

PLANNING WITH PURPOSE

Action Planning Tips for the Water First! Learning Community

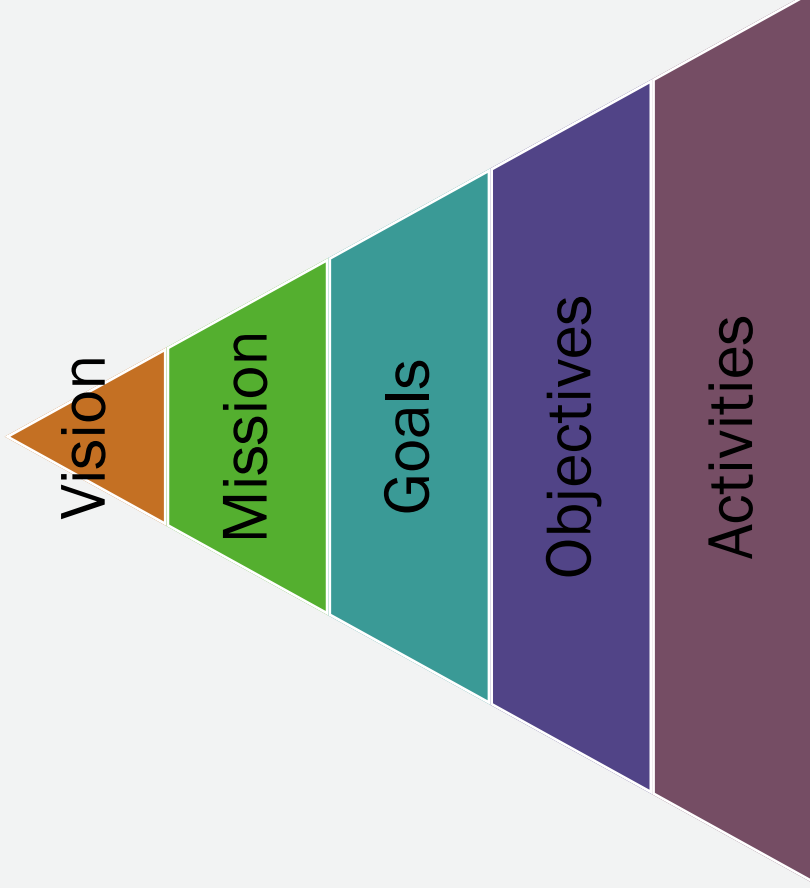
Webinar Developed & Presented by Nathania Tsosie, MCRP

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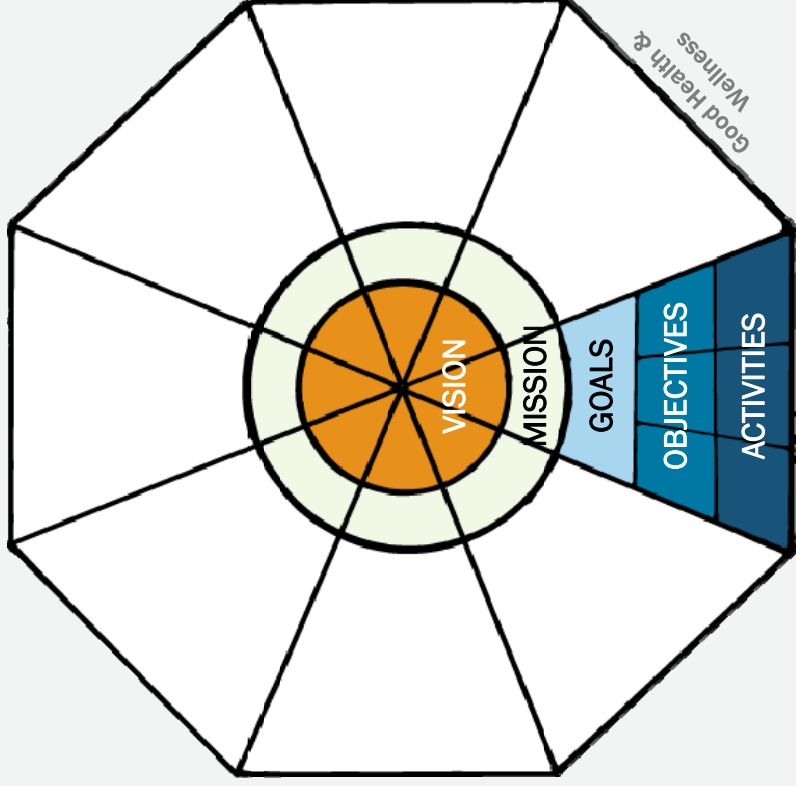


