## 6 PLANNING STEPS[1]

*The basic strategic planning process includes the following 6 steps:*

1. **Identify your purpose (mission statement)** - This is the statement(s) that describes why your organization exists, i.e., its basic purpose. The statement should describe what client needs are intended to be met and with what services, the type of communities are sometimes mentioned. The top-level management should develop and agree on the mission statement. The statements will change somewhat over the years.

2. **Establish a vision statement** - This statement describes the future state of your customers/clients and your organization at some point in the future.

3. **Select the goals your organization must reach if it is to effectively work toward your mission and achieve your vision** - Goals are general statements about what you need to accomplish to meet your purpose, or mission, and address major issues facing the organization.

The vision and goals might be long-range, for example, for 3-5 years into the future.

4. **Identify specific approaches (or strategies) that must be implemented to reach each goal** - The strategies are often what change the most as the organization eventually conducts more robust strategic planning, particularly by more closely examining the external and internal environments of the organization. Small organizations might not refer to strategies and, instead, go the next step about action planning for each goal.

5. **Identify specific action plans to implement each strategy (or objectives to achieve each goal)** - These are the specific activities or objectives that each major function (for example, department, etc.) must undertake to ensure it's effectively implementing each strategy (or achieving each goal). Objectives should be clearly worded to the extent that people can assess if the objectives have been met or not. Ideally, the top management develops specific committees that each have a work plan, or set of objectives.

5. **Compile the mission, vision, strategies and action plans into a Strategic Plan document.** Ensure that upper management approves the Plan.

6. **Monitor implementation of the Plan and update the Plan as Needed** - Planners regularly reflect on the extent to which the goals are being met and whether action plans are being implemented. Perhaps the most important indicator of success of the organization is positive feedback from the organization's customers.

For more information:

McNamara, Carter. (n.d.) *Basic overview of various strategic planning models.* Retrieved from Free Management Library http://managementhelp.org/strategicplanning/models.htm

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[1] Planning tool directly borrowed from resources at the following website
http://managementhelp.org/strategicplanning/index.htm#anchor1234

EBP TOOL 2: PROGRAM FIT CHECKLIST


## PROGRAM FIT CHECKLIST[1]

This checklist can be used to guide the discussion and consideration in the process of identifying the right program.

- Is the program appropriate for the population identified in the community needs assessment and community logic model? Has the program been implemented successfully with the same or a similar population? Are the population differences likely to compromise the results?
- Is the program delivered in a setting similar to the one planned by your community? In what ways is the context different? Are the differences likely to compromise the program's effectiveness?
- Is the program culturally appropriate? Did members of the culturally identified group participate in developing it? Were program materials adapted to the culturally identified group?
- Are program materials (e.g., manuals, procedures) available to guide implementation? Are training and technical assistance available to support implementation? Are monitoring or evaluation tools available to help track implementation quality?
- Is the program culturally feasible, given the values of the community?
- Is the program politically feasible, given the local power structure and priorities of the implementing organization? Does the program match the mission, vision, and culture of the implementing organization?
- Is the program administratively feasible, given the policies and procedures of the implementing organization?
- Is the program technically feasible, given staff capabilities, time commitments, and program resources?
- Is the program financially feasible, given the estimated costs of implementation (including costs for purchase of implementation materials and specialized training or technical assistance)?


For more information:

SAMHSA's National Registry of Evidence-Based Programs and Practices. (2012). *A road map to implementing evidence-based programs.* Retrieved from http://nrepp.samhsa.gov/Courses/Implementations/resources/imp_course.pdf

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[1] Tool borrowed directly from page 27 of *A road map to implementing evidenced-based programs*: http://nrepp.samhsa.gov/Courses/Implementations/resources/imp_course.pdf

**FINDING THE RIGHT PROGRAM[1]**

*Finding the right program starts with a search!*

**1. Starting the search**

Answering these questions will help start your search for the best promising practice for your community.

- What is the broad area of interest (e.g., health promotion, independent living )?
- What specific problem are you working on (e.g., substance abuse, obesity)?
- What population will benefit from your effort (e.g., Hispanics, youth, rural groups)
- What type of intervention or community change (i.e., change in program, policy, or practice) are you seeking? Is it listed in your strategic plan?
- In what sector of the community will this take place (e.g., business, youth groups, churches)?
- Are you interested in a targeting an intervention at a high-risk group or a comprehensive approach, or both?

**2. Choosing your approach**

Answering these questions will help you choose the best promising practice for your community.

- Does the promising practice meet all of the criteria set by your search?
- Some programs can be complicated, which means an organization that can support the effort is needed. Are there organizations in your community that can support the effort? If not, can you create such an organization?
- What is the evidence that the promising practice will have some impact?
- Will you be able to replicate the practice? If not, how will you modify it for your community?
- What resources do you have or will you be able to generate to support the practice? Will a pared back version satisfy your needs?
- Is the practice compatible with your community's beliefs, attitudes and values (e.g., will your community support condom distribution)?
- Have you looked at different versions of the practice in the examples and stories provided in the Community Tool Box or in other resources? Have you contacted others who have implemented the practice?
- How will this promising practice work for you? What would make it a success for your community?

