

<b>OVERVIEW: Capstone Partnership Transformational Support Levels (Years 1-2) Individual Healthcare Organization – Size &lt;1,000 Employees*</b>		
<b>Essential</b>	<b>Premium</b>	<b>Concierge</b>
<p><b><u>ASSESSMENT</u></b></p> <p><b>Remote Pre-Study - Current State Assessment (6-10 weeks)</b></p> <ul style="list-style-type: none"> <li>● Assess Processes, Systems, and Structures for Achieving Results, Making Improvements, and Planning/Executing Strategies</li> <li>● Review of Results Trending</li> <li>● Leadership Learning Needs Assessment</li> </ul>	<p><b><u>ASSESSMENT</u></b></p> <p><b>Remote Pre-Study - Current State Assessment (6-10 weeks)</b></p> <ul style="list-style-type: none"> <li>● Assess Processes, Systems, and Structures for Achieving Results, Making Improvements, and Planning/Executing Strategies</li> <li>● Review of Results Trending</li> <li>● Leadership Learning Needs Assessment</li> </ul>	<p><b><u>ASSESSMENT</u></b></p> <p><b>Remote Pre-Study - Current State Assessment (6-10 weeks)</b></p> <ul style="list-style-type: none"> <li>● Assess Processes, Systems and Structures for Achieving Results, Making Improvements, and Planning/Executing Strategies</li> <li>● Review of Results Trending</li> <li>● Leadership Learning Needs Assessment</li> </ul> <p><b>On-Site Assessment Activities – One Day (Visit 1)</b> with two Transformation Advisors (One Advisor will be a Capstone Principal)</p> <ul style="list-style-type: none"> <li>● Observations of Operations</li> <li>● Key Stakeholder Interviews and Focus Groups</li> </ul> <p><b>Re-Assessment Activities (on-site) – One Coach, One Day (end of Year 1 and end of Year 2)</b></p>
<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>● Customized Team Structure</li> <li>● Three Years of Action Plans for Each Team</li> <li>● Three Years of Leadership Development Plans</li> </ul>	<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>● Customized Team Structure</li> <li>● Three Years of Action Plans for Each Team</li> <li>● Three Years of Leadership Development Plans</li> </ul>	<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>● Customized Team Structure</li> <li>● Three Years of Action Plans for Each Team - added customization based on on-site assessment/reassessment activities</li> <li>● Three Years of Leadership Development Plans - added customization based on on-site assessment/reassessment activities</li> </ul>

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<b>OVERVIEW: Capstone Partnership Transformational Support Levels (Years 1-2)</b> Individual Healthcare Organization – Size <1,000 Employees*		
Essential	Premium	Concierge
<p><b><u>EXECUTION - INITIATION SUPPORT</u></b></p> <p><b>Remote &amp; 2 Days On-Site (Visit 1):</b></p> <ul style="list-style-type: none"> <li>● Team Formation Resources and Support (Remote)</li> <li>● Team Action Plan Initiation Sessions (On-Site)</li> <li>● Leadership Action Plan Initiation Session(s) (On-Site)</li> </ul>	<p><b><u>EXECUTION - INITIATION SUPPORT</u></b></p> <p><b>Remote &amp; 2 Days On-Site (Visit 1):</b></p> <ul style="list-style-type: none"> <li>● Team Formation Resources and Support (Remote)</li> <li>● Team Action Plan Initiation Sessions (On-Site)</li> <li>● Leadership Action Plan Initiation Session(s) (On-Site)</li> </ul> <p><b>2-Days On-Site (Visit 2):</b></p> <ul style="list-style-type: none"> <li>● Leadership Development: Capstone Leadership Summit</li> </ul>	<p><b><u>EXECUTION - INITIATION SUPPORT</u></b></p> <p><b>Remote &amp; On-Site (Visit 1)</b></p> <ul style="list-style-type: none"> <li>● Team Formation Resources and Support (Remote)</li> <li>● Team Action Plan Initiation Sessions (On-Site)</li> <li>● Leadership Action Plan Initiation Session(s) (On-Site)</li> </ul> <p><b>2-Days On-Site (Visit 2):</b></p> <ul style="list-style-type: none"> <li>● Leadership Development: Capstone Leadership Summit</li> </ul>
<p><b><u>EXECUTION SUPPORT</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>● Coaching (Remote) with Steering Team - 3 monthly calls after on-site kick-off and then every once every six months</li> <li>● Unlimited Access to Partner-Only Resources via Website</li> <li>● Remote team-specific coaching events/offerings</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>● Unlimited access to CapstoneEDU</li> <li>● Partnership Discounts (50%) to all Capstone public training offerings</li> </ul>	<p><b><u>EXECUTION SUPPORT</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>● Coaching (Remote) with Steering Team - 6 monthly calls after on-site kick-off and then once per quarter</li> <li>● Unlimited Access to Partner-Only Resources via Website</li> <li>● Remote team-specific coaching events/offerings</li> <li>● On-Site Team Coaching/Planning – 1 day per year (Visit 3 &amp; Visit 4)</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>● Unlimited access to CapstoneEDU</li> <li>● Partnership Discounts (50%) to all Capstone public training offerings</li> </ul>	<p><b><u>EXECUTION SUPPORT</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>● Coaching (Remote: Steering Team - monthly</li> <li>● Unlimited Access to Partner-Only Resources via Website</li> <li>● Remote team-specific coaching events/offerings</li> <li>● On-Site Team Coaching - 2 days each year</li> <li>● Capstone Concierge Coaching</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>● Unlimited Access to CapstoneEDU</li> <li>● 2 Registrations and Discounts (50%) for each Capstone public training offering</li> <li>● Two 1-Day On-Site Leadership Trainings</li> </ul>

