

# OPIOID SAFETY STRATEGIC PLANNING: **A TOOLKIT DESIGNED FOR LOCAL COALITIONS**



**CENTER FOR  
HEALTH  
LEADERSHIP &  
PRACTICE**

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Public Health Institute



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PREPARED BY

**THE CALIFORNIA OPIOID SAFETY NETWORK  
CENTER FOR HEALTH LEADERSHIP AND PRACTICE  
PUBLIC HEALTH VIEWS CONSULTING, LLC**

## OVERVIEW AND ACKNOWLEDGEMENTS

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The California Opioid Safety Network (COSN) is pleased to offer coalitions a tool that captures resources needed for organizing, prioritizing, re-energizing, growing and strengthening local efforts.

Opioid Safety Strategic Planning: A Toolkit Designed for Local Coalitions was created with our communities in mind, demonstrating how to harness and guide the momentum that has been underway in California to address the opioid epidemic. The Toolkit contains a range of hands-on tools that are applicable to all levels of coalition functioning. There are instructions on how to best apply these tools and how to practice the concepts depicted.

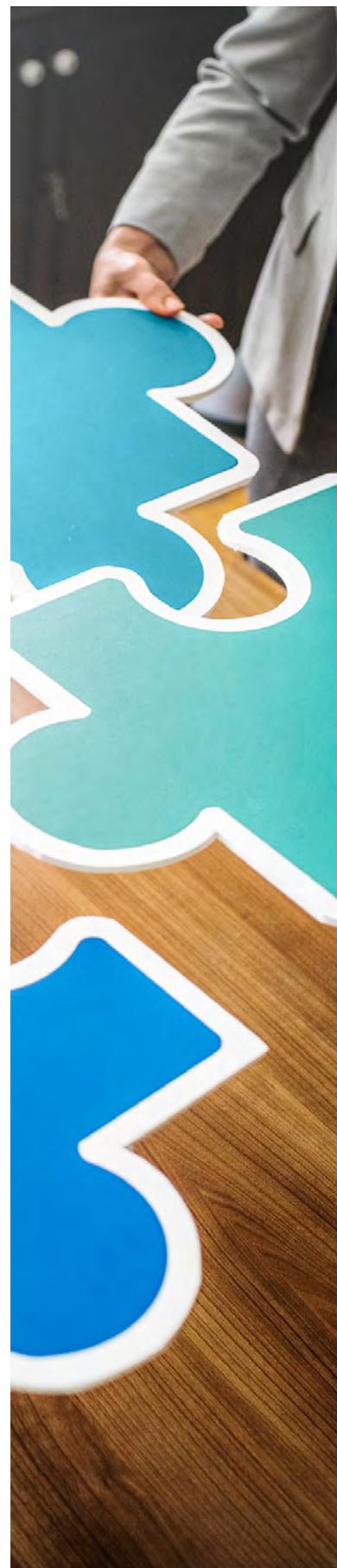
For ease of use, the Toolkit is divided into two parts. The main body of the Toolkit describes the dynamic elements and process of strategic planning, with many tips, examples, and active links to the tools. A fictional case study runs throughout this section of the Toolkit, adding a practical demonstration of how the principles and ideas can be applied. The second part of the Toolkit is the Appendix. This is where all of the tools and instructions reside.

Putting together a document of this complexity takes the help of many. COSN would like to extend a special thank you to Holly Sisneros, with Public Health Views Consulting LLC, for her leadership in developing this Toolkit.

COSN is also grateful for the continued support of our partners, the California Department of Health Care Services and the California Health Care Foundation. Their ongoing contributions, expertise, and mentorship have been invaluable in expanding this work throughout the state.

Lastly, our most heartfelt thanks to California's local opioid safety coalitions. They are on the front lines daily, facing challenges and rewards that build resiliency, but can also test endurance. This Toolkit is meant for them and we hope it will inspire and support their current and future work.

The California Opioid Safety Network



# CONTENTS

<b>INTRODUCTION</b> .....	<b>4</b>
<b>STEP ONE: INTENT</b> .....	<b>6</b>
<b>STEP TWO: APPROACH</b> .....	<b>8</b>
<b>STEP THREE: COMPONENTS</b> .....	<b>10</b>
<b>STEP FOUR: PREPARATION</b> .....	<b>13</b>
<b>STEP FIVE: CREATING AND LOOPING</b> .....	<b>16</b>
<b>STEP SIX: THE PRODUCT</b> .....	<b>18</b>
<b>STEP SEVEN: APPRAISE</b> .....	<b>20</b>

## APPENDIX

### **STEP ONE: INTENT**

STRATEGIC PLANNING BENEFITS FOR OPIOID SAFETY COALITIONS .....	23
DECISION MAKING: IS STRATEGIC PLANNING THE RIGHT STEP .....	25
DEFINING SUSTAINABILITY FOR YOUR COALITION .....	27
COLLABORATIVE SELF-ASSESSMENT SURVEY .....	30

### **STEP TWO: APPROACH**

DECISION TREE: NEW AND PROFICIENCY .....	37
DEVELOPING THE BIG PICTURE .....	40
PARTNERSHIP MAPPING TOOL .....	44
WAYS TO INCREASE YOUR SUSTAINABILITY ODDS .....	47

### **STEP THREE: COMPONENTS**

COMPONENTS OF AN OPIOID SAFETY STRATEGIC PLAN.....	51
MEASUREMENT PLAN TEMPLATE .....	53

### **STEP FOUR: PREPARATION**

KEY INFORMANT INTERVIEW QUESTIONS FOR OPIOID SAFETY .....	56
OPIOID SAFETY COALITION TRAINING.....	58
DOT VOTING .....	60

### **STEP FIVE: CREATING AND LOOPING**

NO ADDITIONAL TOOLS IN THIS SECTION

### **STEP SIX: THE PRODUCT**

TEMPLATE FOR COALITION FACT SHEET .....	64
COALITION ELEVATOR PITCH WORKSHEET .....	69

### **STEP SEVEN: APPRAISE**

NO ADDITIONAL TOOLS IN THIS SECTION

## INTRODUCTION

When the opioid epidemic emerged in California with catastrophic impact, there was a scramble to respond. As a result, communities, and in particular local opioid safety coalitions, did not always have time or resources available to conduct assessment, training, short and long-term planning, and evaluation. These steps, sometimes referred to as strategic planning, create an applied practice of problem solving that is reflective of identified needs, provides timeframes and deliverables, and shapes program structure and credibility.

It is likely that many, if not most coalitions, are already engaged in planning related activities. However, having **a strategic plan that demonstrates a detailed approach is advantageous for gaining support, tracking progress, justifying resources and priorities, and establishing accountability.**

As we explore this topic, we will employ a comparative method that creatively conveys ideas and approaches. This Toolkit will present the concepts of strategic planning in relation to something that is universally recognizable to all disciplines represented in a coalition: *cooking*.

**A strategic plan wears many faces and can vary in form, size and content. The process will change depending on the purpose, audience, resources and desired outcomes.** The steps taken are not that dissimilar to those of creating a satisfying and successful meal plan. Using this analogy will enable coalitions to:

- effectively understand a sometimes puzzling and complicated topic; and,
- engage their membership in a meaningful and encompassing way.

It is important to note that while the cooking analogy provides a context, **the substance of this Toolkit is focused on steps, tools and guidance for multi-component strategic planning with opioid safety coalitions.** The analogy helps breakdown the process into “bite size” pieces, but it will be up to the reader to pick and choose from the menu of ideas that are most relevant to their situation, challenges, and expected outcomes.

To further contextualize your understanding of the Toolkit, you will see call-out boxes highlighting the experiences of the fictional Mountain County Opioid Coalition. The story of this coalition adds a real-world component, demonstrating how a local coalition moved into and through a strategic planning process.

# THE SEVEN STEPS FOR CREATING A COMPREHENSIVE STRATEGIC PLAN

To better understand how the steps for creating a strategic plan flow, view the comparison chart below. You will see how the cooking correlation can clarify the sometimes complex flow of strategic plan development.

Cooking	Strategic Planning
1. INTENT: Intent of the Gathering	1. INTENT: Intent of Strategic Planning
2. APPROACH: Confirming the Right Recipe	2. APPROACH: Confirming the Right Approach
3. COMPONENTS: The Ingredients	3. COMPONENTS: Selecting the Plan Elements
4. PREPARATION: Cooking It Up	4. PREPARATION: Conducting the Activities
5. CREATING: Tasting and Testing	5. CREATING: Writing, Production, Design
6. THE PRODUCT: Delivering the Meal	6. THE PRODUCT: Disseminating the Plan
7. APPRAISE: Is the Recipe a Keeper?	7. APPRAISE: Evaluate, Adjust and Revisit

**The Toolkit is arranged to highlight the seven steps outlined in the above chart.** Each section contains descriptions and tools related to that step, but strategic planning is also a fluid process and not all stages or steps in this process are necessary. What your coalition needs, and where they are in their evolution, will determine how much or how little of this Toolkit you choose to access. Be open to a flexible cooking experience.



# STEP ONE: INTENT

**Determining the intent for your strategic planning effort is the first step.** When planning a meal, your first thoughts will focus on the intent of this gathering. Is it a family style buffet, an intimate dinner with friends, a cultural sharing experience, or perhaps a large potluck?

Similar considerations come into view for strategic planning. **There may be one, two, or five reasons for conducting a planning process. Here are a few:**

- Organize program activities
- Create measurable outcomes
- Establish activity timelines
- Conduct priority setting
- Assess or reassess coalition needs
- Create community/coalition buy-in
- Publicize and track progress
- Engender sustainability

There may be very clear reasons for engaging in this process, but there is also consideration for readiness. Is your coalition ready to participate and is there enough person-power to move forward? Perhaps you will need to “sell” the idea. To help with this, review the tool: [\*Strategic Planning Benefits for Opioid Safety Coalitions.\*](#)

You can share these concepts with your coalition in several ways:

- Have the coalition brainstorm benefits they have seen from other strategic planning processes they have been involved in and compare their results with the concepts in the Benefits Tool.
- Select a few of the items from the Benefits Tool and discuss how these areas could be strengthened through strategic planning.
- Have coalition members reflect and interpret what the different parts identified in the Benefits Tool would mean to them. Have them make it personal, such as what does “tracking,” “road map” and being “proactive” mean to them?
- Point to examples of how following a road map or having accountability has helped other local coalitions or similar programs.



Okay, now for a **reality check**: sometimes the juice isn't worth the squeeze. Even if the intent is understood and agreed upon, before embarking on the strategic planning journey, there are some key questions to help a coalition determine if strategic planning is the best next step. Refer to the tool [Decision Making: Is Strategic Planning the Right Step](#). The questions posed in this tool can help a coalition or planning group decide if there are enough factors in place to make the strategic planning journey worthwhile and applicable to the coalition's future. Work through these questions as a team, addressing discrepancies, potential barriers, capacities and outcomes. If moving forward with strategic planning appears to be the right move, the two [Decision Tree tools](#) discussed in Step Two can assist with determining your approach.

### **COSN FEATURED TOOL**

When your intent is known, the process may seem sensible; however, there may be times when the intent is less known, less transparent or not familiar. This can often be the case when seeking to align strategic planning with sustainability. COSN introduced a unique and helpful tool that examines how to shift a coalition's focus from resources to impact: [Defining Sustainability for Your Coalition](#). Emphasizing how to reach a desired outcome, rather than staying attentive on how to fund it, draws in opportunities with other partners, sister programs, proven practices, etc. This tool is a strong first step in building sustainability.

On a similar plane, a coalition's organization and leadership plays an important role in the longevity and effectiveness of the coalition. Determining the coalition's governance structure is essential to understanding how decisions are made and priorities are established. To shed light on how coalition members view their involvement, consider utilizing the scale-style tool: [Collaborative Self-Assessment Survey](#). Use of this tool, can reveal perceptions and insights critical to keeping the coalition structure transparent.

