

# Resource Guide

## *Compilation of Network Resources*

### Introduction

Community-based organizations (CBOs) operate in an increasingly complex and competitive environment, requiring them to adopt strategic approaches to sustain and amplify their impact. Conducting an external market assessment is crucial for understanding the broader landscape, including emerging trends, stakeholder expectations and potential collaboration opportunities. By leveraging the insights gained from such assessments, CBOs can strengthen their business intelligence, enabling them to develop compelling business cases that appeal to cross-sector partners, particularly health care partners. These partnerships, built on a foundation of well-researched and data-driven proposals, not only enhance CBOs' credibility but also can foster innovative solutions to address pressing challenges in meeting the needs of older adults, people living with disabilities and their caregivers.

Funded by **The SCAN Foundation**, USAging's Aging and Disability Business Institute, in partnership with Collaborative Consulting, convened business acumen learning collaboratives with three California CBO networks<sup>1</sup>—established and emerging. These collaboratives aimed to enhance organizations' capabilities for contracting with health care entities in alignment with CalAIM (California's Medicaid transformation), the California Master Plan for Aging and other health care initiatives.

The learning collaborative convenings highlighted the essential role of market research and structured information gathering in building effective partnerships for community care delivery. Community care, also called social care, refers to the array of home and community-based services provided to older adults, people with disabilities and caregivers to promote health and wellness, and assist with their functional and other support needs.

A key lesson learned is the importance of having a systematic approach to capturing, organizing and continuously updating market intelligence. Each respective collaborative worked to adopt practices and methodologies for partnership development, like using process mapping, learning costing and pricing strategies, and identifying and gathering essential

data and information to support multi-organization coordination. This includes identifying publicly available resources that demonstrate the value of community care services and strengthen the business case for partnerships.

Additionally, generating an understanding of other organizations operating in their respective markets, their missions and roles in serving the community, how they are funded, and whether they represent potential competitors or partners are all critical pieces of information needed to inform one's own business practices. A comprehensive market assessment not only helps these networks inform their strategic decisions but also provides critical insights into structuring contracting relationships and leveraging the unique strengths of different organizations to align service delivery within a coordinated community care network.

This compilation provides links to resources to support conducting market research to better inform CBO business planning, strategy and the creation of compelling business cases.

<sup>1</sup> California Association of Area Agencies on Aging; Meals on Wheels California; Venture County Community Information Exchange

# Market Assessment and Analysis

## Getting Started: Why Conduct a Market Assessment

- **ANSARADA:** Business Readiness, Market Assessment [www.ansarada.com/business-readiness/corporate/market-assessment](http://www.ansarada.com/business-readiness/corporate/market-assessment)
- **Qualtrics, Experience Management:** Market Intelligence and How You Should Use It, [www.qualtrics.com/experience-management/research/market-intelligence](http://www.qualtrics.com/experience-management/research/market-intelligence)
- **CO—by U.S. Chamber of Commerce:** How to Conduct a Market Analysis, [www.uschamber.com/co/start/strategy/market-analysis-guide-for-business](http://www.uschamber.com/co/start/strategy/market-analysis-guide-for-business)
- **U.S. Small Business Administration:** Market Research and Competitive Analysis, [www.sba.gov/business-guide/plan-your-business/market-research-competitive-analysis](http://www.sba.gov/business-guide/plan-your-business/market-research-competitive-analysis)

## Public Resources for Policy Trends and Insights

- **Administration or Community Living:** Data and Research, [acl.gov/aging-and-disability-in-america/data-and-research](http://acl.gov/aging-and-disability-in-america/data-and-research)
- **Aging and Disability Business Institute:** Monthly Newsletter, [www.aginganddisabilitybusinessinstitute.org/subscribe-to-our-mailing-list](http://www.aginganddisabilitybusinessinstitute.org/subscribe-to-our-mailing-list)
- **Aligning for Health:** Social Determinants Updates, [aligningforhealth.org/category/sdoh-updates](http://aligningforhealth.org/category/sdoh-updates)
- **ATI Advisory:** Data and Research, [atiadvisory.com](http://atiadvisory.com) **Centers for Medicare & Medicaid Services (CMS) Innovation Center:** Priorities, Innovation Models, [www.cms.gov/priorities/innovation/models](http://www.cms.gov/priorities/innovation/models)
- **CMS:** Datasets to Help You Better Understand CMS Programs, [data.cms.gov/](http://data.cms.gov/)
- **CMS:** Map, Where Innovation is Happening, [www.cms.gov/priorities/innovation/where-innovation-happening](http://www.cms.gov/priorities/innovation/where-innovation-happening)
- **Health Management Associates:** Weekly Roundup, [www.healthmanagement.com/hma-weekly-roundup](http://www.healthmanagement.com/hma-weekly-roundup)
- **Kaiser Family Foundation:** Data and Research, [www.kff.org](http://www.kff.org)
- **National Academy for Health Policy:** Data and Research, [nashp.org](http://nashp.org)

