COALITION TO TRANSFORM ADVANCED CARE

The Community Engagement Toolkit Companion Guide

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Module 3 - Plan of Action

With your goals and messaging in place, the next steps are to pull all of the pieces together and identify the resources that will meet your objectives, implement your plan, and begin to focus on collecting, storing and analyzing data.

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Module 3 - Plan of Action

- Chapter 3.1 - Creating and Implementing Your Plan of Action

Goal:

In this chapter, the four tools previously discussed will be revisited: the Present/Future grid, the patient journey, the Logic Model, and the messaging matrix - and they will be used to create the remainder of your plan.

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- Chapter 3.1 - Creating and Implementing Your Plan of Action

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Module 3 - Plan of Action

Please complete the Reflection Questions and Action Step in your C-TAC Toolkit Companion Guide before continuing Module 3.

Module 3 - Plan of Action

- Chapter 3.1 - Creating and Implementing Your Plan of Action

Step 1 : Collaboration: Recognizing existing and Complementary Efforts

As described in Module 1, likely, some members of your community may already be engaged in efforts focused on advanced illness or advanced care planning. As you create your plan of action:

- It is essential that you recognize them for their efforts.
- Ask for their input and acknowledge both their efforts and results.
- Look to build on their efforts rather than duplicate them.
- Research coalitions and partnerships that focus on a specific disease or condition that are complementary to work together.

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- Chapter 3.1 - Creating and Implementing Your Plan of Action

Step 1 : Collaboration: Recognizing existing and Complementary Efforts

Collaborative efforts can be focused at different levels – within a city, a region, or even at a state level. This effort will focus on efforts undertaken at a state or regional level.

Knowing your community will also help your group identify the individuals and organizations whose support is necessary. This knowledge will make decision making and consensus building easier and will translate into improved program planning, design, and execution.

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Step 1 : Collaboration: Recognizing existing and Complementary Efforts

Available resources drive the work of the collaborative.

- Your work may require funders, and an important place to start is to consider partners who are already part of the effort.
- It is also essential to understand which grant-making organizations align with your work and what their grant-making process is.
- Another method to extend resources is to invite others to join currently funded projects where their expertise or labor may be needed.

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Step 2 : Determining Milestones and Outcomes

In the Logic Model in your Companion Guide; that you saw in Module1, you see goals/outcomes derived from the State Index measures.

Follow along in your Companion Guide through this part of the study.

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- Chapter 3.1 - Creating and Implementing Your Plan of Action

Step 2 : Determining Milestones and Outcomes

Follow along in your Companion Guide through this part of the study.

Look at local process measures, especially when you are focused on trying to ensure access to services or growth in community capabilities. These may include:

- The number of available support groups
- The number of support group members
- The number of physician champions for hospice
- The growth in calls to advocacy organizations

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Step 2 : Determining Milestones and Outcomes

Follow along in your Companion Guide through this part of the study.

Together this information can help guide the milestones, the activities, and the needed resources, which will be described next.

- The goals/outcomes entered into the Logic Model are preceded outputs and milestones. Reaching your desired goals/outcomes is a progressive process.

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Step 2 : Determining Milestones and Outcomes

Follow along in your Companion Guide through this part of the study.

- So, you should determine ahead of time what those outputs and milestones should occur.
- You can arrive at these outputs and milestones by asking what needs to take place for you to reach the end goal.
- These outputs and milestones result from the activities you carry out but are defined before the activities.
- The list of outputs and milestones you generate will help determine both the activities and the budget needed for them.

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Step 3: Creating Your Activities' List

The project's activities are linked with your outcomes and milestones. In creating your activities list, it is vital to consider the following:

- **Target Audience** - Like your messaging matrix exercise, you need to make sure it's clear who that target is.
- **Prioritize** - With limited resources the number of activities may have to be reduced.
- **Collective Impact** - everyone who is part of the effort may be carrying out activities on their own that will move the community to achieve the outcomes successfully. These activities should be listed.

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Step 3: Creating Your Activities' List

Creating your activities list is best achieved by either at an in-person convening or online. Each of them can be useful, and they can be used singly or together, to create your plan. Review Module 2 for best practices.

Follow along in your Companion Guide through this part of the study.

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- Chapter 3.1 - Creating and Implementing Your Plan of Action

Step 3: Creating Your Activities' List

To prioritize the activities list, you should consider the questions below:

- What activities are most urgent?
- Do they build on one another?
- Is the timeline affected by funding?.
- Do you have a proposed timeline in mind?

The easiest way to denote priority in the plan is to rank order them or color-code them, by highlighting the most important and urgent activities in red, important less urgent in yellow, and important but-not-urgent in green.

Module 3 - Plan of Action

STOP

Please review the Chapter 3.1 Summary and complete the Action Steps in your C-TAC Toolkit Companion Guide before continuing Module 3.

Module 3 - Plan of Action

- Chapter 3.2 - Measuring Impact

Goal:

Throughout this toolkit, a considerable amount of time has been spent developing the Logic Model. This chapter will focus on collecting, storing and analyzing data, along with the frequency of collection. Translating the data will also be discussed.

Follow along in your Companion Guide through this part of the study.

Module 3 - Plan of Action

- Chapter 3.2 - Measuring Impact

Data: Using the C-TAC State Index

The C-TAC state Index will provide you with annual data updates which will allow you to assess improvement and identify ongoing opportunities.

Follow along in your Companion Guide through this part of the study.

Module 3 - Plan of Action

- Chapter 3.2 - Measuring Impact

Data: Using Local Data

A considerable amount of local data is restricted by the Social Security Administration or the Center for Medicare and Medicaid Services (CMS), to provide adequate privacy protection for individuals. With just four or five data points, such as age, the number of children, and geocode, it is possible to narrow down to only a few people with these characteristics in a city/county.

Follow along in your Companion Guide through this part of the study.

Module 3 - Plan of Action

- Chapter 3.2 - Measuring Impact

Data: Using Local Data

The critical thing is to connect the State Index data to locally identified measures to the specific area where efforts are undertaken and regularly measured. This may apply primarily to outputs but can apply to goals/outcomes as well. This allows you to assess improvement more frequently and make adjustments, rather than depending solely on the state data.

Follow along in your Companion Guide through this part of the study.

Module 3 - Plan of Action

- Chapter 3.2 - Measuring Impact

Data: Using Local Data

It is essential to work with members of your group locally to determine what data they collect and may be willing to share. Other sources of local data include advocacy organizations and social service organizations. While you will likely be able to find data, it is unlikely that you will find one aggregated source.

Follow along in your Companion Guide through this part of the study.

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- Chapter 3.2 - Measuring Impact

Data: Using Local Data

Data that may be accessible can include

- the number of available support groups, the number of support group members
- the number of physician champions for hospice, and the percent increase in calls to advocacy organizations.
- the number of people who are attending large convenings
- the number of people who become actively involved in task forces and other relevant activity.

As you gather data, it is important to understand the process of how the data is collected.

Follow along in your Companion Guide through this part of the study.

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- Chapter 3.2 - Measuring Impact

Data: Using Local Data

Members of your coalition are often great sources of data. Asking coalition members several key questions will be beneficial. These include:

- What data are you collecting related to advanced illness and caregiving?
- What is the purpose of collecting the data?
- How often is the data collected?
- How large is the sample?
- Is your data quantitative or qualitative?

Follow along in your Companion Guide through this part of the study.

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- Chapter 3.2 - Measuring Impact

Data: Using Local Data

Once you determine which of the data aligns with your needs, then ask if the organization is willing to share it regularly. If they will then create a data dashboard to assess your progress. Remember, it is important to periodically share your data with your funders, partners, and stakeholders through the communication channels outlined in Module 2.

Follow along in your Companion Guide through this part of the study.

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Please review the Chapter 3.2 Summary and complete the Reflection Questions and Action Steps in your C-TAC Toolkit Companion Guide

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