UNM HEALTH SCIENCES CENTER
Center for Native American Health

An Overview of Strategic Planning

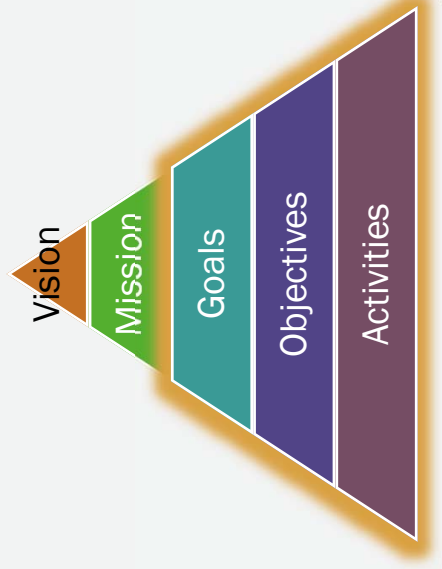


An Overview of Strategic Planning



Water First!

What is an Action Plan?



An Action Plan addresses questions such as:

1. Where are we now?
2. Where do we want to be?
3. How will we get there?
4. How will we know when we have got there?
5. How will we know if we have been successful?

Why should you develop an Action Plan?

“People don’t plan to fail.
Instead they fail to plan.”

- To avoid overlooking any of the details
- To understand what is and isn’t possible for your organization
- To save time, energy, and resources in the long run
- To increase the chances that people will do what needs to be done

Source: Center for Community Health & Development. (2017). Community Tool Box: Chapter 8. Developing a Strategic Plan. Retrieved from <http://bit.ly/2uZVow>

General Action Planning Steps

- 1) Develop a Planning Team
- 2) Review and analyze data
i.e. the results of your community assessment
- 3) Identify the outcomes that would address the issues identified in your assessment
 - a) Clarify the goal of your program
 - b) Identify 2-3 objectives ("strategies") to implement
 - c) Brainstorm activities to achieve each objective
- 4) Identify strengths, challenges, obstacles, resources, etc. to successfully implement your ideas
- 5) Develop work plan that organizes your activities into a timeline, identifies who will be responsible for the activity, & pertinent deadlines.
- 6) Monitor, evaluate, and update your action plan as you move along

Adapted from: Good & Healthy South Dakota Communities. "Writing a Community Health Action Plan." Retrieved from <http://bit.ly/2wqgoyn>

Essential Components of your Action Plan

Community Assessment Highlights

- Brief summary of your community assessment findings focusing on how the data influenced your planning decisions.

Goals

- Reduce SSB consumption
- Increase access to water or increase breastfeeding supports

Objectives ("Strategies")

- The process steps to meet the goals and how the team plans to achieve them
- Identify 2-3 objectives/strategies

Activities ("Work Plan")

- What will be done?
- Who will do the work?
- When will the work be done?


Policy, Systems & Environmental (PSE) Change

Policy, systems and environmental change is a way of **modifying the environment** to make healthy choices practical and available to every community member.

Setting	Programs/Events	PSE Change
School	Celebrate national nutrition month	Add fruits and vegetables to the meal options in schools
Community	Host a community bike ride & parade	Implement a roads policy to ensure roads are constructed for safe biking, walking and driving
Worksite	Hold health screenings for staff	Implement a healthy vending machine policy that offers healthy snacks at an affordable price
Hospital	Hold free breastfeeding courses for new moms	Implement the WHO 10 Steps to Successful Breastfeeding and become a Baby Friendly Hospital

Source: Communities Putting Prevention to Work. What is 'Policy, Systems and Environmental Change'? Retrieved from <http://bit.ly/2u5iUJD>

Community Assessment Highlights



*"It is a capital mistake to theorize before one has data. Insensibly one begins to twist facts to suit theories, instead of theories to suit facts."
— Sherlock Holmes*

- How does your community view the consumption of SSBs?
- What are the strengths and assets of your community?
- What are the challenges your children face with regard to health issues?
- What are the primary barriers to eliminating the consumption of SSBs among children in your community?
- Who are or will be your partners in this work?
- What policy or systems changes are needed?