## Gathering and Organizing Your Insights

- **Aging and Disability Business Institute:** External Market Assessment Tool, [www.aginganddisabilitybusinessinstitute.org/assessment-tools/external-market-assessment](http://www.aginganddisabilitybusinessinstitute.org/assessment-tools/external-market-assessment)
- **Aging and Disability Business Institute:** Competitor Analysis Tool, [www.aginganddisabilitybusinessinstitute.org/assessment-tools/competitor-analysis](http://www.aginganddisabilitybusinessinstitute.org/assessment-tools/competitor-analysis)
- **Aging and Disability Business Institute:** Opportunities Assessment Tool, [www.aginganddisabilitybusinessinstitute.org/assessment-tools/opportunity-assessment](http://www.aginganddisabilitybusinessinstitute.org/assessment-tools/opportunity-assessment)

## Partnership Development/Business Case

### Getting Started: Considerations for CBO-Health Care Partnerships

- **Aging and Disability Business Institute:** CBO-Health Care Contracting Survey, [www.aginganddisabilitybusinessinstitute.org/resources/cbo-health-care-contracting-survey](http://www.aginganddisabilitybusinessinstitute.org/resources/cbo-health-care-contracting-survey)
- **Aging and Disability Business Institute:** Five Key Factors for Successful Health Care and CBO Partnerships, [www.aginganddisabilitybusinessinstitute.org/five-key-factors-for-successful-health-care-cbo-partnerships](http://www.aginganddisabilitybusinessinstitute.org/five-key-factors-for-successful-health-care-cbo-partnerships)
- **Aging and Disability Business Institute:** How to Guide and Worksheet: Developing Your Value Proposition for Medicare Advantage Plans, [www.aginganddisabilitybusinessinstitute.org/adbi-resource/value-proposition-how-to-guide-and-worksheet](http://www.aginganddisabilitybusinessinstitute.org/adbi-resource/value-proposition-how-to-guide-and-worksheet)
- **HealthBegins:** The Return on Investment (ROI) Calculator for Healthcare Partnerships to Address Social Needs, [roi.healthbegins.org/welcome](http://roi.healthbegins.org/welcome)
- **Nonprofit Finance Fund:** Integrating to Improve Health: Partnership Models between Community-Based and Health Care Organizations, [nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships](http://nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships)
- **Nonprofit Finance Fund:** Resources for Community-Based Organization and Healthcare Partnerships, [nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships](http://nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships)
- **CO—by U.S. Chamber of Commerce:** 5 Steps to Identify New Products and Services, [www.uschamber.com/co/grow/sales/developing-new-products-and-services](http://www.uschamber.com/co/grow/sales/developing-new-products-and-services)
  - Value Proposition Tool: Articulating Value Within Community-Based and Health Care Organization Partnerships, [nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships](http://nff.org/fundamental/resources-community-based-organization-and-healthcare-partnerships)

### Gathering and Organizing Your Insights

- **Aging and Disability Business Institute:** Building the Business Case Tool, [www.aginganddisabilitybusinessinstitute.org/assessment-tools/building-the-business-case](http://www.aginganddisabilitybusinessinstitute.org/assessment-tools/building-the-business-case)

### Coordinating Care Through Networks

- **Aging and Disability Business Institute:** Building a CBO Network for Health Care Contracting: Choosing the Right Model, [www.aginganddisabilitybusinessinstitute.org/adbi-resource/building-a-cbo-network-for-health-care-contracting-choosing-the-right-model](http://www.aginganddisabilitybusinessinstitute.org/adbi-resource/building-a-cbo-network-for-health-care-contracting-choosing-the-right-model)
- **Aging and Disability Business Institute:** Building a Stronger Network: Questions to Consider and an Action Plan, [www.aginganddisabilitybusinessinstitute.org/adbi-resource/building-a-stronger-network-questions-to-consider-and-an-action-plan](http://www.aginganddisabilitybusinessinstitute.org/adbi-resource/building-a-stronger-network-questions-to-consider-and-an-action-plan)
- **Aging and Disability Business Institute:** Lifting The Veil: How Networks Form, Operate, Struggle and Succeed, [www.aginganddisabilitybusinessinstitute.org/adbi-resource/lifting-the-veil-how-networks-form-operate-struggle-and-succeed](http://www.aginganddisabilitybusinessinstitute.org/adbi-resource/lifting-the-veil-how-networks-form-operate-struggle-and-succeed)
- **Center of Excellence to Align Health and Social Care (COE):** Community Care Hub 101 Learning Series, [www.aginganddisabilitybusinessinstitute.org/community-care-hub-101-learning-series](http://www.aginganddisabilitybusinessinstitute.org/community-care-hub-101-learning-series)
- **COE:** Catalog of Resource for Developing and Community Care Hub, [www.aginganddisabilitybusinessinstitute.org/wp-content/uploads/2025/01/NCL-Catalog-508-1.30.25.pdf](http://www.aginganddisabilitybusinessinstitute.org/wp-content/uploads/2025/01/NCL-Catalog-508-1.30.25.pdf)

## Conclusion

Understanding the market in which your organization operates is a critical step toward enhancing its overall effectiveness and impact. In an evolving health care landscape, where innovation and collaboration are essential, gathering and organizing information allows CBOs to identify gaps, anticipate trends and position themselves as valuable partners. By using this data to develop clear and compelling value propositions, aging and disability CBOs can demonstrate their expertise and capability to potential cross-sector collaborators. This strategic approach not only strengthens partnerships but also ensures that CBOs remain adaptable and aligned with the changing needs of the communities they serve, ultimately driving greater community impact and organizational sustainability.

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