COP-RCORP

Communities of Practice for Rural Communities Opioid Response Program

On-Demand Webinar

Strategic Planning: Cross-walking the JBS Strategic Plan Template with Ohio's Strategic Plan Map

Presented by Ohio University's Voinovich School of Leadership and Public Affairs & the Pacific Institute for Research and Evaluation

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Webinar Orientation

David Collins,
Research Scientist
Pacific Institute for Research and Evaluation

- ❑ Discuss HRSA RCORP-Planning Strategic Plan Deliverable
- ❑ Review the Ohio Strategic Plan Map and Strategy Description Form
- ❑ Show how the JBS Template cross-walks with Ohio's Strategic Plan Map
- ❑ Worksheets and Tools are available on Website
  - Feel free to download to follow along: https://www.communitiesofpractice-rcorp.com/strategic-planning

Strategic Planning

- Each local consortium must submit one OhioMHAS Strategic Plan Map & Strategy Description form for the following five plan areas:
    1. Prevention (Demand Reduction)
    2. Prevention (Supply Reduction)
    3. Prevention (Harm Reduction)
    4. Treatment
    5. Recovery
- First draft due to your local TA provider: August 9, 2019

Strategic Planning: JBS Template

Strategic Plan

Complete a plan for each problem statement and related goal your initiative proposes to address. Complete an objective worksheet for each objective in your project. See Attachment C for a sample strategic plan.

A. Assessment Summary

Briefly summarize the relevant data regarding the overall problem identified in your needs assessment.

B. Problem Statement

Concisely describe the priority problem based on your assessment data.

Strategic Planning:
Ohio Strategic Plan Map

Insert COP-RCORP Local Consortium Here

RCORP-P **Strategic Plan** Map: *Insert Content Area Here*

Statement of how the plan is related to at least one of the HRSA RCORP-Planning Goals:

1. Prevention: reducing the occurrence of opioid use disorder among new and at-risk users, as well as fatal opioid-related overdoses, through activities such as community and provider education, and harm reduction measures including the strategic placement and use of overdose reversing devices, such as naloxone, and syringe services programs;
2. Treatment: implementing or expanding access to evidence-based practices for opioid addiction/opioid use disorder (OUD) treatment, such as medication assisted treatment (MAT), including developing strategies to eliminate or reduce treatment costs to uninsured and underinsured patients; and
3. Recovery: expanding peer recovery and treatment options that help people start and stay in recovery.

Write 1-3 sentences here to support how this plan is connected to HRSA's RCORP-P Goals.

Population of Focus:

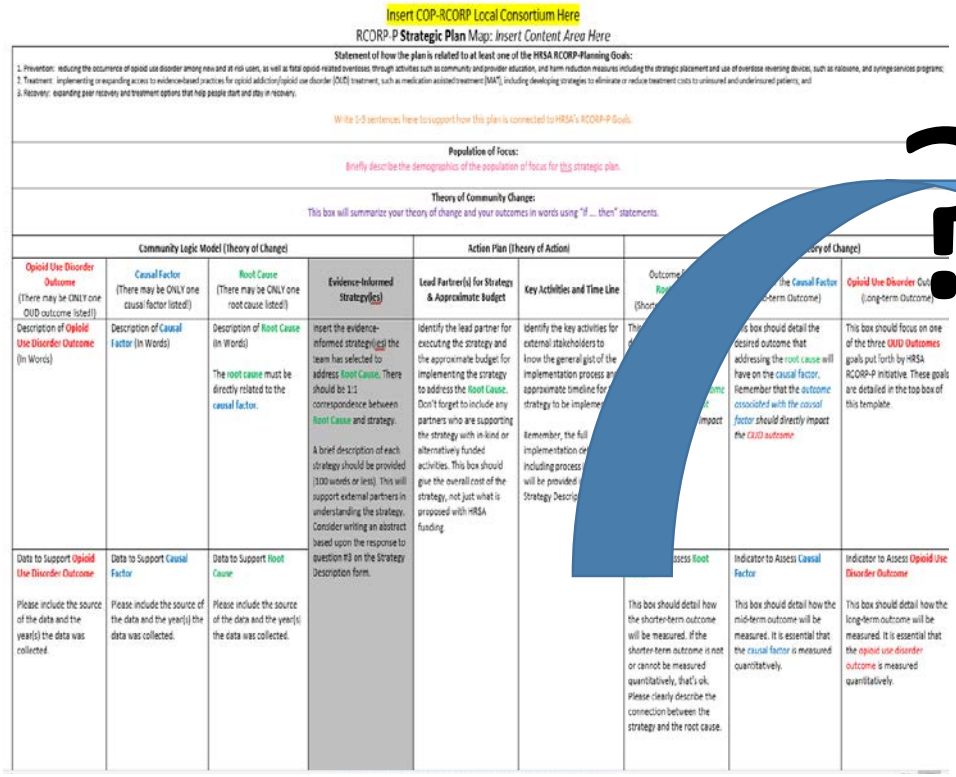
Briefly describe the demographics of the population of focus for this strategic plan.

