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| **Information and Referral Initiative** |
| **Initiative #:** |  | **Initiative Title:** | ***Information and Referral (I & R)*** |
| **Initiative Description:**  | **(Community name)** has a systematic process for making available services known to families and providers as well as a process for referring families to services they want, need, and for which they are eligible. |
| **Overall Result Desired:** | **(Community name)** AOK Network has strategies in place to:* identify, update, and disseminate information about available services and supports
* facilitate making, receiving and tracking referrals
* assure that families receive the services they want and need.
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| **Objective** |
| **Objective #:** |  | **Objective Name:** | ***Information and Referral Vision*** |
| **Objective Statement:** | By --------, Network partners have a vision of their proposed Comprehensive Information and Referral system that includes key metrics to define success and the expected impact to families as a result of adopting a vision statement that leverages current local referral practices and tools, realizes innovative practices and engages community commitment.  |
| **Projected date objective will be accomplished:**  |       |

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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | **Introduction to the Integrated Referral and Intake System (IRIS)** |
| **Approach Description:** | AOK Network partners will be introduced to IRIS as a possible tool to facilitate making, receiving and tracking referrals. Partners will identify how current referral practices may be enhanced through the utilization of IRIS.  |
| **Projected Measurable Outputs:** | * Introduction to IRIS (5-minute video (<http://connectwithiris.org/what-is-iris/> ) presented at AOK Network meeting
* Information and Referral Workgroup created
* (Projected Number) I & R Workgroup meetings
* Workgroup partners navigate IRIS through test environment
* (Projected Number) Small Group Discussions on pros and cons of utilizing IRIS
* Utilization of IRIS is determined by Network partners
 |
| **Projected Measurable Outcomes:** | * Network partners increase their understanding of how IRIS may enhance current I & R practices.
 |
| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** | September 2019 |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | **Facilitate a visioning process**  |
| **Approach Description:** | Network partners will adopt a clear, specific, compelling picture of what the desired Community’s Information and Referral System will look like in three to five years that includes metrics to define success.  |
| **Projected Measurable Outputs:** | * (Projected Number) meeting/s held to facilitate a visioning process
* List of metrics to define success developed
* Local Information and Referral System Vision Statement created and approved
* Metric tools identified
 |
| **Projected Measurable Outcomes:** | *
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| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |  |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | Gain Commitment to the Vision |
| **Approach Description:** | Network Partners will gain commitment to the approved vision by comparing it to current practices and distinguishing differences in the expected impact to families and the community, recognizing past accomplishments and breakthroughs, identify what yet needs to be accomplished and identify critical stakeholders to engage in promoting the vision.  |
| **Projected Measurable Outputs:** | * (Projected Number) meeting/s held to compare vision to current practices.
* Comparison document completed
* List of critical stakeholders developed
* Plan to engage critical partners to support efforts toward vision developed
 |
| **Projected Measurable Outcomes:** | *
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| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |       |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
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| **Objective** |
| **Objective #:** |  | **Objective Name:** | ***Identifying System Coordination Issues*** |
| **Objective Statement:** | By --------, stakeholders have prioritize the top three coordination issues (and their root causes) that are getting in the way of an effective information and referral system that will be addressed through strategy design.  |
| **Projected date objective will be accomplished:**  |       |

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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | **Prioritize three specific system coordination issues** |
| **Approach Description:** | Network partners will prioritize the top three system coordination issues that are getting in the way of an effective information and referral system. |
| **Projected Measurable Outputs:** | *
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| **Projected Measurable Outcomes:** | *
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| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |       |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
| **#** | **Action** | **Projected Timeline** |
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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | **Conduct a root cause analysis**  |
| **Approach Description:** | By --------, stakeholders will conduct a root cause analysis, adding detail and checking logic on the identified three system coordination issues that are getting in the way of an effective information and referral system. Root cause analysis will be reviewed with community stakeholders to determine what additional information is needed. |
| **Projected Measurable Outputs:** | *
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| **Projected Measurable Outcomes:** | *
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| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |       |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
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| **Objective** |
| **Objective #:** |  | **Objective Name:** | ***Design System Change Approaches/Strategies*** |
| **Objective Statement:** | By --------, Network partners acknowledge challenges in the referral network and develop strategies to address these issues. |
| **Projected date objective will be accomplished:**  |  |

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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | Prioritize, Label and Translate Specific Coordination Issues |
| **Approach Description:** | Network partners will prioritize coordination system issue. Label each and their related root causes by system characteristic, then prioritize the root causes associated each identified system issue. |
| **Projected Measurable Outputs:** | * Root Cause Analysis is labeled by system characteristics
* Root Causes are prioritized by targeting 2-3 different types of system characteristics
* (Projected Number) Root Causes will be addressed through strategy design
 |
| **Projected Measurable Outcomes:** | *
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| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |       |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
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| **Approach** |
| **Approach #:** |  | **Approach Name:**  | Design Strategies to Address Prioritized Root Causes |
| **Approach Description:** | Network partners and critical stakeholders will brainstorm strategy ideas that target identified root causes and promote system improvements through identified changes in the system structure and/or function, building on what works and prioritizing stakeholder perspectives and ideas.  |
| **Projected Measurable Outputs:** | * (Projected Number) meetings are completed to engage Target population’s perspective in the strategy design process.
* Integrated strategy/s are developed
* Identified strategies are translated into the strategic plan
 |
| **Projected Measurable Outcomes:** | *
 |
| **Evidence of Success: Relative to your outputs and outcomes noted above, indicate how you will track your efforts in the AOK Connect Database.** |
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| **Projected date approach will be accomplished:** |       |
| **If approach is an ongoing effort, when will the efforts be completed for this fiscal year?** | **Is or will a workgroup be established to support this approach?** |
| **☐** Monthly**☐** Quarterly☐ Semi-annually ☐ Annually | ☐ Yes, a workgroup is currently established |
| **Workgroup Name:**  |  |
| ☐ Yes, a workgroup will be established☐ No |
| **Action Steps** |
| **#** | **Action** | **Projected Timeline** |
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