



## Strengthening & Sustaining Ohio's Suicide Prevention Coalitions (SSOSPC): Strategic Planning Learning Community

### Phase 3: Choosing a CDC Strategy to Learn about Strategic Planning DUE May 14, 2021 at 5:00pm

#### PHASE 3 SUMMARY INFORMATION

**Overall Goal:**

The goal of Module 3 is for coalitions to select one of the CDC Strategies (please see the note below) to work with as they learn the needs assessment and strategic planning processes. The key constraints to know are that the needs assessment will be completed in one month and the strategic plan will be completed in one month.

**Tasks:**

- (1) Project Directors will read the entire document and review all deliverables before moving into action.
- (2) Project Directors will assemble a team to engage in Phase 3 tasks.
- (3) The Phase 3 Team will consider important points to inform their decision and make their selection.
- (4) The Phase 3 Team will document the process.

**Handouts:**

- (1) Phase 3 Guidance

**Resources:**

Consensus building resources found as web links in Step 3, Part C.

**Note:**

For Phase 3, we will continue to explore five of the seven Strategies in the CDC Technical Package to Prevent Suicide (Strengthen Access and Delivery of Suicide Care, Create Protective Environments, Teach Coping and Problem-Solving Skills, Identify and Support People at Risk, and Lessen Harms and Prevent Future Risk). These are the same strategies that we focused on in Module 2. We will address the remaining two strategies prior to the end of the grant.

**Deliverables – Due May 14, 2021 at 5:00pm:**

- (1) Phase 3 Team Form
- (2) CDC Strategy Selection Worksheet
- (3) CDC Strategy Selection Reflection Form

## Start Here

Coalition leaders are encouraged to read through the entire document before moving into action. Phase 3 includes five steps:

Step	Task	Staffing Resource
1	Review all Phase 3 Materials and Tasks	Project Director
2	Assemble the Strategic Planning Phase 3 Team	Project Director & potential Phase 3 Team members
3	Complete the Selection Worksheet and Choose a Strategy	Phase 3 Team
4	Complete the Reflection Form	Phase 3 Team
5	Submit Deliverables	Project Director

## Step 1: Review all Phase 3 Materials and Tasks

**Goal:** The goal of Step 1 is for the Project Director to review the materials and tasks associated with Phase 3.

**Handouts:** Phase 3 Guidance (this document)

**Videos:** Project Directors may find the following videos and supporting materials to be supportive when preparing to take action on Phase 3: [Staffing Management with Servant Leader Principles](#) and [The Power of Project Management](#). Leadership Videos for the SSOSPC Initiative are available on the OhioMHAS Suicide Prevention Website under the [Coalitions Leadership Resources](#) page.

**Deliverable:** None

- A. **Getting Oriented:** Begin by reading through this entire guidance document. After that, take some time to familiarize yourself with the Phase 3 deliverables and supporting resources so that you understand what is being asked of you (as the Project Director), the Phase 3 Team, and the coalition. Once you have the ‘bigger picture,’ you can then begin to outline your action steps for the entire phase.
- B. **Managing Tasks:** This is a good time to think about how you will **manage the tasks** associated with Phase 3 and ensure the work gets done in the given timeframe. We encourage you to review the following supporting resources for project management:
  - [The Power of Project Management](#) video (available under [Coalitions Leadership Resources](#)) and [The Project Management Starter Guide](#) that we used during Year 1 for managing the Community Readiness Assessment project.
  - The **Community Readiness Assessment Planning Tool** that we offered in Year 1. This Excel document could be easily modified with the tasks of Phase 3 and would certainly help keep you and the coalition on track. It can be found under the [Community Readiness Assessment](#) page by clicking on the “Assessing Community Readiness” button on the left-hand side of the page, then look under “Segment 3: Tools and Key Components of the CRA.”
- C. **Leading and Managing Staff:** This is also a good time to think about how you will **lead and manage the people** who are involved in the Phase 3 work. You may want to review the video introduced in previous phases, [Staffing Management with Servant Leader Principles](#). This video and supporting materials and videos are available on the [Coalitions Leadership Resources](#) page.