Theory of Community Change:

This box will summarize your theory of change and your outcomes in words using "if …. then" statements.

Community Logic Model (Theory of Change)				**Action Plan (Theory of Action)**		**Measurable Outcomes (Theory of Change)**		
Opioid Use Disorder Outcome (There may be ONLY one OUD outcome listed!)	**Causal Factor** (There may be ONLY one causal factor listed!)	**Root Cause** (There may be ONLY one root cause listed!)	**Evidence-Informed Strategy(ies)**	**Lead Partner(s) for Strategy & Approximate Budget**	**Key Activities and Time Line**	Outcome for the **Root Causes** (Shorter-term Outcomes)	Outcome for the **Causal Factor** (Mid-term Outcome)	**Opioid Use Disorder** Outcome (Long-term Outcome)
Description of **Opioid Use Disorder Outcome** (In Words)	Description of **Causal Factor** (In Words)	Description of **Root Cause** (In Words) The **root cause** must be directly related to the **causal factor**.	Insert the evidence-informed strategy(ies) the team has selected to address **Root Cause**. There should be 1:1 correspondence between **Root Cause** and strategy. A brief description of each strategy should be provided (100 words or less). This will support external partners in understanding the strategy. Consider writing an abstract based upon the response to question #3 on the Strategy Description form.	Identify the lead partner for executing the strategy and the approximate budget for implementing the strategy to address the **Root Cause**. Don't forget to include any partners who are supporting the strategy with in-kind or alternatively funded activities. This box should give the overall cost of the strategy, not just what is proposed with HRSA funding.	Identify the key activities for external stakeholders to know the general gist of the implementation process and approximate timeline for the strategy to be implemented. Remember, the full implementation details, including process indicators will be provided in the Strategy Description Form.	This box should detail the desired outcome the strategy selected will have on the root cause. Remember that the *outcome associated with the root cause should directly impact the causal factor.*	This box should detail the desired outcome that addressing the root cause will have on the causal factor. Remember that the *outcome associated with the causal factor should directly impact the OUD outcome.*	This box should focus on one of the three **OUD Outcomes** goals put forth by HRSA RCORP-P Initiative. These goals are detailed in the top box of this template.
Data to Support **Opioid Use Disorder Outcome** Please include the source of the data and the year(s) the data was collected.	Data to Support **Causal Factor** Please include the source of the data and the year(s) the data was collected.	Data to Support **Root Cause** Please include the source of the data and the year(s) the data was collected.				Indicator to Assess **Root Cause** This box should detail how the shorter-term outcome will be measured. If the shorter-term outcome is not or cannot be measured quantitatively, that's ok. Please clearly describe the connection between the strategy and the root cause.	Indicator to Assess **Causal Factor** This box should detail how the mid-term outcome will be measured. It is essential that the causal factor is measured quantitatively.	Indicator to Assess **Opioid Use Disorder Outcome** This box should detail how the long-term outcome will be measured. It is essential that the opioid use disorder outcome is measured quantitatively.

Strategic Planning:
Cross-Walking the two templates



Insert COP-RCORP Local Consortium Here

RCORP-P **Strategic Plan** Map: *Insert Content Area Here*

Statement of how the plan is related to at least one of the HRSA RCORP-Planning Goals:

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Population of Focus:

Briefly describe the demographics of the population of focus for this strategic plan.