### **CASE STUDY**

#### **The Mountain County Opioid Safety Coalition: THE BEGINNING**

The opioid crisis hit Mountain County rather suddenly. Overdose rates were high, but fortunately resources were coming in for the coalition to organize around the problem. They hit the ground running and managed to get some practices in place that helped stabilize the situation. After some time, however, people became burnt out and it was clear they needed an actual plan, with invested partners, that provided organization to their efforts. They decided to do some strategic planning that would clarify their purpose, goals and timeframes.

## STEP TWO: APPROACH

Once you have defined your intent for conducting coalition strategic planning, and agree proceeding is a good decision, the next step is determining the approach. When meal planning, one needs to confirm the right recipe so that the food served will fit the intent of the meal style, address dietary restrictions, meet your food budget requirements, and contain accessible ingredients.

The two Decision Tree tools discussed in this section can assist with determining your approach. Whether your coalition has previously engaged in this type of planning, or this is the first time, knowing how to proceed is critical. Walking through the various components can help solidify your next steps. *The two Decision Trees - New and Proficiency* are designed to help you explore these pathways and provide direction forward.

These Decision Trees are interactive such that the path followed is dependent on the response to various questions or concepts. Likely, the best method for engaging these Decision Tree tools is to have a core group from the coalition examine and walk through them first. Take time to discuss and reflect on each “box.”



For example, in “Decision Tree – New,” if the coalition has shown interest in strategic planning, a lead group may want to view examples of [completed strategic plans](#) and discuss desired outcomes. Balance these factors with consideration for resources and timing to help determine if the coalition should create a strategic plan that is:

1. Full Package: has all the contents outlined in Step Three.
2. Mission and Values: focuses only on the core operating principles of the coalition.
3. Assessments: lays out the problems and data and how the coalition will address these challenges.
4. Priority Setting: summarizes the results from a priority setting process, such as the dot voting method outlined in Step Four, and how these results will guide the coalition’s actions.

These are just a few examples from the spectrum and variation of ideas that coalitions can use for their strategic planning process.

### **COSN FEATURED TOOLS**

As you proceed through the Decision Trees, it may also be helpful to consider a few of the COSN Tools that have been designed to examine your coalition in terms of impact, community outreach mapping and sustainability planning. These tools will deepen your understanding of your coalition's structure, function and longevity.

- [\*Developing the Big Picture\*](#)
- [\*Partnerships Mapping Tool\*](#)
- [\*Ways to Increase Your Sustainability Odds\*](#)

#### **CASE STUDY**

##### **The Mountain County Opioid Safety Coalition: NOVICE STEPS**

Having never done strategic planning before, the coalition talked with other coalitions and programs to get an idea of what to expect and how to proceed. Using the Decision Tree New tool, they decided to attempt the "Full Package," but pull back to the essential pieces if it became too much. Armed with their completed Big Picture, they pulled together a core team of four, who would be the primary writers and reviewers, along with facilitating the process with the coalition.

# STEP THREE: COMPONENTS

Now that the intent and approach have been explored and/or decided, **the next step is to determine the strategic plan components.** In meal preparation, this is the ingredient section. For this, you will consider the type (organic vs. processed), quantity, what needs to be purchased versus what exists already, where to purchase, and any adjustments to the recipe list.

**Step three describes the building blocks for your strategic plan.** There are several components, but also a shortcut tool that lists the primary pieces: [\*Components of an Opioid Safety Strategic Plan: Your Ingredient Menu\*](#). This tool is very useful for presenting or explaining to groups, in an abbreviated fashion, what might be contained within a strategic plan.



The following information provides more detail on the various components:

- **Introduction and Framing:** Draws the reader in through a **compelling statement about how the opioid epidemic is impacting your community.** What are the challenges, tragedies and successes that your community has seen over the last few years as a result of the rise in opioid overdose and death? Tell a personalized story to make it real and immediate. Also, frame the local problem in context with a statewide and national view.
- **Background/History:** How has your community responded to the opioid crisis? What was the trajectory of how, why and by whom the coalition was formed? How long has the response been going on and has there been any known, or hoped for, impact to this point? What are the challenges for the future and unmet needs?

- **Purpose/Evolution:** Describe the **framework for the coalition**, including mission and vision statements. Identify the coalition's primary operating structure, such as key goals and objectives (program priorities), active partners and stakeholders, and governance structure. Lastly, clearly state the reason for conducting strategic planning at this time, and what will be the expected outcome from this plan.
- **Data:** This section **draws the visual pattern of opioid use in your community**. Whether it is overdose deaths, opioid prescribing rates or emergency department admissions for opioid overdose, knowing what data you have available will help determine what data gaps you might want to fill or pursue. In California, the most comprehensive place to review local data is the California Department of Public Health Opioid Surveillance Dashboard: <https://discovery.cdph.ca.gov/CDIC/ODdash/>. The Dashboard is a multi-functional site that can query county-based searches, provide useful charts and graphics, identify trends, and links to other useful sites. The county data is especially helpful, as it can zoom into specific pockets where higher rates of opioid overdose are taking place and narrow information about opioid prescribing, among other useful functions. In your strategic plan, provide key data points for your community, and identify your area rankings, as compared to other communities.

**Also consider the data pieces that are missing.** The Dashboard does have some limitations regarding localized data. Find out what data might be available through local law enforcement, medical examiner's offices, schools, or behavioral health service programs. Include this local data in the plan as well.

**When presenting your data, use colored text boxes, graphs or other methods to make the information interesting and digestible for the reader.**

- **Categorizing Intervention Strategies:** This is the section that **details your intervention categories**. Some common categories include: prescriber and pharmacy education, media and outreach, treatment, harm reduction, and overdose prevention. Take each of the coalition's main categories and provide the overview of what the intervention category should achieve, but also provide specific activities and outcomes that are expected.

For example: If you are portraying your prescriber education interventions, briefly define how you will address: high risk prescribers, general provider outreach, CURES promotion, pain management alternatives, patient/provider contracts, emergency department and healthcare organization prescribing protocols, etc.

- **Timeframes:** Strategic plans sometimes fail to provide specific timelines for implementing and completing activities. **For a plan to be relevant and actionable, timeframes are critical.** There may be ways to divide objectives and activities into immediate, mid-range and long-term timeframes.

- **Activity Descriptions:** Another element that is sometimes overlooked is **making the objectives and activities within a plan measurable**. This is not always possible, as specific numbers may not be known. How many clinics will we work with to adopt harm reduction strategies; or which treatment providers will be open to buprenorphine (“X-waiver”) training? However, even though actual numbers may be uncertain, providing the intervention detail (target audience, activity type, description and timeframe) creates a plan with accountability and validity.
- **Reevaluation:** Why “reevaluation” instead of evaluation? Because this is not a document that is going to be one and done. **The coalition’s strategic plan should be cyclical**, such that it is revisited, adjusted, revised every six months, or at least annually. The trends, priorities, resources, partners and community needs continually change and the plan needs to stay current with those environmental and program shifts. **State in your plan the commitment to reevaluation and how often this will take place.**
- **Conclusion:** Time to wrap it up. Provide your acknowledgements, contact information and a closing statement about ongoing commitment to planning, community building, or perhaps a quote or brief success story. This is a difficult topic, so consider closing with a positive or hopeful statement.

### **COSN FEATURED TOOL**

Further refining our understanding of strategic plan components, COSN has a [\*Measurement Plan Template\*](#) that demonstrates the content of a measurable plan. It breaks down the interventions by category, with a focus on SMART objectives (Specific, Measurable, Achievable, Relevant, and Time-limited).

#### **CASE STUDY**

##### **The Mountain County Opioid Safety Coalition: WHAT TO INCLUDE**

This was the step that helped the coalition improve their organizational structure. As they started examining the different components that would be in the strategic plan, they realized that how the coalition is organized could also be tweaked. They did some shifting and came up with three Action Teams, each of which would be responsible for the activities within that area. This helped the coalition members have identity and ownership of their work.

## STEP FOUR:

# PREPARATION

**This is the heart of your strategic planning** when you pull together what you know to: fill-in the gaps, draw out more information, and create an even playing field for your coalition members. You have gathered all or most of your ingredients, it's time to coalesce your ingredients into a dish. So, let the cooking begin!



For this section, we will be looking at:

- **Assessment:** key informant interviews (KII), focus groups, stories and data.
- **Training:** establishing a common knowledge base for your coalition members.
- **Action Teams:** giving organization to the coalition through evidence-based practices.
- **Objectives:** acknowledging what activities are already in place or planned
- **Priority Setting:** conducting “old school” dot voting, or similar activities, for your coalition to have a voice in deciding next steps.

### ASSESSMENT:

This can be the **most insightful and interesting part of strategic planning**. This is when background issues, stigma, talents, previously unknown resources, stories and agendas can come to light. If you yet to conduct KIIs or community focus groups related to your opioid coalition, it is likely that in doing so, a new and deeper perspective will be gained. The tool, [Key Informant Interview Questions for Opioid Safety](#) contains sample KII questions specific to opioid safety.

**This is where the personal stories emerge and the data story becomes real.** When doing KIIs, it is important to stretch beyond the borders of your coalition. Reach into the community, interviewing political leaders, law enforcement and first responders, those struggling with opioid use disorder and their families, people working in harm reduction, with homeless populations, youth, and in behavioral health, and interview those within the healthcare system. Think broadly and apply these same parameters when selecting your focus group participants.

## TRAINING:

When conducting the “cooking” portion of your strategic planning, it is helpful if you can ensure a knowledge base among your coalition members. You probably would not ask an inexperienced cook to help with dinner by having them to make the bernaise or béchamel sauce. More likely, you would have them cut the onions or peel the carrots (or maybe just boil water). Similarly, **priority setting engagement will be far more meaningful and fruitful if there is a common knowledge base about opioid safety.** The tool, [Opioid Safety Coalition Training](#) is an example coalition training agenda. If more information is needed on coalition training, COSN can provide further guidance.

## ACTION TEAMS:

The majority of opioid safety coalitions are organized into action teams, workgroups or subcommittees. These are generally established based on what are known as effective intervention strategies (refer to “Categorizing Intervention Strategies” on page 12). **These action teams become the center point from which priority setting activities launch.** Much like the center kitchen island serving as the cooking hub.