Identifying Priorities

Assemble a team & share the assessment results.

Facilitate a conversation:

1. Please underline words, phrases, or images that get your attention. What did you underline?
2. What questions of clarity do you have for the team who collected the data?
3. What was interesting to you?
4. What did you find worrying?
5. What is familiar?
6. What limitations or gaps did you notice in the data?
7. **What is the data telling us about SSBs in our community? Drinking water? Breast Feeding?**
8. **Based on this discussion, what should be our priority moving forward?**

Source: R. B. Stanfield, Ed. (2000). *The Art of Focused Conversation*. Gabriola Island, BC, Canada: New Society Publishers.

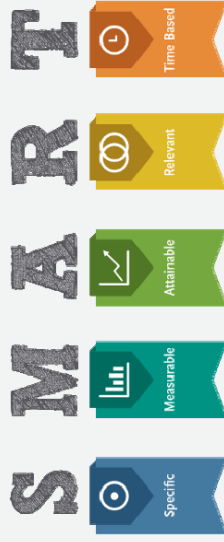
Clarify Your Goals

Reduce sugar sweetened beverage (SSB) consumption among youth ages 0-8

(Choose ONE)

- Increase access to clean drinking water among youth ages 0-8
- OR**
- Increase breastfeeding supports in the tribal workplace

Clarify Your Goals



Goals summarize what is expected to be achieved in the long run.

Source: Good & Healthy South Dakota Communities. "Writing a Community Health Action Plan." Retrieved from <http://bit.ly/2wqgoyh>

GENERAL GOAL

Reduce sugar sweetened beverage consumption among youth ages 0-8

SMART GOAL

By March 2019, we will collaborate with local parents, WIC, primary care, pediatricians and dentists to create a culturally-centered, family-friendly **educational campaign** to support achieving early dental health and the elimination of sugar sweetened beverage consumption among children 0-8.

Acknowledgement: Sample SMART goal by Dr. Tassy Parker, UNM HSC CNAH. Adapted by N. Tsosie.

Identify Objectives

Objectives are the process steps to meet the goal(s) and how the team plans to achieve them.

Source: Good & Healthy South Dakota Communities. "Writing a Community Health Action Plan." Retrieved from <http://bit.ly/2wqgoyh>

SMART GOAL

By March 2019, we will collaborate with local parents, WIC, primary care, pediatricians and dentists to create a culturally-centered, family-friendly **educational campaign** to support achieving early dental health and the elimination of sugar sweetened beverage consumption among children 0-8.

OBJECTIVES

1. Increase the coordination of local efforts around dental health and SSB consumption elimination by establishing a coalition of partners before January 1, 2018.
2. Promote a culturally-centered message about the importance of early dental health and healthy beverages to families by providing educational materials and parent/child care provider education.
3. Collaborate with tribal council and local restaurants and convenience/grocery stores to provide point-of-purchase information promoting healthy beverage options for children 0-8.

“Work Plan” of Activities

The work of the team that drives and supports the objectives and goals.

- Organized in a timeline
- Who will do the work?
- Useful tool for monitoring and evaluating activities

Source: Good & Healthy South Dakota Communities. "Writing a Community Health Action Plan." Retrieved from <http://bit.ly/2wqgoyh>

