



Learning Collaborative Call for Applications

Capital Development Learning Collaborative - Late Project Planning Stages

Overview

A learning collaborative is a dynamic, virtual peer exchange enabling dialogue among stakeholders pursuing similar objectives to explore promising best practices, solve challenging problems, and create new opportunities. The **Capital Development Learning Collaborative - Late Project Planning Stages** is designed to assist health centers planning a capital project during the next one to three years and focusing on the later phases of project plans. Through a series of four virtual sessions beginning **March 26, 2024**, participants will go beyond the initial planning phase of capital development to explore the complexities of the numerous and often complex financing approaches and options, and highlight “lessons learned”.

Learning sessions will be enhanced with valuable tools and resources, including customized Performance Evaluation Profiles providing multiyear performance trends benchmarked against peers, a Debt Capacity Analysis to estimate the amount of debt a health center can afford to take on given its historical or projected financial position, as well as opportunities for one-on-one guidance to help participating health centers understand specific

The Learning Collaborative has two primary components:

1. *Group Learning:* Through a series of four virtual meetings conducted between March and April 2024, health centers will go beyond the basics of planning, financing, and developing capital projects that will better serve their communities. The sessions will be conducted via Zoom and will be one hour in length.

Session Schedule:

Organizational and Financial Readiness, March 26th 4-5:00 pm EST

Advancing a Project Concept and Determining Project Feasibility, April 2nd 4-5:00 pm EST

Funding: Evaluating Your Financing Options and Fundraising Plans, April 9th 4-5:00 pm EST

Implementation: Managing a Project and Transition Planning, April 16th 4-5:00 pm EST

2. *Individualized Planning Services:* Each Learning Collaborative session will include free resources and planning templates that participants can adapt for their individual organization and projects. In addition, some individualized guidance from Capital Link consultants will be available.

Participation

There is no fee for participants as this Learning Collaborative is funded by HRSA through its cooperative agreement with Capital Link. We recommend each organization **enroll at least two team members**. All organizations interested in participating must:

- ✓ **Complete and submit an application by March 20, 2024 to Kristin Allen at kallen@caplink.org.**
- ✓ Commit to engage in all Learning Collaborative sessions and exercises with the goal of incorporating new knowledge and provide feedback on the overall structure and effectiveness of the Collaborative after the last session.
- ✓ Obtain written consent from your health center’s leadership for your health center’s participation in the Collaborative—see the last page of this application.



Application of Interest

Planning & Financing a Capital Project to Accommodate Integrated Care

Eligibility

- ☐ The health center applicant has obtained written consent from leadership for your organization's participation in the Collaborative (see the last page of this application).
- ☐ The health center provides **latest available three years of financial audits and UDS data for 2021**.
- ☐ The health center applicant is considering or beginning the capital planning process and has the capacity to proceed.

Contact Information

Date Submitted	
Health Center Name	
Location	<i>Street, City, State, Zip Code:</i>
Person Submitting Application	<i>Name, Title, Telephone Number, Email Address:</i>
Primary Contact	<i>Name, Title, Telephone Number, Email Address:</i>
Name of Intended Team Participants (2-3 individuals)	<i>We recommend at least two team members.</i>
1.	<i>Title, Organization, Telephone Number, Email address:</i>
2.	<i>Title, Organization, Telephone Number, Email address:</i>
3.	<i>Title, Organization, Telephone Number, Email address:</i>

General Information

FQHC Designation(s)	Yes	No	If No, Target Application Date	Approval Date
Section 330 FQHC				
FQHC Look-Alike				
Other, please specify:				

Services Summary	<i>Services Provided (medical, dental, behavioral health, etc.):</i> <i>Number of Patients:</i>
Organizational Status	<i>Submit copies of latest three years of financial audits</i>

Project Information

Project Location (if known)	<i>Street, City, State, Zip Code:</i>
Development Timeline	<i>Estimated timing for planning, development team assemblage, site acquisition, construction, and/or operations:</i>
Financing/Other Information	<i>Any identified sources of funding, including status of financing commitments? Have you begun to create a development budget? Estimated size of project budget? Estimated total square footage of new or rehabilitated building? Services to be offered in new space?</i>
Preparedness	<i>On a scale of 1 to 5 (with 5 being extremely prepared), how prepared do you feel your organization is to undergo a capital project at this time?</i> <div style="display: flex; justify-content: space-around; width: 100%;"> 1 2 3 4 5 </div>

Expectations

Barriers	<i>What barriers have you faced in planning for facility expansion?</i>
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Barriers (continued)	<i>What capital resources have you tried/want to access, but need more information?</i>
Decision Making	<i>What questions about capital expansion have been raised within your organization?</i>
	<i>What do you need/want to understand about your market when making capital expansion decisions?</i>
Other	<i>What other information do you hope to learn about/share during the Learning Collaborative?</i>

Consent for Participation from Health Center Leadership (Direct Supervisor or Senior Management)

I understand and consent to the participation of members representing my health center in Capital Link's Capital Development Learning Collaborative - Late Project Planning Stages. I understand that participation will include attendance at six group webinars and engaging in coaching with a Capital Link staff member to make progress in achieving readiness for planning a capital development project.

Printed Name

Title

Signature

Date

If a signature cannot be obtained, health center leadership may email written consent to kallen@caplink.org.

Please submit your completed application of interest by March 20, 2024 to Kristin Allen at kallen@caplink.org.

About Capital Link

Capital Link is a national, non-profit organization that has worked with hundreds of community health centers and Primary Care Associations (PCAs) for 30 years to plan for sustainability and growth, access capital, improve and optimize operations and financial management, and articulate value. Established through the health center movement, we are dedicated to strengthening health centers—financially and operationally—in a rapidly changing marketplace. Capital Link is a National Technical Assistance and Training provider through a National Cooperative Agreements with HRSA. For more information, visit us at www.caplink.org.