## OBJECTIVES:

Step 3 introduced the information and tools for fleshing out measurable objectives. A coalition should know to which objectives/activities they are already committed, versus knowing what space might exist for new efforts. When conducting priority setting, one needs to create a balance between previous/current commitments and what can be done in the future. This is where **labeling objectives/activities as either immediate, middle and long-term sets a mapping sequence that is more manageable.**

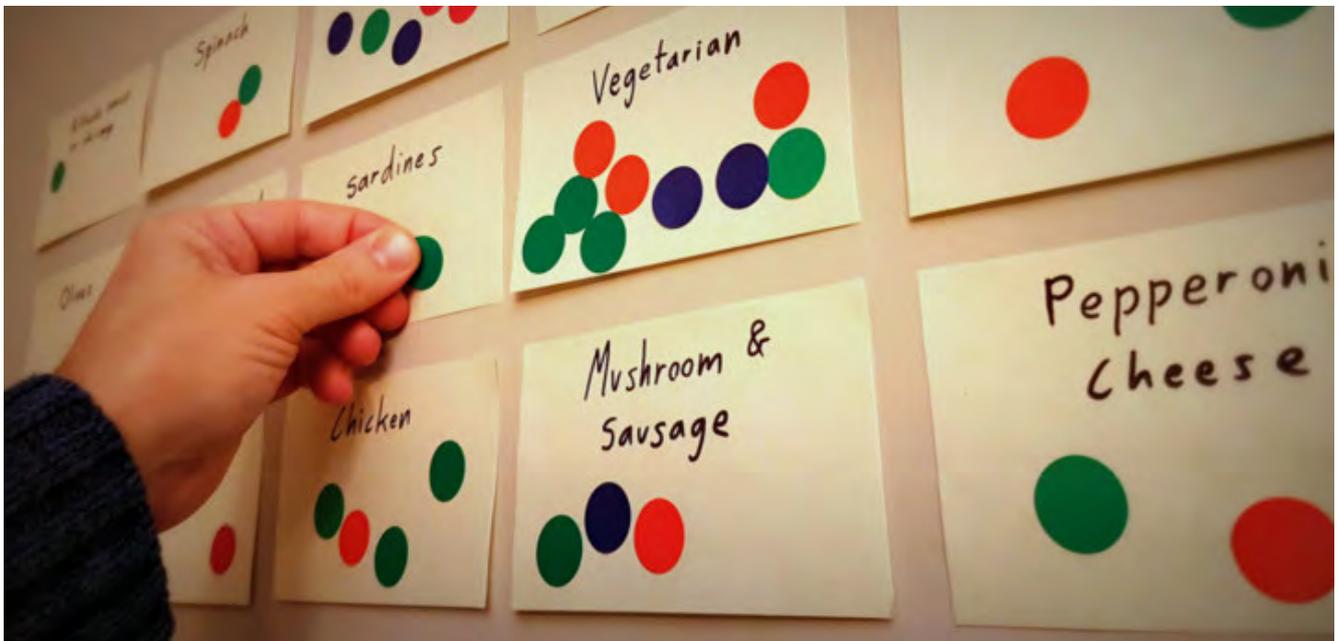
**PRIORITY SETTING:** All the processes to this point, such as establishing intent, determining your approach, lining up your ingredients, and doing the preparation, culminates in conducting a priority setting activity with your coalition. This is the meat of the meal, or tofu, if you are vegetarian.

An “old school,” but very effective priority setting method, is dot voting, also known as Dotmocracy. Dot Voting has several advantages, as it:

1. gives every coalition member a voice;
2. physically engages members so that they are moving around, talking, comparing, and sharing;
3. is a fairly simple process to implement, with minimal complications;
4. is a visual process where people can easily and immediately see the results;
5. is easy to summarize to large groups; and,
6. creates a real-time discussion opportunity that can be followed up with smaller group work in the future.

[Conducting Dot Voting with Opioid Safety Coalitions](#) provides tips on how to conduct dot voting.

Once priorities have been outlined, it will be up to the action teams and larger coalition to cull the responses into a second level of decision-making. Looking at the top voted items, consider for each item: existing and future resources; community needs; community readiness; and time. Based on these factors, the top voted items should be arranged into immediate, middle and long-term categories. If there is an ability to incorporate all of the items into some range of short to long-term planning, that would be ideal.



#### CASE STUDY

##### The Mountain County Opioid Safety Coalition: DISCOVERY!

The Key Informant Interviews revealed some previously unknown resistance to their work; the training was a “light bulb” moment for many new members; and the Dot Voting activity set them on a track that truly reflected the coalition’s chosen direction. This provided confirmation that their approach was wholistic and inclusive.

# STEP FIVE: CREATING AND LOOPING

**The development of your strategic plan should be a fluid process;** one in which you are continually looking at how it is progressing, and adjusting as you go. Most good chefs will tell us to taste our cooking as we go. Is there enough salt and spices, how is the temperature and consistency, what other adjustments are needed? In the same vein, check in with the leadership team, coalition members and other partners to ensure the plan is on a good track.

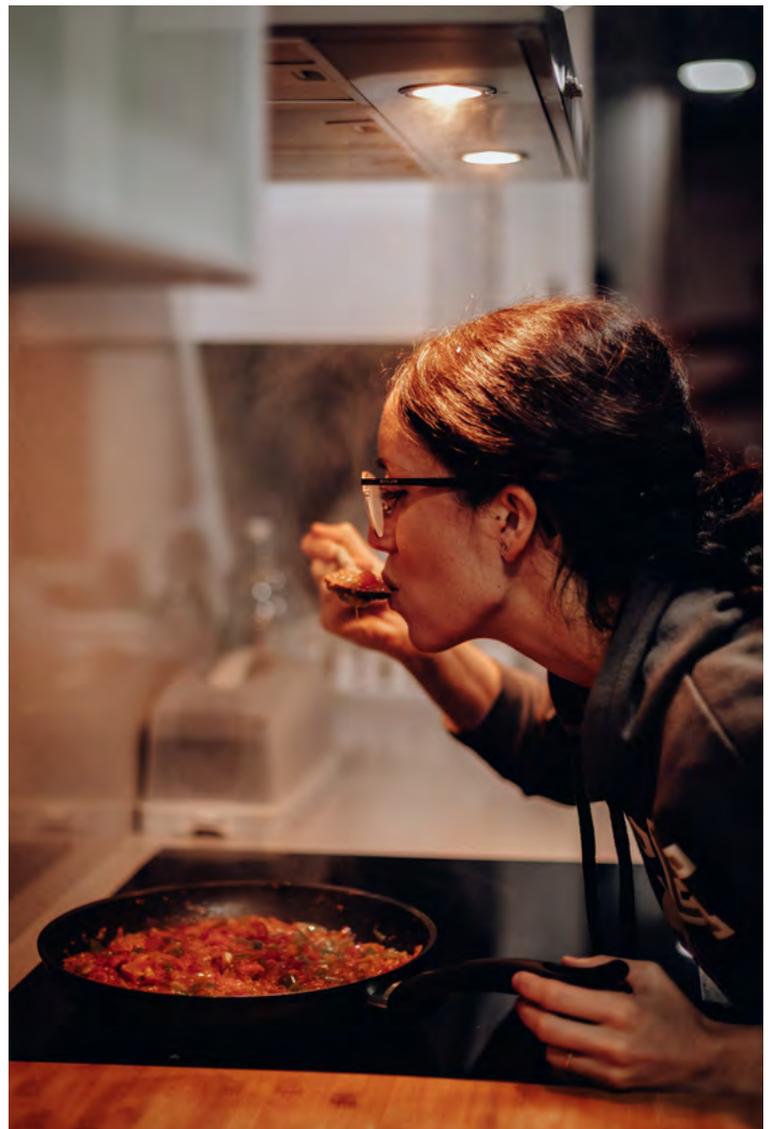
For this section, we look briefly at “putting it together”:

- Design
- Writing style
- Keeping partners involved
- Needed adjustments
- Length

This is also the part where one might expect to see a template for a strategic plan. As explained at the start, this type of planning can vary greatly in how it is done and how it looks. Instead of a one-size-fits-all approach, please refer to [\*Components of an Opioid Safety Strategic Plan\*](#) and pages 10-12 for the potential contents that could make up a strategic plan. Pick and choose the elements that make the most sense for your approach and the product you want to deliver.

## **DESIGN:**

Because the strategic plan should be both an internal and external document, shared with community members, political leaders, partner agencies, **looks do matter**. Consider using graphics, pictures, and text boxes to capture quotes and stories, and include color where possible.



### WRITING STYLE:

If there will be more than one author, **consider meshing voices** so that the document is less disjointed and tells the story more smoothly. This can be done by having a single editor give it a final polish. It also helps to be working as a team, coalescing how ideas are conveyed. When multiple layers of review are required, the voice sometimes can get choppy. If the content is authentic and demonstrates that the coalition was engaged in a meaningful process, consider it mission accomplished.

### KEEPING PARTNERS INVOLVED:

This document **represents a community body**. Getting coalition members to occasionally review drafts or pieces creates buy-in and helps align the plan's progression with the coalition's expectations.

### NEEDED ADJUSTMENTS:

**Be open to shifts**, based on changing coalition or community needs, emerging or unplanned opioid trends, or unexpected responses for unmet needs. For this reason, set and communicate a timeframe for releasing the plan, but keep players informed of potential delays. It would be a shame to have that soup end up bland because we forgot to taste it before serving it.

### LENGTH:

**There is no minimum and there is no limit.** However, as you would gauge how much food to serve your guests, it is important to keep a balance between having enough information without overloading the reader to the point of post-meal comatose.

#### CASE STUDY

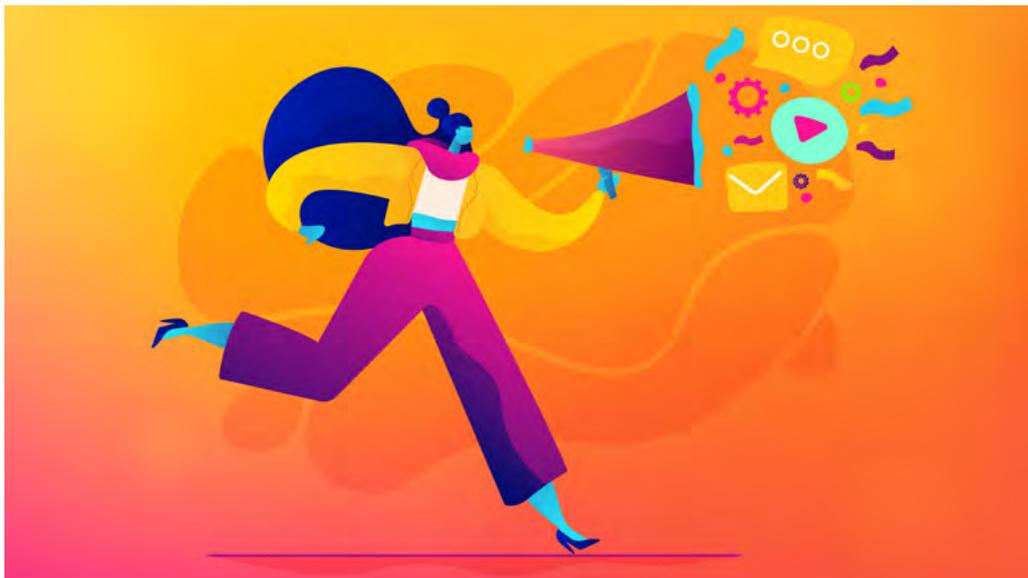
##### The Mountain County Opioid Safety Coalition: A BIT OF WRITERS BLOCK

This was the stage that required time and patience. Referencing existing strategic plans as a format model, the leadership team agreed on content and style for the written plan. The leadership team served as the primary authors, but repeatedly invited coalition members to provide input and feedback. In the end, it was rewarding for the coalition to see their work pulled together into a visual document, but more importantly, to have created an infrastructure for actionable work.

## STEP SIX:

# THE PRODUCT

**How, when and to whom you disseminate the plan is not be overlooked.** Your completed strategic plan serves as **a voice for the coalition.** In order to ensure that voice reaches into your community, attracts the attention you want and ignites interest in your coalition, have a pre-determined method for sharing that voice.



When the cooking is almost done, we think about how to serve up the meal. Sit down or buffet style, what type of place settings and presentation, what will be the timing and how do we keep the dishes fresh until we serve them?

Here are some beneficial elements of an organized dissemination plan:

- Partners - A methodical way of reaching key partners, but also engaging others who have been on the periphery, or not involved at all. Identify who are these current or background partners. **Build a connection** (dare we say “sales pitch” approach) through targeted outreach.
- Media - **Synthesize your strategic plan with your media.** It can be the go-to document placed on your website for public demonstration of how your community is addressing the opioid issue. It can be referenced in media materials, shown in presentations, promoted by coalition members.
- Accountability - There will be varying ideas of what to do when the plan is completed. Having structure to the dissemination is a very **visible and concrete way to manage expectations.**

- Reinvigoration – This is an opportunity to **showcase current and future work**. Recruiting new members may be easier when one can point to defined activities and outcomes.
- Policy – The strategic plan can get you in the door with local policy leaders. Sharing the **strategic plan is a marker for your coalition’s work and can be an ambassador** of sorts, encouraging greater participation and support for policy implementation.

