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Team Planning: Integrating and Synthesizing Learning


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Team Planning Goals

- Integrate the material from the conference
- Talk amongst yourselves
- Practice planning exercises you can take back to your campus
- Understand better the linkages between planning and evaluation

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Today's Outline

Part I


- Introduction: focusing on *change*
- Group exercise
- Discussion/sharing

- Break -

Part II

- Brief introduction
- Group exercise
- Discussion/sharing

Closing Plenary

Homeward Bound! 



From Cohort 1 Grantee: “Lessons Learned”

“We conducted pre and post tests of participants in gatekeeper training. We learned that the participants’ knowledge and attitudes didn’t change in particular areas. Our steering committee went back to the drawing board, conducted a literature review, examined our program rationale, developed learning objectives based on our desired outcomes. We have a much stronger program foundation, which we believe will result in much better outcomes.”



Demonstrates Key Principles

More effective **programs**....

- Have clearly defined goals and objectives
 - Based on the research literature (and local problem analysis)
- Are evaluated, and results used for program improvement



What is a “Program”?

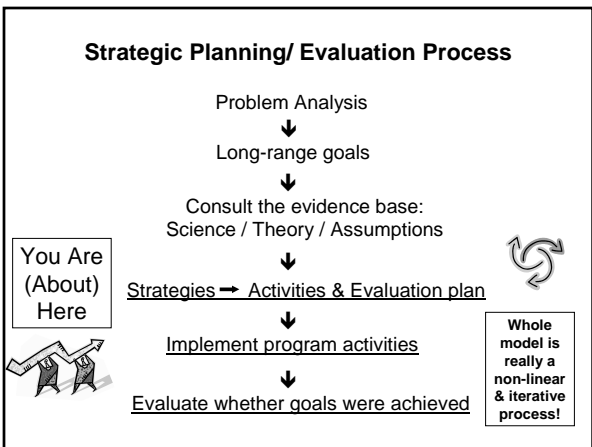
- Combination of activities, policies, practices, services
- Designed to result in some *change* in people or in the environment
- Comes about as a result of a planning process


Day 1 Review: Mort & Laurie

- Problems must be addressed *at multiple levels*
- Think/plan *strategically*
 - Understand problems
 - Set clear, measurable, achievable goals
 - Choose evidence-, theory-, or logic-based strategies

Day 1 Review: Mort & David


- **Evidence-Based Practices** = practices shown empirically to
 - Reduce suicide risk factors,
 - Increase suicide protective factors,
 - Reduce suicidal behaviors (ideation, attempts, completions)




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Grantee Fundable Activities – “Program Areas”


- Training programs
- Networking infrastructure
- Educational seminars
- Hotline
- Informational materials
- Educational materials for families

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3-Minute Exercise

 **Team Planning Worksheet – Side 1**

- List:
 - **Your grant activities**
 - What you are actually doing/planning (regardless of original proposal)
 - Very big picture
 - **Target audience** for each (if applicable)

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Typical Suicide Program Goals

- Decrease deaths by suicide
- Decrease suicide attempts
- Decrease suicidal ideation
- Decrease injuries from suicide attempts

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Key Component of a Strategic Plan: Thinking “Inside the Box”

```

    graph LR
      A[Program Activity] --- B[Black Box]
      B --- C[Program Goal]
  
```

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Filling in the Black Box

Answer the question:

- What is the chain of events that will occur between the activity and its intended goal(s)?

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“Theory of Change” Model

A model of ...”the causal links that tie program inputs to expected program outputs.” (Weiss, 1998)

“A plausible and sensible model of how a program is supposed to work.” (Bickman, 1987)

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Generic Model

```

    graph LR
      A[Activity/Output] --> B[Short-Term Outcome]
      B --> C[Intermediate Outcome]
      C --> D[Long-Term Outcome]
  
```

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Specifying the Links

- Each link in the chain should specify a *change* that is expected to occur, rather than the program activity that is expected to cause the change
- So, rather than:
 “implement suicide prevention training” (activity),
 say:
 “increase staff members’ knowledge of warning signs for suicide” (change)