SMART GOAL

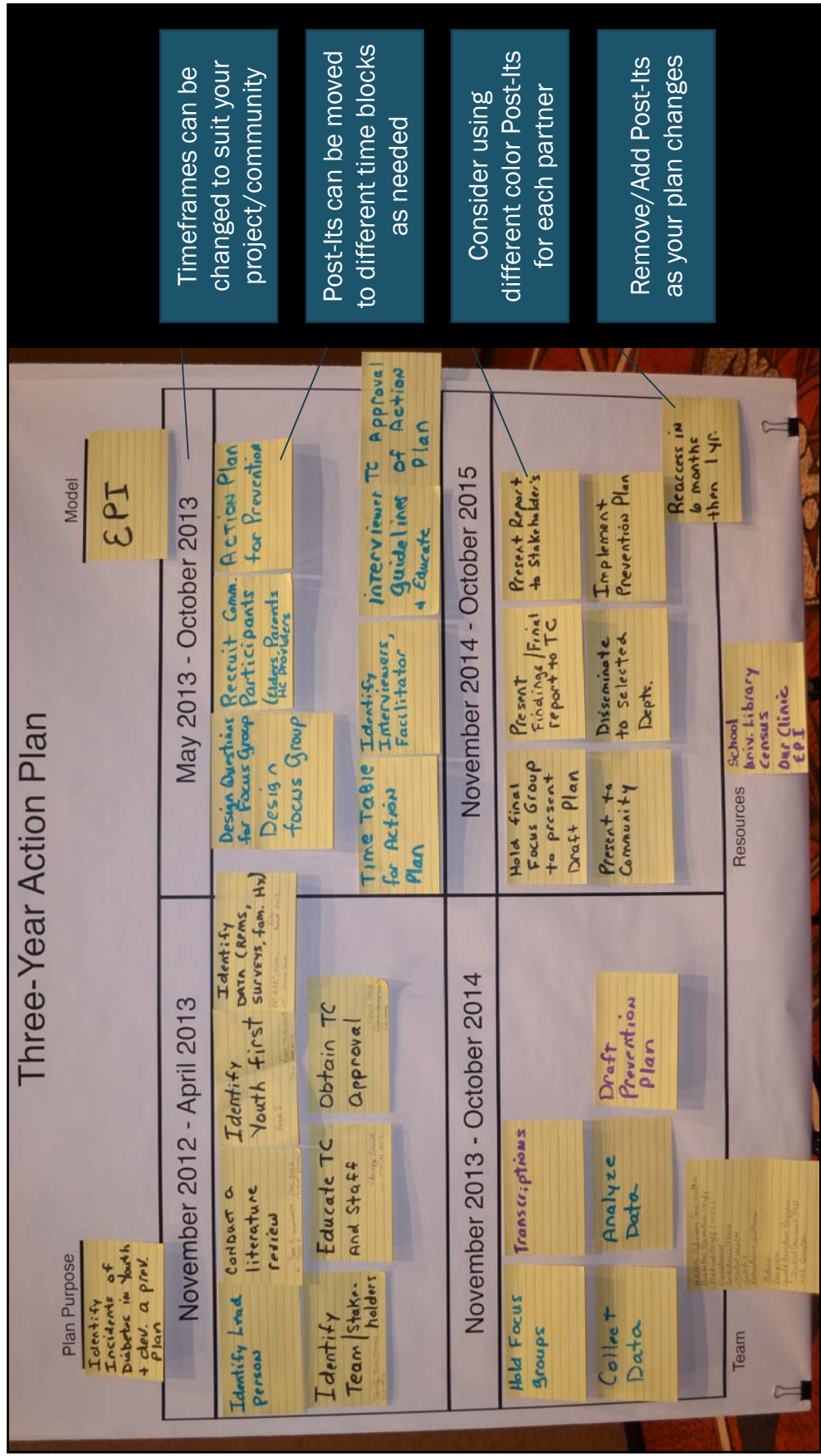
By March 2019, we will collaborate with local parents, WIC, primary care, pediatricians and dentists to create a culturally-centered, family-friendly **educational campaign** to support achieving early dental health and the elimination of sugar sweetened beverage consumption among children 0-8.

OBJECTIVES

1. Increase the coordination of local efforts around dental health and SSB consumption elimination by establishing a coalition of partners before January 1, 2018.

ACTIVITIES

- A. By October 15, 2017, identify at least 10 representatives from family-serving organizations including WIC, parents/grandparents, primary care, pediatricians, dentists, and others.
- B. Hold a 1/2 day orientation & planning meeting before November 17, 2017 to orient representatives to the Water First grant, conduct a [SWOT or SOAR] analysis, & update the action plan.
- C. By December 2017, we will work with the team to create a list of elders and cultural leaders to interview about cultural values around water, breastfeeding, and children’s oral health & wellness.



- Timeframes can be changed to suit your project/community
- Post-Its can be moved to different time blocks as needed
- Consider using different color Post-Its for each partner
- Remove/Add Post-Its as your plan changes

Can be organized into columns/rows by:

- Who will do the tasks?
- Objective/Strategy

Add notes using dry/wet erase markers to show relationships, deadlines, circle important tasks, etc.

