SPACECAT

Quick Start Guide

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Intro/Overview

Welcome! This Quick Start Guide aims to help local health departments (LHDs) translate results from their Suicide, Overdose, and Adverse Childhood Experiences (ACEs) Prevention Capacity Assessment Tool (known as SPACECAT) into public health action. The Quick Start Guide provides a step-by-step process with worksheets to guide the development of an action plan to increase capacity to prevent suicide, overdose, and ACEs.

About SPACECAT

NACCHO collaborated with the Association of State and Territorial Health Officials (ASTHO) to develop the SPACECAT with funding from the Centers for Disease Control and Prevention (CDC). The SPACECAT aims to help local, state, and territorial health agency staff understand their current capacity to address suicide, overdose, and ACEs. Data from SPACECAT results can help LHDs identify opportunities to work at the intersection of these public health issues to maximize resources and impact. The tool covers eight domains in two capacity areas:

- **Infrastructure Capacity:** Networked Partnerships; Multilevel Leadership; Managed Resources; Data and Surveillance; Shared Planning and Strategic Plans
- **Topical Capacity:** Evidence-Based Strategies for Suicide, Overdose, and ACEs Prevention; Health Disparities; Workforce Capacity

Complete only one SPACECAT per LHD. Learn more information about the SPACECAT.

This Quick Start Guide is a resource for LHDs after they have completed the SPACECAT. The SPACECAT is intended to be completed collaboratively by staff working in areas related to suicide, overdose, and ACEs.

A word about using the Quick Start Guide with your team

The SPACECAT asks a lot of questions and is intended to assist LHDs in identifying their strengths and limitations in addressing the intersection of suicide, overdose, and ACEs. Sometimes, LHD staff may have reactions to seeing areas that have little to no current capacity. It is important to remember that the SPACECAT is not a test; LHDs do not “pass” or “fail.” Rather, the SPACECAT is intended to help LHDs understand where they are currently so that teams can make thoughtful, informed decisions about next steps.

With results from the SPACECAT in hand, questions naturally arise: How do we use this information? Where do we start? What’s next? Working through the Quick Start Guide will help answer these questions and move LHDs from assessment to action.

Intended Participants

This Quick Start Guide is intended for LHD staff who completed the SPACECAT in collaboration with additional staff who are working in these topical areas. Other staff, leadership, and/or external partners should be engaged in the different steps of the process as needed. LHDs may choose to have all levels of the agency involved from the beginning or may decide to have different staff participating in the effort at different times. For example, leadership may not need to be a part of the SPACECAT or the readiness assessment but may need to be a part of strategic prioritization. After the priorities are agreed upon, staff and partners in the community may continue to drive the work forward. While the Quick Start Guide provides some suggestions for who to include at each step in the process, it is up to the LHD to decide who makes sense to have “at the table” at each point in the process.

Quick Start Guide Process and Exercises

The Quick Start Guide and exercises facilitate a multi-step process of environmental scanning, visioning, and action planning. LHDs can use the Quick Start Guide to develop and implement an action plan toward building capacity in suicide, overdose, and ACEs prevention. Each section includes an overview of the step, instructions for completing the exercise, and a worksheet template. Sections are intended to build upon one another, so it is recommended that teams complete the sections in order.

At the beginning of each section, you'll find:

Goal	Recommended time allotted	Ideal number of participants	Materials needed	Suggested team approach
What is the purpose of this exercise?	How much time will you need to complete the exercise?	How many people are recommended to participate?	What supplies or virtual tools do you need?	How might your team need to approach this step?

Section 1. Readiness Assessment: Are we ready to take action?

This initial activity invites LHD staff to discuss the need for change based on the SPACECAT results and assess the current resources available to address that need. Completion of the Readiness Assessment ensures that the next steps in the process are realistic and attainable.

Section 2. SOAR Analysis: What is our vision?

The SOAR analysis is a framework for identifying current *strengths,* potential *opportunities, aspirations,* and desired *results* related to the intersection of suicide, overdose, and ACEs prevention. The SOAR Analysis has a positive orientation and helps root future steps in LHDs' specific strengths and opportunities. The SOAR exercise can facilitate strategic visioning about potential efforts to increase capacity to address suicide, overdose, and ACEs.

Strategic Thinking/Visioning vs Strategic Planning

While you're working to translate SPACECAT data to action, it's important to engage in broader creative and innovative thinking to determine the direction you will take to achieve your vision. Certain sections of the Quick Start Guide promote strategic thinking or strategic visioning, which is different than strategic planning. The process outlined in the guide is not meant to be a complete strategic planning process. Many LHDs will already have strategic plans in place that touch on these issues or could benefit from that bigger picture blueprint of how to achieve strategic goals. Rather, this process aims to incorporate intentional, reflective strategic thinking into a more targeted action planning process.

Section 3. Strategic Prioritization: What goals should we focus on?

With so many possible directions, it can be difficult to determine the best way forward. In this section, LHDs prioritize ideas generated in the SOAR Analysis so that the most important and feasible goals emerge.

Section 4. SMARTIE Objectives: What results will help us make progress towards our goals?

SMARTIE stands for *specific, measurable, achievable, relevant, timebound, inclusive,* and *equitable*. The SMARTIE framework serves to help LHDs develop objectives into their most clear and measurable forms. As priorities are identified, SMARTIE assists teams in crafting the objectives in a format that lends itself to planning, task delegation, and evaluation.

Section 5. Action Planning: How will we achieve our objectives?

Action Planning maps the goals and objectives into a tactical plan. The Action Planning template facilitates identification of specific steps toward an objective, timeframes, and responsible parties. The result of this step is a tangible plan that is ready for implementation.

Section 6. Implementation Follow-Up: How are we doing?

Once efforts are underway, intentional follow-up is critical to ensure that the Action Plan is moving forward, to problem-solve any barriers that have emerged, and to make adjustments as needed.

Recommendations for Use

- **Engage in the Quick Start Guide as a team.** Substantial and sustainable change will require buy-in from more than one staff member, team, or department, so it is important for this process to be inclusive and collaborative. Consider engaging the same team who completed the SPACECAT and invite other staff to participate.

- **Follow the process outlined above in sequential order.** Begin with Step 1: Readiness Assessment, continue to Step 2, then Step 3, and so on. There are specific questions in some sections for LHDs who may already have strategic priorities related to suicide, overdose, and ACEs prevention capacity-building.

- **Approach the process with an open mind.** Reflect on the spirit of the project. The intersection of suicide, overdose, and ACEs is a challenging public health problem. Such complex issues may require creative solutions, but there is real opportunity to make an impact. Individuals may be used to operating within silos and their own spheres of influence. Yet, it's important to challenge traditional thinking about how to strengthen capacity and implement programs and services to address these intersecting issues. Carefully consider where you are trying to go before moving forward with a decision or action. Encourage sharing and considerations of all ideas, even those that may not seem possible at first glance.

- **Throughout the process, pause to re-evaluate if the right people are at the table.** Along the way, the team may reach decision points that require buy-in from individuals who are not currently part of the planning process. Consider when and how to include these collaborators.

Facilitation Resources

Exercises in the Quick Start Guide involve group brainstorming, discussion, and decision-making. If one or more of the LHD team is familiar with basic facilitation skills, this will likely add value to your process. Here are three resources on basic facilitation skills to further your learning:

- **Book:** Schwarz, R. (1994). The skilled facilitator: Practical wisdom for developing effective groups. San Francisco, CA: Jossey-Bass.

- **Video:** Facilitation 101 by Nielson Norman Group. Available on YouTube.

- **Article:** Section 2: Developing Facilitation Skills from “Chapter 16: Group Facilitation and Problem-Solving” in the online Community Tool Box.

STEP 1

Readiness Assessment

Quick Start Guide

Readiness Assessment Tool

Goal: Assess LHD readiness so that next steps toward addressing the intersection of suicide, overdose, and ACEs are grounded in current realities.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
60-90 mins	2-20 Consider inviting: Team members who completed the SPACECAT tool Staff from related departments Individuals who have knowledge of current LHD resources (e.g., budget, staffing)	Different color pens/ markers, sticky notes, paper OR virtual collaborative tool of your choice (e.g. Miro, Mural) Readiness Assessment Matrix template provided OR create a larger version on a wall or easel	1. Listen to understand, NOT respond. 2. Prepare to actively participate. 3. Criticize ideas, not people. 4. Share the air. 5. Speak your voice. 6. Feel safe, but not comfortable. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

- Assessing readiness provides information about current context, influence, and interest.
- Understanding your readiness level sets up reasonable and appropriate next steps.
- A readiness level is not a 'grade'.

Overview

Now that you've completed the SPACECAT tool, you can begin thinking about the next steps toward developing an action plan. This Readiness Assessment is a series of questions that invites your team to review the SPACECAT results, discuss the need for change, and assess the current resources available to address that need.

Imagine you've decided you'd like to take a vacation. You may start by asking yourself some important questions: When is the best time to go, given your other commitments? What is the budget for your trip? What type of experience would you like to have? Would you like to prioritize relaxation? Adventure? If you are looking for relaxation, you may consider a beach, lake, or cabin. A goal of adventure may mean a location with a lot of activities. Does your budget and schedule allow for the vacation you have in mind? After deciding you can take the time off work and afford to schedule the trip, you might decide what you'll need to pack. Which of those items do you currently own? Which will you need to buy? This process is important; without it, you could end up taking vacation at an inopportune time, overspending, or showing up to the beach with a sweater.

Similarly, SPACECAT results may reveal several opportunities for capacity-building, but the opportunities may not match your team's level of readiness. There are important questions to ask before you begin action planning. Without ensuring your team is ready to take on the challenge, you may begin down a path of action planning that can't be sustained or realistically achieved. The Readiness Assessment can assist your team in thinking through several different variables before taking any next steps and increase the likelihood that your process and goals are realistic and attainable.