For more information:

Wadud, E. and Berkowitz, B. (n.d.). *Chapter 19. Section 4: Adapting community interventions for different cultures and communities*. Retrieved from The Community Tool Box: http://ctb.ku.edu/en/table-of-contents/analyze/choose-and-adapt-community-interventions/cultural-adaptation/main
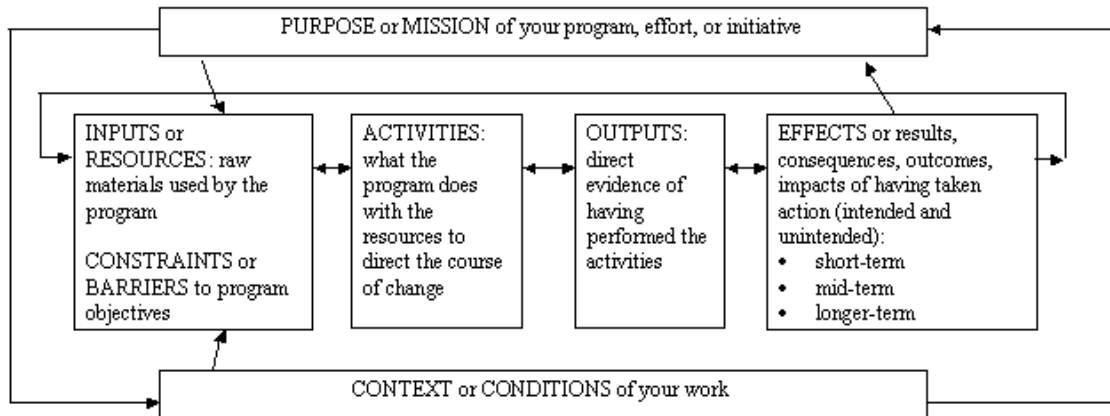
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[1] Planning tool borrowed directly from http://ctb.ku.edu/en/table-of-contents/analyze/choose-and-adapt-community-interventions/cultural-adaptation/main
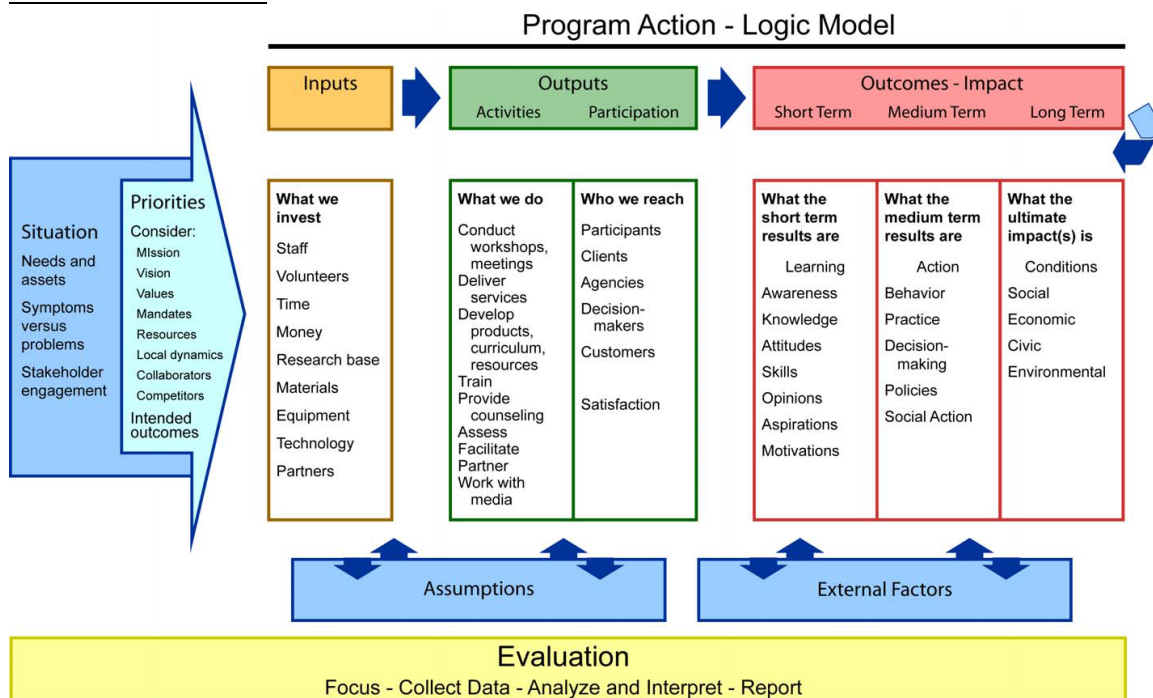
PLANNING TOOL 4: SAMPLE LOGIC PLANS