Tasks are moved to the bottom when completed (+Date)

ACTION PLAN TEMPLATE

BACKGROUND

Brief narrative summary of your community assessment. Describe how your findings influenced your action plan.

GOALS & OBJECTIVES

Use the SMART goal/objective format.

WORK PLAN

Optional: Brief narrative summary of how you developed your action plan – who was involved? How did you decide on the activities?



Objective ("Strategies")	Activities (Tasks)	When (Milestones/Deadlines)	Who (Individuals, Organization)	Team and/or Collaborators
I.	A.			
	B.			
	C.			
II.	A.			
	B.			
	C.			
III.	A.			
	B.			
	C.			

SPECIAL CONSIDERATIONS

- Resources Needed
- Seasonal/Cultural Time Considerations
- Staff/People Time Required

Change to "Progress" to track what has been done

Examples:

- % Done: 0-100%
- Status: To Do, Doing, Done
- "Lights": 
- 0%  Done!

Adapted from "Community Action Plan Template," Health Trust; "Generic Action Plan Template for MATs to address inequality for Asylum-seekers, refugees, and migrant workers," Menter, 2010; and Top 180-Day Implementation Plan, The Institute of Cultural Affairs, 2012.

Lessons Learned

Advice for Action Planning

Your action plan should be....

- Informed by your community** – collaboration is key!
- Concise** – no more than 2 pages.
- Clear** – is it apparent who will do what and by when?
- Asset-Oriented** – where are you well situated to do this work?
What are your strengths?
- Outcome-oriented**

" A GOAL
WITHOUT
A PLAN
IS JUST
A WISH "

Thank you for your time & attention!

QUESTIONS?

IF YOU THINK OF SOMETHING LATER...

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WRITING A COMMUNITY HEALTH ACTION PLAN

After conducting a CHNA the next step is to write a community health action plan (CHAP) to address the local health priorities that were identified from the CHNA. The CHAP, developed at the end of the CHNA process, can take what was learned through the community assessment process and turn it into a written health improvement plan for the community.



The CHAP becomes a detailed blueprint that maps a clear course of action to support community change. In other words, the plan describes:

- What your community wants to accomplish
- What needs to be done, by whom, how it will be done, and by when
- What resources (i.e. money, people) are needed to be successful
- Who will be most affected

Following a plan makes reaching far-off goals and changes possible. It may take time to achieve the goals the coalition has determined, but setting them with clear-cut objectives and activities that support them is an essential piece for ensuring sustainable change.

WHAT IS A COMMUNITY HEALTH ACTION PLAN?

A CHAP is a written document that lists plans for achieving health improvements in the community. This is developed in response to needs and gaps identified from data collection. The plan is written by the community coalition and typically includes establishing and clarifying desired outcomes, goals, objectives, activities, assignments, and deadlines for coalition members supporting the action plan. A CHAP offers built-in deliverables and focuses on doing work in the community to support priority health needs.

Having an action plan:

- Lends credibility to your organization. An action plan shows members of the community (including grant makers) that your organization is well ordered and dedicated to getting things done.
- Prevents the possibility of overlooking details.
- Helps understand what is and isn't possible for your organization to do.
- Helps your community be more efficient by saving time, energy, and resources.
- Increase the chances that people will do what needs to be done by making them more accountable.

An action plan may take one, three, or even up to 10 years to complete. The number of years it may take is determined by 1) the coalition - content of the CHAP, 2) how long it might take to reach the desired outcomes and goals, and 3) community support or resistance. The action plan is constantly progressing. It is not something to write, lock in a file drawer, and forget about. Keep it visible. Display it prominently. As the organization changes and grows, continually (usually monthly) revise and update the action plan to fit the changing needs of the community.

CHAP COMPONENTS

Developing the components of a CHAP that support the work of the community coalition may seem like a lot of busy work; but if done properly, it saves money, time, and increases the odds that the coalition's initiative will succeed. Documenting these plans will help keep the coalition focused on "where it is going" and "how and when it will get there" and "what to expect when it does."

Community Health Action Plan Terms	
Vision	Where the coalition is headed, what it is trying to do, what is important and why
Mission	The coalition's principles and purpose, determines the focus and sets the direction
Goals	What is expected to be achieved in the long run
Objectives	The process steps to meet the goals and how the coalition plans to achieve them
Activities	The work of the community coalition that drives and supports the objectives and goals
Outcomes	The desired effect on the community, what the measure of success would be

PLANNING STEPS

The following steps are meant to be a guide for developing a comprehensive CHAP. The plan is to be shared with community coalition members and partners once the CHNA phase has been completed. What things are necessary to carry out the goals and objectives determined by the coalition? By breaking it into defined steps, developing a plan will be more manageable. The CHAP should be complete, clear, and current.

The following steps are integral components to developing a CHAP. It is important to complete each step at some point, to ensure a comprehensive community health action plan to address local chronic disease prevention and control.

- **Review and analyze results of community assessment.** By the time an action plan is ready to be developed, there has been a substantial amount of information collected from data, and also information collected in the CHNA. Review and analyze the feedback and information gathered from the community; it is very significant and can provide some clues and priorities for what needs to be addressed in the plan.
- **Choose a group of people to work together on developing the CHAP.** The writing of the plan can be limited to one or two main people. The process of developing the CHAP should be a collaborative/partnership effort; the writer(s) can translate the planning notes into a CHAP. Too many writers can result in a fragmented plan.
- **Identify outcomes that would address the issues.** Outcomes are focused at producing a healthy change in the community. It is important to think through what would be most appropriate and achievable for those who will be carrying out the plan. After the parameters of the overall project are determined, the next step is to set a goal for each outcome to be addressed and add objectives and activities that support the work.
 - a. Choose a goal(s) that supports the outcomes and priority areas.
 - b. Determine short-term, intermediate, and long-term objectives for each goal; these are the action steps that drive the work of the goals.
 - c. Decide activities that support the objectives.
 - d. Identify what sector(s) of the community will be affected.
 - e. Establish lead responsibility and planning team participants for each goal.
 - f. Keep in mind that the goals and objectives should be S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, and Time-based). See *Setting S.M.A.R.T. Objectives* in the Toolkit for more information.
- **Identify challenges, obstacles, or potential barriers to successfully implementing interventions.** Part of deciding what would be most effective and achievable is to examine potential barriers that may exist to deter successfully implementing interventions to address and improve the community's health status.

SHORT TERM OBJECTIVES ARE GENERALLY EXPECTED IMMEDIATELY AND OCCUR SOON AFTER THE PROGRAM IS IMPLEMENTED, VERY OFTEN WITHIN A YEAR. (1-3 YEARS)

INTERMEDIATE OBJECTIVES RESULT FROM AND FOLLOW SHORT-TERM OUTCOMES. (3-5 YEARS)

LONG-TERM OBJECTIVES STATE THE ULTIMATE EXPECTED IMPACT OF A PROGRAM. (5-10 YEARS)

- **Identify necessary resources and where you will obtain them.** A key task is to identify the abilities, capacity, skill sets, duties, and responsibilities of all people that will be asked to do the work of the CHAP. The plan requires many people and organizations to contribute their unique assets and resources.
- **Choose individuals and community partners who will support, identify with, and implement goals and objectives.** It is important for people to identify with the outcomes, goals, and objectives of the action plan to participate in the activities that will drive it.
- **Consider a timeline for conducting activities.** Time is a valuable resource so it is important to state clearly and realistically community member's contributions to the various parts of the plan. Creating a timeline provides everyone working on the CHAP with a clear idea of what activities should be done and when to expect activities to be accomplished.
- **Include monitoring and evaluation activities.** It is essential to know how the plan is progressing as you carry out the objectives and activities—this is where evaluation fits in. Address these questions informally (ask yourself, discuss with friends and other people), as well as formally (i.e. surveys, interviews, focus groups, and other evaluation methods):
 - Are we doing what we said we'd do?
 - Are we doing it well?
 - Is what we are doing advancing the mission?
- **Review the completed action plan.** Carefully check for completeness, make sure you are not leaving anything out that will affect the intended outcome(s) of the initiative.

