

Collaborative Strategic Planning Form
(Source: Curtis, Castillo & Cohen, 2008)

Step 1: Define the problem

- Include concrete examples and details
- Could be several related problems – pick one to address first.
- Describe the desired outcome of one specific problem

<p><u>Desired outcome:</u></p> <p><u>Baseline data:</u></p> <p><u>Problem Defined (Discrepancy between outcome and baseline):</u></p>
<p><u>Goal:</u></p> <p><u>By (date):</u> _____</p>

Step 2: Analyze the problem

- Analyze factors impacting the problem.
- Brainstorm (do not discuss) actual and potential resources to achieve the goal
- Brainstorm (do not discuss) actual or potential barriers to achieve the goal

<u>Resources</u>	<u>Barriers</u>

Step 3: Select one important barrier to achieving the goal.

- Select a first (not the only) important barrier.
- Select a barrier that has shared interest across group.
- Select a barrier most likely to generate strategies to reduce/eliminate it.

Barrier:

Step 4: Brainstorm strategies to reduce or eliminate barrier

- Use list of resources in step 2
- Generate many potential strategies (do not discuss)
- Make no decisions

Strategies:



Step 5: Design multiple action plans to implement strategies

- Develop several plans to address the same barrier
- Include who, what, when for each plan
- Clarify details to maximize intervention integrity

Action Plans (Step 5)

<u>Who</u>	<u>What</u>	<u>When</u>	<u>Follow-up</u>

Step 6: Develop plans to monitor implementation of interventions

- Design follow-up monitoring for each action plan: Was it implemented? Was it implemented as intended?
- Include who, what, when for monitoring

Action Plans (Step 6)

<u>Who</u>	<u>What</u>	<u>When</u>	<u>Follow-up</u>

Step 7: Develop plan to evaluate progress

- Collect data at two levels: a) reduction or elimination of barrier; b) progress toward goal (desired outcome identified in step 1).
- Include who, what, when for data collection
- Data analyses
- Decisions: a) Is satisfactory progress being made? b) What are next steps?

- Include who, what, when

Action Plans (Step 7)

<u>Who</u>	<u>What</u>	<u>When</u>