**SAMPLE LOGIC PLANS**

*The below are sample logic plan templates that you can use when planning your program For more logic plan tools, check out the* <u>*University of Wisconsin-Extension 'Program Development and Evaluation' site.*</u>
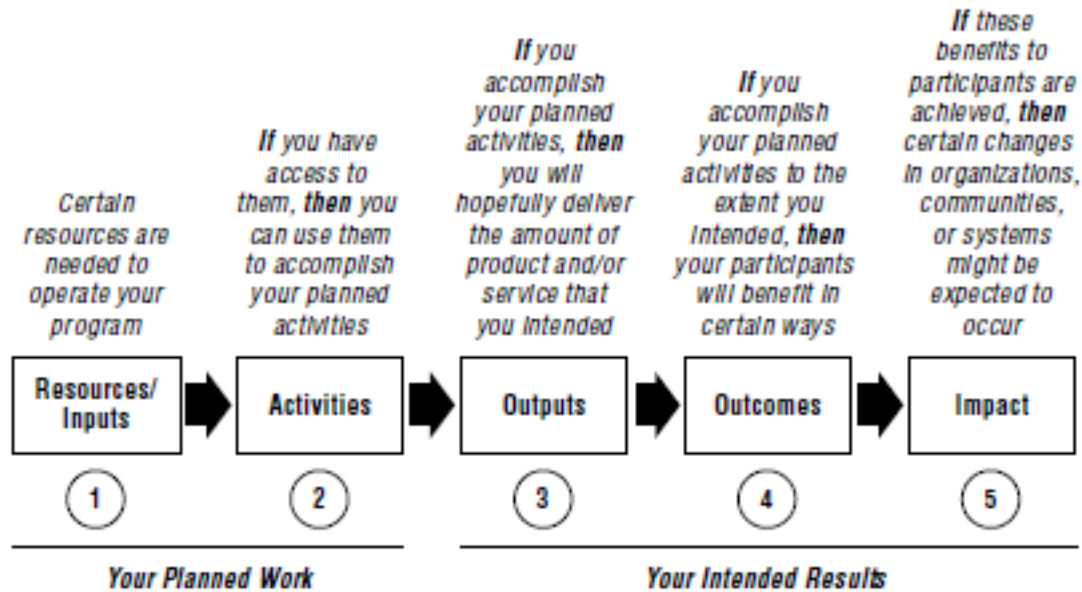
SAMPLE PLAN A[1]



SAMPLE PLAN B[2]



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[1] Sample plan borrowed directly from http://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main
[2] Sample plan borrowed directly from http://www.uwex.edu/ces/pdande/evaluation/pdf/LMfront.pdf

PLANNING TOOL 4: SAMPLE LOGIC PLANS

SAMPLE PLAN C[3]

| Resources/Inputs | Activities | Outputs | Outcomes | Impact |
|---|---|---|---|---|
| Certain resources are needed to operate your program | If you have access to them, **then** you can use them to accomplish your planned activities | If you accomplish your planned activities, **then** you will hopefully deliver the amount of product and/or service that you intended | If you accomplish your planned activities to the extent you intended, **then** your participants will benefit in certain ways | If these benefits to participants are achieved, **then** certain changes in organizations, communities, or systems might be expected to occur |
| 1 | 2 | 3 | 4 | 5 |

Your Planned Work      Your Intended Results

For more information:

Her Majesty's Treasury. (2011). *The magenta book: Guidance for evaluation.* London: HM Treasury. Retrieved from https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/220542/magenta_book_combined.pdf

Milstein, B. and Chapel, T. (n.d.). *Chapter 2. Section 1: Developing a logic model or theory of change.* Retrieved from The Community Tool Box: http://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main

Program Development and Evaluation. (n.d.). *Evaluation.* Retrieved from the University of Wisconsin-Extension: http://www.uwex.edu/ces/pdande/evaluation/

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[3] Sample plan borrowed directly from page 58 of *The Magenta Book: Guidance for Evaluation: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/220542/magenta_book_combined.pdf*

## SETTING PRIORITIES[1]

*Once communities have completed data collection and review, they need to develop a process for setting prevention priorities. Criteria for analyzing and prioritizing assessment data include:*

- *Magnitude*, which describes the number of people affected by a problem.
- *Changeability*, which describes how easily a problem can be changed.
- *Impact*, which describes the depth of a problem across a variety of dimensions, such as health, economic or criminal.
- *Concentration*, which describes how concentrated the problem is in a specific population.
- *Time lapse*, which describes the amount of time that elapses between consumption and consequence. This is important to consider if a community wants to show that it is having an impact within a set timeframe.

For more information:

SAMHSA. (2015, October 2). *Prioritizing risk and protective factors*. Retrieved from http://www.samhsa.gov/capt/applying-strategic-prevention-framework/step3-plan/prioritizing-risk-protective-factors

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[1] This planning tool was originally borrowed directly from a 2013 SAMHSA document entitled, "About the Strategic Prevention Framework (SPF)." However, this document is no longer available on the SAMHSA website in its original form. Please see the following site for a similar presentation of this information: http://www.samhsa.gov/capt/applying-strategic-prevention-framework/step3-plan/prioritizing-risk-protective-factors