO	
Next steps to put project into action included.	YES	NO	
Component Total: /25			
Required Components Total: /100			
Must have at least 80 out of 100 to become Fellow; if scored from 70-80, referred back for clarification and team lead reviews; if scores less than 70, referred to mentor; re-evaluated by different team			
Part V: Overall presentation			

COMMENTS:			
Sections lead logically to solution or conclusion.	YES	NO	
Subheadings are used to guide transitions.	YES	NO	
Writing is clear, sentence structure is grammatically correct.	YES	NO	
Terminology and acronyms are defined and vocabulary is appropriate to the audience.	YES	NO	
Conclusions drawn are based on the data/research presented and opinions are clearly stated as such.	YES	NO	
Presentation Total: /25			
Overall impression			
Is this plan relevant for the organization identified?	YES	NO	COMMENTS:
Does the plan address implementation (opportunities/challenges)?	YES	NO	
Does the plan coherently support the objective outlined?	YES	NO	
Impression Total: /75			
Presentation and Impression Total: /100			
Must have at least 80 out of 100 to become a Fellow; if scored from 70-80, referred back for clarification and team lead reviews; if scores less than 70, referred to mentor; re-evaluated by different team			

Name:	Team number:	Grader number:	Date:
Determine the extent to which this paper contains the following key elements (by circling yes or no). Check for the inclusion of each element. Give a score based on the number of elements present (if 50% missing, subtract 50% off component total).			
Required Components for Business Plan Expanding on Current Company			
Topic/problem/opportunity:			
Title			COMMENTS:
Is succinct and clear	YES	NO	
Is tied to at least one area of the body of knowledge	YES	NO	
Presented on coversheet	YES	NO	
Table of contents exists and provides quick reference to all major aspects of plan	YES	NO	
Project summary exists, is no longer than one page, and presents the "elevator speech" for why this topic/problem/opportunity is relevant to the organization	YES	NO	
Component Total: /5			
Executive summary: The section adequately summarizes the content and purpose of the finished plan, covering all key points including:			
The Company (introductory overview - who, what, and where)	YES	NO	COMMENTS:
Market Opportunity (opportunities the company is positioned to take advantage of)	YES	NO	
Mission Statement	YES	NO	
Management and key personnel (who they are and strengths each one brings to the company)	YES	NO	
Competitors (direct and indirect)	YES	NO	
The company's competitive advantages	YES	NO	

Financial Information (summary of income statement projections for next 3 years, ROI, and capital requirements)	YES	NO	
Component Total: /15			
Part I: Organizational plan:			
Summary description of the existing business (includes introduction, SWOT analysis, strategy, strategic relationships, key stakeholders/decision-makers)	YES	NO	COMMENTS:
Summary description of the new Business (includes mission, business model, SWOT analysis, strategy, strategic relationships, key stakeholders/decision-makers)	YES	NO	
Products/services involved	YES	NO	
Administrative plan (Includes organizational chart, approval plan, responsibilities assigned to teams)	YES	NO	
Operational Plan (includes timeline & key milestones for success; possible roadblocks and strategies to address weaknesses/threats)	YES	NO	
Incorporation Strategy (includes how the new business will work in conjunction with the existing business)	YES	NO	
Regulatory and Accreditation bodies	YES	NO	
Component Total: /15			
Part II: Marketing plan/Implementation/Strategy:			
Overview and goals of the marketing strategy (brand recognition, product/service recognition, definition of what is being sold)	YES	NO	COMMENTS:
Target market and audience (identifies demographics, psychographics, and niche market specifics)	YES	NO	COMMENTS:

Competition (describes major competitors assessing their strengths and weaknesses)	YES	NO	
Market trends (identifies industry trends and customer trends)	YES	NO	
Market research (describes methods of research, database analysis, and results summary)	YES	NO	
General description (budget % allocations on- and off-line with expected return on investment, relationship with current business)	YES	NO	COMMENTS:
Mode and methods for marketing (tactics for success)	YES	NO	COMMENTS:
Component Total: /20			
Part III: Financial plan			
Summary of financial needs	YES	NO	COMMENTS:
Pro Forma Cash Flow Statement (Budget)	YES	NO	
Three-Year income projection	YES	NO	
Projected balance sheet	YES	NO	
Break-even analysis	YES	NO	
Profit & Loss Statement (Income Statement)	YES	NO	
Balance sheet	YES	NO	
Financial statement analysis	YES	NO	
Business Financial History	YES	NO	
Component Total: /20			
Part IV: Innovative elements and expected business outcomes			
Expressed how the innovative idea positively impacts the healthcare industry or the organization.	YES	NO	COMMENTS:
The challenges encountered during process defined.	YES	NO	

Next steps to put project into action included.	YES	NO	
Component Total: /25			
Required Components Total: /100			
Must have at least 80 out of 100 to become Fellow; if scored from 70-80, referred back for clarification and team lead reviews; if scores less than 70, referred to mentor; re-evaluated by different team			
Part V: Overall presentation			
COMMENTS:			
Sections lead logically to solution or conclusion.	YES	NO	
Subheadings are used to guide transitions.	YES	NO	
Writing is clear, sentence structure is grammatically correct.	YES	NO	
Terminology and acronyms are defined and vocabulary is appropriate to the audience.	YES	NO	
Conclusions drawn are based on the data/research presented and opinions are clearly stated as such.	YES	NO	
Presentation Total: /25			
Overall impression			
Is this plan relevant for the organization identified?	YES	NO	COMMENTS:
Does the plan address implementation (opportunities/challenges)?	YES	NO	
Does the plan coherently support the objective outlined?	YES	NO	
Does the plan work logically with the existing organization?	YES	NO	
Impression Total: /75			

Presentation and Impression Total: /100

Must have at least 80 out of 100 to become a Fellow; if scored from 70-80, referred back for clarification and team lead reviews; if scores less than 70, referred to mentor; re-evaluated by different team



Name:

Team #:

Grader#:

Date:

Please review business plan proposal. As a reminder, the objective of Fellowship in ACMPE is to demonstrate the skills and abilities that contribute to the advancement of medical practice leadership and the healthcare industry.

- A thought leader capable of identifying key improvement areas for the sustainability and success of an organization.
- An innovative thinker able to manage change in the complex healthcare environment.
- A proven problem-solver qualified to tackle the greatest challenges in a healthcare organization.

Recommendation – Please check one

Accept in present form

Resubmit, major revisions needed as noted below

Problem areas and recommendations for improvement:

Please identify specific problem areas and revisions needed for the author.

Refer to Mentor Team for Assistance *(Please explain why this author needs mentor assistance)*

Outside Technical Review Required - Submission contains legal implications or other technical subject matter (e.g., clinical, etc.) which is beyond my ability to evaluate or verify. *(Please explain why this outline needs special review)*

General Comments:
