**MassCALL3 Office Hours: 9.14.22  
Notes**

This session will focus on the process to follow in submitting your strategic plan deliverables, what to expect in the review process, and answering any questions you have.

* **SAVE THE DATE!**
  + September 21: This session will focus on crafting problem statements for your logic model. Come with your draft problem statements if you have them or just come with your questions and/or past experiences in developing problem statements.
  + September 28: This session will focus on criteria and processes for prioritizing intervening variables, as well as where you go from there in identifying strategies and short, intermediate, and long-term outcomes.

**Strategic Plan**

* The Site Visit comes before completing the written deliverable for Step 1
  + Site visit is too formal of a term, the intent is to provide an opportunity for BSAS, SSRE, and CSPS to get to know your coalition. CSPS and BSAS get to know the coordinator but want to introduce ourselves to the rest of the coalition members or supervisors
    - Anyone you rely on in this process is who BSAS wants to meet and who you can include in the site visit
  + **Site Visit Template:** “Required” but just to organize and give you a bit of an overview of what BSAS wants to hear. It is meant to be a useful tool there won’t be feedback given on the visit itself, it should be used a jumping off tool.
    - **The goal of the visit:**
      * Is to have a relaxed casual opportunity to see how things are going in your strategic planning process, would love to have anyone involved that are comfortable share their experiences and hear from them
      * Show you are engaging your region
      * Provide structure but also flexibility
      * Showcase what you coalition is proud of in your assessment or what you want to demonstrate that is going so well
      * View it as a “Take stock point” to assess what didn’t go so well, or something you wish you had done differently. It can help inform the next time or upcoming parts of the process
        + It is a deliberate place to slow down, check in, talk to each other and take what we learn from the experiences and apply it moving forward
    - **If you want:** you can send your site visit PowerPoint to your TA and/or Contract Manager ahead of visit to make sure you are on-track
    - **If you feel you are ready** for the site visit let your TA provider and Contract Manager know and they will coordinate with the rest of the team.
      * There is no rush if you don’t feel ready and when you do feel ready feel free to reach out.
* **After the Site visit**
  + You will complete the written deliverable for parts 1+2 of the Strategic Plan Submission Process
    - **If you want**, you can share with your TA Liaison for informal feedback
  + When you are ready submit is to [bsasplantracker@edc.org](mailto:bsasplantracker@edc.org)
    - **After submission it will be reviewed by CSPS, SSRE, BSAS and you can expect the review to take 10 business days**
    - Once the review and comments are all compiled each section of Steps 1+2 will have feedback and your BSAS Contract manager and TA LIASON can meet with you to discuss the changes
      * **If you have questions, or concerns reach out to** [bsasplantracker@edc.org](mailto:bsasplantracker@edc.org)
      * **Once you get the feedback and make the changes you must use TRACK CHANGES and resubmit it.**
      * Use these guides to assist:
        + <https://csps-ma.org/masscall3bguidancedocuments>
        + <https://csps-ma.org/resources/masscall3b-strategic-plan-development-guide>

**Deliverable Breakdown**

* + 1.1 Assessment Data: Where you look at and you share what you found around the use, substance, misuse, need, or problem
    - What data sources or techniques did you use for data collection?
    - What were the sources of that information, both quantitative and qualitative?
    - Were there any populations that were disproportionately affected?
      * And if so, identify the nature of the disparity.
      * Any gaps you had in your assessment process no assessment process is perfect
        + you can include those in your capacity building plan, too,
  + 1.2 Assessing Intervening Variables
    - What types of data sources did you use for the data collection focus group surveys, key partner interviews, and then list all of the inter meeting variables that you looked at
    - Listing intervening variables, risk factors and protective factors contributing to the use, substance misuse, need, or issue
    - Note any gaps in the data
  + 1.3 Equity in Assessment
    - How will you sustain these surveys
    - When do you plan to address gaps
    - How often will you do the surveys
    - Who was involved in collecting that data or interpreting that data?
    - How are you integrating cultural responsiveness and sustainability into this assessment?
    - What steps did you take to ensure equity, who was a decision maker, who evaluated etc.
    - What TA help do you need?
  + 2.1 What are the key sectors involved
    - Community stakeholder involvement: what are the key sectors that were involved in and how are they involved, and what's their role?
    - How did you involve colleges?
    - How do you plan to engage with general community?
    - Are there stakeholders you want to engage and how will you reach them? How will you engage them down the road and then again?
    - How did you promote equity throughout the stakeholder engagement process?
  + 2.2 Structure and Functioning
    - What is your coalition structure?
      * Org chart is a requirement
    - How are you communicating with the various stakeholders? How do you meet? How often do you meet?
    - What is the decision-making process? Who facilitates decision making process? How are the decisions made? Who makes the final decisions?
    - What challenges are you facing? How do you overcome these challenges? What have you done to overcome these challenges?
    - How are you promoting equity throughout the structure and functioning part of the strategic plan?
  + 2.3 Core Planning Comm
    - Who is part of the core planning committee? How are they involved? What sectors are they representing?
    - What challenges have you faced with this?
    - What steps have you taken to promote equity?
    - Amongst your core planning committee, who is involved? What are your capacity building needs?
  + 2.4 Capacity Buildings
    - Describe strengths, could be current prevention efforts or previous efforts
    - What has worked and hasn’t worked
    - What are your capacity building needs? What sectors and what parts of the community need capacity building? Around what topics?
    - How are you integrating cultural responsibility and sustainability?
    - Capacity building plan, anything you found in the assessment process that you are addressing
  + 2.5 Proposed process for strategic planning
    - Some decisions were made, who is collecting the data?
    - How are you collecting the data? How are you interpreting it?
    - What are you going to do going forward to ensure it is inclusive?
    - How are you going to prioritize the variables and who is involved?
    - What is your process once you have a list of intervening variables? How will you prioritize those and who will be involved in that?
  + 2.6 TA Needs
    - Do you see and contract management needs or TA?