Readiness is neither good nor bad. It is a snapshot of your current circumstances. Your team may be highly motivated to build capacity at the intersection of these issues but may face barriers to the work that are important to acknowledge before taking the next step. Conversely, your team may not know much about the intersection of suicide, overdose, and ACEs, or even whether it's the right initiative to pursue right now. **Your team's level of readiness is not a grade nor a judgment of how motivated or committed your team is in preventing suicide, overdose, or ACEs.**

Readiness can be understood as a spectrum from low to high (or challenging to facilitative) and is impacted by many factors, including:

Energy/Interest Readiness Factors	
LOW	**HIGH**
• Priority given to other project work • Limited information on how the intersection of these issues impacts the local community • Topical areas are outside the typical scope staff involved	• High priority to address intersection of suicide, overdose, and ACEs • Data or other motivating information on the impact of this intersection locally • Staff have some familiarity with topical areas and/or have access to workforce capacity development

Influence Readiness Factors	
LOW	**HIGH**
• Limits in decision-making power • Beholden to other, competing priorities • Limited community partnerships in the areas of suicide, overdose, and ACEs	• Decision-making abilities or buy-in from decision-makers • Influence on priority-setting • Existing partnerships or potential partnerships identified

Environment/Context Readiness Factors	
CHALLENGING	**FACILITATIVE**
• Staff stress and burnout • Limits in time, funding, staffing, or other necessary resources • Barriers due to local, state, or national political climates • Stigmatizing narratives in the community around suicide, overdose, or ACEs	• Staff well-being and support • Available time, funding opportunities, staffing, or other necessary resources • Facilitative local, state, or national political climates and/or barriers have been problem-solved • Positive community narratives and/or stigma is being addressed

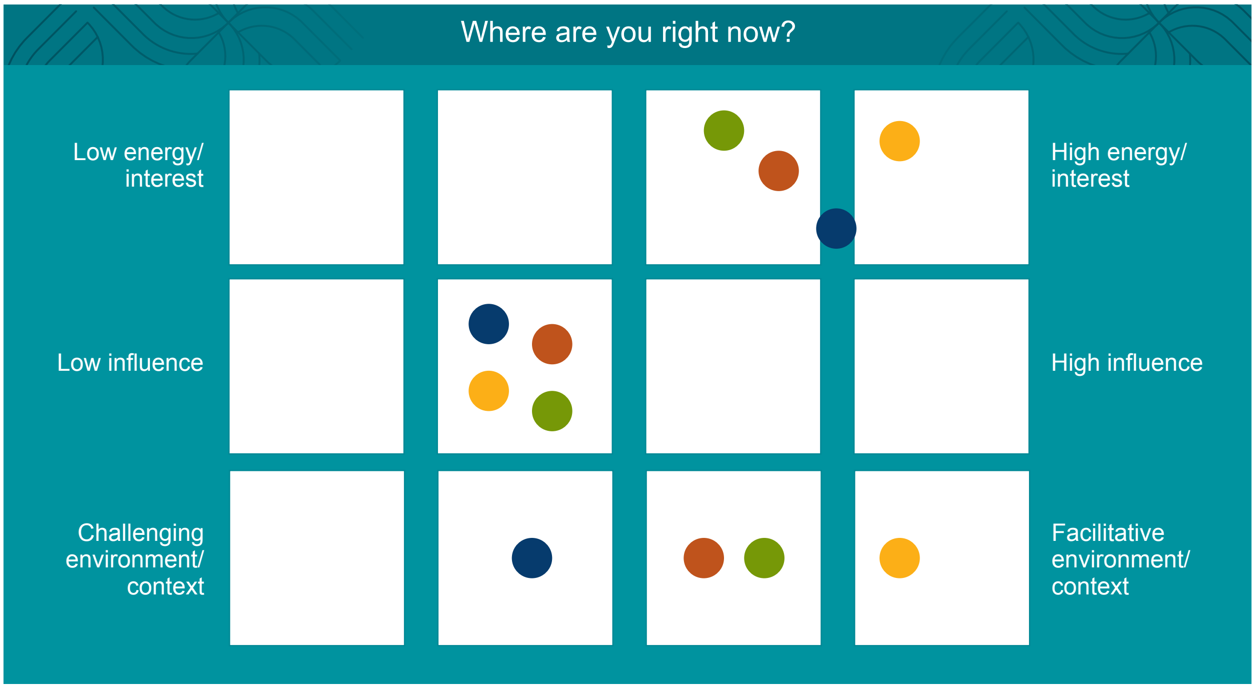
The Readiness Assessment questions are organized around the categories above (environment/context, energy/interest, influence), though there may be other factors that deserve attention. The Readiness Matrix provides a visual representation of how influence, environment/context, and interest contribute to your team's readiness. Reflection questions that coincide with different matrix configurations are provided as well.

Example:

A LHD overdose prevention team of two staff members is considering ways they could adapt or expand their program to target the intersection of suicide, overdose, and ACEs. They have completed the SPACECAT in collaboration with two other LHD staff. All four staff members gather to complete the Readiness Assessment.

While discussing the question prompts in the Readiness Assessment, the four staff recognize that they are motivated to make changes to the address this intersection but are unable to make programmatic decisions without the approval of the administrator, who is not present. They also discuss other LHD departments whose involvement would be necessary for this initiative. When considering environmental context, they recognize that some staff have shared feeling overworked, especially as COVID-19 continues to be a factor in their community. There is discussion about the competing priorities in the department, the increasing suicide rates over the last two years, and leadership's acknowledgement in a recent all staff meeting that more prevention efforts need to be targeting mental health.

Following group discussion of the question prompts, each of the four staff members marks their position on the Readiness Matrix:



The four staff members review their completed Readiness Matrix and the corresponding reflection questions. They decide to set up meetings with the administrator and other department staff to better understand and generate buy-in for this initiative to address intersection work. They decide that there is enough energy/interest and possibly facilitators within the current context to set up these meetings while simultaneously moving forward to the next step in the Quick Start Guide.

Readiness Assessment Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and, and read the section overview.
2. Complete the following questions about stress and wellness individually and anonymously:
   a. From 0-10, what is your current stress level at work if 0 represents no stress and 10 represents high stress?

      0 10

   b. From 0-10, how reasonable is it to add another task to your current workload if 0 represents unreasonable and 10 represents very reasonable?

      0 10

   c. Consider your responses to the two questions above without judgment. What does this indicate to you about your current readiness to do this work?
3. Discuss the questions below as a group ,Consider designating a note-taker to document the major points in your discussion.

Energy/Interest: Attention, priority, and motivation toward the topic:

- Why did we decide to complete the SPACECAT?
- What prompted us to consider addressing the intersecting issues of suicide, overdose, and adverse childhood events (ACEs)?
- What stands out to us about the SPACECAT results? Name the top 3-5.

SPACECAT Domains

- Workforce Capacity
- Health Disparities
- Managed Resources
- Multilevel Leadership
- Data and Surveillance
- Evidence-based practices
- Networked Partnerships
- Strategic Plans and Shared Planning

- Is there a specific geographical area or population of focus we want to target? Why or why not?

Influence: Ability to effect change:

- When we look around the room right now, what is the level of influence present?
- Who else from the health department do we need to engage for action planning?
- What community partners or community connections do we have in these topical areas?
- Are there community organizations that are not yet partners but whom we should engage?

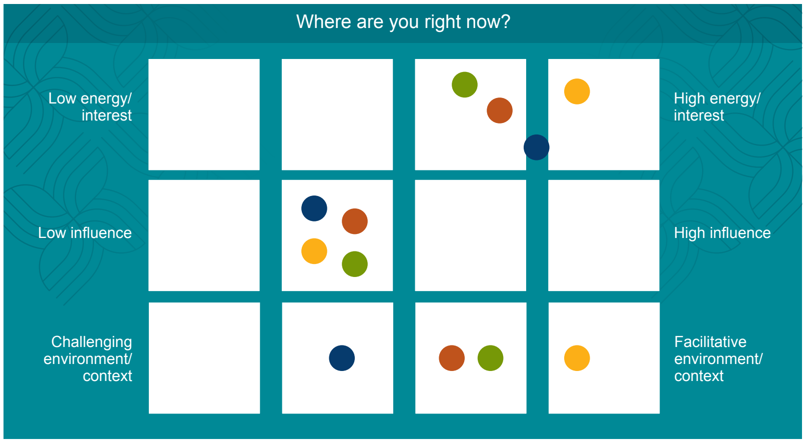
Environment/Context: Current internal, external, or personal circumstances:

- What resources do we have that can support this work?
- Do we think we have what/who we need to keep moving along in this process?
- How coordinated is our health department's work on suicide, overdose, and ACEs?
- What is the current narrative of these issues in the community?

4. Individually, have each member of the team identify the place on the matrix that best represents his/her sense of readiness for each of the three areas and place their sticky note there. Use the blank matrix provided at the end of this section or create a larger version on an easel or wall.

   There will be three stickies per participant: one each for energy/interest, influence, and environment/context. If virtual, team members can use an annotation or virtual sticky note to mark their positions. Team members should keep the most recent discussion in mind, as well as incorporate any information about their own wellness into where they place their sticky.

Going back to the earlier example, one staff member, using the yellow star stickies, identified her interest/energy as high, her perception of influence is low-medium, and the environment/context as facilitative.



5. As a group, take a moment to absorb your Readiness Matrix. Share any observations that come to mind.

6. **Use the questions below as a jumping off point for determining your next steps:**

- **If your matrix reflects primarily LOW placements,** you might consider focusing on generating buy-in and internal capacity-building. Discuss the following questions to inform additional internal conversations:
  - » Can we include leadership? If so, how would we do that?
  - » Is anyone in the community currently doing this work? If so, who?
  - » What can we do to address staff workload or burnout?
  - » Who else in our agency or on our team would benefit from seeing our SPACECAT results?
  - » Is there anyone missing from this discussion?
  - » What partnerships are missing or necessary to move this work forward?
  - » What other information do we need about the intersection of these issues in our community?

- **If your matrix reflects primarily MEDIUM placements,** you might discuss:
  - » What would high energy/interest or influence look like? What would make the context more facilitative?
  - » What makes our current standing medium and not low or challenging?
  - » Is there anyone missing from this discussion?
  - » Who else could weigh in?

- **If your matrix reflects primarily HIGH placements,** you might discuss:
  - » Are there existing departmental efforts on these topics?
  - » What partnerships could we leverage?
  - » Are there any additional readiness factors that have not been reviewed in this assessment?
  - » What has impeded this work until now?
  - » What makes your readiness high at present, and how might you sustain that moving forward?

- **If your matrix reflects a mixture of LOW, MEDIUM, and HIGH placements,** you might discuss:
  - » How is the mixture dispersed? Are there low, medium, and high placements in each category? Or are some categories low/challenging and others high/facilitative?
  - » If there are low, medium, and high placements in a single category, what is contributing to the different perspectives among participants?
  - » How can you leverage high/facilitative categories while addressing low/challenging categories?
  - » How could you move the needle in low and medium categories?
  - » Are there any red or yellow lights here that need to be addressed before moving forward? If so, consider the questions in the LOW placements section to facilitate this.

Readiness Matrix Template

Where are you right now?