Simple Example: Underage Drinking

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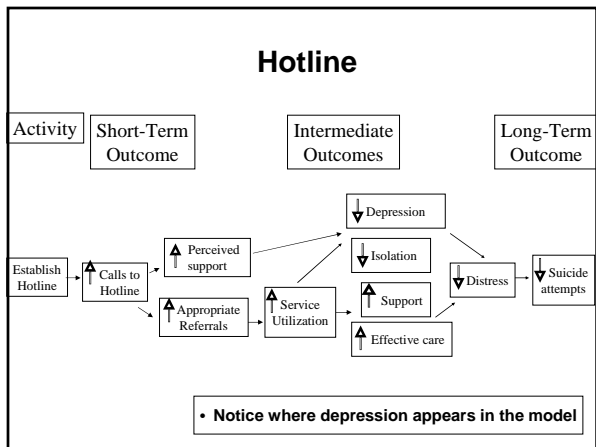
    graph TD
      A[Years of struggle] --> B[↑ Bar owners agree to minimum drink pricing]
      B --> C[↑ Price of drinks]
      C --> D[↓ Access to alcohol among minors]
      D --> E[↓ Underage student drinking]
  
```

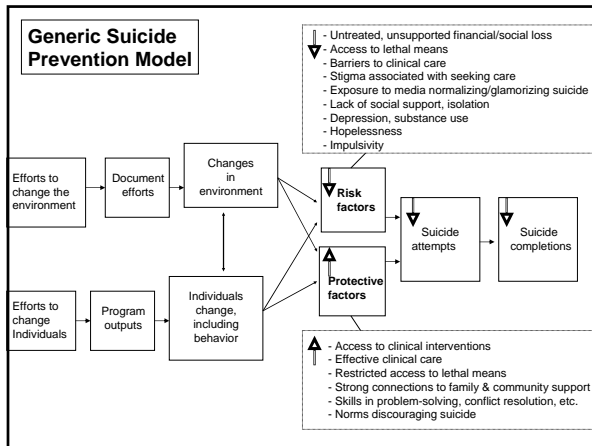
Key Insight

- No program or policy itself is “right” or “wrong”... it all depends on its content and how it is implemented
- Think through planned/existing program components → what is each one trying to change?
 - Anticipated *change* is also what your evaluators care about

Suicide Example
➡ Me

Exercise
➡ You!





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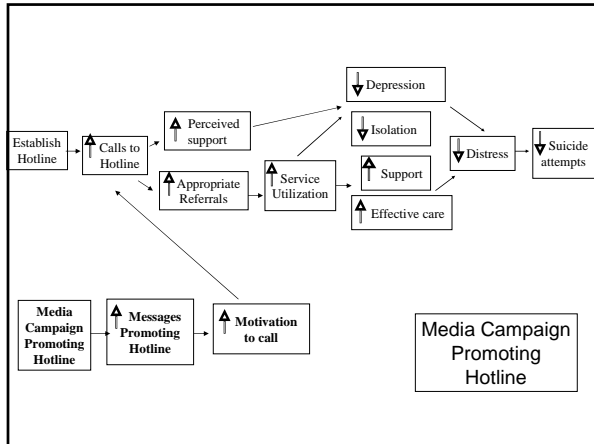
Hints

- Changes towards right side of model are risk and protective factors
 - Affected by more than one activity
- Changes towards left side of model are tied more closely to the specific activity
 - 1st column after activity are *immediate* changes

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Getting Fancy: Other “threads” to include in the model

- Other programs/policies and their expected effects
- Possible (negative) unintended consequences
- Other factors that might cause changes in your outcomes



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Group Exercise

- Work with your team (or a small group)
- Pick one activity from the list you made earlier
- Write the activity on a sticky note; that's your far-left box
- Write "decrease in completed suicides" on another sticky note; that's the far-right box

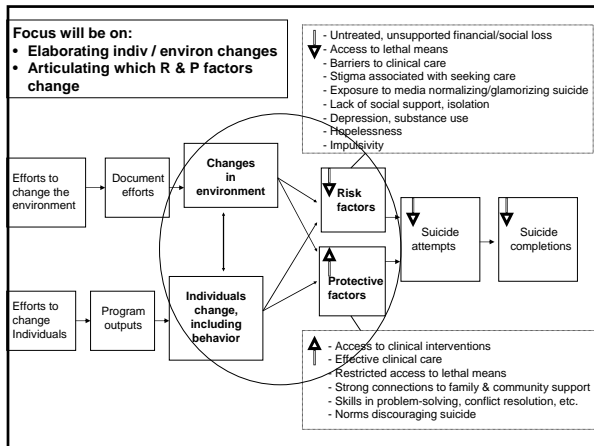
Your Activity

↓ Completed Suicides

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Group Exercise, con't

- Create a "theory of change" model to connect left and right boxes
 - Use sticky notes – 1 change per sheet
 - No "right" number of middle steps



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Specify, specify, specify

- E.g., “Increase awareness” in the community

Get more specific by asking:

- Increase awareness of what, exactly? Among whom?
- By “awareness,” do we mean knowledge, skills, attitudes, or something else?



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Work on Group Exercise

Reminder:

- Use change language like “increase” and “decrease” (sometimes “create” or “revise”)

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Questions  and
 Marvelous Breakthroughs 

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Wrap-Up Part I:
 Change Models as Program Tools

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Benefits of Change Models

- **Clarify the program**
 - Focus on desired changes
 - Get specific
 - Achieve internal agreement
 - Resolve competing “implicit theories”
 - Visualize how program elements fit together
 - Communicate program to others
- Use as **basis for evaluation plan**
- Enhance **sustainability**

Key Insight

Expected changes are driven by content

- “Education” does not convey expected changes; it’s the content of the education that matters

⇒ Articulate changes you want, then make sure the program (policy, service, materials) content is designed to lead to those changes


Helps You Promote Paradigm Shift: From Activities to “Strategic Change”

Instead of: What are we going to DO?
E.g., Conduct a workshop

State: What are we trying to CHANGE?
E.g., Increase staff skills in recognizing suicide risk and intervening effectively


Connection with Evaluation

- In short-term programs, suicide rates often not an accurate indicator of success
- Theory of change model allows you to *evaluate the interim outcomes* that will eventually lead to reductions in suicidal behavior

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Evaluation Report
Youth Suicide Prevention in British Columbia:
Putting Best Practice Into Action

“The expectation that communities participate extensively in the evaluation work for the overall demonstration project was perceived by most project members as onerous, and contributed to considerable anxiety among project implementation teams.”

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From Model To Evaluation Plan

- Theory of change model = a statement of your goals and how you plan to accomplish them.
- Your evaluation should address whether this series of events occurred.
- Based on specified *changes*, decide:
 - *Indicator*: what info could show this change?
 - *Data Sources*: where could you get that info?