### **COSN FEATURED TOOLS**

One thing to note is that your full strategic plan may not be light or quick reading. Many coalitions have developed one-page coalition fact sheets. Consider using a template to design a summary/overview of your strategic plan, or add in pieces of the plan’s highlights to your coalition fact sheet. Over the course of several webinars, COSN and their partners released: [\*Coalition Fact Sheet Template\*](#) and [\*Coalition Elevator Pitch Worksheet\*](#)

#### **CASE STUDY**

##### **The Mountain County Opioid Safety Coalition: GETTING THE WORD OUT**

Ahh, sigh of relief that the plan was done! The coalition discussed how to release the plan – to whom, how, when? The coalition had some great ideas and many of the partners offered to do special presentations to community groups and have the document linked to their agency websites. They also met with key policy leaders in the county to share the shortened version of the plan. As a coalition, they felt accomplished and proud to have a clearer direction unfold.

# STEP SEVEN: APPRAISE



A strategic plan should not just be a bookcase or a computer file addition. It is an evaluative process to keep the plan alive and relevant. **The coalition should revisit the plan every 6 months, or at a minimum, every year.**

As you reach the end of a gratifying meal, you enjoy the moment of contentment, linger in companionship and relish the satisfaction. At some point, you turn your attention to lessons learned for next time: do you keep or discard this recipe, what tweaks will you make, and how are you going to catalog and store the recipe?

When revisiting the plan, consider making adjustments related to:

- Timeframes;
- Validity of planned activities;
- Shifts in resources and/or priorities;
- Changes with partners and coalition membership; and,
- Variations in environmental or community tenor.

All these steps help keep the strategic plan sustainable, and as you see progress emerging, publicize your successes and accomplishments.

We learn a little bit more each time we cook, enhancing our skills and gaining proficiency. Similarly, strategic planning can strengthen the resolve of your coalition and expand on its reach, depth, and accountability. From determining your intent, through creating and serving, your strategic planning meal is bound to be well done.

## ***BON APPETIT!***

### **CASE STUDY**

#### **The Mountain County Opioid Safety Coalition: KEEP IT GOING**

After six months, the coalition revisited their progress. Having the timelines in place helped them gauge progress and see where they needed to spend more time and what adjustments had been made. They will continue checking in, celebrating successes, and watching for what pops up next on the radar.

# OPIOID SAFETY STRATEGIC PLANNING: **A TOOLKIT DESIGNED FOR COMMUNITY COALITIONS**

## APPENDIX

This Appendix includes all of the tools referenced in the Toolkit, organized by steps one to seven. Some of the tools have additional instructions included, and are designed as “pullout” pieces that can be implemented separately from the Toolkit descriptions.

We hope you find these useful!

# STEP ONE: INTENT

**1A - Strategic Planning Benefits for Opioid Safety Coalitions**

**1B - Decision Making: Is Strategic Planning the Right Step**

**1C - Defining Sustainability for Your Coalition**

**1D - Collaborative Self-Assessment Survey**



OUTCOME

# STEP ONE: INTENT

## 1A - STRATEGIC PLANNING BENEFITS FOR OPIOID SAFETY COALITIONS

You can share these concepts with your coalition in several ways:

- Have the coalition brainstorm benefits they have seen from other strategic planning processes in which they have been involved and compare their results with the concepts in the Benefits Tool.
- Select a few of the items from the Benefits Tool and discuss how these areas could be strengthened through strategic planning.
- Have coalition members reflect and interpret what the different parts identified in the Benefits Tool would mean to them. Have them make it personal, such as what does “tracking,” “road map” and being “proactive” mean to them?
- Point to examples of how following a “road map” or having “accountability” has helped other local coalitions or similar programs.



## STRATEGIC PLANNING BENEFITS FOR OPIOID SAFETY COALITIONS



# STEP ONE: INTENT

## *1B - DECISION MAKING: IS STRATEGIC PLANNING THE RIGHT STEP*

Before embarking on the strategic planning journey, there are some key questions to help a coalition determine if strategic planning is the best next step. The questions posed in this tool can help a coalition or planning group decide if there are enough factors in place to make the strategic planning journey worthwhile and applicable to the coalition's future. Work through these questions as a team, addressing discrepancies, potential barriers, capacities and outcomes.

Once you have completed the Decision Making tool, if moving forward with strategic planning appears to be the right move, the two Decision Tree tools discussed in Step Two can assist with determining your approach.



## **DECISION MAKING: IS STRATEGIC PLANNING THE RIGHT STEP**

Convene a small planning or leadership group to consider the following questions. The answers may help your team determine if the timing is right for strategic planning engagement.

### QUESTIONS:

#### ***Does strategic planning meet a priority for our coalition?***

- Have we done this already; will this be seen as a good use of our time?
- Do we have other pressing needs that might be viewed as more important?

#### ***Will the process actively engage our coalition?***

- Do we have coalition members who will actively participate?
- Is our coalition readiness high enough that many will become involved?

#### ***Can it be done with known resources?***

- Do we have the person-power to do this now, or in the near future?
- Will there be adequate support from agencies to complete the process?

#### ***Will strategic planning enhance our existing goals and activities?***

- Can this process expand and support work we are already doing?
- Are we prepared to expand or shift directions if the planning process reveals new priorities?

#### ***Is the timing practical given the status of our coalition?***

- Do we have the membership attendance necessary to get this done?
- Are we solid, struggling or still emerging, and how will this impact our ability to see the planning process completed?

#### ***Can we justify the process to our partners?***

- Will engaging in this process be seen as a valuable use of time and resources?
- Are we able to draw in our partners to be actively engaged?

#### ***Is it feasible to do this now, so that we have an attainable and achievable outcome?***

- Is our coalition ready to make commitments that require accountability?
- Are we ready to take actionable steps to ensure the plan is implemented?

From these questions, it isn't difficult to see that a key factor in the success of coalition strategic planning weighs heavily on the readiness, resources and commitment of the coalition. So, how did it go? If many of the responses were in the negative (there isn't support or participation; no resources; poor timing, etc.), perhaps the idea of strategic planning should be tabled for future consideration. However, if the questions revealed a level of interest and capacity, then moving onto the tools, *Decision Trees - New and Proficiency* is your next step!

# STEP ONE: INTENT

## *1C - DEFINING SUSTAINABILITY FOR YOUR COALITION*

Questions posed in this tool can help your coalition decide what is necessary to sustain the benefits of your work. Move through these questions as a team, use the prompts to assist in the larger discussion, and create a definition of what sustainability means for your coalition. Once you have a definition in place, make sure that every member knows what it is.





## Defining Sustainability for Your Coalition

We believe that the focus of sustainability should be on the outcome(s) of the effort and not on the effort itself. With that framework in mind, sustainability for public health programming can be defined as the continuation of community health and/or quality-of-life benefits over time.

### *What is the value of this framework?*

When you shift your focus from continuing a coalition and/or a specific program to continuing the benefit(s) of that work, you shift your focus from resources to impact. This shift allows you to tell the story of the impact of your work which can improve outreach efforts and increase your chances of securing additional funding and support. Using this framework opens up a broader discussion about your work – it can “free” your thinking and allow for more flexible and creative approaches to sustaining your efforts.

### Tips

- The “community” in the definition is what you choose to define it as. It can be a geography, a constituency, a target population, a specific group (i.e., a collaborative), etc.
- The definition for your unique program can be narrow or broad. The important thing is that the definition is agreed upon and communicated.

### Planning for the Process

Answering the following questions will help ensure that your definition is agreed upon and that you are poised to communicate that definition successfully.

1. Who needs to be involved in defining, or be informed/know about, our sustainability definition?
2. What information do we need to complete/agree upon our definition?
3. What challenges do we anticipate with communicating our sustainability definition and how will we manage those challenges?

Getting the Discussion Started

The following questions can be helpful for starting the definition discussion:

- When you think about sustainability what does it mean/represent? What impact are you trying to achieve?
- What if your coalition/program was successful, how would your community be enhanced? What change(s) in individuals and/or community are you trying to achieve?

**Definition Generator**

Based on your discussion(s), enter the following information to generate a draft definition of sustainability for your effort.

Name of the coalition: \_\_\_\_\_

Brief description of community/constituents/target group:  
\_\_\_\_\_

Impact statement 1: \_\_\_\_\_

Impact statement 2: \_\_\_\_\_

Impact statement 3: \_\_\_\_\_

Sustainability of the \_\_\_\_\_ means that  
\_\_\_\_\_,  
\_\_\_\_\_,  
\_\_\_\_\_, and  
\_\_\_\_\_.

# STEP ONE: INTENT

## 1D - COLLABORATIVE SELF-ASSESSMENT SURVEY

Successful collaborations take the time to reflect and regularly assess their functioning, and progress towards reaching their goals. Use this survey as a tool to discover successes and challenges that members of your coalition currently face. Complete it individually or collectively, but take time to discuss the results as a group. Areas that are marked as challenging require action. Make concrete action plans, incorporate them into your work plans, and create a system to check in on progress made.



## Collaborative Self-Assessment Survey

Often, collaborations get off to a great start with an infusion of resources and then lose impetus as projects come and go. Successful collaborations/partnerships have the willingness and ability to assess their organizational functioning, the implementation of strategies, projects or activities and progress towards reaching goals and outcomes.

### **GUIDELINES FOR USING THE SURVEY:**

1. **There are a variety of ways to use this survey. Some ideas include:** Collaborative members can complete the survey separately, submit the surveys to someone who will tally the results and then come together to discuss results and plan action steps. Alternatively, members can complete the survey while together at a meeting and discuss results and plans immediately. Surveys can be completed anonymously or not. However, keep in mind that the purpose is to generate discussion, not simply a numerical result. Use of web-based tools such as Zoomerang or Survey Monkey can be efficient ways to distribute and compile survey results.
2. **Once members have completed the survey, the group can determine what areas were most often marked “successful” or “partially successful.”** These are areas in which your collaborative is well functioning and strong. How can your group maximize these strengths?
3. **Now, determine which questions were most often marked “challenging” or “very challenging.”** These are areas that require action. What will you do to improve collaborative functioning in these areas? Who is willing to take the lead?
4. **Once someone has agreed to take the lead,** incorporate these actions into your work plans. Remember to include a way to check-in on progress.