Theory of Community Change:

This box will summarize your theory of change and your outcomes in words using "if ... then" statements.

Community Logic Model (Theory of Change)				Action Plan (Theory of Action)					
Opioid Use Disorder Outcome (There may be ONLY one OUD outcome listed!)	Causal Factor (There may be ONLY one causal factor listed!)	Root Cause (There may be ONLY one root cause listed!)	Evidence-Informed Strategy(ies)	Lead Partner(s) for Strategy & Approximate Budget	Key Activities and Time Line	Outcome Root (Short	the Causal Factor -term Outcome)	Opioid Use Disorder Out (Long-term Outcome)	
Description of Opioid Use Disorder Outcome (In Words)	Description of Causal Factor (In Words)	Description of Root Cause (in Words) The root cause must be directly related to the causal factor.	Insert the evidence-informed strategy(ies) the team has selected to address Root Cause. There should be 1:1 correspondence between Root Cause and strategy. A brief description of each strategy should be provided (100 words or less). This will support external partners in understanding the strategy. Consider writing an abstract based upon the response to question #3 on the Strategy Description form.	Identify the lead partner for executing the strategy and the approximate budget for implementing the strategy to address the Root Cause. Don't forget to include any partners who are supporting the strategy with in-kind or alternatively funded activities. This box should give the overall cost of the strategy, not just what is proposed with HRSA funding.	Identify the key activities for external stakeholders to know the general gist of the implementation process an approximate timeline for strategy to be implem Remember, the full implementation pl including process will be provided Strategy Descrip	This box should detail how the shorter-term outcome will be measured. If the shorter-term outcome is not or cannot be measured quantitatively, that's ok. Please clearly describe the connection between the strategy and the root cause.	his box should detail the desired outcome that addressing the root cause will have on the causal factor. Remember that the outcome associated with the causal factor should directly impact the OUD outcome	This box should focus on one of the three OUD Outcomes goals put forth by HRSA RCORP-P initiative. These goals are detailed in the top box of this template.
Data to Support Opioid Use Disorder Outcome Please include the source of the data and the year(s) the data was collected.	Data to Support Causal Factor Please include the source of the data and the year(s) the data was collected.	Data to Support Root Cause Please include the source of the data and the year(s) the data was collected.				ssess Root	Indicator to Assess Causal Factor This box should detail how the mid-term outcome will be measured. It is essential that the causal factor is measured quantitatively.	Indicator to Assess Opioid Use Disorder Outcome This box should detail how the long-term outcome will be measured. It is essential that the opioid use disorder outcome is measured quantitatively.	

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Strategic Plan

Complete a plan for each problem statement and related goal your initiative proposes to address. Complete an objective worksheet for each objective in your project. See ttachment C for a sample strategic plan.