Low energy/ interest					High energy/ interest
Low influence					High influence
Challenging environment/ context					Facilitative environment/ context

STEP 2

SOAR Analysis

Quick Start Guide

SOAR Analysis

Goal: Brainstorm current LHD strengths, current or upcoming opportunities, future aspirations, and future results.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
2 hours	2-20 Consider inviting: Team members who completed the SPACECAT tool Staff from related departments Individuals who have knowledge of current LHD resources (e.g., budget, staffing)	Pens, paper, sticky notes OR collaborative virtual platform of your choice SOAR Analysis Worksheet template provided OR create a larger version on a wall or easel	1. Take breaks as needed. 2. Listen to understand, NOT respond. 3. Prepare to actively participate. 4. Criticize ideas, not people. 5. Share the air. 6. Speak your voice. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

- The SOAR Analysis facilitates brainstorming through positive-oriented prompts.
- Identifying strengths, opportunities, aspirations, and results generates innovation.
- The SOAR Analysis lays the groundwork for action planning.

Overview

After completing your Readiness Assessment, you are ready for the next step. The complexities of the intersection of suicide, overdose, and ACEs require innovative thinking and problem-solving. After all, if the solution to strengthening capacity at this intersection was as simple as just thinking about it, you likely would have solved the problem by now! The SOAR Analysis is a framework for strategic visioning that sets the stage for action planning.

SOAR stands for strengths, opportunities, aspirations, and results.

In this exercise, your team is invited to:

- Reflect on the strengths of your department or agency
- Consider current opportunities you may be able to leverage
- Identify your aspirations for working at the intersection of suicide, overdose, and ACEs prevention and
- Imagine what future results could look like.

The SOAR Analysis will assist your team in developing a vision(s) for your work at this intersection that reflects your strengths, shared aspirations, and available opportunities.

SOAR Analysis vs SWOT Analysis

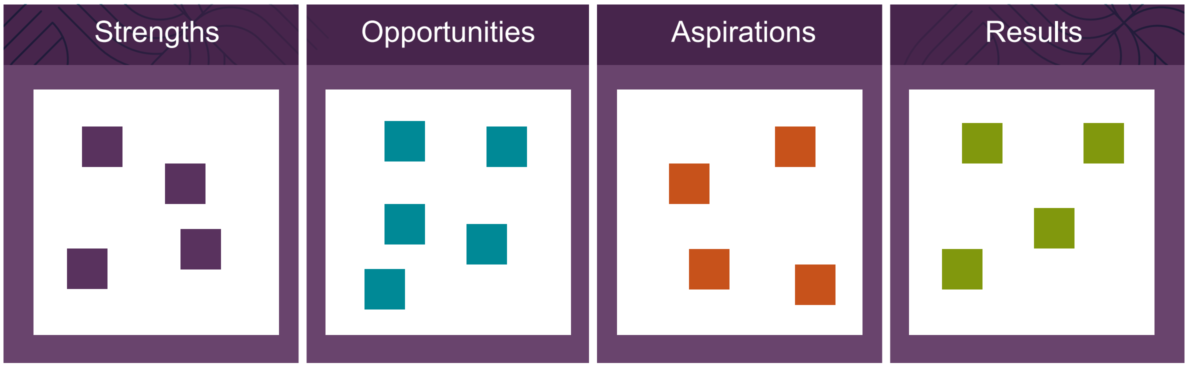
The SOAR Analysis is a modern iteration of a strategic thinking framework called the SWOT Analysis. SWOT stands for strengths, weaknesses, opportunities, and threats. The elements of the SWOT Analysis can lead to a spiral of negative, deficit-based thinking while the SOAR analysis facilitates positive, creative visioning.

It's possible at this stage that your team may already have ideas for the future, the beginnings of an action plan, or a project in mind to build capacity at the intersection of suicide, overdose, and ACEs. Regardless, your team can still benefit from completing the SOAR Analysis. New ideas or insights may emerge that can add value to the work you've already done and provide a new lens through which to view your ideas. Specific questions for teams who have identified projects, ideas, or initiatives are included.

Example:

The overdose prevention team of two along with the two additional LHD staff members who worked together to complete the SPACECAT and the Readiness Assessment have convened to complete the SOAR Analysis. Since completing the Readiness Assessment, they have initiated several meetings with administration and other department heads to share the SPACECAT results and garner support for moving forward with an action plan. An administrator and two additional department heads have agreed to join them in completing the rest of the Quick Start Guide.

They hold an in-person meeting to complete the SOAR Analysis and set up the room with four large flipcharts and sticky notes. Each participant begins by working independently to respond to the SOAR Analysis questions and adding sticky notes with ideas to the corresponding flipchart. After everyone has completed their independent work, the group goes section-by-section to clarify what's written on the sticky notes and discuss.



Through the process, they collectively identify several strengths of their LHD, including their strong network of partnerships. They recognize an opportunity to include their initiative in the LHDs upcoming strategic plan. They reflect on shared aspirations for work at this intersection. For example, they identified a shared aspiration to decrease the stigma of mental health in their community. This aspiration connects to one of the results they imagined—that more community members will seek services.

SOAR Analysis Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and read the section overview.

2. **If completing in-person,** arrange the room with four, large flipchart sheets or pieces of paper. Each flipchart sheet should have one label: Strengths, Opportunities, Aspirations, and Results. Each label should correspond with one color sticky note. Ensure each participant has a writing utensil and sticky notes in all four colors.

   If completing virtually, transpose the SOAR Analysis template below into your preferred virtual collaborative platform, such as Mural, Miro, Google docs, etc. If your team has not used virtual collaboration tools or do not have a preferred platform, search online for virtual collaboration tool platforms.

3. Allow time for each participant to work through each section of the SOAR chart independently. Each participant should write ideas on sticky notes (or virtual stickies) and place that sticky note on its corresponding sheet in the room (or virtual platform). Work in an S-shaped flow. Start with strengths, then move to opportunities, aspirations, and finally results. The questions in each section are only prompts; participants do not need to answer each question in each section.

START HERE

Strengths

Strengths are things your organization does well, along with its key assets, resources, capabilities, and accomplishments. Pull your strengths from both current and past work in other areas/prevention initiatives.

- What do we excel at?
- What are our greatest accomplishments?
- What are our assets?
- What are we most proud of?
- What makes us unique?
- Where have we grown?

Opportunities

Opportunities are circumstances that your team could leverage for success.

- What partnerships would lead to greater success?
- What changes and trends in our community align with our strengths?
- What threats do we see that we could reframe as opportunities?
- What needs and wants are we currently not fulfilling for our internal and external collaborators or partners?
- Where do we need greater leadership and/or collaborator/partner buy-in?
- What is the community's perspective of our current priorities/areas for growth?
- What are our populations of focus?

Aspirations

Aspirations are expressions of what you want to be and achieve in the future. Aspirations are the building blocks on which a vision that incorporates current strengths, provides inspiration, and challenges the current situation is built.

- What do we want our health department work around ACEs, overdose, and suicide prevention to look like in the future?
- What should our future collaborative, cross-sector work around ACEs, overdose, and suicide prevention look like?
- What accomplishments will we be most proud of?
- What do we want to be known for?
- How can we make a difference?
- What are we passionate about?
- What do we want to achieve in the next 3-5 years?
- What do we want to achieve in the next 2 years?
- What do we want to achieve in the next 12 months?

Results

Results are tangible outcomes and measures that demonstrate you've achieved your goals and aspirations.

- What measures will tell us we are on track to achieve success?
- How will we know when we've achieved our goals?
- What does success look like for us?

4. When each participant is done adding stickies, return to the “Strengths” section as a group:

- Have a volunteer read out each sticky in the “Strengths” section out loud.
- Discuss as a group:
  - » Are there any questions about any of the stickies?
  - » What stands out to each of us? (Note: Encourage each participant to respond.)
  - » Now that we see it all together, is there anything we would add to this?
  - » What are our greatest and most unique strengths?
- Mark the stickies that the group agrees are your greatest and most unique strengths.

5. Now move to the “Opportunities” section:

- Have a volunteer read out each sticky in the “Opportunities” section out loud.
- Discuss as a group and add additional sticky notes as needed:
  - » Are there any questions about any of the stickies?
  - » What stands out to us? (Note: Encourage each participant to respond.)
  - » Now that we see it all together, is there anything we would add to this?
  - » If we already had ideas for an initiative to strengthen our work at this intersection, how does it fit in with the opportunities we’ve identified?
  - » Based on our assessment of our greatest strengths, what key opportunities from our SOAR can we capitalize on this year?
- Mark the stickies that the group agrees are your key opportunities.

6. Now move to the “Aspirations” section:

- Have a volunteer read out each sticky in the “Aspirations” section out loud.
- Discuss as a group and add additional sticky notes as needed:
  - » Are there any questions about any of the stickies?
  - » What stands out to us? (Note: Encourage each participant to respond.)
  - » Now that we see it all together, is there anything we would add to this?

7. Stay in the "Aspirations" section. Put these aspirations into groups. Ultimately, these will become the goals of the action plan. Move the stickies under "Aspirations" into like groups. Don't worry about having too many groups; your team will work on prioritization in the next section of the Quick Start Guide. Use the following prompts to help you categorize:

   - What words stand out to you on these stickies?
   - What themes emerge as you look at these stickies?
   - Are there any two stickies that seem to go together? If so, move them next to one another.
   - Are there any stickies that don't seem to go with the others? If so, it is okay for them to be in their own category for now.

8. Now move on as a group to the "Results" section:

   - Have a volunteer read each sticky in the "Results" section out loud.
   - Discuss as a group and add additional sticky notes as needed:
     - » Are there any questions about any of the stickies?
     - » What stands out to us? (Note: Encourage each participant to respond.)
     - » Now that you see it all together, is there anything we would add to this?
     - » What if any challenges do we see to our ability to achieve these results?
     - » How should we account for those challenges as we continue this process?

9. Stay in the "Results" section. Put these results into categories. Move the stickies under "Results" into like categories. Don't worry about having too many categories; your team will work on prioritization in the next section of the Quick Start Guide. Use the following prompts to help you categorize:

   - What themes emerge as you look at these stickies?
   - What words stand out to you on these stickies?
   - Are there any two stickies that seem to go together? If so, move them next to one another.
   - Are there any stickies that don't seem to go with the others? If so, it is okay for them to be in their own category for now.

10. Pause and reflect on the work you've done today.

- What were your reactions to this process?
- What surprised you?
- What energized you?
- What challenged you?
- What new information or insights emerged?