SAMPLE - COMMUNITY HEALTH ACTION PLAN

COMMUNITY HEALTH ACTION PLAN		Current Year: 2013	Sector: Community but may affect others			
Goal: Logan County will explore and develop opportunities that support residents in achieving increased physical activity.		Priority area: Physical activity behaviors of local residents				Target audience: over 18 years old Target reach: 743 people
Lead responsibility: Jane Doe, Logan County Economic Development Coordinator		Justification: 70.7% of respondents very concerned/concerned about - Lack of Physical Activity and Access to fitness facilities				Source of justification: Logan County Community Health Needs Assessment
Barriers: community buy-in of necessity, financial management		Resources: fundraisers, donations				
S - Short term I - Intermediate L - Long term	Objectives	Activity	Responsible person(s)	Timeline	Costs	Other
S	Increase the coordination of efforts to establish a fitness facility in Logan County	Survey community member support for fitness facility		3 months-4/1/13	\$50	
S	Identify funding prospects /sources for fitness facility	Schedule meeting with USDA to explore grant funding opportunities	Logan County Economic Development Coordinator	By 3/1/13		
S	Determine location of fitness facility			By 7/1/13		
I	Develop business plan for fitness facility			By 12/31/13		
I	Establish a fitness center			By 12/31/14		
L	Increase the number of adults who state they are physically active by 25% since the Fitness Center became available.			By 12/31/17		
Desired outcomes: Increase the percentage of adults who engage in leisure-time physical activity						

Here is an example of a CHAP.

And some additional considerations for completing a CHAP.

- **Partnerships among people.** In order to accomplish the goals and objectives in the plan, many people will have to be engaged in doing the work.
- **Budget.** Financial resources are usually necessary to carry out a community a health action plan. Thus, it is important to develop a budget that details the expenses that support the action plan. What you include in the budget should match the proposed objectives and activities.
- **Close alignment with the community's mission and vision.** During the writing of the CHAP, the writers work from the vision and the mission to identify either priority or strategic goals.
- **Find out what has already and is currently being done toward the initiative.** Build off of what has already been started, no need to reinvent the wheel!
- **Include justification of the goal and/or need.** What is the find or data that justifies the need for this intervention?
- **Measure of success.** What are the desired outcomes or milestones for the intervention?

- **Creating a marketing and PR plan.** Make a plan to get media involved and the word out about your project.
- **Communicate progress.** Keep the stakeholders, coalition members, and entire community informed and involved; share how their input was incorporated.
- **Follow through.** Take the plan and run with it! Remember the 80-20 rule: successful efforts are 80% follow through on planned actions and 20% planning for success.
- **Keep track of what (and how well it was) has have done.** Always keep track of what the group has actually done. If the community change (a new program or policy) took significant time or resources, it is also a good idea to evaluate it, either formally or informally. Record all progress (keep all your papers, flyers, and letters), to help write a summary or success story at the end of the event.

CONCLUSION

A CHAP is a necessary tool to keep the work of a community on task, outcomes obtainable, and support health improvements in the community, but it does not have to be perfect. More important than a perfect plan is one that is supported and feasible for the community coalition to complete within a reasonable period of time. The CHAP is a working document that can be reviewed and modified as it is implemented. It is a starting point that the coalition can continue to update and revise as community coalitions learn over time how to accomplish their goals. The well-written and community utilized CHAP will be the vehicle that drives a coalition down the road to a Good & Healthy Community.

Tools and Templates

Sample Community Health Action Plan - includes an example to reference when writing a community health action plan.

Community Health Action Plan Template - includes a template to use when writing a community health action plan.

The section, **Setting S.M.A.R.T. Objectives**, includes information and discussion on writing sound objectives. There are templates to follow as well as language hints that might be helpful to a coalition when writing objectives.

Resources

Writing a Community Health Action Plan
Developing an LHD Strategic Plan. National Association of County & City Health Officials.
Accreditation and Performance. Association of State and Territorial Health Officials.
Develop Community Health Action Plans. North Carolina Division of Public Health.
Chronic Disease Prevention and Health Promotion Domains. Centers for Disease Control and Prevention.

References

1. University of Kansas. [2013]. Chapter 8. Developing a Strategic Plan. In *The Community Toolbox*, University of Kansas. Retrieved from http://ctb.ku.edu/en/tablecontents/chapter_1007.aspx
2. Nagy, J., Fawcett, S., Berkowitz, B., & Schultz, J. [2013]. Chapter 8. Developing a Strategic plan, Section 5. Developing an Action Plan. In *The Community Toolbox*, University of Kansas. Retrieved from http://ctb.ku.edu/en/tablecontents/sub_section_main_1089.aspx



*Making suburban Cook County
a healthier place to live, work and play.*

Communities Putting Prevention to Work
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Phone 708.524.5156 Email cppw@phimc.org
Website www.cookcountypublichealth.org

What Is ‘Policy, Systems and Environmental Change’?