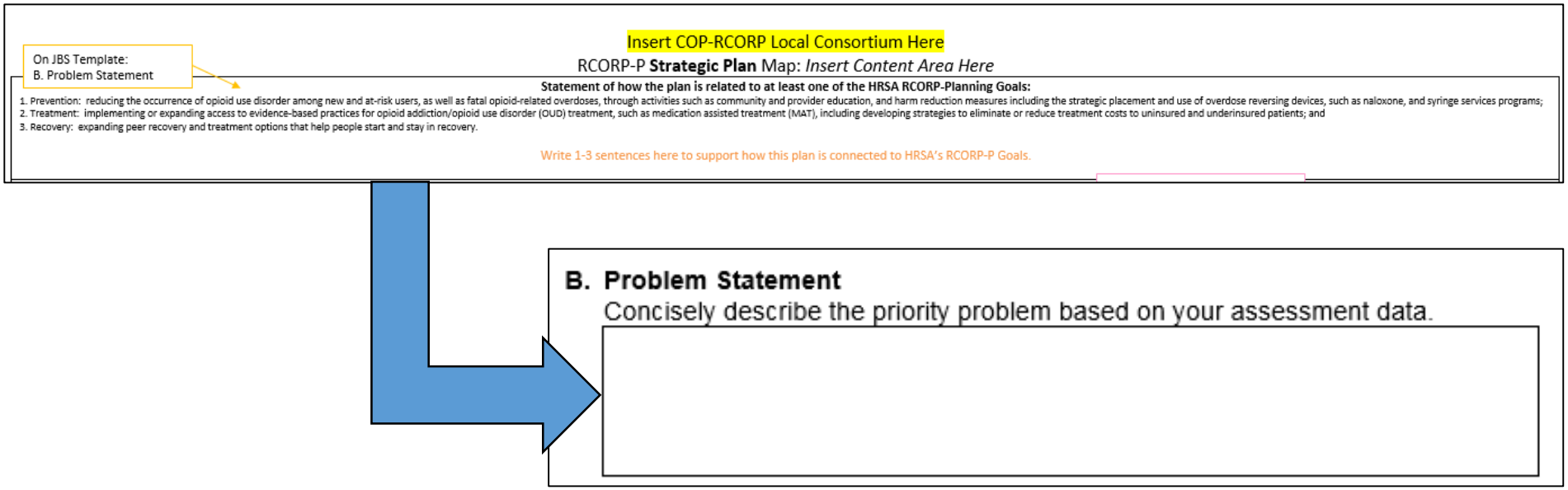
A. Ass Summary

Briefly e the relevant data regarding the overall problem identified in your nee ment.

B. Problem Statemen

Concisely describe the priority problem based on your assessment data.

Cross-Walking the two templates: Problem Statement



Cross-Walking the two templates:
Population of Focus = Target Population

Population of Focus:
Briefly describe the demographics of the population of focus for this strategic plan.

On JBS Template:
C. Target Population

C. Target Population
Describe the individuals or groups most affected by the problems in your problem statement above.

Cross-Walking the Two Templates:
Theory of Community Change = Overview

On JBS Template:
Optional Logic Model

Theory of Community Change:

This box will summarize your theory of change and your outcomes in words using "if …. then" statements.

Attachment A: Logic Model Template

(optional, not an RCORP deliverable)

As you develop your strategic plan, complete a logic model for each problem statement and its related intervening variables or underlying conditions and proposed strategies. These will serve as a 1-page overview of your plans to address each problem or consequence.

Substance Use-Related Problem	Substance Use	Intervening Variables and Target Populations	Strategies
		List in these boxes the key intervening variables and target populations…	List in these boxes the strategies you intend to use. Make sure they have been documented to be effective with the intervening variables and target populations you need to impact.
List in this box the substance use-related problem that your work plan will impact.	List in this box the primary substance use behavior that creates the problem.	…most closely associated with the problem behavior.	Use arrow or lines to link the strategies to the intervening variables and underlying conditions that they are intended to address.
		Add or delete boxes as needed.	Add or delete boxes as needed.

Cross-Walking the Two Templates:

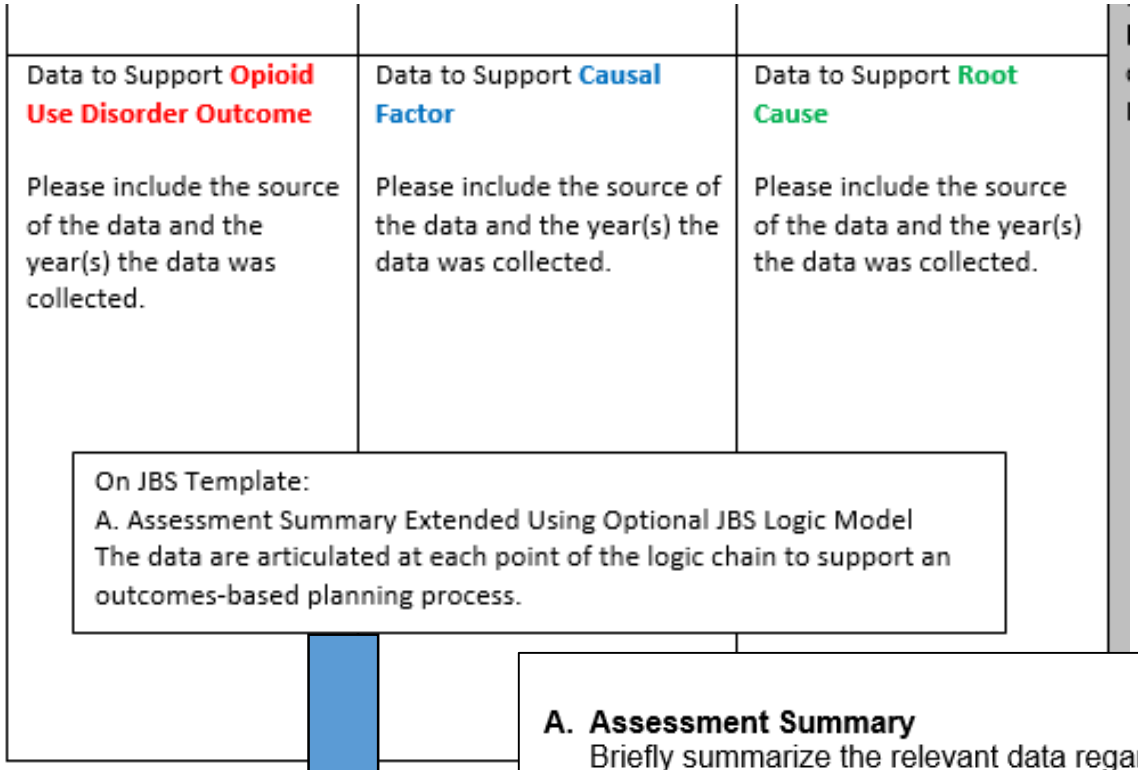
Community Logic Model = Goal & Assessment Summary

Community Logic Model (Theory of Change)			
Opioid Use Disorder Outcome (There may be ONLY one OUD outcome listed!)	**Causal Factor** (There may be ONLY one causal factor listed!)	**Root Cause** (There may be ONLY one root cause listed!)	**Evidence-Informed Strategy(ies)**
Description of **Opioid Use Disorder Outcome** (In Words)	Description of **Causal Factor** (In Words)	Description of **Root Cause** (In Words) The **root cause** must be directly related to the **causal factor**.	Insert the evidence-informed strategy(ies) the team has selected to address **Root Cause**. There should be 1:1 correspondence between **Root Cause** and strategy. A brief description of each strategy should be provided (100 words or less). This will support external partners in understanding the strategy. Consider writing an abstract based upon the response to question #3 on the Strategy Description form.
Data to Support **Opioid Use Disorder Outcome**	ta to Support **Causal** ctor	Data to Support **Root Cause**	

On JBS Template:
D. Goal Statement Extended Using Optional JBS Logic Model
The goal statements are articulated in to three statements to support the outcomes-based planning process which involves short-, mid-, and long-term outcomes. This supports the linkage of goals to outcomes.

D. Goal
State the major changes in behavior that need to occur within your identified target population to achieve your vision.

Cross-Walking the Two Templates:
Community Logic Model = Goal & Assessment Summary



On JBS Template:
A. Assessment Summary Extended Using Optional JBS Logic Model
The data are articulated at each point of the logic chain to support an outcomes-based planning process.

A. Assessment Summary
Briefly summarize the relevant data regarding the overall problem identified in your needs assessment.

Cross-Walking the Two Templates:

Measurable Outcomes = Long-Term Outcome & Indicators

Measurable Outcomes (Theory of Change)		
Outcome for the **Root Causes** (Shorter-term Outcomes)	Outcome for the **Causal Factor** (Mid-term Outcome)	**Opioid Use Disorder** Outcome (Long-term Outcome)
This box should detail the desired outcome the strategy selected will have on the root cause. Remember that the *outcome associated with the root cause should directly impact the causal factor.*	This box should detail the desired outcome that addressing the root cause will have on the causal factor. Remember that the *outcome associated with the causal factor should directly impact the OUD outcome.*	This box should focus on one of the three **OUD Outcomes** goals put forth by HRSA RCORP-P Initiative. These goals are detailed in the top box of this template.

On JBS Template:
E. Long-Term Outcome Extended Using Optional JBS Logic Model
The outcomes are articulated at each point of the logic chain to support an outcomes-based planning process.