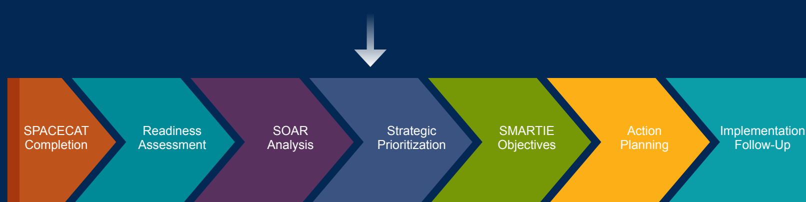
SOAR Analysis Template

Strengths	Opportunities

Aspirations	Results

STEP 3

Strategic Prioritization



Quick Start Guide

Strategic Prioritization

Goal: Assess the relative cost and impact of potential goals to strategically prioritize them.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
30-45 mins	2-20 Consider inviting: Team members who completed the SOAR Analysis Staff from related departments Individuals who have knowledge of current LHD resources (e.g., budget, staffing) LHD Leadership	Completed SOAR Analysis worksheet Pens, paper OR virtual collaborative tool of your choice (e.g. Miro, Mural) Strategic Prioritization Worksheet template provided OR create a larger version on a wall or easel	1. Listen to understand, NOT respond. 2. Prepare to actively participate. 3. Criticize ideas, not people. 4. Share the air. 5. Speak your voice. 6. Feel safe, but not comfortable. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

- Understanding the difficulty/cost and importance/impact of your goals is critical for planning.
- Goals with low relative difficulty/cost and high importance/impact are preferable priorities.

Overview

Your team's SOAR Analysis likely had many ideas and directions, and you should now have category groups of "Aspirations" and "Results" based on your current strengths and opportunities. With many possible directions, it can be difficult to determine the best way forward. Strategic Prioritization helps you to narrow the focus of your initiative by returning to those category groups, refining them, and identifying goals that are the most feasible and likely to have the greatest impact.

This type of prioritization is similar to other decisions your team members may make several times a day in your personal and professional lives. Determining what task is top of the list at any given moment involves questioning that task's time, effort, and importance. You may ask:

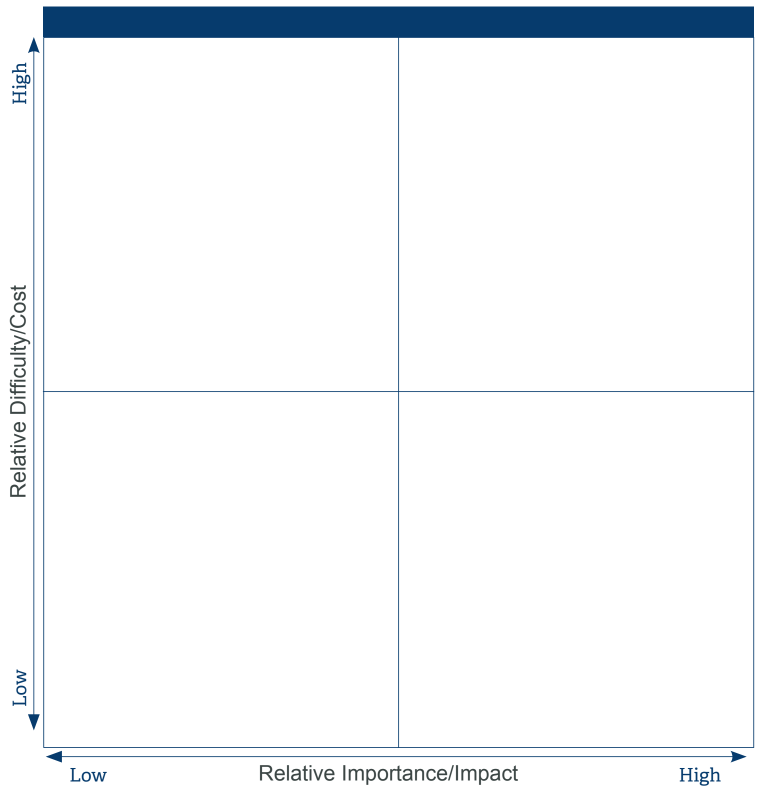
- What's the most important thing to accomplish right now?
- What can wait?
- How much effort will this task take, and is this the right time to do it?

The elements of Strategic Prioritization pose similar questions with a focus on relative difficulty/cost and relative importance/impact. The difficulty/cost and importance/impact of any given goal can be understood on a spectrum:

Relative Difficulty/Cost	
LOW	**HIGH**
Compared to other goals, achieving this goal: • May require minimal resources • May have a simple or relatively quick process • Uses knowledge, skills, or support that already exists	Compared to other goals, achieving this goal: • May require significant resources • May be complex or time-consuming • May necessitate obtaining additional knowledge, skills, or support
Relative Importance/Impact	
LOW	**HIGH**
Compared to other goals, achieving this goal: • Minimally contributes to team vision or shared aspirations • Has limited consequences for or impact on population of focus	Compared to other goals, achieving this goal: • Is integral to the team vision and shared aspirations • Has significant consequences for or impact on population of focus

Tasks with **both relatively low difficulty/cost and relatively high importance/impact** offer an opportunity to make big change, relatively easily. Prioritizing these tasks can help your team build momentum and buy-in, while **difficult, low impact tasks** can be frustrating and slow down progress.

The matrix template below organizes relative difficulty/cost along the y-axis and relative importance/impact along the x-axis and offers a visual representation of how these factors intersect to assist your prioritization.

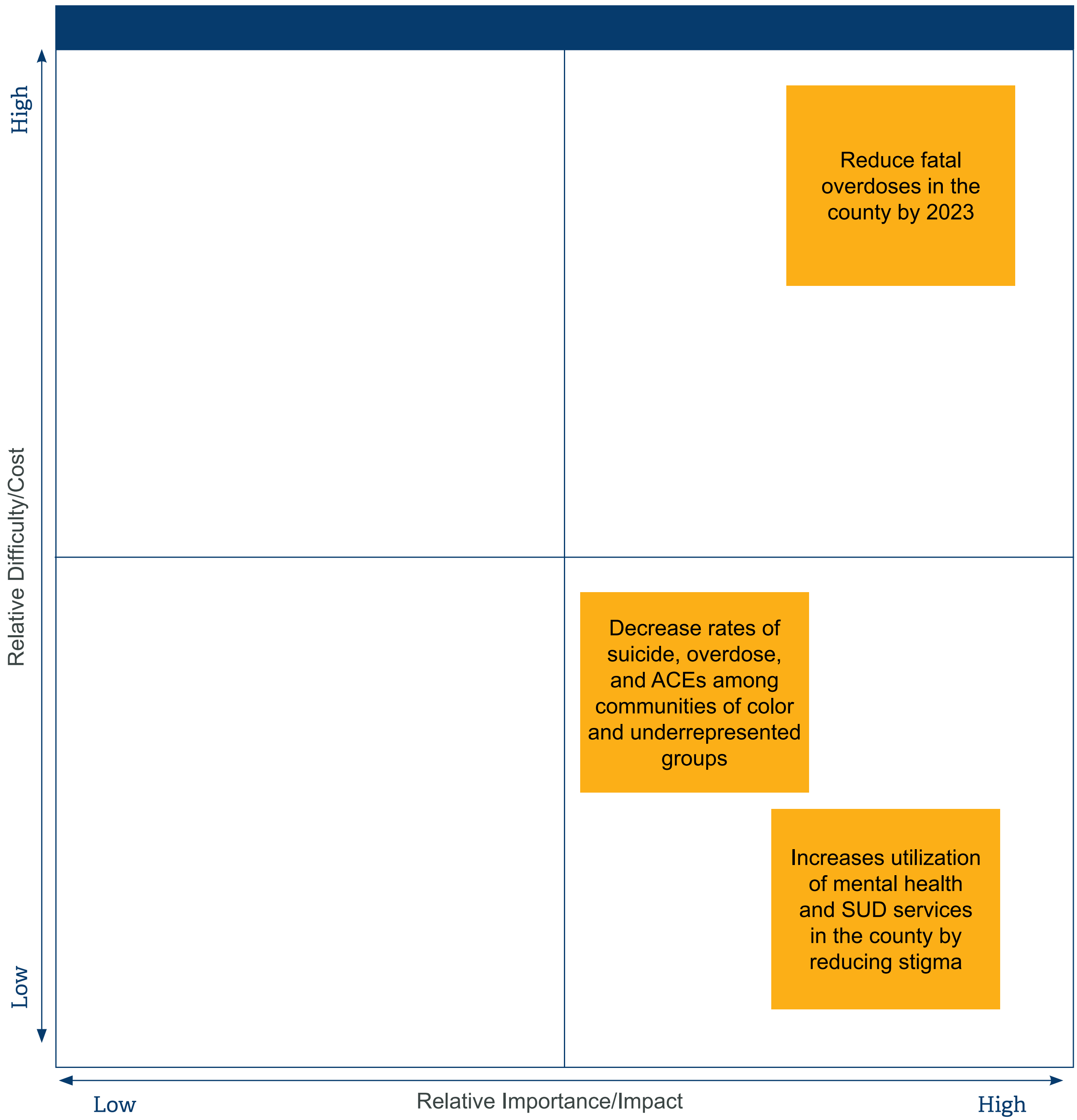


Example:

The LHD team that completed the SOAR Analysis reconvenes to begin the Strategic Prioritization section of the Quick Start Guide. The team revisits the Aspirations sheet that they filled with sticky notes during the SOAR Analysis process. The team works to create a category name for each grouping of sticky notes. Then, they translate these category names into goal format, resulting in four potential goals for their work to build capacity at the intersection of suicide, overdose, and ACEs.

They work together to assess the relative difficulty/cost and importance/impact for each of the four goals and place the goal sticky notes in their corresponding location on the Blank Strategic Prioritization Matrix. Through this process, they recognize that while their goal "Reduce fatal overdoses in the county by 2023" ranks high in the importance/impact axis, it also falls very high in the difficulty/cost axis given their limited access to county data on fatal overdoses, the need for stronger cross-sector partnerships, and the already burdensome workload of internal overdose prevention staff.

Two other goals--"Increase utilization of mental health and SUD services in the county by reducing stigma" and "Decrease rates of suicide, overdose, and ACEs among communities of color and underrepresented groups."—are relatively high on impact/importance and relatively low on difficulty cost. The team decides to prioritize these two goals for their action plan.

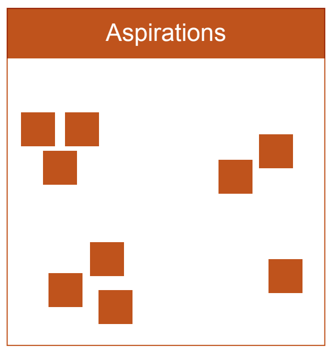


High
Relative Difficulty/Cost
Low
Reduce fatal overdoses in the county by 2023
Decrease rates of suicide, overdose, and ACEs among communities of color and underrepresented groups
Increases utilization of mental health and SUD services in the county by reducing stigma
Low
Relative Importance/Impact
High

Strategic Prioritization Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and read the section overview.