**Q+A/Discussion**

1. Prioritizing what you focus on is hard, how do you decide?

* Emily’s Answer: “lead a conversation with the full coalition about what the criteria are going to be before you jump into trying to prioritize. Use a very formal ranking structure for each of the possible topics or intervening variables to rank them according to those criteria that we've all agreed on I mean that that helps assure that there's some progress in prioritizing because without parameters and a clear process it can feel like you are going in circles”
  + Will talk more about this in 9/28 meeting
* Tracy’s Answer: Can you some of the criteria from the Substance Abuse Prevention Skills Training (SAPST):
  + IMPORTANCE: how important it is to address this protective or risk factors
  + CHANGEABILITY: when looking at risk factor is it something we can see move in the next 5 years or less? Institutional racism isn’t something that is easy to move quickly, you can work on it through capacity building and keep it on your list. This might help to decide what is on the logic model
  + READINESS: There is a time factor, is your community ready to work on this? Do you have people interested in working on alcohol or are people more interested in vaping for example? You need to take a pulse of where people are already at.
  + Once you decide on the criteria and you want to vote you can do it in-person using sticky notes which comes to the top or in-person and
    - virtual or you can do a survey for those that can’t attend the meetings

1. Assessment section: I have 5 or so data sources but they have a small sample size. How in-depth should I go? Do you want to know the exact process we did? Like email 30 people times 5? And should we use appendices?
   * Include as much as you have in the data section, even if it’s a small group, had a conversation with X partner about X thing. You took the time to send the survey or interview so that is worth including.
   * More info including background like 2 focus groups with 17 conversations is useful. Even if it is that you had formal key partner interviews.
     + **Over documentation is key!**

* Inserting a full report with the big concepts and info in the main sections, then you can add tables within the report or as appendices.
* No right or wrong way to do it
  + Can put tables in the appendices or in the report
  + Pretend we know nothing (naïve as to what happened) tell a story to fill in the picture of what took place
    - You can do multiple stakeholder meetings and get feedback to ensure the same variables are popping up
    - Need to think differently to engage and have inclusive process
    - What bubbles up for us and how we will go to others to get their input, the more transparent the better. As a coordinator then you will determine what was comes up.
    - What has the bigger impact in your community and how can you work on them?
    - The more you get decisions on paper so everyone can see them the better
    - Could do a few different logic models and get feedback as there is more funding don’t need to just pick one thing

1.1 and 1.2

* Keep it simple, get down as much as you can get down with what you did and what you are trying to put together
  + Starting to narrow down and the logic model with come later
  + List the problem behaviors first, don’t link the risk and protective factors just yet
  + Identify problem behaviors in the first part and then the intervening variables don’t overcomplicate things
  + Reach out to your TA or contract managers to help if you’re struggling
  + Write it up in a way that represents your process
  + Think of it as an archival record,
    - Here is what happened for us as we experienced and thought through it, should be representative of your thinking and process no one way to do it
    - Other members of your planning team and coalition can read through the report before submission and see if the dots connect and ask if its representative of their process and how they saw things. Roadmap to work of off.
  + Not pass/fail
    - Example of feedback: this piece doesn’t quite make sense to us, or do you have info on this or if not, can you go get it
      * As we read it here’s how we understood it, we don’t know how you got from here to here
    - 45-page limit, appendices don’t count not a requirement or expectation
      * Don’t get stuck in the minutia, just provide info to understand what took place
      * Don’t be afraid of feedback

**Tips**

* Think about the naïve reader
* Write in a way ensuring that the reader knows what took place
* It’s okay to write it frankly, clear, and concise real gaps, and shortcomings, don’t mitigate the value of that, there will not be punishment only support to rectify them
* Connect and fill the gaps you identified in the other sections, should be asking for TA or include how you will address gaps in the capacity building section, it should be connected
* Initial process not a final process, expectation is you revisit this process on occasion and what you prioritize and why you prioritized them
  + Helps in future when we need to address if we need to drop something off or add to it, build not binding yourself to a single strategy; you are making a decision about where to start
* Tense doesn’t matter make it comfortable to you
  + We, us, they, them, I, me is acceptable
* Repetition across sections is okay, it’s somewhat intentional seeking evidence that you are being true to your process, things should be carried forward, you can repeat yourself and refer to the section you said the same thing
* Don’t write in isolation, use your team and various stakeholders
* If you have done as much as you can, submit the plans if you feel they are complete. If you hit a roadblock, we will provide feedback that will help you to move forward.
  + Our system is setup to support the coordinator and coalition, reach out if you need support