E. Long-Term Outcome
Define the change you are seeking to make in problems or behaviors.

Cross-Walking the Two Templates:

Measurable Outcomes = Long-Term Outcome & Indicators

Indicator to Assess **Root Cause**	Indicator to Assess **Causal Factor**	Indicator to Assess **Opioid Use Disorder Outcome**
This box should detail how the shorter-term outcome will be measured. If the shorter-term outcome is not or cannot be measured quantitatively, that's ok. Please clearly describe the connection between the strategy and the root cause.	This box should detail how the mid-term outcome will be measured. It is essential that the causal factor is measured quantitatively.	This box should detail how the long-term outcome will be measured. It is essential that the opioid use disorder outcome is measured quantitatively.

On JBS Template:
F. Long-Term Outcome Indicators Extended Using Optional JBS Logic Model
The outcomes are articulated at each point of the logic chain to support an outcomes-based planning process.

F. Long-Term Outcome Indicators
List the indicators that will demonstrate you are making progress toward your goal.

Cross-Walking the Two Templates: Action Plan = Objective Worksheet

	Action Plan (Theory of Action)	
Evidence-Informed Strategy(ies)	**Lead Partner(s) for Strategy & Approximate Budget**	**Key Activities and Time Line**
Insert the evidence-informed strategy(ies) the team has selected to address Root Cause. There should be 1:1 correspondence between Root Cause and strategy. A brief description of each strategy should be provided (100 words or less). This will support external partners in understanding the strategy. Consider writing an abstract based upon the response to question #3 on the Strategy Description form.	Identify the lead partner for executing the strategy and the approximate budget for implementing the strategy to address the Root Cause. Don't forget to include any partners who are supporting the strategy with in-kind or alternatively funded activities. This box should give the overall cost of the strategy, not just what is proposed with HRSA funding.	Identify the key activities for external stakeholders to know the general gist of the implementation process and approximate timeline for the strategy to be implemented. Remember, the full implementation details, including process indicators will be provided in the Strategy Description Form.

On JBS Template:
Objective Worksheet
Note: Please see also Ohio Strategy Description Form as well as page 11 of the Crosswalk Document for further detail.

Objective Worksheet

Objective: [Insert Objective]

Intermediate Outcome (Define the change you are seeking to make in the intervening variables or underlying conditions of your identified problem):

Intermediate Outcome Indicators (List the indicators that will demonstrate you are making progress toward your goal):

-
-
-

Strategy					
Activities	**Timeline**		**Who Is Responsible?**	**Process Indicators**	**Short-Term Outcomes**
	Start Date	**End Date**			

Strategy					
Activities	**Timeline**		**Who Is Responsible?**	**Process Indicators**	**Short-Term Outcomes**
	Start Date	**End Date**			

COP-RCORP Strategy Description Form

Coalition/Group Name: Insert Here
County: Insert Here
Date Submitted: Insert Here
Date Reviewed: Insert Here

COP-RCORP Strategy Description Form

Overview of the Strategy (Please answer each question using 100 words or less for each response.)

Using the results of your needs assessment as a guide, please provide a concise description of your strategy including the following ten (10) elements:

1. Who is the intended recipient (priority population) of this strategy?

Please type your response here.

2. How will you address the unique needs of the service population?

Please type your response here.

3. What is the strategy that will be implemented?

Please type your response here.

4. What is the history of this strategy in the community? (i.e., Has this strategy been implemented before in the community? Is it a continuation of an existing strategy? Is it an expansion of an existing strategy? Is it a brand new strategy?)

Please type your response here.

5. What agency/organization will implement the strategy? Why is this agency/organization taking the lead on this strategy?

Please type your response here.