## Collaborative Self-Assessment Survey

**PLEASE RATE THE FOLLOWING QUESTIONS IN EACH AREA USING THE SCALE BELOW:**

### I. Shared Vision

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. Our group revisits our vision periodically and revises when needed.	1	2	3	4
2. Our vision is the starting point for setting goals, developing strategies, and creating change in our community.	1	2	3	4
3. Our vision represents input from a broad range of people in the community.	1	2	3	4
4. Members can see where their personal vision fits in the shared vision.	1	2	3	4

### II. Inclusivity & Participation

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. Membership is open – that is, anyone can join.	1	2	3	4
2. Our members represent a wide range of people and groups (e.g., parents, faith, business, local associations, etc.)	1	2	3	4
3. Our group works with a broad range of community groups (outside of the partnership itself).	1	2	3	4
4. Meetings and materials are presented in languages that are accessible to partnership members and community residents.	1	2	3	4
5. The membership of the group reflects the ethnic, racial, socioeconomic and age diversity of our community.	1	2	3	4
6. Our membership includes a balance of community members and agency representatives.	1	2	3	4
7. Members share responsibility and workload so that the work of the collaborative is accomplished.	1	2	3	4

Collaborative Self-Assessment Survey

Developed by Center for Collaborative Planning, Public Health Institute

[www.connectccp.org](http://www.connectccp.org)

2

## Collaborative Self-Assessment Survey

### III. Sound Decision Making

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. Our collaborative has an agreed upon decision-making process that is spelled out in writing and is understood by all members.	1	2	3	4
2. Members have an opportunity to participate in decision-making.	1	2	3	4
3. We are able to resolve conflict in order to reach decisions.	1	2	3	4
4. Decision-making power is shared and not concentrated in the hands of a few.	1	2	3	4
5. Our group collects information and data and uses it to make informed decisions.	1	2	3	4

### IV. Facilitative Leadership

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. Leadership is shared among members.	1	2	3	4
2. New members of the group have the opportunity to take leadership roles.	1	2	3	4
3. The group provides leadership within the broader community on issues of interest to the collaborative.	1	2	3	4
4. The ideas of all members are heard and respected.	1	2	3	4
5. We build in time to have fun and celebrate success.	1	2	3	4
6. Capacities and skills of members are recognized and used.	1	2	3	4

## Collaborative Self-Assessment Survey

### V. Effective Communication

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. Information about collaborative activities and decision-making is freely shared and easily accessible – there is not a lot of “insider” information.	1	2	3	4
2. Our collaborative has a communication plan that fosters communication among members and the larger community (e.g., meetings, community events).	1	2	3	4
3. Our group has a plan or process in place for managing conflict.	1	2	3	4
4. Information about upcoming events and activities received via e-mail, fax or post is communicated to all collaborative members.	1	2	3	4
5. Activities and communications are done in language that everyone can understand (e.g., no jargon, multilingual).	1	2	3	4
6. The results of our work are shared with the larger community.	1	2	3	4
7. Our collaborative has a visible presence and identity in the community.	1	2	3	4

## Collaborative Self-Assessment Survey

### VI. Sustainability

1 = Successful      2 = Partially Successful      3 = Challenging      4 = Very Challenging

1. The collaborative periodically evaluates its efforts and identifies activities members want to sustain or revise.	1	2	3	4
2. The collaborative has developed public will and a constituency around issues of interest.	1	2	3	4
3. The group has built its capacity – and that of its constituencies – to understand how policy is made and influenced.	1	2	3	4
4. Members have formed relationships to gain support of local institutions and formal policy bodies.	1	2	3	4
5. The collaborative has implemented policy and systems change strategies.	1	2	3	4
6. Successful activities and programs initiated by the collaborative are incorporated into the ongoing work of local institutions and/or community groups.	1	2	3	4
7. The collaborative has a plan for sustainability.	1	2	3	4
8. The collaborative has a fund development plan to sustain both core functioning and successful strategies of the partnership.	1	2	3	4

# STEP TWO: APPROACH

2A - Decision Tree: New

2B - Decision Tree: Proficiency

2C - Developing the Big Picture

2D - Partnership Mapping Tool

2E - Ways to Increase Your Sustainability Odds



# STEP TWO: APPROACH

## *2A AND 2B - DECISION TREES: NEW AND PROFICIENCY*

These Decision Trees are interactive, in that the path followed is dependent on the response to various questions or concepts. Likely, the best method for engaging these Decision Tree tools is to have a core group from the coalition examine and walk through them first. Take time to discuss and reflect on each “box.”

For example, in “Decision Tree – New,” if the coalition has shown interest in strategic planning, a lead group may want to view examples of [completed strategic plans](#) and discuss desired outcomes. Balance these factors with consideration for resources and timing to help determine if the coalition should create a strategic plan that is:

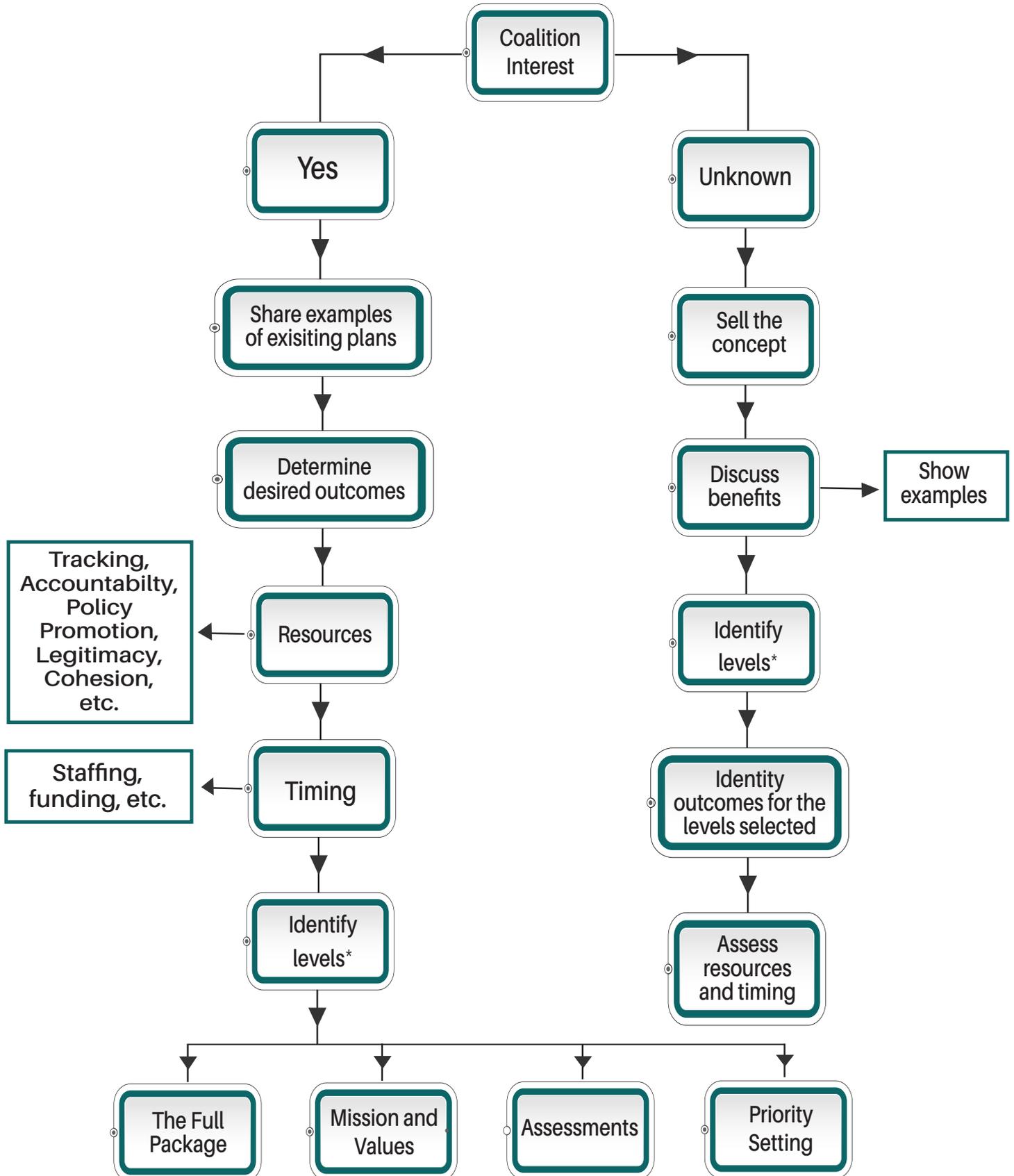
1. Full Package: has all the contents outlined in Step Three.
2. Mission and Values: focuses only on the core operating and principles of the coalition.
3. Assessments: lays out the problems and data and how the coalition will address these challenges.
4. Priority Setting: summarizes the results from a priority setting process, such as the dot voting method outlined in Step Four, and how these results will guide the coalition’s actions.

These are just a few examples from the spectrum and variation that coalitions can draw upon for their strategic planning process.

## Strategic Planning for Opioid Safety Coalitions: A Decision Tree - New

*New: Our coalition has not previously engaged in strategic planning activities.*

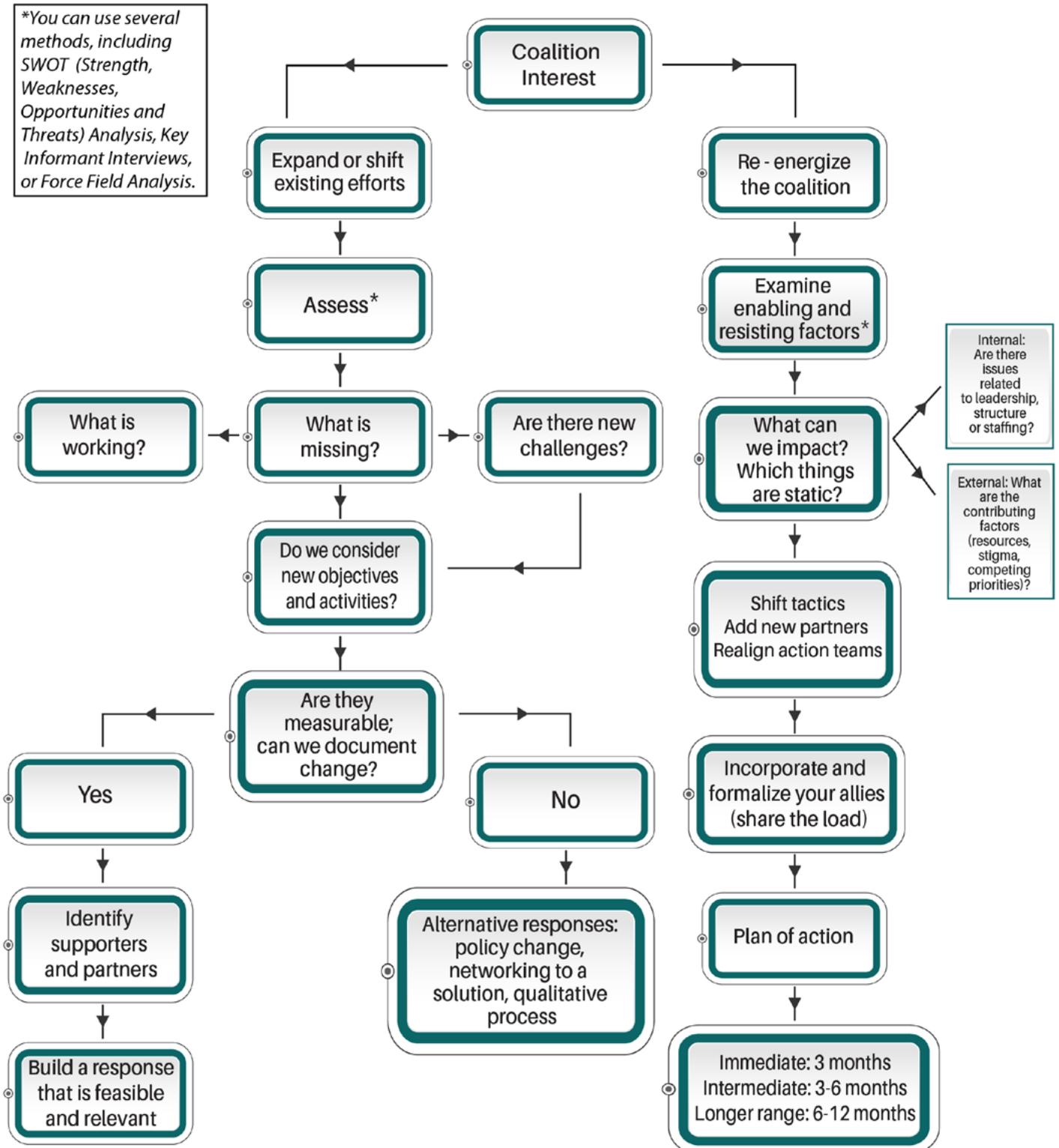
*Your coalition may have considered engaging in a strategic planning process. Questions arise about what will this look like, what will it accomplish, or do we have the necessary resources? This Decision Tree is a tool to assist your leadership team and coalition in how to proceed.*



## Strategic Planning for Opioid Safety Coalitions: A Decision Tree - Proficiency

**Proficiency:** Our coalition has previously engaged in strategic planning activities.

Your coalition has previously engaged in strategic planning activities, such as development of a mission statement or vision, goals and objectives, or assessments. However, your coalition is seeking to expand or invigorate through an ongoing process. This Decision Tree is a tool to assist your leadership team and coalition in learning how to proceed.