## Step 2: Assemble the Strategic Planning Phase 3 Team

**Goal:** The goal of Step 2 is for the Project Director to assemble a team to engage in Phase 3 Tasks.

**Handouts:** None

**Videos:** Project Directors may find the following videos and supporting materials to be supportive when assembling their team for this task: [Making the Ask](#) and [Building Successful Teams with Help-seeking Behaviors](#). Leadership Videos for the SSOSPC Initiative are posted on the website on the [Coalitions Leadership Resources](#) page.

**Deliverable #1:** Phase 3 Team Form

- A. **Building the Phase 3 Team:** Begin by thinking about who on the coalition could/should engage in Phase 3 of this work. During this phase, the Phase 3 Team will choose from one of the 5 CDC strategies considered in the Phase 2 SWOT analysis. The teams from Phases 1-3 may not be identical, but the Phase 3 team should have some understanding of the work completed in Phases 1 and 2 and access to those deliverables.
- B. **Considering Roles and Responsibilities:** The Phase 3 tasks may be completed in multiple sessions. You may ask each team member to complete activities separately and then come together as a group to finalize the deliverable, or you may prefer to tackle the entire worksheet as a team. If team members have not participated in earlier phases, they will need to familiarize themselves with the relevant CDC strategies (Phase 1) and SWOT analyses (Phase 2), in addition to completing the tasks of Phase 3.
- C. **Thinking through Logistics:** Finally, think about how you reached out to potential members during earlier phases and what worked well in terms of logistics (method of communication, scheduling, number and length of meetings, meeting platform and technology, etc.). Each team will have different needs, but you can use your experience from each phase to inform how you approach assembling the team. You will want to make sure that you have a clear “ask” in mind.



**Deliverable #1:** Use the **Phase 3 Team Form** to capture names and organizations of team members. You will turn in this form as a final deliverable for Phase 3.

### Step 3: Complete the Selection Worksheet and Choose a Strategy

**Goal:** The goal of Step 3 is for the Phase 3 team to come to consensus on which strategy will be used to learn the needs assessment and strategic planning processes.

**Note:** For Phase 3, we will be focusing on 5 of the 7 CDC Strategies: Strengthen Access and Delivery of Suicide Care, Create Protective Environments, Teach Coping and Problem-Solving Skills, Identify and Support People at Risk, and Lessen Harms and Prevent Future Risk.

**Handouts:** None

**Deliverable #2:** Strategy Selection Worksheet

- A. **Understanding the Task:** The end goal of this step is for the team to select one of the CDC Suicide Prevention Strategies to focus on as the coalition learns the needs assessment and strategic planning processes.
- B. **Understanding the Deliverable:** The Strategy Selection Worksheet includes activities intended to guide the team through the process of understanding the goals of this learning module and the differences between **prioritizing a strategy to impact community conditions** and **selecting a strategy for the purpose of learning how to conduct a needs assessment and develop a strategic plan**. The team will be asked to think about what factors are important to consider when selecting a strategy to use as the coalition learns the needs assessment and strategic planning processes. Finally, the team will select the strategy they believe best fits the coalition's goals and needs.
- C. **Consensus Building:** The team will need to come to consensus on which strategy to select. By coming to consensus, the group agrees to move forward with the work and support the decision even if there may not be total agreement on which strategy is the best option. Here are some resources to facilitate consensus building:
  - Explore [Section 9. Making Decisions](#) of the Community Tool Box (Center for Community Health and Development at the University of Kansas). This resource provides summaries of decision-making processes, including consensus building.
  - This [document](#) from the American Heart Association is a thorough introduction to consensus-based decision-making and includes examples of ground rules and variations on basic consensus.
  - Review [this summary](#) from the Library and Information Technology Association on consensus process in virtual spaces.
- D. **Being Inclusive:** Consider how you are going to create a space where those who did not participate in the first two phases feel included and informed. It may be helpful to review the action plans and reflections from phases 1 and 2.
- E. **Leading and Managing the Phase 3 Work:** Think about how you want to lead the Phase 3 Team and how you are going to engage the work.
  - How are you going to lead and manage this effort in the most efficient and effective way possible? (Consider all of the "behind the scenes" aspects of this task: distributing materials, sending reminders, scheduling session(s), facilitating the group meetings, etc.)
  - What timeline do you think is appropriate for the Phase 3 team to engage in the activity? How many meetings do you think you will need?
  - What will the agenda for each meeting look like? Who will facilitate that meeting? When will the meeting take place?