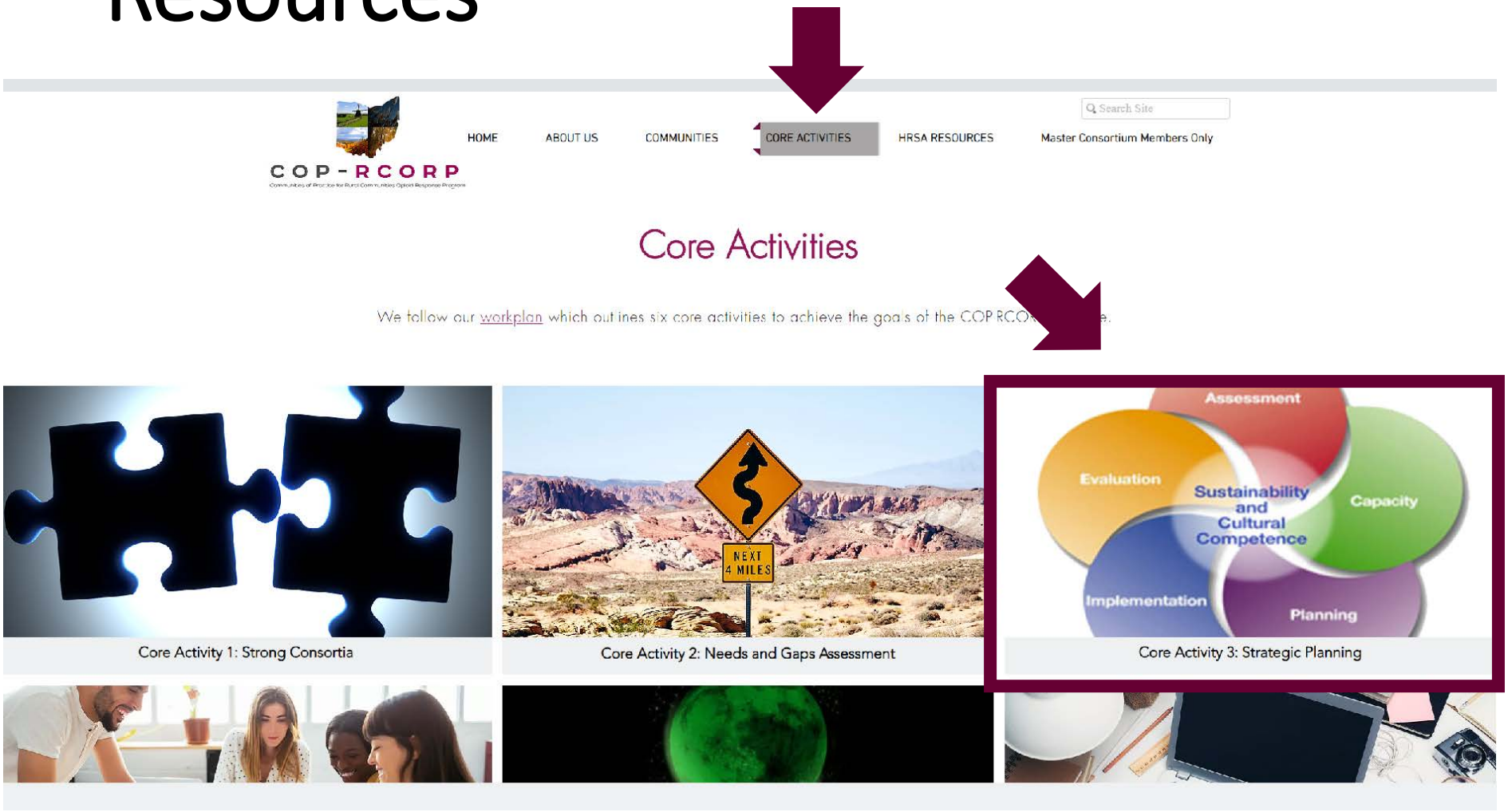
Strategic Planning: Materials

- COP-RCORP Website:
  https://www.communitiesofpractice-rcorp.com/

- Strategic Planning Page:
  https://www.communitiesofpractice-rcorp.com/strategic-planning

- Master Consortium Members Only Page
  - Data and language from the grant proposal
  - Community Needs Assessments

Strategic Planning: Resources



Resources

1. Templates
2. Crosswalk between OhioMHAS Strategic Plan Map & Strategy Description Form
3. Strategic Planning Resources (Optional – Take what's valuable and let the rest flit away!)
   - Identifying and selecting causal factors
   - Developing logic chains
   - Annotated documents
   - Websites, on-demand videos, examples from other communities
4. Drop-in Calls
5. TA Providers
6. COP-RCORP Consortia Members – please use each other!