 - *Design*: timing, comparison groups, etc.

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Realistic Expectations

- For many programs, resources are insufficient to conduct rigorous “controlled” research
- BUT, at minimum, should aim to
 1. Have clearly defined program goals and a clear understanding of how you expect activities to lead to desired outcomes
 2. Conduct some monitoring of process and outcomes

Cohort 1 Quotes

- “Expect to spend more time than you allotted on grant evaluation activities.”
- “Expect to use the first year to pilot and refine your goals – not to maintain all of them.”

Theory of Change Models & Sustainability

- Program continuation more likely when:
 - Components are conceptually clear
 - Evaluation demonstrates positive changes
- Use theory-of-change models to:
 - Get additional partners/funding sources on board
 - Facilitate grant-writing
 - Ask for specific support & justify it



Introduction to Part II

- Focus of Part I was on ensuring activities make change
- But what about the many other elements needed to ensure program success?

Challenge:
Balance between “strategies” & “tactics”

Strategies are not the same as tactics.

- *Strategies* focused on creating changes in people or environments;
- *Tactics* are used in service of achieving strategies, but will not in themselves lead to desired outcomes;

For example:

Strategies vs. Tactics

Strategies (lead to):

- Increased access to services
- Increased intervention skills
- Decreased access to lethal means
- Increased help-seeking
- Etc.

Tactics:

- Leadership
- Collaboration
- Planning
- Communication
- Staffing
- Fundraising
- Data collection
- Evaluation

Complicating Factors

- Tactics are often important in the early stages
- Lead department’s role involves a lot of tactical work (e.g., cultivating allies, convening partnerships, hiring staff)

Cohort 1 Quotes

“One of the lessons learned is a need to allow for project development and implementation time at the beginning of the grant period.”


“Take the first year to develop strategic liaisons and partnerships so that project goals can be implemented with campus support”

To increase effectiveness...

- Periodically check that you are using tactics *in support of* (rather than *instead of*) strategic plan

Specifically:

- Develop clear vision of desired strategic changes
- Be clear about how tactics will eventually lead to (or support) changes in people or in the environment.

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Example

Tactic: Establish a case management committee


Strategy: What that committee *does differently*

Could be creating:


- New mechanisms to coordinate services
- Different system for making appropriate referrals
- Systematic follow-up protocol

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Refining Your Strategic Plan

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Team/Small Group Exercise


 **Team Planning Worksheet – Side 2**

- Start with the activity you worked on this morning
- Based on:
 - Theory of change model exercise; and
 - Workshops/sessions you attended....
- Consider what adjustments you might make ⇔

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**Brainstorm “Strategy Adjustments”
(1st Row)**

- What adjustments might increase the likelihood of achieving desired *changes*?
 - Often, refers to program/policy/service **content**.
- Next Steps (Strategies)
 - Translate these ideas into tasks
 - Be concrete; name behaviors or actions

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**Brainstorm “Tactical Adjustments”
(2nd Row)**

- What adjustments might you make to your tactics?
 - Often, refers to program/policy/service **processes**.
 - Can be planning, evaluation, partners, staffing, data collection, etc.
 - How will these support your strategic changes?
- Next Steps (Tactics)
 - Again, translate into tasks

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Example: Media Campaign

<p><u>Strategy adjustments:</u></p> <ul style="list-style-type: none"> • Ensure content meets safe messaging guidelines • Ensure that campaign addresses barriers to desired action 	<p><u>Next steps:</u></p> <ul style="list-style-type: none"> • Compare all messages to guidelines • Conduct student focus groups, intercept interviews & revise
<p><u>Tactical adjustments:</u></p> <ul style="list-style-type: none"> • Partner with campus communications office 	<p><u>Next steps:</u></p> <ul style="list-style-type: none"> • Set up appointment to discuss collaboration

Sharing Lessons Learned and Next Steps