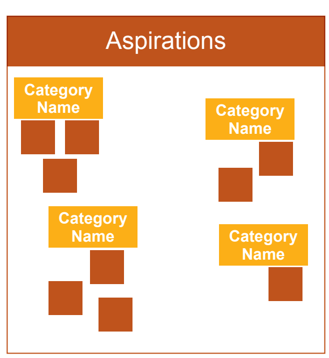
2. Return to the Aspirations section of your completed SOAR Analysis Worksheet (or virtual template). As you may recall, during the SOAR Analysis, your team grouped aspiration ideas by category:



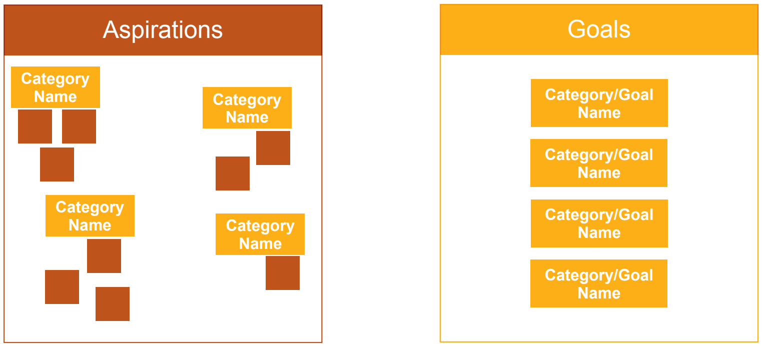
As a group, come up with a name for each category. Choose a name that is simple and clear (1-3 words) and best represents the common theme among the grouped stickies. Consider structuring the name as an adjective + noun, such as “Comprehensive Data”. Use the following prompts to assist you if needed:

- What words stand out in each category to members of the team?
- How might you describe this category to someone outside of your team?
- What are the shared elements of the stickies within each category?

Add a sticky with your chosen category name to each grouping:



3. Title a new, large flipchart sheet or piece of paper as "Goals." Duplicate the category names on your Aspirations sheet onto your Goals sheet. Your aspirations are now taking shape as initiative goals. Reword your categories into goals.



Tips for Goal-Writing

- Utilize the following format: Through our initiative we want to **[verb + noun + timeframe].**
- Consider action verbs: adapt, assess, collect, connect, coordinate, create, determine, develop, discover, drive, eliminate, ensure, establish, facilitate, foster, generate, gather, implement, improve, inform, innovate, launch, map, measure, monitor, observe, obtain, organize, prevent, recommend, reduce, report, review, test, transform, update, etc.
- Keep it brief. Only include words that are necessary.

4. With your goals in mind, discuss the following questions as a group:

- How do these goals address the intersection of suicide, overdose, and ACEs?
- Do any of these goals target the shared risk and/or protective factors of suicide, overdose, and ACEs? If so, which shared risk or protective factors?
- Are any of the goals skewed more toward one area (suicide, overdose, or ACEs prevention)? If so, what do you think might be driving that?
- Are these goals reflective of the areas of need in your SPACECAT results? If so, which areas? If not, are there changes you could make?

5. Use the questions below to help you determine where each goal falls on the Strategic Prioritization matrix. Discuss the questions as a group to reach a consensus and then add the Goal sticky note to the matrix. Use the blank Strategic Prioritization matrix at the end of this section or create a larger version on an easel or wall:

Strategic prioritization is valuable for any number of goals.

- If you have **one goal**, use the following steps to assess the impact and cost of this goal.
- If you have **two goals**, use the following steps to assess their relative impact and cost.
- If you have **more than two goals**, use the following steps to assess their relative impact/cost and to identify one to two priority goals.

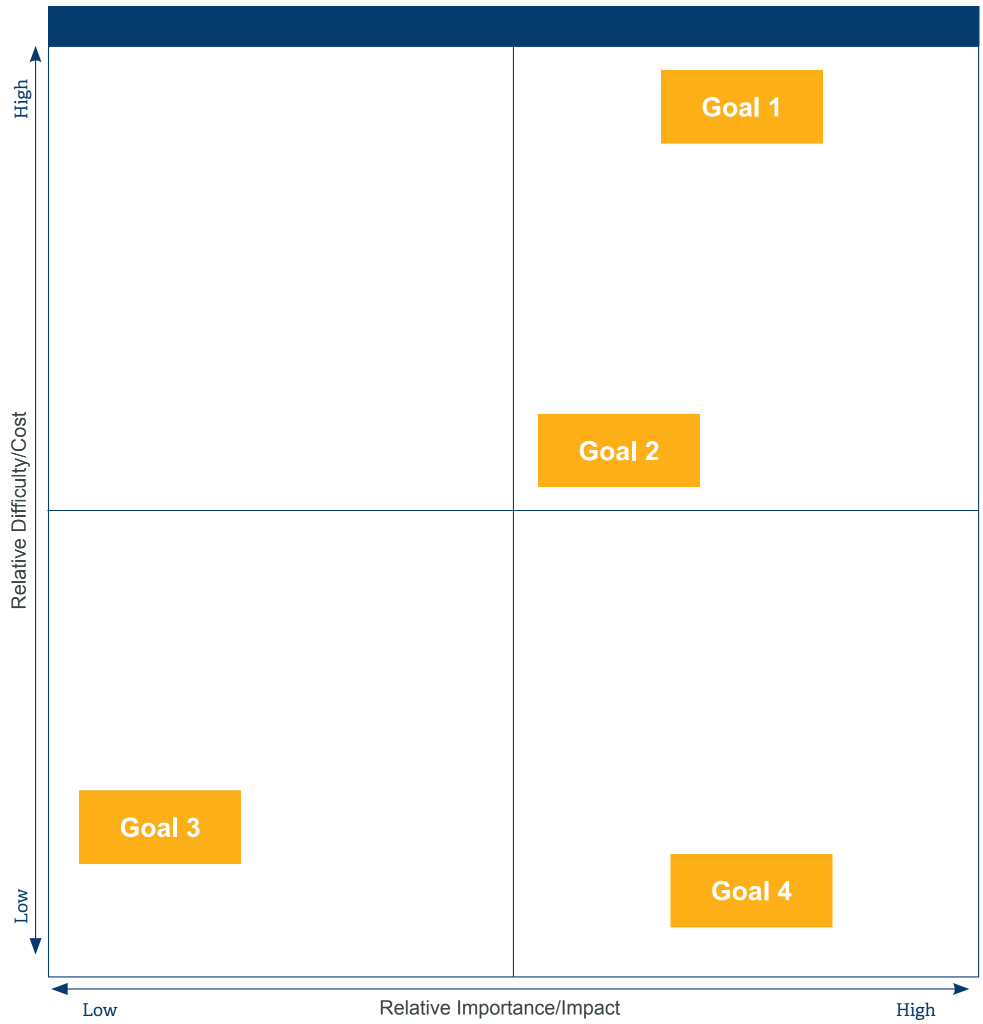
Relative Difficulty/Cost:

- How feasible is this goal currently?
- How complex is this goal?
- What resources (time, energy, staffing, finances) might be needed to accomplish this goal, and are these resources currently available?
- If not, how easy or difficult might it be to secure those resources?

Relative Importance/Impact:

- How well does this goal embody or align with your shared vision?
- How much impact would this goal have? (on the community, population of focus and/or LHD capacity)
- How important is this goal to your team?

Example:



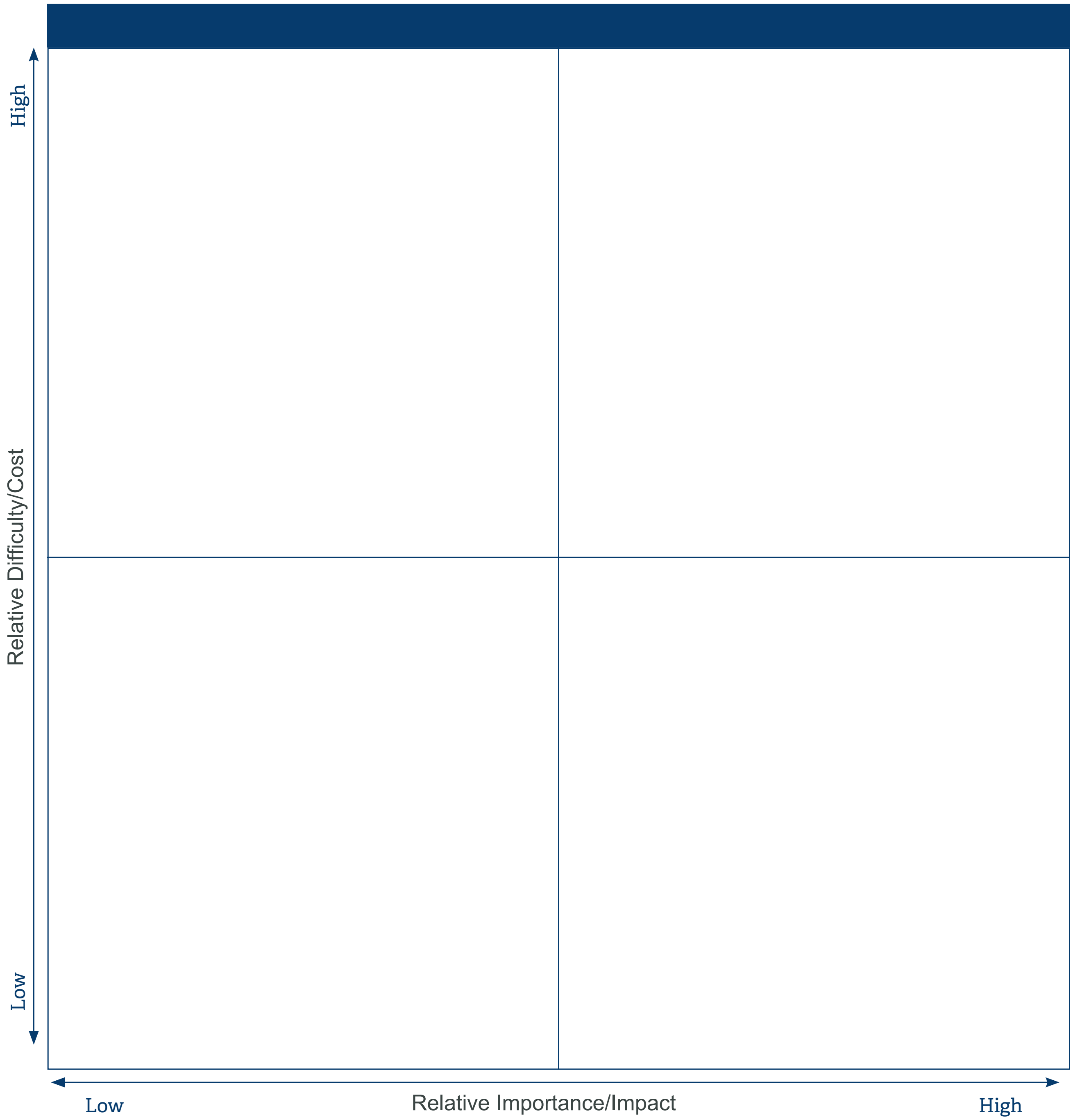
6. Use the completed matrix to identify where your goals currently fall with respect to impact and difficulty. If you have more than two goals, use the matrix to help you identify one or two priorities. In the example above, Goal 4 and Goal 2 have the highest importance/impact with the lowest difficulty/cost, therefore, may be the most reasonable goals to prioritize.