F. **Thinking through Logistics:** Communicate with the Phase 3 team the next steps to meet the goal of Phase 3.

Consider how you will:

- Articulate what each member needs to do to prepare for and participate in the selection activities.
- Provide instructions to the team members on how to access the materials. Here is some language that may be helpful for you:

Please visit the SSOSPC website to review the materials for selecting a CDC strategy:

<https://suicideprevention.ohio.gov/Communities/Coalitions/Strategic-Planning>. You may find the materials by clicking on the “Phase 3” tab on the left-hand navigation panel. On the Phase 3 tab, you can find the link to download the Strategy Selection Worksheet

- Indicate when and how meetings will occur. Provide connection information.
- Provide deadlines for the process – keeping in mind that the **final deadline for Phase 3 is 5/14/2021 at 5:00pm.**



**Deliverable #2:** Use the **CDC Strategy Selection Worksheet** to capture the group’s process for selecting a strategy. You will turn in this form as a final deliverable for Phase 3.

## Step 4: Reflect on the Selection Process and Consider Next Steps

**Goal:** The goal of Step 4 is for the Phase 3 Team to reflect on the selection process and discuss next steps.

**Handouts:** None

**Deliverable #3:** CDC Strategy Selection Reflection Form

- A. **Understanding the Task:** After the Phase 3 team makes their final selection, the next step is for the Phase 3 Team to reflect on the process and discuss next steps. For this step, you will use the CDC Strategy Selection Reflection Form (Deliverable #3) to capture the discussion.
- B. **Leading and Managing the Reflection Process:** Like the selection and consensus building process, there is no prescribed way to operationalize the reflection session. You may choose to combine it with the selection session or hold a separate meeting for reflection. You may find it helpful to consult the notes you took while processing out the selection to bring forward perspectives from those who can’t attend the reflection session if it is held at a later date.
- C. **Thinking through Logistics:** Consider how you will lead and communicate with the Phase 3 Team to complete the reflection session. It may be helpful to consult sections (E) and (F) in Step 3 for helpful reminders on logistics. As you schedule and consider deadlines, keep in mind that the Phase 3 Team will need to complete the reflection form **after** coming to consensus on a selection. The **due date to complete Phase 3 is 5/14/2021 at 5:00pm.**



**Deliverable #3:** Use the **CDC Strategy Selection Reflection Form** to capture the group’s reflection and next steps. You will turn in this form as a final deliverable for Phase 3.

## Step 5: Submit Deliverables – DEADLINE: May 14, 2021 at 5:00pm

**Goal:** The goal of Step 5 is for the Project Director to submit the required deliverables.

- A. The final step in Phase 3 is to submit the final deliverables. As a friendly reminder, the coalition must submit three (3) deliverables:
1. Phase 3 Team Form
  2. CDC Strategy Selection Worksheet
  3. CDC Strategy Selection Reflection Form
- B. Please submit all three files via email to: Casey Shepherd (cshepherd@PIRE.org) and CC: Carrie Burggraf (burggraf@ohio.edu).