CURRICULUM 01 / INSTRUCTOR-LED DEMONSTRATION + HANDS-ON PRACTICE

Healthcare Partnership Development

Audience: outreach staff / healthcare navigators | Duration: approximately 35 minutes | Materials: fictional prospect profiles, blank outreach log, scoring rubric

Learning outcome: make an evidence-based outreach decision, record an actionable next step, and select meaningful progress measures.

Module 1 · Diagnose and prioritize (about 17 min)

Teach the decision process — do not start by handing learners a ranking exercise.

1. **Frame the real problem (2 min).** "We have time for one call today. How do we choose the best partner, rather than just the highest number?" Ask learners what makes a prospect actionable.
2. **Explain the decision rule (3 min).** First, compare the priority score from the eight-factor, 40-point prospect model. Second, check whether the decision-maker contact is verified. A high score signals potential; verification determines immediate readiness.
3. **Model the skill (3 min).** Show Harbor (34/40, verified) and Beacon (29/40, verified). Think aloud: "Both can be contacted. Harbor ranks higher, so I would contact Harbor first." Then reveal Coastal (36/40, unverified) and explain why it needs verification before being actioned.
4. **Guide the group (4 min).** Ask: "What could we do with Coastal today?" Prompt learners to distinguish a verification task from a partner conversation. Co-create: verify decision-maker name, contact channel and owner by an agreed date.
5. **Independent try + feedback (5 min).** Learners choose one first contact, defend it in a sentence, and identify one missing fact. Trainer provides immediate feedback using the model answer on page 2.

Module 2 · Execute and measure (about 18 min)

1. **Teach the outreach log (3 min).** Show the five fields: partner; action/contact method; owner; due date; status/next step. Demonstrate that "follow up soon" is not an actionable record.
2. **Model an outreach action (4 min).** Fill an example: "Harbor / email invitation to 15-minute introductory meeting / outreach coordinator / next business day / pending response; check again in three business days." Explain where each item belongs.
3. **Demonstrate the message (3 min).** Model an opening: "I'm reaching out about a potential referral and education partnership. Could we schedule a brief conversation?" Discuss adapting language for the partner and avoiding assumptions.
4. **Practice and choose measures (5 min).** Learners draft a record and identify one activity measure (e.g., contacts completed) and one result measure (e.g., agreements signed). Explain why both are needed.
5. **Debrief (3 min).** Invite one learner to share a record; ask peers what is missing. Trainer corrects incomplete fields and distinguishes activity from outcome.

Video teaching focus: show the priority comparison, narrate the decision rule, and pause for the learner's choice. The app appears only as the practice environment.

CURRICULUM 01 / LEARNER PRACTICE + SCORING GUIDE

Partnership Activity: Your First Outreach Decision

Scenario: You have capacity for one partner conversation today. All organizations and scores below are fictitious, created for training.

Prospect	Score (of 40)	Decision-maker contact
Harbor Recovery Network	34	Verified
Coastal Community Services	36	Not yet verified
Beacon Wellness Center	29	Verified

Follow these steps (work alone, then compare with a partner)

1. **Scan the data.** Underline the highest score, and circle the prospects whose contacts are verified. (1 min)
2. **Make the decision.** Write: "I would contact ___ first because ___." Use both the score and readiness of the contact. (2 min)
3. **Resolve the gap.** Write one verification action for the unverified prospect, naming what must be confirmed and who will do it. (2 min)
4. **Draft your outreach.** Write one or two sentences proposing a short introductory conversation and the reason for connecting. (2 min)
5. **Document the next step.** Enter the chosen partner, method, owner, due date, current status and follow-up action into the practice outreach log. (3 min)
6. **Measure progress.** Select one process metric and one outcome metric; explain what each tells a supervisor. (2 min)

Worked answer and feedback

Best first contact today: Harbor. Its contact is verified and its score (34) is higher than the other verified prospect, Beacon (29). Coastal has the top score (36), but its decision-maker contact must first be verified. A suitable Coastal task: "Outreach coordinator confirms decision-maker name and email by the next business day."

Acceptable log entry: Harbor | email meeting invitation | outreach coordinator | next business day | pending response; check again three business days later. Acceptable metrics: number of contacts completed (activity) and agreements signed (result).

Performance assessment · 8 points

Criterion	2 points: strong evidence	1 point: partial	0 points
Decision	Chooses a reachable priority and cites score + verification	Choice or rationale incomplete	Unsupported priority
Verification	Defines missing fact, owner and timing	Missing one element	No meaningful task
Execution	Clear outreach and complete next-action record	Some fields unclear/missing	Not actionable
Measurement	One process and one outcome metric, both explained	Measures named but not distinguished	Missing/incorrect metrics

Passing standard: 6/8, plus a coachable explanation of the priority decision. If not met, trainer re-models the missing skill and gives a second fictional scenario.