# STEP TWO: APPROACH

## *2C - DEVELOPING THE BIG PICTURE*

This foundational tool will help organize your coalition's process and thinking for framing your community's context, identifying partners, outlining action steps, and setting short and long-term performance measures.





## DEVELOPING THE BIG PICTURE© WORKSHEET

### 1. Project Impact Statement:

- a. What is the overarching goal of your team's coalition work?
- b. What impact are you aiming for? (i.e., if you had "wild success" what would have happened?) This is most likely a few years (or more) out.

### 2. Socio-Economic, Political and Cultural Context:

- a. What is the current context in the community relative to the opioid epidemic?
- b. What factors are at work in the community that might either facilitate or impede progress on addressing opioid safety?
- c. What are the specific factors related to the social determinants of health<sup>1</sup> in your community? How do these factors relate to the context of your proposed work?

### 3. Rationale:

- a. Why is opioid safety important to the accelerator team, full coalition, other partners and stakeholders, and the community at large?
- b. What is the evidence that this is the right problem to solve?
- c. How does health equity in your community relate to your rationale and/or your approach to opioid safety?

### 4. Stakeholders:

- a. Beyond the full coalition, what other partners are critical to successfully address opioid safety? Are those partners currently missing from your coalition?
- b. Beyond the team and the full coalition, what other partners have a stake in the outcome of your work?
- c. Within the context of changing the social determinants of health in your community, are their additional stakeholders and/or partners that are crucial to your efforts?

### 5. Coalition Priorities

- a. What are the most significant priorities your team will need to focus on to be successful as a coalition in each of the areas outlined (performance improvement, opioid strategy implementation, measurement/CQI, communications and sustainability)?

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<sup>1</sup> Definition: Conditions in the places where people live, learn, work, and play that affect a wide range of health risks and outcomes (Centers for Disease Control and Prevention).

## 6. Pathway to Change/Key Activities:

- a. What will your team do to achieve your opioid safety goal?
- b. What roles will team members and stakeholders have in effecting that change?
- c. How will learning priorities be addressed to achieve your goal?

## 7. Indicators of Success:

- a. Two year outcome indicators
- b. Long-term outcome indicators (3-5 years)

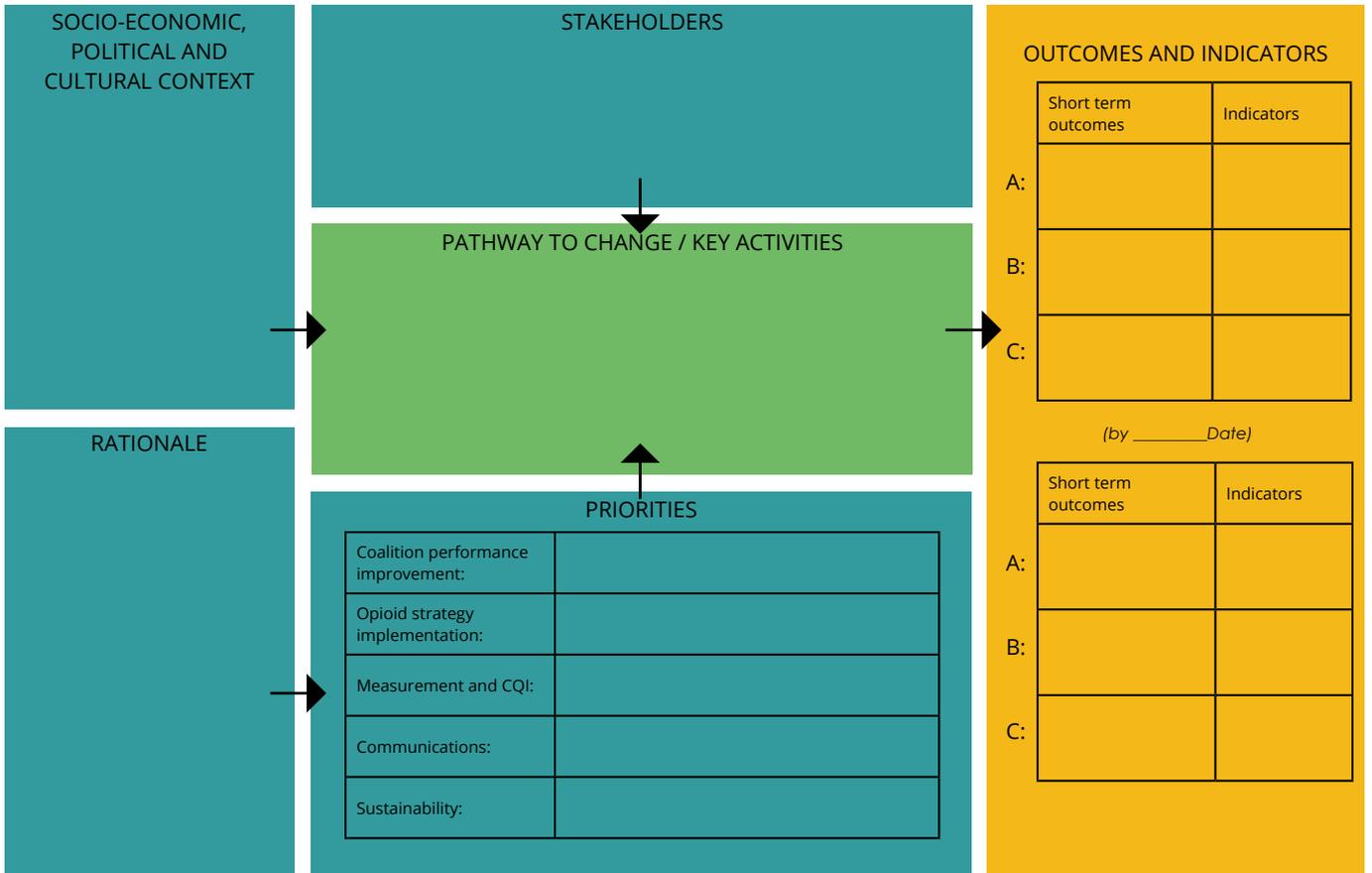
### Examples of Indicators:

- Output indicators measure the product of coalition activities.
  - # of naloxone kits distributed
  - # facilities that receive safe prescribing guidelines
  - # of MAT waiver trainings
- Process indicators measure whether the planned activities took place and/or how well you are running your activity.
  - # of new stakeholders/partners who have attended at least one coalition meeting
  - # of institutional alliances
  - # of pharmacists and first responders receiving naloxone training
  - # of newly waived MAT providers
- Outcome indicators measure the quantity and quality of coalition activities.
  - # of naloxone overdose reversals
  - % of facilities implementing safe prescribing guidelines
  - % of newly waived providers prescribing MAT

# The *BIG PICTURE*®

**COALITION TEAM NAME:**

**COALITION IMPACT STATEMENT:**



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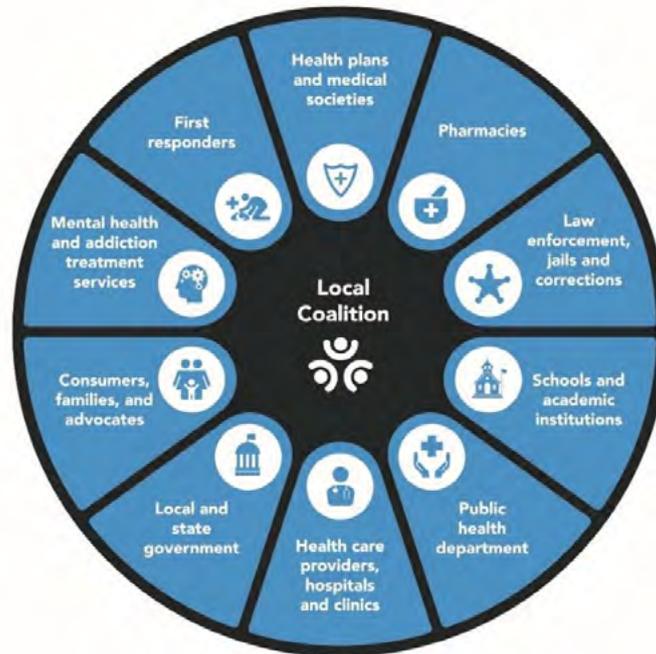
## STEP TWO: APPROACH

### *2D - PARTNERSHIP MAPPING TOOL*

Strong partnerships are essential to the success of any coalition. Use this interactive worksheet to discover where your partners live within the community. Using the diagram provided, think about all the work your coalition is currently engaged in, check off which partners you already have at the table, and then think about which partners you still need to engage. After completing the worksheet, make an action plan and assign members of your coalition to start connections with any missing partners.



# Partnership Mapping Tool



## STEP 1: Overall Coalition Partnerships

Using the diagram above, think about all the work your coalition team is engaged in (what you talked about in your Big Picture Tool), check off which of these apply currently, and then use a different color to mark those that you have thought about working with.

## STEP 2: Opioid Safety Strategy Partnerships

	Addressing Supply	Promoting Recovery	Preventing Overdose Deaths
Partners you currently work with (category of partner, actual partner, and/or purpose in relation to that strategy)			
Partners you have talked about working with (follow same categories as first)			
Partners you might add if you were focused specifically on addressing the social determinants of health in relation to that category			

### STEP 3: Coalition Building Partnerships

When you think about making your coalition as effective as possible as the foundation for the work you are seeking to accomplish...

Which partners do we currently have that support this work?	
Who would we like to do work with to better support this work?	

### STEP 4: Communications Partnerships

When you think about your communications work specifically...

Which partners do we currently have that support our communications work?	
Who would we like to do work with to better support our communications work?	

### STEP 5: Sustainability Partnerships

When you think about sustaining the work of your coalition...

Which partners do we currently have that support our sustainability efforts?	
Who would we like to do work with to better support our sustainability efforts?	

## STEP TWO: APPROACH

### *2E - WAYS TO INCREASE YOUR SUSTAINABILITY ODDS*

There are a number of factors that influence the likelihood that you will be able to sustain your coalition's impact. Use this worksheet to review a list of common factors that will increase your sustainability odds and mark which ones are most important to your coalition. As coalitions change, so will these factors, so use this tool to help get an idea of where your coalition lands today. Coalition members can complete this activity individually, in pairs, or in small groups and then review the results with the full group.





## Ways to Increase Your Sustainability Odds

One place to start is to utilize an assets-based approach and identify what the coalition/program is already doing in the way of sustainability planning.

There are a number of factors that influence the likelihood that you will be able to sustain your coalition's impact. This is a list of some of them. As you can see by reviewing the list, there are a number of choices made in the beginning of an effort that may influence whether it is successfully continued. You can make changes along the way and you do not need to have all of these factors in place to ensure sustainability. The nature of your work may also impact which factors are most important. Reviewing this list, and adding to it as needed, may help you take a quick pulse on your coalition/program.

Coalition members can complete this activity individually, in pairs, or in small groups and then review the results with the full group. As a further step, the group could prioritize the factors and develop action plans to work on the highest-rated issues.

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For each item, mark with a  $\surd$  those you feel you are doing successfully and mark with a \* those you feel need work. There are spaces in each section to add additional items as relevant.

### **Design and Implementation Factors**

*Effort's resources (e.g., staff, money, time)*

- Create a project that came from the community vs. one that was imposed by a funder.
- Make sure your efforts are effective and/or are viewed as effective.
- Set clear expectations and communicate them effectively (internally and externally).
- Engage in public relations to keep your activities/issue highly visible.
- Build in time during your current funding cycle for evaluation.
- Build upon established activities.
- Initiate a project that aligns with your priorities and also helps other organizations fulfill their mission.
- Plan for sustainability.
- Obtain enough resources to generate an initial success.
- Make intentional efforts to creatively leverage existing funds to secure additional funds and in-kind support.
- Obtain technical assistance to address strategic planning and sustainability needs.