Priority Goals for Action Planning:

Goal 4	Goal 2

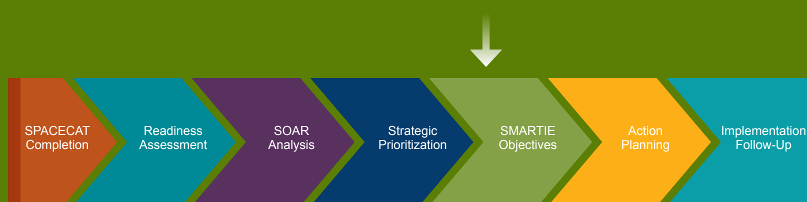
Once you have identified your priority goals, write them at the top of a new, large flipchart sheet or piece of paper.

Blank Strategic Prioritization Matrix:



STEP 4

SMARTIE Objectives



Quick Start Guide

SMARTIE Objectives

Goal: Develop clear and measurable objectives to correspond with prioritized goals.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
60-90 mins	2-20 Consider inviting: Team members who completed Strategic Prioritization Staff from related departments Individuals who have knowledge of current LHD resources (e.g., budget, staffing)	Different color pens/ markers, sticky notes, paper OR virtual collaborative tool of your choice (e.g. Miro, Mural) Completed SOAR Analysis worksheet Completed Strategic Prioritization worksheet SMARTIE Objective worksheet provided OR create a larger version on a wall or easel	1. Listen to understand, NOT respond. 2. Prepare to actively participate. 3. Criticize ideas, not people. 4. Share the air. 5. Speak your voice. 6. Feel safe, but not comfortable. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

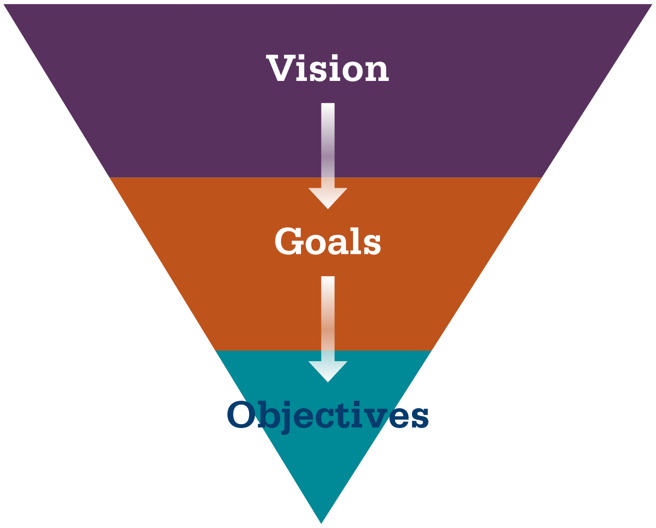
- Objectives are measurable actions toward a goal.
- The SMARTIE framework helps to develop effective objectives.
- SMARTIE incorporates inclusivity and equity.

Overview

Congratulations! You now have identified 1-2 priority goals for your initiatives to build capacity at the intersection of suicide, overdose, and ACEs prevention. In this section, your team will work to develop objectives using the SMARTIE format.

SMARTIE stands for specific, measurable, achievable, relevant, time-bound, inclusive, equitable.

While goals represent your long-term vision, objectives are the measurable actions that demonstrate progress toward that goal. Objectives are the path leading the work from point A to point B, from the present to the future.



The SMARTIE framework helps format objectives to be *clear, achievable, and relevant* so that they can be used to plan, delegate tasks, and evaluate progress. A plan has the best chance of success if the task is clear, everyone knows his/her role, and the timeline for completion. Each component of the SMARTIE framework is incorporated into the objective formulation, creating an objective with which your team can begin the work ahead.

You may recognize the SMART of the SMARTIE framework. This tool has been around for some time. The I, *inclusive*, and E, *equitable*, were added more recently to deepen the process of crafting objectives. As public health professionals, it is crucial to embed the principles of inclusivity and equity at every stage of planning and implementation.

Equitable, the E of SMARTIE, refers to the ways an objective may address systemic inequities or injustices. When an objective is inclusive and equitable, the objective takes into account many viewpoints and what each of those viewpoints may need to be successful.

Even if your objective does not explicitly address inequity or injustice you can still incorporate inclusivity and equity. To incorporate inclusivity, you might consider how to engage multiple staff perspectives in your processes to ensure that everyone has an opportunity to weigh in on changes that affect them. To incorporate equity, you might consider how a policy change would be adopted by all levels within the LHD, from administrative staff to program staff to leadership.

WHAT MAKES OBJECTIVES S.M.A.R.T.I.E.?

SPECIFIC

Does this objective clearly specify what will be accomplished, by whom, and for whom?

MEASURABLE

Can we easily demonstrate that this goal has been met?

ATTAINABLE

Is this objective realistic, reasonable, and within our control or scope?

RELEVANT

Does this clearly align to the vision and strategic priorities identified?

TIME-BOUND

By when will you have accomplished this objective?

INCLUSIVE

How will you include or involve those most impacted in the process, activities, and decision-making?

EQUITABLE

Does this objective seek to address systemic injustices or inequities?

SPECIFIC

When the objective is *specific*, it is clear to someone who may not have any context. Specific objectives include the names or position titles of people who will be involved.

Example: "Plan the training." → "The **Education Coordinator** will plan the **Intro to ACEs training for the LHD direct care providers.**"

MEASURABLE

When the objective is *measurable*, it will incorporate an output that can be measured or that can demonstrate completion.

Example: "The Education Coordinator will plan the Intro to ACEs care training for the LHD direct care providers." → "The Education Coordinator will **develop a curriculum** for the Intro to ACEs training for the LHD direct care providers."

ATTAINABLE

When the objective is *attainable*, it's one that is reasonable, realistic and within your control.

Example: Though enthusiastic, the Education Coordinator does not have expertise or training experience in ACEs subject matter.

"The Education Coordinator will develop curriculum for the Intro to ACEs training for the LHD direct care providers." → "The Education Coordinator **will identify 3-5 existing curriculum options** for the Intro to ACEs training for the LHD direct care providers."

RELEVANT

When the objective is *relevant*, it makes sense with the project goal or vision.

Example: "The Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training for the LHD direct care providers." This objective **aligns with the initiative goal** to reduce mental health stigma.

TIME-BOUND

When the objective is *time-bound*, a completion date is included.

Example: The Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training for the LHD direct care providers. → **By December 1, 2022**, the Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training for the LHD direct care providers.

INCLUSIVE

When the objective is *inclusive*, it reflects inclusion of those who are impacted or those whose input is often neglected. The I of SMARTIE prompts you to consider how the proposed objective will be inclusive of or incorporate the needs and interests of those who are impacted the most by the plan.

Example: The planning team recalls the opportunity to leverage its partnership with a local ACEs coalition that includes members with lived experience.

"By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training for the LHD direct care providers. → By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the LHD direct care providers' Intro to ACEs training **to be reviewed by the coalition**."

EQUITABLE

When the objective is *equitable*, it moves the needle toward addressing injustices or inequities whenever possible. The objective takes into account many viewpoints and what each of those viewpoints may need to be successful.

Example: The planning team recognizes that all staff, regardless of role, would benefit from an introduction to ACEs. The team also recognizes that some staff, based on their roles and schedules may have a more difficult time attending trainings at the dates and times they are scheduled.

"By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the LHD direct care providers' Intro to ACEs training to be reviewed by the coalition." ➞ "By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training to be reviewed by the coalition, **with the intention that all LHD staff members will have access to the training content and materials."**

SMARTIE Objectives Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and read the section overview.
2. Revisit the priority goals for action planning that you identified during Strategic Prioritization:

Priority Goals for Action Planning:

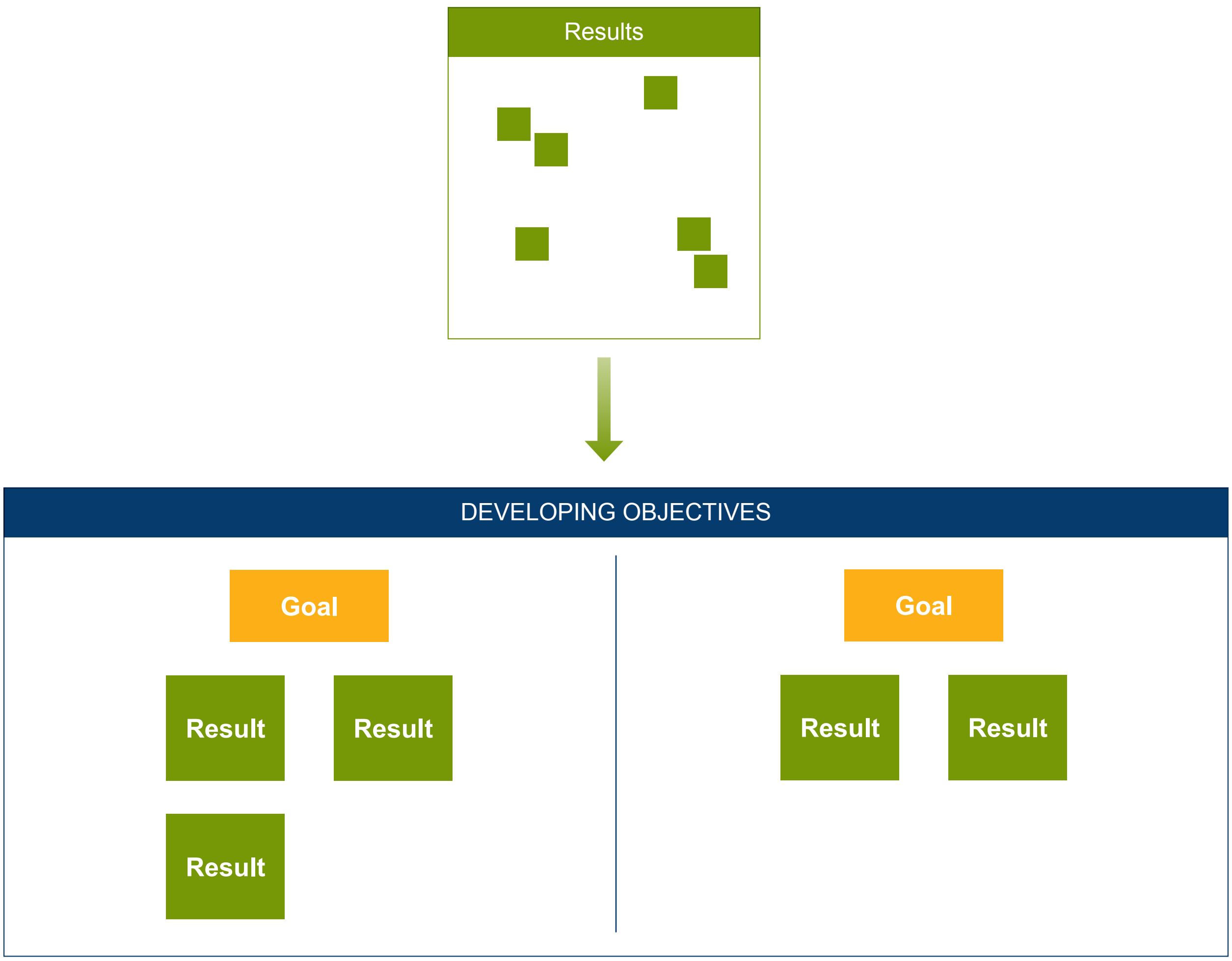
Goal	Goal

Add these goals into the box below, onto an easel/large sheet of paper, or in your virtual collaboration tool.