Policy, systems and environmental change is a new way of thinking about how to effectively improve health in a community. For many years, health programs have focused on individual behavior, assuming that if you teach people what will make them healthy, they will find a way to do it. Unfortunately, being healthy is not just about individual choices.

Today, we’re realizing that it’s not enough to know how to be healthy – you need practical, readily available healthy options around you. That’s where policy, systems and environmental change comes in.

What Is Policy, Systems and Environmental Change?

Policy, systems and environmental change is a way of modifying the environment to make healthy choices practical and available to all community members. By changing laws and shaping physical landscapes, a big impact can be made with little time and resources. By changing policies, systems and/or environments, communities can help tackle health issues like obesity, diabetes, cancer and other chronic diseases.

Why is Policy, Systems and Environmental Change Important?

Where you live affects how you live - you simply can’t make healthy decisions if healthy options aren’t available to you. Policy, systems and environmental change makes healthier choices a real, feasible option for every community member by looking at the laws, rules and environments that impact our behavior.

What’s the Difference Between Policy, Systems and Environmental Change and Programs?

Setting	Programs/Events	Policy, Systems and Environmental Change
School	Celebrate national nutrition month	Add fruits and vegetables to the a la carte options in schools
Community	Host a community bike ride and parade	Implement a Complete Streets policy to ensure community roads are constructed for safe biking, walking and driving
Worksite	Hold health screenings for staff	Implement a healthy vending machine policy that offers healthy snacks at an affordable price
Hospital	Hold free breastfeeding courses for new moms	Implement the WHO 10 Steps to Successful Breastfeeding and become a baby friendly hospital

About Policy Change

- Policy change includes the passing of laws, ordinances, resolutions, mandates, regulations, or rules.
- Government bodies (federal, state, local level), school districts and schools, park districts, healthcare organizations (hospitals, health systems), worksites and other community institutions (jails, daycare centers, senior living centers, faith institutions) all make policy change.
- Policies greatly influence the choices we make in our lives. Laws that are passed (like workplace policies, school policies) greatly influence the daily decisions we make about our health.
- Examples: Adding a tax on unhealthy food, passing a law allowing residents to plant community gardens in vacant lots, schools establishing a policy that prohibits junk food in school fundraising drives.

About Systems Change

- System change involves change made to the rules within an organization. Systems change and policy change often work hand-in-hand.
- Systems change impacts all elements of an organization. Often systems change focuses on changing infrastructure within a school, park, worksite or health setting.
- Examples: Creating a community plan to account for health impacts of new projects, creating a certification system for school bake sales to ensure they are in line with school wellness policy.

About Environmental Change

- Environmental change is a change made to the physical environment.
- Environmental change can be as simple as installing bike signage on already established bike routes or as complex as sidewalk installation and pedestrian friendly intersections to promote walking and biking among its citizens.
- Examples: Municipality undertakes a planning process to ensure better pedestrian and bicycle access to main roads and parks; community development includes neighborhood corridors with pedestrian accommodations meeting the needs of seniors (e.g. adequate benches and ramped sidewalks).

About Us

Communities Putting Prevention to Work (CPPW) is an initiative led by the Public Health Institute of Metropolitan Chicago and the Cook County Department of Public Health. With support from partners throughout suburban Cook County, the initiative focuses on making healthy options available, accessible and convenient for all residents.

For more information, please visit www.cookcountypublichealth.org and click on Healthy Initiatives, call 708-524-5156 or email cppw@phimc.org.

ACTION PLAN TEMPLATE

BACKGROUND

Brief narrative summary of your community assessment. Describe how your findings influenced your action plan.

GOALS & OBJECTIVES

Use the SMART goal/objective format.

WORK PLAN

Optional: Brief narrative summary of how you developed your action plan – who was involved? How did you decide on the activities?

Objective (“Strategies”)	Activities (Tasks)	When (Milestones/Deadlines)	Who (Individuals, Organization)	Team and/or Collaborators
I.	A.			
	B.			
	C.			
II.	A.			
	B.			
	C.			
III.	A.			
	B.			
	C.			

SPECIAL CONSIDERATIONS

- Resources Needed
- Seasonal/Cultural Time Considerations
- Staff/People Time Required