- Maintain continuity in staff, community members and political leaders.
- Include policy change to get more cost-effective, long-term outcomes.
- Have a separate group/committee focus on sustainability so that others can focus on desired outcomes.
- Make evaluation a priority - evaluate and revise activities on an ongoing basis so that project clearly demonstrates outcomes.
- Create sustainability benchmarks, especially for long-term initiatives.

### **Organizational Setting Factors**

#### *Structures and processes related to organization of the effort*

- Work to create a strong coalition (stable organization, projects are aligned with goals, strong leadership).
- Strong organizational leadership.
- Integrate the effort within existing systems.
- Make sure the activity fits with the coalition's mission, activities and priorities.
- Develop and nurture a well-positioned advocate/program champion.
- Gain endorsement, support and/or commitment from the top of the organization.
- Build alliances with other groups that have a similar mission.
- Make your issue part of someone else's agenda, plan or operations (e.g., business, government).
- Give awards/recognition to key individuals and organizations to make their commitments more public.

### **Environmental Factors**

#### *Broader contextual factors in political, economic and social environment*

- Look out for competing problems that might be a barrier to sustainability (e.g., downturn in the economy).
- Focus on your community's assets (vs. needs).
- Involve participants and the community in decision-making so the activities are relevant and they have a long-term commitment to the effort.
- Be flexible; look for windows of opportunity (e.g., new federal/state initiatives, new elected officials).
- Try to obtain core funding from within the community (ask, "who are the people with financial resources in our community who have an interest in seeing the community improve?").
- Build relationships. This will include funders (philanthropies, corporations, individual donors), other organizations, community at-large, media, etc. Be creative!

# STEP THREE: COMPONENTS

**3A - Components of an Opioid Safety Strategic Plan:  
Your Ingredient Menu**

**3B - Measurement Plan Template**



### **3A - COMPONENTS OF AN OPIOID SAFETY STRATEGIC PLAN: YOUR INGREDIENT MENU**

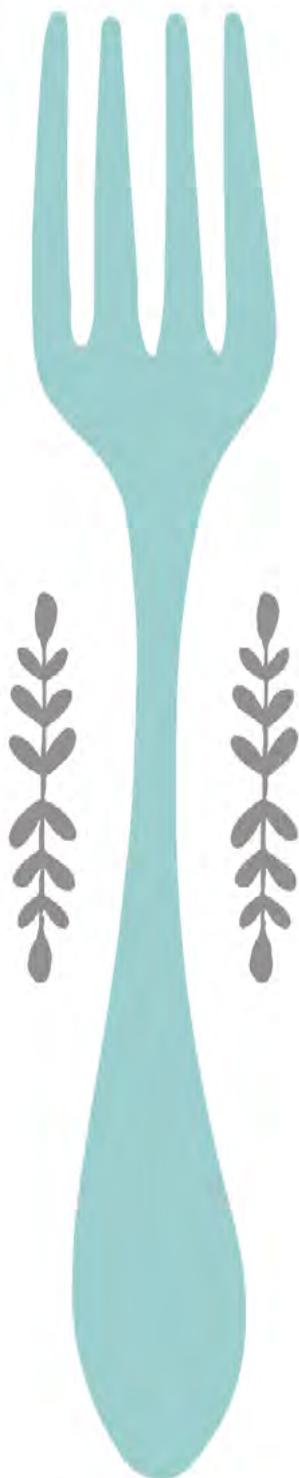
This tool is very useful for presenting or explaining to groups, in an abbreviated fashion, what might be contained within a strategic plan. Sharing it with your coalition and other partners can help them visualize the scope of a plan's content.

You can also compare what is in this tool with examples of completed strategic plans to determine which elements are the most relevant and useful for your coalition.

A more detailed explanation of the various components is described on pages 10-12 in the Toolkit.



## COMPONENTS OF AN OPIOID SAFETY STRATEGIC PLAN: YOUR INGREDIENT MENU



### **Strategic Plan Overview**

*This is your opening, framing and statement of intent. What is the problem you are addressing? What will the reader learn? Use this space to engage the reader and set the stage; keep it to one page or less.*

### **Local Data Overview**

*Define the problem locally. Emphasize area “hot spots,” trends, equating numbers so they are easily understandable.*

### **Purpose**

*What will this plan accomplish and how will it be used? Tell the reader why this document is important and how it will benefit the coalition and the community.*

### **Mission and Values**

*Describe your coalition’s work to establish a mission statement and/or vision. Explain how this guides the work through consistency and consensus.*

### **Assessment**

*How did the coalition evolve to reach this point? What and how was knowledge gained? Consider conducting and reporting the results of coalition priority setting activities, key informant interviews, training, focus groups, analyse, such as SWOT (Strengths, Weaknesses, Opportunities, and Threats) and Force Field, or the COSN Big Picture Model and Coalition Assessment Tool.*

### **Intervention Strategies**

*Explain how your coalition is structured. What are the action teams and how were they determined? What is being accomplished and what are the overall goals for each area?*

### **ATE: Activities, Timeframes and Evaluation**

*Outline in clear terms the objectives and activities. Be sure that whenever possible, the activities are measurable, time-limited and achievable. Find the balance between focusing on interventions that are necessary to meet funding requirements and those which evolve more organically through the priority setting and coalition/program building process. Where appropriate, include evaluation measures to document impact and gain direction for what to change, repeat or tackle anew. Ideally, all this should be in a single “workplan” style format for easier comprehension and tracking.*

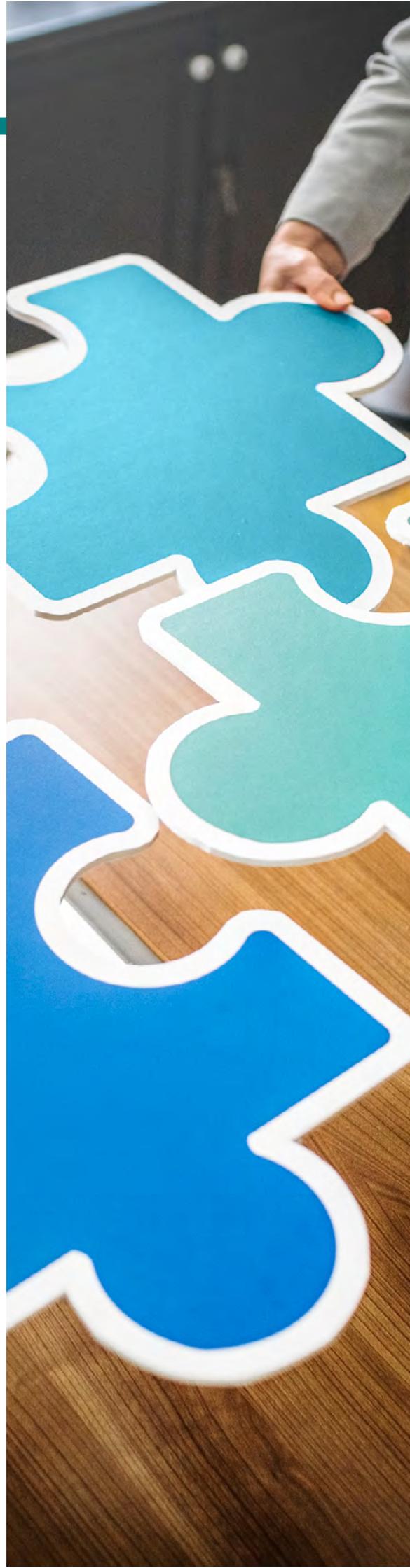
### **Conclusion and Acknowledgements**

*This document will evolve. Let the reader know the coalition will regularly revisit the Plan, keeping it relevant and empowering, reflective of the community’s changing needs and priorities.*

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### 3B - MEASUREMENT PLAN TEMPLATE

It is often said that *“what gets measured gets done.”* Having a measurement plan will help your coalition use data in a strategic and actionable way, including when to adjust your strategies. It will also help you to tell a compelling story to your partners, funders and community. This tool provides instructions on how to create a clear plan across multiple areas of your coalition’s work.



## MEASUREMENT PLAN TEMPLATE

Having a measurement plan in place can help ensure that your coalition uses data in a strategic and actionable way. Below are steps for creating a measurement plan along with examples for each area:

1. Start by reviewing your vision, impact statement and priorities. What goals do you need to achieve?
2. Next, develop SMART objectives to meet those goals. Each time you create an objective, double check that it is: 1) Specific; 2) Measureable; 3) Attainable; 4) Relevant; and 5) Time-bound.
3. For each objective outline your outcomes, indicators, data sources, and frequency of data collection. Be sure to designate a “data lead.”
4. Finally, outline how the data will be shared (e.g., website, presentations, brochures) and with whom (e.g., public-facing dashboard on website, quarterly meetings with Steering Committee, etc.) Your data should help you learn when to adjust your strategies (think continuous quality improvement, or CQI!) and tell a story to your local partners and community.

Example by category:	SMART Objective	Outcome (short and long-term)	Indicators	Data Source	Frequency of Data Collection	Data Lead
Coalition performance improvement	Increase # of sectors represented on coalition from X to Y by [month, year]	Multi-sector coalition representation	# new partners # new sectors	Coalition roster	6 months	Person A
Opioid strategy implementation	Increase % of pharmacies dispensing naloxone without a prescription from [x to y] by [date].	Increased access to naloxone	# pharmacies # pharmacies dispensing naloxone without Rx	Local pharmacy assessment	6 months	Person B
Measurement and CQI	Increase # of partners sharing overdose surveillance data from [x to y] by [date].	Improved overdose surveillance	# data sharing agreements	Coalition data sharing tracker	6 months	Person C
Communications	Increase open rate of coalition newsletter from [x to y] by [date].	Increased public awareness of coalition activities.	Newsletter open rate (%)	Mailchimp	6 months	Person D
Sustainability	Increase # of coalition funding opportunities from X to Y by [date].	Increased core funding for coalition	# fundraising events # grant applications submitted # grants awarded Revenue generated (\$)	Coalition resource development log	1 year	Person E

*Note for using this template: We recommend you limit the amount of text in order to ensure that all information appears on the page when printed.*

## STEP FOUR:

# PREPARATION

- 4A - Key Informant Interview Questions for Opioid Safety
- 4B - Opioid Safety Coalition Training Agenda
- 4C - Dot Voting: Steps for an Opioid Safety Coalition Priority Setting Activity



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#### **4A - KEY INFORMANT INTERVIEW QUESTIONS FOR OPIOID SAFETY**

Key Informant Interviews (KII) are an excellent mechanism for learning more about your community and gaining insightful knowledge from individuals who may impact your work. Select interviewees who may have a unique perspective, including policy leaders, agency directors and managers, those experienced in treating substance use disorder (SUD) or those recovering from SUD, youth leaders, emergency responders and law enforcement, those from the health care industry, etc.



## KEY INFORMANT INTERVIEW QUESTIONS FOR OPIOID SAFETY

*The interview begins with an introduction describing the purpose and process for the interview, including time (not to exceed 30 minutes), types of questions to be covered, ability to decline any question, and how the results will be used. Each interviewee will be given the opportunity to have responses kept confidential. The following questions are the general guideline, but can be expanded upon, omitted or altered depending on how the interview evolves.*

Date:

Name:

Agency:

Position:

### Your Agency

- 1) Please describe your role within your agency?
- 2) Do you have any opioid related responsibilities or activities that you conduct?
- 3) What types of interaction do you and your agency currently have regarding opioid safety activities?
- 4) Are there any specific goals that have been discussed or established for working on the opioid epidemic within your agency?

### The Epidemic

- 1) How serious is the opioid problem viewed in \_\_\_\_\_ County?
- 2) What do you view as the primary concerns regarding the opioid crisis in \_\_\_\_\_ (location)?
- 3) Are there groups disproportionately impacted in \_\_\_\_\_ (location)?
- 4) Are there misconceptions that the public should be aware of?
- 5) Should there be a specific focus for addressing the issue?