3. Keeping your priority goals in mind, return to your completed SOAR Analysis Worksheet:
   - Do any of the stickies in the Results section align with your priority goals? If so, duplicate these stickies in the box below under the goal they correspond with.
   - If not, that's okay. Move on to the next question.

4. Brainstorm other results in the box below, using the questions as prompts:

- What other results might align with each priority goal?
- What measurable results will tell you that you've made progress toward your vision for the future?
- How will you know that you're succeeding toward each priority goal?



5. Revisit the Strengths and Opportunities sections of your completed SOAR Analysis:
   - Do the results in the box above align with any of your strengths or opportunities? If so, how? If not, why not?
   - Is there anything you would change about the results in the box above after reviewing your strengths and opportunities? If yes, make those changes.
   - Is there anything you would add? If yes, add now.
6. Revisit these questions from the goal-setting portion of strategic prioritization, this time with your results in mind:
   - How do these results address the intersection of suicide, overdose, and ACEs?
   - Do any of these results target the shared risk and/or protective factors of suicide, overdose, and ACEs? If so, which shared risk or protective factors?
   - Are any of the results skewed more toward one area (suicide, overdose, or ACEs prevention). If so, what do you think might be driving that?
   - Are these results reflective of the areas of need in your SPACECAT results? If so, which areas? If not, are there changes you could make?
7. Work as a group to determine which results in the box above should be crafted into objectives. The results from your original SOAR may align topically with your prioritized goals but may not be the most important or feasible. Your team may benefit from using a blank Strategic Prioritization matrix (provided in the Strategic Prioritization section) to help you understand the relative value and difficulty of each potential result. Discuss and come to a consensus about which results you will take to the next step.

8. Rewrite each result so that it becomes a SMARTIE objective. Use the SMARTIE Questions Checklist and fill-in-the-blank guide below to assist you. Place your SMARTIE Objectives into the boxes below with the corresponding goal.

By ___*[date/time]*___, ___*[person, role, group]*___ will ___*[specific, measurable action or specific outcome]*___ (for___*[person, role, group]*___).

- ✓ **Specific-** Does this objective clearly specify what will be accomplished, by whom, and for whom?
- ✓ **Measurable-** Can you easily demonstrate that this objective has been met?
- ✓ **Attainable-** Is this objective realistic, reasonable, and within our control or scope?
- ✓ **Relevant-** Does this objective clearly align with the goal you've identified?
- ✓ **Time-Bound-** Does this objective include a timeframe? **At this point, your objective timeframe may be an estimate. You will have opportunities to change or update your objective timeframe in the Action Planning section.**
- ✓ **Inclusive-** Is this objective inclusive of those most impacted by the process, activities, and decision-making?
- ✓ **Equitable-** Does this objective seek to address injustices or inequities?

SMARTIE OBJECTIVES

	Goal		Goal
SMARTIE Objective		SMARTIE Objective	
SMARTIE Objective		SMARTIE Objective	
SMARTIE Objective		SMARTIE Objective	
		SMARTIE Objective	

SMARTIE OBJECTIVES

Goal	Goal
SMARTIE Objective:	**SMARTIE Objective:**
SMARTIE Objective:	**SMARTIE Objective:**
SMARTIE Objective:	**SMARTIE Objective:**

STEP 5

Action Planning

Quick Start Guide

Action Planning

Goal: Develop an action plan to achieve the objectives that have been identified.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
60-90 mins	2-20 Consider inviting: Team members who completed the SMARTIE Objectives Staff from related departments Individuals who have knowledge of current LHD resources (e.g., budget, staffing) LHD leadership	Pens OR virtual collaborative tool of your choice (e.g. Miro, Mural) Action Planning Worksheet provided OR virtual version	1. Listen to understand, NOT respond. 2. Prepare to actively participate. 3. Criticize ideas, not people. 4. Share the air. 5. Speak your voice. 6. Feel safe, but not comfortable. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

- In action planning, the team outlines specific steps to achieve each objective.
- The team should consider feasibility for each step required to complete the activity.
- The completed action plan keeps the team on track and accountable to objectives and goals.

Overview

Now that you have identified priority goals and created SMARTIE objectives, you are ready to develop an action plan. Through action planning, your ideas take are converted into concrete action steps.

Action planning is a process by which your team can consider the steps that would be needed to achieve the objective and ensure that you have a clear plan, adequate resources, and the means by which to hold responsible team members accountable for goals you identify.

An action plan consists of the specific activities that will help you meet your objectives and eventually, the larger goal. Each activity should contain a target date, resources required, responsible party(ies), anticipated product or result, and a space to detail the status of each activity throughout the project (i.e., "Progress Note").

Action planning is the process of “putting pen to paper” and mapping out the details of your objectives. Regardless of how obvious some aspects of action planning may feel, it is important to engage in comprehensive action planning to ensure activities – and the resources required – are in place and accounted for at each stage in the process. Action planning can also provide clarity and a shared agreement among your team, particularly surrounding next steps and who is responsible for what.

The Action Planning worksheet in this section includes the following sections:

Action Planning Goal:	The priority goal that you identified through Strategic Prioritization
Objectives:	The objectives you crafted in the SMARTIE Objectives section
Priority Population(s):	The population group(s) targeted by this objective
Activity:	The steps you will take to achieve each objective. The activities are the "how" portion of the action plan. It is best to organize activities chronologically by start dates. Place each activity in a separate row and add as many rows as you need to the template.
Target Date:	The anticipated end date for each activity
Resources Required:	All anticipated resources needed for this action step. (Examples: funding, staff time, space needs, supplies, technology, equipment, and key partners.)
Lead Person/ Organization:	The key person(s) who will be responsible for the activity, provide direction for the work, and monitor progress
Anticipated Result:	The final "product". For example, the result could be a changed policy, a training provided, or a resource you created.
Progress Notes:	Space for tracking progress toward completion of activities. If conditions have changed or an unexpected issue has emerged, you may need to use this information to revise your activity.

Example:

The LHD team reconvenes to complete their action plan. A team member volunteers as the scribe and fills out the worksheet provided as the team completed each step. They begin with the following SMARTIE objective that they crafted in the last meeting: “By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training to be reviewed by the ACEs coalition, with the intention that all LHD staff members will have access to the training content and materials.”

Going step by step, the team discusses each aspect of the action plan for this objective. Doing so allows them to recognize that internal policy dictates that before searching for curriculum options, they first need to get approval from the Workforce Development Committee to incorporate and Intro to ACEs training into the professional development training schedule for 2023. They include this as the first step in the action plan (Action Planning Example #1, below).

Later in the meeting, they move on to one of their other SMARTIE objectives: “By July 2023, decrease the percentage of suicide and overdose deaths in Pleasantville County by 10%, particularly among communities of color and underrepresented groups through implementation of the SOAR messaging campaign” (Action Planning Example #2, below).

Action Planning

Example #1

Goal: Improve internal training opportunities for employees at Pleasantville County Health Department.

Objective:	By December 1, 2022, the Education Coordinator will identify 3-5 existing curriculum options for the Intro to ACEs training to be reviewed by the ACEs coalition, with the intention that all LHD staff members will have access to the training content and materials.
Priority Population(s):	All staff at Pleasantville County Health Department

ACTION PLAN

Activity	Target Date	Resources Required	Lead Person/ Organization	Anticipated Product or Result	Progress Notes
Meet with Workforce Development Committee (WDC) to get Intro to ACEs training included in internal professional development calendar	7/30/22	Staff time	Janet Smith, Education Coordinator	WDC will agree to adopt the Intro to ACEs into the professional development calendar	
Attend ACEs coalition meeting to share plan to incorporate Intro to ACEs curriculum and make request for coalition review	8/15/22	Staff time	Janet Smith, Education Coordinator	Minutes from coalition meeting	
Research existing ACEs curriculum	9/30/22	Staff time	Janet Smith, Education Coordinator	List of up to 10 existing curriculum options	
With the WDC, narrow down training curriculum list to 3-5 options according to preferred training platforms, lengths, and format	10/30/22	Staff time	Janet Smith, Education Coordinator	List of 3-5 existing curriculum options	
Schedule meeting with the ACEs coalition	11/30/22	Staff time	Janet Smith, Education Coordinator	Confirmed meeting date	

DESCRIBE PLANS FOR SUSTAINING ACTION

In January of each year, the Workforce Development Committee and ACEs coalition will review the content for the training to ensure that it is still relevant and accurate. Any changes to the curriculum must be reviewed and approved by the ACEs Coalition.

Action Planning

Example #2

Goal: Decrease rates of suicide, overdose, and ACEs among communities of color and underrepresented groups in Pleasantville County.

Objective:	By July 2023, decrease the percentage of suicide and overdose deaths in Pleasantville County by 10%, particularly among communities of color and underrepresented groups through implementation of the SOAR messaging campaign.
Priority Population(s):	Communities of color and underrepresented groups in Pleasantville County who are at increased risk for suicide, overdose, and ACEs.

