Lobby

Hello. I am excited to see you here! As folks log in, please consider putting the following in the chat box:

1) Your Name
2) Your Title
3) Your Organization
4) The first thought that comes to mind when you hear “strategic planning”

I will start! Dr. Ashley Hall, Assistant Professor, Washington State University, “Strategic planning - that’s my jam!”

Northwest (HHS Region 10)

PTTC Prevention Technology Transfer Center Network

Funded by Substance Abuse and Mental Health Services Administration

Strategic Tools

Using Logic Models for Organizational Planning and Evaluation

Dr. Ashley Hall, Washington State University

Northwest (HHS Region 10)

PTTC Prevention Technology Transfer Center Network

Funded by Substance Abuse and Mental Health Services Administration

The Northwest PTTC is a partnership led by the Social Development Research Group (SDRG) at University of Washington (UW) School of Social Work in collaboration with the Prevention Science Graduate Program at Washington State University (WSU), and the Center for the Application of Substance Abuse Technologies (CASAT) at the University of Nevada, Reno (UNR).

Northwest partnering institutes share a vision to expand the impact of community-activated prevention by equipping the prevention workforce with the power of prevention science.

SDRG

SCHOOL OF SOCIAL WORK
UNIVERSITY of WASHINGTON

Prevention Science Graduate Program
WASHINGTON STATE UNIVERSITY

CASAT
Center for the Application of Substance Abuse Technologies
University of Nevada, Reno

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Overview For Session 1

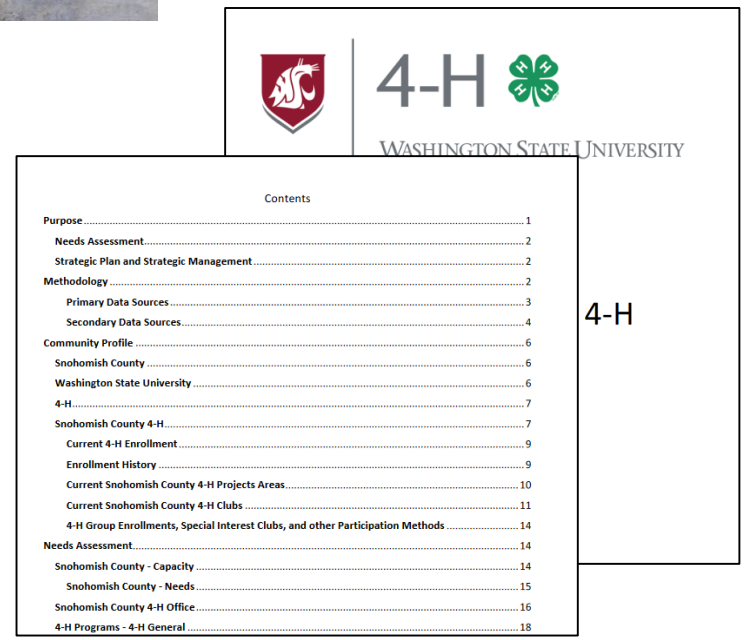
- Recipe for Strategic Plan
- Worksheets and Templates For Success
  - Theory of Change
  - Inputs
  - Needs Assessment
  - Goals and Outcomes
  - Logic Model
- Survey for Session 2

Overview For Session 2

- Review Theory of Change & Logic Model From Previous Session
- Data Deep Dive
  - Data types, uses, and management
  - Survey Data review and visualization
- Learning Exercises
  - Data Evaluation & Visualization Demonstration using Tableau
  - Interpret data visualization and identify needs
  - Practice using data to develop a logic model and write a strategic plan

Strategic Plan Recipe

- Ingredients
  - Organizational Mission
  - Theory of Change
  - Organizational Inputs
  - Community/Population Needs
  - Goals and Outcomes
  - Logic Model



Organizational Mission

Why is a mission important to a strategic plan?

- A mission statement guides an organization
- It summarizes, in very few words, the purpose of the organization
- Starting with a mission statement means a strategic plan will be relevant to the organization and its stakeholders

What makes a good mission statement?