### Future Activities

- 1) What should \_\_\_\_\_ County be doing to reduce opioid use rates – consider current gaps and needs?
- 2) Who should be involved in addressing the problem?
- 3) What are the primary barriers that may prevent progress in reducing opioid use?
- 4) Who should be educated about the problem – consider primary audiences?
- 5) What types of messages might be important to include?
- 6) Are there specific policies or guidelines that should be considered for adoption?

Do you have any other thoughts or ideas you would like to add?

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#### **4B - OPIOID SAFETY COALITION TRAINING THE OPIOID EPIDEMIC: EDUCATION AND COMMUNICATION**

Ensuring that most of your coalition members are operating from a similar knowledge base is important for effective and meaningful priority setting. When members have a common foundational understanding of the opioid crisis, its impacts and evidence-based solutions, making decisions about resource allocation and priorities becomes a more cohesive process.

This is especially true with both newer coalitions and those establishing new members.



## **Opioid Safety Coalition Training**

### **The Opioid Epidemic: Education and Communication**

- 9:00 – 9:20**            **Overview and Introductions**
- 9:20 – 9:40**            **Review and What Does the Epidemic Look Like?**
- Training Expectations
  - Brief review of opioid information
    - o History
    - o Terminology
    - o Current Data
    - o Factors impacting the epidemic locally
- 9:40 – 9:50**            **Local Efforts**
- Results from “Landscape” Inventory (current program efforts summarized)
  - Key Informant Interview Findings (preliminary data)
- 9:50 – 10:25**        **Stigmatization and Opioid Use Disorder (OUD)**
- Why and How We Stigmatize
  - How to Shift Perspectives - Communities and Individuals
  - Group Activity
- 10:25 – 10:40**        **BREAK**
- 10:40 – 11:15**        **Risk Communication and Promoting Change**
- Risk Communication and OUD
  - Expectations for Change
  - Group Work: Describing the Epidemic to Your Audience
    - o Identifying audience needs (open brainstorm)
    - o Developing and using talking points (group worksheet)

#### ***Learning Objectives***

1. Participants will be able to cite expectations for their ongoing opioid safety work within their community.
2. Participants will understand the breadth of opioid safety programming as it relates to partners and future planning.
3. Participants will identify components of stigmatization and the use of risk communication skills for delivering key messages.
4. Participants will learn how to construct and deliver key talking points that address community and audience needs.

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#### **4C - CONDUCTING DOT VOTING WITH OPIOID SAFETY COALITIONS**

While possibly considered “old school,” dot voting, also known as Dotmocracy, has several advantages:

1. provides every coalition member a voice;
2. physically engages members so that they are moving around, talking, comparing, and sharing;
3. is a fairly simple process to implement, with minimal complications;
4. is a visual process where people can easily and immediately see the results;
5. is easy to summarize to large groups; and,
6. creates a real-time discussion opportunity that can be followed up with smaller group work in the future.

For more information on how to proceed once priorities have been established, please review page 15 of this Toolkit.





## DOT VOTING

### Steps for an Opioid Safety Coalition Priority Setting Activity

- One: A minimum of two hours should be scheduled for this activity.
- Two: Coalition members should be told well in advance that this activity is planned to maximize participation.
- Three: Have your supplies ready: 1-2 pads of flip chart paper; several markers, and dot stickers in 3-4 colors.
- Four: Divide the coalition into their action teams (workgroups/subcommittees, etc.) and have an assigned recorder and facilitator available for each group. Because this activity can get loud, it is best to have separate space available for each group.
- Five: Based on the action team's expertise/topic, each team will brainstorm the interventions and activities they would like to see implemented in their community. This is not the time for broad ideas related to change. For this brainstorm, the ideas need to be concrete and actionable.
- Allow a minimum of 45 minutes for this brainstorm. The recorder should be writing down legibly and clearly the team's ideas. As a facilitator, keep the discussion focused on actionable items, but also remember to validate the importance of all ideas, not just the ones that meet the requirement.
- Six: Take a 10-minute break after the brainstorm and then reconvene the entire coalition into one room.
- Seven: Have each team post their flip charts around the room and summarize their findings for the whole coalition. Keep this to about 20-30 minutes.
- Eight: Give each coalition member 3 different colored dots. Each color denotes a priority: 1 = red; 2 = yellow; and 3 = blue, as an example.
- Nine: All coalition members will walk around to the various flip charts and place their 3 dots on the 3 activities they deem the most important.
- Ten: The coalition's lead facilitator will summarize the visual results and explain possible next steps: 1) the results will be recorded and sent out; 2) a future meeting will hone the feasibility and timeframe for the results; and 3) the results will be incorporated into a workplan and strategic plan for further implementation.
- Eleven: Be sure the coalition understands this is an ongoing process that will be revisited as the plan takes shape and that ongoing input is valued.

## STEP FIVE: CREATING AND LOOPING

There are no additional tools for this step. Please refer to pages 16 and 17 of the Toolkit for tips and guidance.



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# STEP SIX: THE PRODUCT

- 6A - Coalition Fact Sheet Template
- 6B - Coalition Elevator Pitch Worksheet



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## **6A - TEMPLATE FOR COALITION FACT SHEET**

Successful coalitions are prepared to engage the public, recruit allies for the cause, and get the message out to as many people as possible. A coalition fact sheet will help your coalition tell your story including your goals, strategies, and accomplishments. This template provides an outline with examples and prompts for developing a fact sheet that can be used when creating a coalition website, presentation, or other outreach materials.



**TEMPLATE FOR COALITION FACT SHEET**  
(can be repurposed for brochure, website copy, etc.)

A coalition fact sheet helps you to tell your story including the goals, strategies, and accomplishments of your coalition, an essential tool to engage the public and recruit allies. This template provides an outline for developing a fact sheet along with examples and prompts.

**IDENTITY:**

**1. Name of Coalition:**

Fill in...
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**Tagline:** signals the purpose of your coalition, example: "Safer Care and Better Outcomes"

Fill in...
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**Your logo:** optional– include the names and logos of key entities in your coalition.

<b>Click to insert your logo</b>	<i>[Names/logos of other orgs]</i>	<b>Click to insert other logo</b>
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**Co-Branding Option:** include California Opioid Safety Network and logo and explanation on why and how your coalition got involved with COSN.

Example:

<b>Click to insert your logo</b>
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*[Insert coalition name] is a diverse coalition of stakeholders, community members and other volunteers from a variety of backgrounds whose aim is to promote opioid safety for all of our county's residents. Our coalition is part of a larger network of opioid safety coalitions throughout the state, called the [California Opioid Safety Network](#).*



**2. MISSION/VISION:**

Why does your coalition do this work? What are your your overarching goals? Information can be sourced using your coalition’s elevator pitch.

*Example: The \_\_\_\_ coalition was formed to reduce opioid overdose deaths in \_\_\_\_ county through strategic community wide mobilization. Our objectives include distribution of naloxone, etc.*

Fill in...

**3. KEY STRATEGIES:**

Include explanations as to why this strategy is essential to to your key goal: preventing opioid overdoses and deaths. [Example text below]

**Safer Prescribing:**

Our coalition helps providers to adopt and implement guidelines to protect patients, and help prescribers understand the importance of safer prescribing and pain management education.

**MAT:**

Currently in our county, there is a treatment gap of \_\_\_\_\_ patients who are unable to access MAT. If we increase the number of MAT practitioners we can save lives.

**Naloxone:**

Our coalition is working to ensure that naloxone is co-prescribed with every opioid, and widely distributed in the community, e.g., homeless shelters, libraries, schools, etc. The only thing naloxone enables is saving lives.

**Other:**

Fill in...

**4. WHO WE ARE:**

Include coalition community members, stakeholders and leadership. Include names.

We are a broad-based coalition that includes health plans, health care providers, public health advocates, victims, and concerned citizens. Our coalition partners include...



**5. HOW WE DO OUR WORK:**

Coalition structure, priorities and tactics such as monthly meetings/working groups. Describe task forces, and include graphics if possible. [Example text below]

**Structure:**

Our coalition is a community based structure formed around \_\_ action teams. These teams include [task forces, meeting groups, etc.] comprised of the following staff and/or stakeholders...

**Priorities:**

We engage health professionals, law enforcement, and community members to reduce opioid overdose deaths through strategies to reduce supply, etc.

**Tactics:**

Our steering group meets monthly, and each task force meets bi-weekly. We are organizing a yearly conference [date] to educate the community... other tactics include:

**Graphics:** Insert any helpful graphics, e.g., trend lines, number of opioid overdose deaths over time.

<b>Click to insert graphic</b>	<b>Click to insert graphic</b>
--------------------------------	--------------------------------

**6. WHAT WE HAVE ACCOMPLISHED**

Detail both past as well as recent accomplishments and, if available, include “data” showing progress on strategies, as well as “stories,” e.g., testimonials.

In the fall of 2017 our coalition helped to increase x-licenses by 50% in our county. We distributed safe prescribing guidelines to 90% of the providers in our community...

**7. GET INVOLVED:**

Join the coalition: how and why. What local work needs to be accomplished and who needs to be involved to make progress? Tailor to your target audience(s).

The opioid epidemic is a multifaceted problem that will require a community wide response, including health professionals, law enforcement, et al.



**8. CALLS TO ACTION:**

Fill in a tailored “call to action” message for each target audience below. Include why and how they can get involved. [Example text below]

Health Professionals	You are the gatekeepers and primary contact for community members at risk for SUD, we need your expertise and connections to reduce opioid overdoses through these strategies... [list]
Law Enforcement	Law enforcement and first responders have a critical role in saving lives and keeping our communities safe from the fallout of this epidemic.
Dentists	Opioids are highly addictive and primarily effective for acute pain yet are too often prescribed in high doses and extra “meds” are prone to misuse. Adopting prescribing guidelines can make our community safer.
Educators	Opioid misuse among youth has reached epidemic levels and will require a community wide response to reverse this trend. Educators have a critical role.
County agencies	Substance use disorders related to opioids are impacting many county agencies, from child welfare to our jails, and it will take a collaborative interagency approach to respond.
Community members affected or in recovery and their family	Opioid addiction can seem like a nearly impossible obstacle to overcome but with community support and ingenuity we can make strides in combating the epidemic, and helping families get control of their lives back.
Other Fill in...	Fill in...

**9. HOW TO REACH US:**

Include contact information (email, phone, address, website) and schedule, e.g., we meet monthly at \_\_\_\_\_.

Fill in contact information:
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## **6B - COALITION ELEVATOR PITCH WORKSHEET**

Being able to speak quickly and effectively about your coalition is crucial to its success. Often, people are only willing to spare a few minutes of their time. To ensure that you are making the most of these few precious minutes, you need to develop an elevator pitch that is succinct and persuasive. Use this template to create an elevator pitch that will grab attention and clearly communicate who your coalition is, why it is important, and the impact that it is making.



## Coalition Elevator Pitch Worksheet



[X Coalition] is a(n) **(brief, basic descriptor)**:

that **(function)**:

for **(audience)**:

We are committed to **(purpose/vision)**:

*(Another way to articulate the vision or purpose of the coalition is to answer the question, What does the work of your Coalition make possible in your community?)*

Our coalition is unique in because **(unique differentiator)**:

I'm involved in [X Coalition] because **(list three reasons or three positive outcomes your coalition has already achieved)**:

- 1.
- 2.
- 3.

### Putting It All Together

[X Coalition] is a (basic descriptor) that (function) for (audience). We are committed to (purpose/vision). This organization is unique because (unique differentiator). I'm involved/committed/passionate about our work because (one, two or three reasons).

Call to Action

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## STEP SEVEN: APPRAISE

There are no additional tools for this step. Please refer to page 20 of the Toolkit for more information.

# OPIOID SAFETY STRATEGIC PLANNING: A TOOLKIT DESIGNED FOR LOCAL COALITIONS



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PREPARED BY  
**THE CALIFORNIA OPIOID SAFETY NETWORK**  
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