ACTION PLAN

Activity	Target Date	Resources Required	Lead Person/ Organization	Anticipated Product or Result	Progress Notes
Host listening sessions with communities of color and underrepresented groups.	9/30/2023	Coalition and staff time, building venue	James Williams, Suicide and Overdose Coalition Chair & Bob Smith, Suicide Prevention Coordinator, Pleasantville County Health Department (PCHD)	Listening session notes	
Evaluate the listening sessions.	10/30/2022	Staff time, computer	Sherry Clark, Program Evaluator, PCHD	Final report from listening session note analysis	
Work with participants from the listening sessions to turn messages into public service announcements (PSA) featuring communities of color that will be released on social media platforms and YouTube.	1/30/2023	Staff time, coalition support, communications team support, IT support	James Williams, Suicide and Overdose Coalition Chair & Bob Smith, Suicide Prevention Coordinator, PCHD	Initial draft of messages for PSA	
Test the messages developed with the target audience.	3/30/2023	Staff Time, coalition support	James Williams, Suicide and Overdose Coalition Chair & Bob Smith, Suicide Prevention Coordinator, PCHD	Report detailing feedback and reception of test messages	
Promote the PSA on social media and YouTube.	4/30/2023	Staff time, coalition support	James Williams, Suicide and Overdose Coalition Chair & Bob Smith, Suicide Prevention Coordinator, PCHD	Final PSA messages and video link	
Develop an online toolkit (including the PSA) to address issues discussed during the listening sessions with communities of color and underrepresented groups.	7/30/2023	Staff time, coalition support, health communications team, IT team	Bob Smith, Suicide Prevention Coordinator, PCHD	Finalized online toolkit	

DESCRIBE PLANS FOR SUSTAINING ACTION

The coalition and health department will continue to collaborate and work together on reducing the rates of suicide, overdose, and ACEs. The online toolkit will be reviewed by the coalition each year in January for accuracy and edits will be made as necessary.

Acknowledgment: This Action Planning Template is a modified version of the *Austin/Travis County Action Plan Template Kit*, which was in turn based on the work of the Wisconsin CHIPP Infrastructure Project and the Healthy Wisconsin Leadership Institute's *Action Plan Template*.

Action Planning Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and read the section overview.

2. Revisit the SMARTIE Objectives that you developed for each prioritized goal:

SMARTIE OBJECTIVES
Goal 1
• SMARTIE Objective • SMARTIE Objective • SMARTIE Objective

SMARTIE OBJECTIVES
Goal 1
• SMARTIE Objective • SMARTIE Objective • SMARTIE Objective • SMARTIE Objective

As a team, begin to arrange the objectives under each goal in their most logical order:

- Which objective should be completed (or started) first?
- Which one should be completed (or started) last?
- Which order makes the most sense for the remaining objectives?

SMARTIE OBJECTIVES
Goal 1
• SMARTIE Objective • SMARTIE Objective • SMARTIE Objective

SMARTIE OBJECTIVES
Goal 1
• SMARTIE Objective • SMARTIE Objective • SMARTIE Objective • SMARTIE Objective

3. If you have more than one prioritized goal, choose one to start with. Write this goal into the GOAL section of the blank action planning template below.

Action Planning Goal:	The priority goal that you identified through Strategic Prioritization

4. Write the first objective that corresponds with that goal in the OBJECTIVE section of the action planning template.

Objectives:	The objectives you crafted in the SMARTIE Objectives section

5. Indicate the Priority Population(s) that are served through this objective.

Priority Population(s):	The population group(s) targeted by this objective or goal • Who will be affected by this completing objective/goal? • What population group are you intending this objective to target? • Clarify in the worksheet whether this is the population of focus for the goal or this particular objective.

6. Brainstorm the activities that are needed to complete the objective.

Activity:	The steps you will take to achieve each objective. The activities are the "how" portion of the action plan. It is best to organize activities chronologically by start dates. Place each activity in a separate row and add as many rows as you need to the template. • What is the first step toward this objective? • What needs to happen next? • If this objective is similar to other projects or processes at your LHD, what activities did those projects or processes require? • How does something like this normally work at your LHD? • What do you think would be the last thing to happen before this objective was considered complete? This may be the final activity in the list. • What is a potential challenge or barrier you could see at this step? How can you plan for that?

7. Input the activities you've identified into the blank rows of the action planning template in their logical order. Fill in the corresponding columns: Target Date, Resources Required, Lead Person/Organization, and Anticipated Product or Results.

Target Date:	The anticipated end date for each activity • What target date reasonable? • What target date keeps the momentum?
Resources Required:	All anticipated resources needed for this action step. (Examples: funding, staff time, space needs, supplies, technology, equipment, and key partners.) • What resources are needed to implement this step?
Lead Person/ Organization:	The key person(s) who will be responsible for the activity, provide direction for the work, and monitor progress • Who needs to be involved in this step? • Who will be responsible for seeing that it gets completed? • Who will need to approve this?
Anticipated Result:	The final "product". For example, the result could be a changed policy, a training provided, or a resource you created. • What is the tangible outcome of this activity? • What will be considered the proof of completion for this activity?
Progress Notes:	Space for tracking progress toward completion of activities. If conditions have changed or an unexpected issue has emerged, you may need to use this information to revise your activity. • What happened as this particular activity was in progress? • What new information/insights emerged? • How might the activity have change during implementation?

If at any point in the action planning process your team recognizes the need to reorder an activity or objective, do it! Re-ordering is often a natural consequence of breaking down objectives into steps/activities.

8. In the box provided, describe your plans for sustaining action.

- What efforts will sustain the action outlined under this objective?
- What will keep the action in motion beyond this action plan?
- What is needed to keep the action relevant over time?

9. Repeat steps 3-8 for each of your SMARTIE objectives.

10. Once you have completed the action planning template, your Action Plan is ready for implementation. Discuss the following considerations with your team:

- How will you communicate your Action Plan to the people/groups involved?
- Who is responsible for disseminating the Action Plan?
- How will team members responsible for each activity share progress or challenges with the larger team?
- When will you meet again to review progress in the Action Plan?
  - » Consider re-convening a quarter of the way through the Action Plan timeline. For example, if your Action Plan spans a 12-month period, re-convene in 3 months to complete the Implementation Follow-Up section of the Quick Start Guide.

Blank Action Planning Template

Goal:	
Objective:	
Priority Population(s):	

ACTION PLAN

Activity	Target Date	Resources Required	Lead Person/ Organization	Anticipated Product or Result	Progress Notes

DESCRIBE PLANS FOR SUSTAINING ACTION

Please copy the goal and objective tables as needed.

Acknowledgment: This Action Planning Template is a modified version of the *Austin/Travis County Action Plan Template Kit*, which was in turn based on the work of the Wisconsin CHIPP Infrastructure Project and the Healthy Wisconsin Leadership Institute's *Action Plan Template*.

STEP 6

Implementation Follow-Up

Quick Start Guide

Implementation Follow-Up

Goal: Assess Action Plan implementation progress, problem-solve any barriers to implementation, and adjust the plan as needed.

Time	Suggested Participants	Materials Needed	Suggested Team Approach
60-90 mins	2-20 Consider inviting: Team members who are involved in the Action Plan.	Pens OR virtual collaborative tool of your choice (e.g. Miro, Mural) Action Plan Implementation Follow-Up Worksheet provided OR virtual version	1. Listen to understand, NOT respond. 2. Prepare to actively participate. 3. Criticize ideas, not people. 4. Share the air. 5. Speak your voice. 6. Feel safe, but not comfortable. 7. Suspend assumptions. 8. Minimize distractions – no technology other than what we are using!

Key Takeaways

- Schedule regular meetings for check-ins and status updates on your action plan.
- Approach challenges with curiosity.
- Leverage strengths and successes when problem-solving barriers to action plan implementation.

Overview

Welcome back to the Quick Start Guide! It is recommended that your team reconvene to complete Implementation Follow-Up a quarter of the way through the Action Plan timeline. For example, if your Action Plan spans a 12-month period, compete this section at the 3-month mark.

By now, your team has started implementing your action plan to build capacity at the intersection of suicide, overdose, and ACEs. The Implementation Follow-Up section provides your team guidance when reconvening and assessing your Action Plan progress.

Implementation Follow-Up is valuable at all stages of your Action Plan implementation. Intentional check-ins during the implementation phase help with sustaining momentum and making necessary adjustments to the original Action Plan when activities, timeframes, and/or circumstances change. Regardless of how detailed your Action Plan is, unexpected staffing changes, unforeseen barriers, and changes in available resources are often unpredictable and can impact progress. Similarly, once your team begins implementing the plan, you may find that additional steps are necessary to complete an activity, and the target date is no longer realistic. Implementation Follow-up is intentionally built into the action planning process to give your team the opportunity to regularly assess whether the plan is still feasible as is or needs some changes.

Approach the Implementation Follow-up process with curiosity. As team members provide updates on progress, inquire what is working and what presents an opportunity for creative problem-solving. Try to set aside judgments about progress or setbacks and frame Implementation Follow-Up as an opportunity to gather valuable information. **The information is neither good nor bad.** Rather, it is all useful as your team works to address this complex intersection.

Example:

The LHD team reconvenes three months after agreeing on an action plan for Implementation Follow-Up. The team responds to the question prompts and recognizes their successes in identifying training curriculums and in organizing their strategic planning schedule with all necessary parties. They are proud that they have prioritized the activities in their Action Plan amidst their other responsibilities. The team reviews their Action Plan together and marks specific activities that have fallen behind schedule or have changed in some way over the past three months.

For each activity that they mark for further discussion, the team uses the decision tree to explore how and why the activity did not go as planned. Team problem-solving leads to some solutions that they add to the action plan, and they agree to reconvene in three months for another Implementation Follow-Up session.

Was the activity description clear?
Did the responsible party understand the task?

Yes

Was the change or barrier to this activity related to timing?

Yes

What timeline is reasonable now?

Discuss, and as needed:

- Update the timeframe for the objective
- Brainstorm and plan ahead for other potential barriers to the timeline

No

What got in the way?

Discuss, and as needed:

- Problem-solve
- Identify needs for more information
- Revisit strengths and successes for ideas

No

What is missing from the activity description?

Discuss, and as needed:

- Clarify
- Reword or rework the activity

What might get in the way now?

- Is the timing for this activity still feasible?
- Are there any other anticipated barriers?
- Brainstorm and plan ahead for other potential barriers to the timeline

Implementation Follow-Up Worksheet

1. Schedule a dedicated time to meet, gather the recommended materials, convene your team, and read the section overview.

2. Review your team's Action Plan. As a group, revisit each objective one at a time.

   - Have a volunteer read the Progress Notes column out loud
   - Are there any questions about anything in this column? Discuss.
   - Are there any activities in this objective that have changed (in timeframe, responsible party, activity description, etc.)? If so, mark these to return to later in this exercise.
   - Is there any information in the Progress Notes column that will require additional discussion or problem-solving? If so, mark these to return to later in this exercise.

3. After reviewing Progress Notes on each objective, take a step back and consider the current state of the Action Plan as a whole. Discuss and take down responses for the following questions:

   What's working well?

   Where are our successes?

What strengths are showing up at this stage of implementation?

What are we proud of?

Continue to next page.

4. Return to activities in the action plan that you marked for further discussion and follow the decision tree below.