- Succinct (try Kevin Starr's 8-words)
- Clear and common language
- Include:
  - What your organization does
  - Who they do it for
  - Outcomes you are striving for
- "Eliminate suicide among youth and young adults."

WSU 4-H Mission

4-H Mission

4-H empowers youth to reach their full potential, working and learning in partnership with caring adults.

Washington State 4-H Youth Development education creates supportive environments for all youth and families to reach their fullest potential. This will be accomplished through a systemic approach of foundation and mission driven science to meet our goals to:

- provide formal and non-formal experiential learning,
- develop skills that benefit youth throughout life,
- foster leadership and volunteerism in youth and adults,
- build internal and external partnerships for programming and funding,
- strengthen families and communities,
- employ research based knowledge and the land grant university system, and
- embrace and expand the traditions of the 4-H Youth Program.

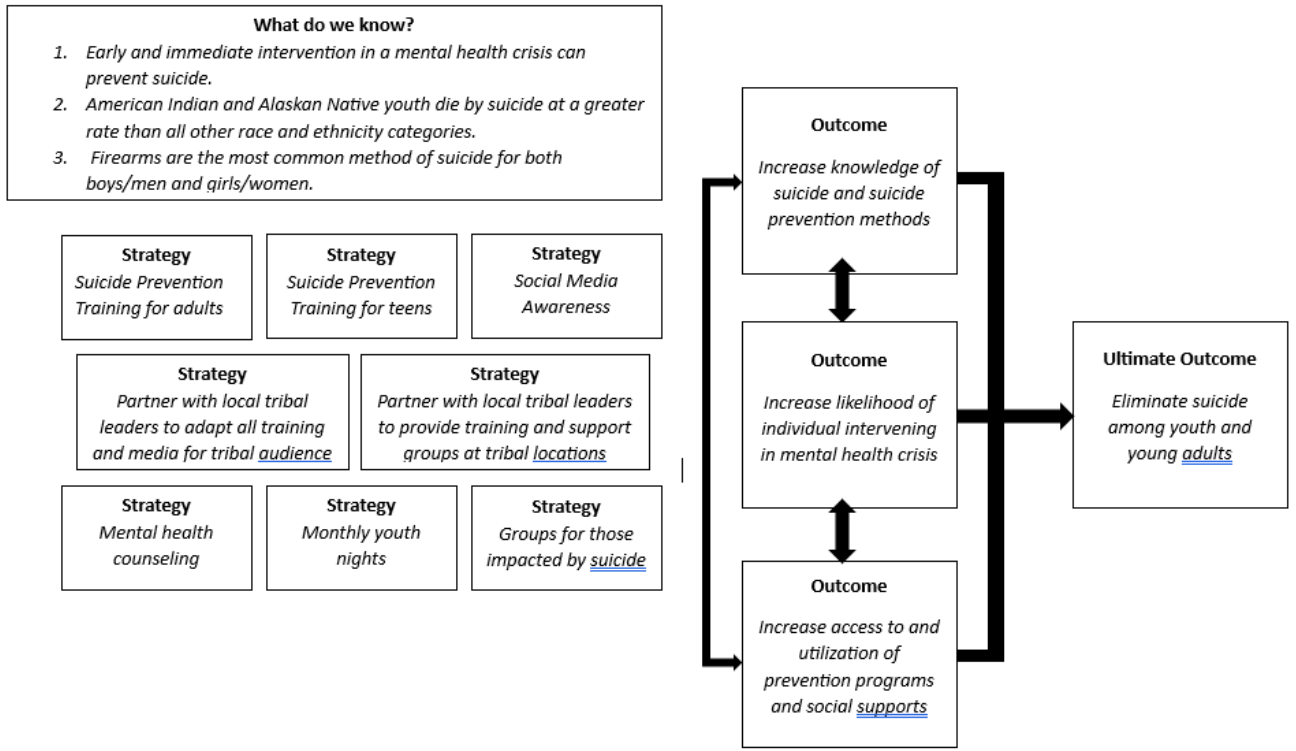
Theory of Change

- Conceptual Model
- Should answer the following:
  - What will we do?
  - How will we do it?
  - What do we expect to happen once we implement our programs?
  - Who is going to benefit?