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<b>Capstone Partnership Transformation Support Pricing</b> <b>Individual Healthcare Organization – Size &lt;1,000 Employees*</b>		
Essential	Premium	Concierge
<b>All Levels - Partnership Initiation Phase I</b> (approx. 6-10 weeks): \$10,000.00		
<b>Initial Partnership (2 Years)</b> 8 Quarterly Payments of \$7,000 \$28,000 per Year	<b>Initial Partnership (2 Years)</b> 8 Quarterly Payments of \$10,000 \$40,000 per Year	<b>Initial Partnership (2 Years)</b> 8 Quarterly Payments of \$16,000 \$64,000 per Year
<b>Initial + 1 Renewal (4 Years)</b> 16 Quarterly Payments of \$6,000 \$24,000 per Year	<b>Initial + 1 Renewal (4 Years)</b> 16 Quarterly Payments of \$8,500 \$34,000 per Year	<b>Initial + 1 Renewal (4 Years)</b> 16 Quarterly Payments of \$14,000 \$56,000 per Year
<b>Additional Expense Considerations:</b> <ul style="list-style-type: none"> <li>Travel expenses including mileage, meals and lodging is reimbursed by the client. Capstone will reduce these fees when on-site work days are coordinated with other clients during the same business travel week.</li> <li>Premium &amp; Concierge Support Levels: training venue, and associated expenses (meals, AV, etc.), will be provided by the Client</li> </ul>		
<b>Pricing for Adding Services to Transformation Support Partnership Level:</b> <ul style="list-style-type: none"> <li>On-Site Assessment with Action Plan Customization: \$20,000.00</li> <li>On-Site Reassessment with Action Plan Customization: \$10,000.00</li> <li>Strategic Planning Facilitation: \$10,000.00</li> <li>On-Site Coaching/Training: \$5,000.00 per day</li> </ul>		

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<b>OVERVIEW: Capstone Partnership Renewal Support Levels (2 Year Increments)</b>		
<b>Essential</b>	<b>Premium</b>	<b>Concierge</b>
<p><b><u>REASSESSMENT</u></b></p> <p>Self-Reassessment Process (remote support/ resources) - Mid Year and End of Year</p>	<p><b><u>REASSESSMENT</u></b></p> <p>Self-Reassessment Process (remote support/ resources) - Mid Year and End of Year</p>	<p><b><u>REASSESSMENT</u></b></p> <p>Self-Reassessment Process (remote support/ resources) - Mid Year and End of Year</p>
<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>• Templates and resources for development of Team Plans</li> </ul>	<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>• Templates and resources for development of Team Plans</li> </ul>	<p><b><u>PLANNING</u></b></p> <ul style="list-style-type: none"> <li>• Templates and resources for development of Team Plans</li> <li>• Facilitation of All Teams Planning Workshop</li> <li>• Annual Review &amp; Recommendations for Team Plans</li> </ul>
<p><b><u>EXECUTION</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>• Coaching (Remote: video- or phone-conferencing) with Steering Team - once every six months</li> <li>• Unlimited Access to Partner-Only Resources via Website</li> <li>• Remote team-specific coaching events/offerings</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>• Unlimited access to CapstoneEDU</li> <li>• Partnership Discounts (50%) to all Capstone public training offerings</li> </ul>	<p><b><u>EXECUTION</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>• Quarterly Coaching (Remote: video- or phone- conferencing) with Steering Team</li> <li>• Full Access to Partner-Only Resources via Website</li> <li>• Remote team-specific coaching events/offerings</li> <li>• On-Site Team Coaching/Planning - 1 day per year</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>• Unlimited access to CapstoneEDU</li> <li>• Partnership Discounts (50%) to all Capstone public training offerings</li> </ul>	<p><b><u>EXECUTION</u></b></p> <p><b>Coaching/Resources:</b></p> <ul style="list-style-type: none"> <li>• Quarterly Coaching (Remote: video- or phone- conferencing) with Steering Team</li> <li>• Full Access to Partner-Only Resources via Website</li> <li>• Remote team-specific coaching events/offerings</li> <li>• On-Site Team Coaching and/or Specialized Support - Two 1 day visits per year</li> <li>• Capstone Concierge Coaching</li> </ul> <p><b>Training:</b></p> <ul style="list-style-type: none"> <li>• Unlimited access to CapstoneEDU</li> <li>• 2 Registrations and Discounts (50%) for each Capstone public training offering</li> </ul>

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