*adapted from Annie E. Casey Foundation

Theory of Change Continued

- Big Picture Map to Ultimate Goal
- Some Notes:
  - A theory of change is not always linear
  - A theory of change includes factors outside of our program
  - Developed Back to Front
    - Start with the end goal
  - Created BEFORE the intervention is developed



Theory of Change Cultural Considerations

- Often overlooked
- Requires intentional planning
- Consider organizational assessment
- Homework: *Protocol for Culturally Responsive Organizations*

Organizational Inputs

Existing

- Staff
  - Individuals
  - Expertise
- Facilities
- Supplies
- Financial assets
- Reputation, infrastructure, branding
- Institutional knowledge

Future/Proposed

- New program staff
- Funding opportunities
- Real estate
- Skills or training
- Partnerships or memberships

Community/Population Needs

Identifying Needs

- Data-informed needs
  - Suicide rates
  - Poverty rates
  - Number of youth without access to food or housing
- These can be known/established and tied to mission
- Or they can be discovered to inform programming

Information Sources

- Primary Data Sources
  - Internal stakeholder survey data
  - Client assessments
  - Other organizational data sources
- Secondary Data Sources
  - US Census
  - Healthy Youth Survey
  - County Health Rankings
  - Etc.

Goals and outcomes

SMART Model

Goals

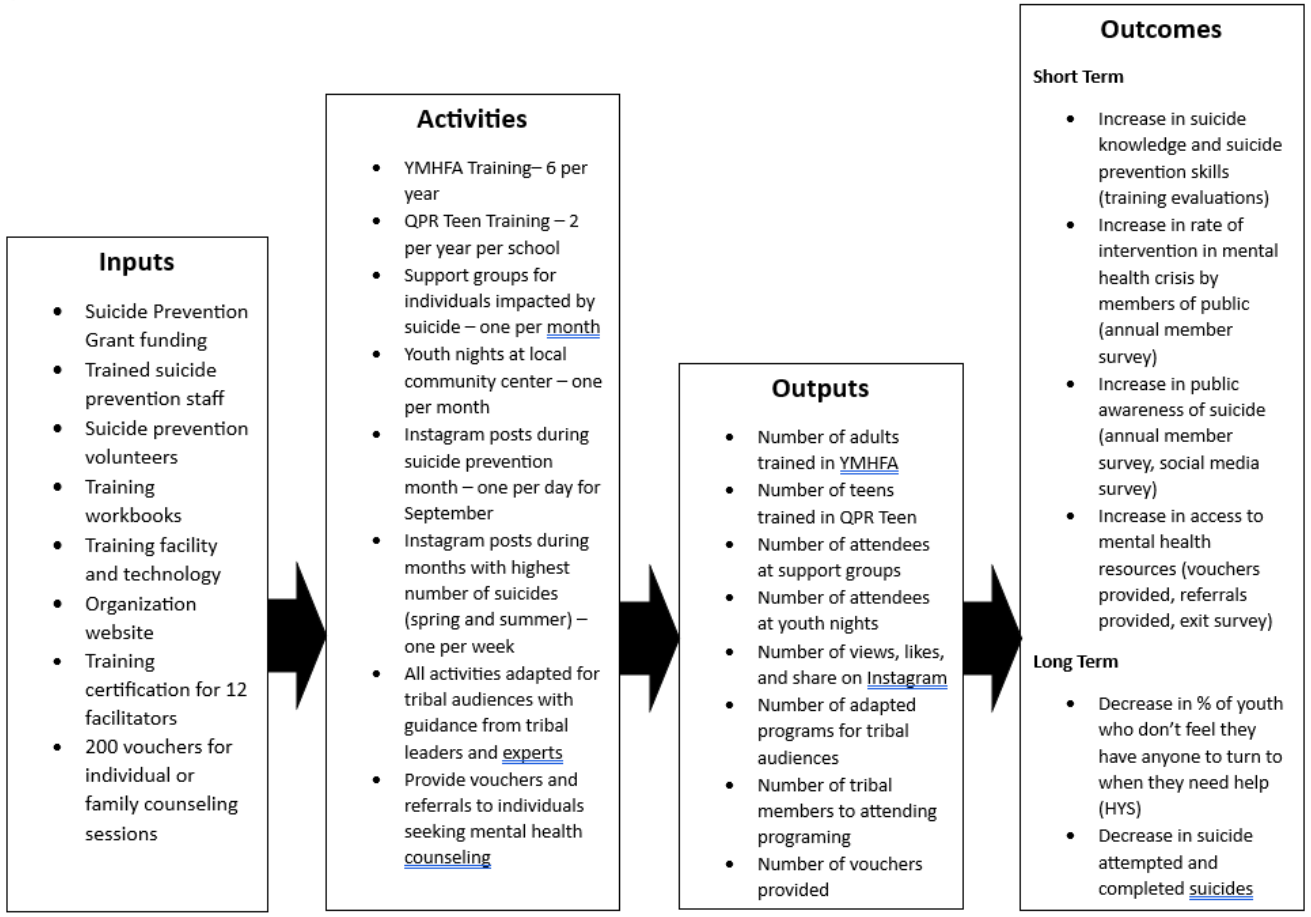
- List one goal at a time
- Broad, but achievable

Objectives

- Between 3 and 5 actions
- Help meet the broad goal
- Should follow SMART Model

Logic Model

- What is a logic model?
  - In short, a program plan
  - Includes the details
    - Inputs
    - Activities
    - Outputs
    - Outcomes



Strategic Plan

You made it! Now let's write your strategic plan!

- Sections:
  - Organizational Mission
  - Problem Statement
  - Theory of Change
  - Inputs
  - Needs Assessment
  - Goals and Objectives
  - Logic Model
- Insert your models
- Publish draft and solicit feedback
- Finalize and publish

Now What – Evaluation!

Evaluating Progress

- S**M**ART Goals:
  - Needs assessment data sources
  - Primary data sources
  - Compare pre intervention to post intervention
  - Collect feedback
- Focus on four levels of evaluation
  - Reaction
  - Learning
  - Behavior
  - Results

Kirkpatrick (1954)

Quick Pause before Wrap-Up

- Do you have any questions?
- Survey for Session 2!

Wrap Up

- Strategic planning can be complex
- Logic models are essential tools that:
  - Break down complex problems into logical steps
  - Help guide programming from beginning to end
- Next session:
  - Review logic models
  - Deep dive into data
  - Live demo data analysis and evaluation with Tableau
  - Use your data to develop a real logic model!

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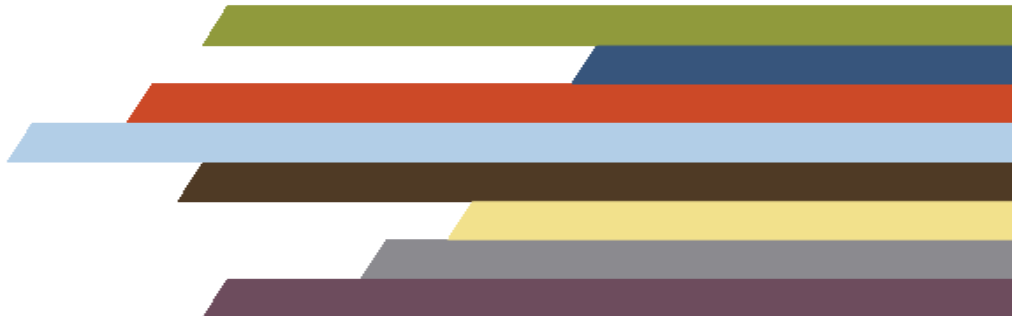
Thank you!