Purpose of 5-year plan: to set the vision, goals, and strategy for the community for how **the community** will (eventually) scale up Triple P in all counties and what you hope to achieve by doing so – **should be community owned, community driven. Not something for the LIA to figure out/put together on their own**

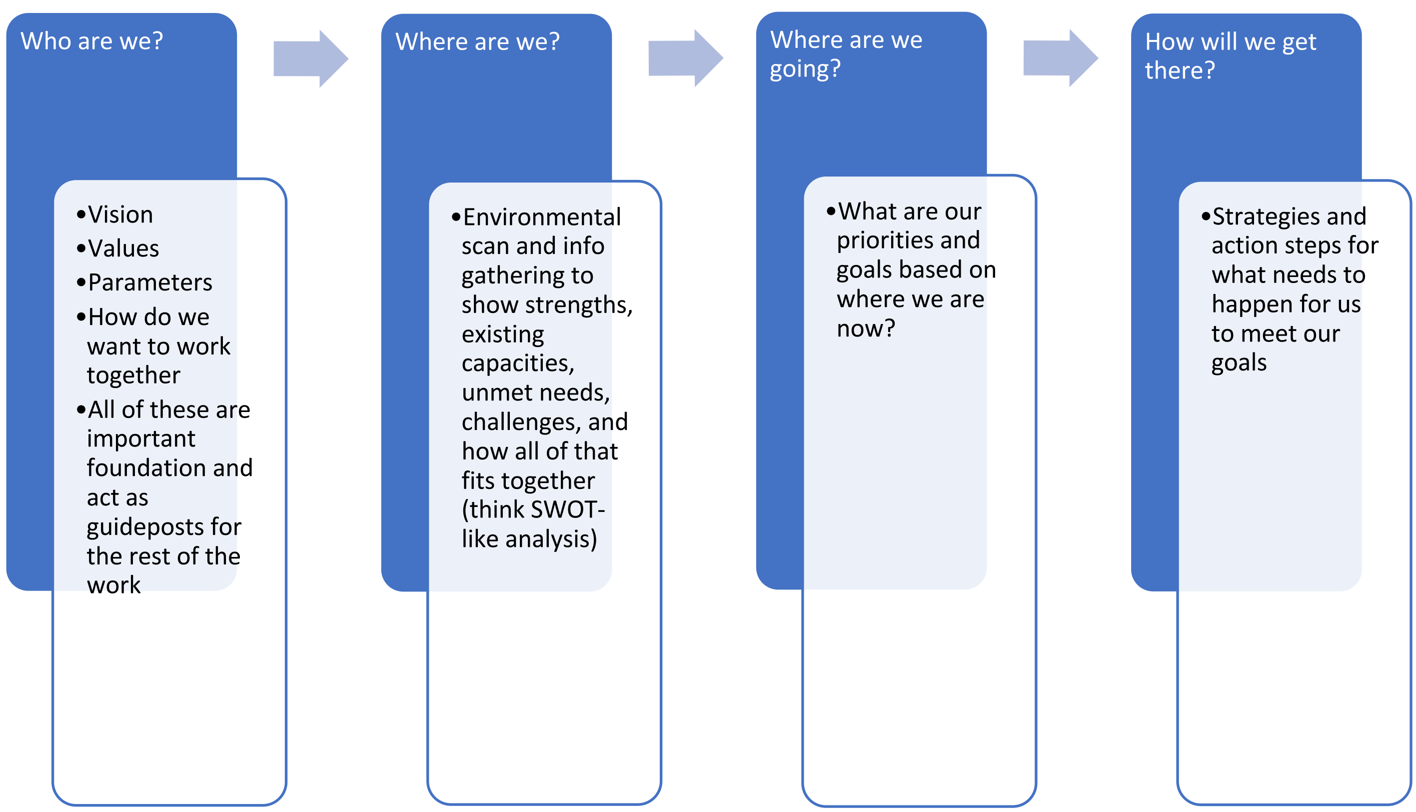
Part 1 of this document: Who to engage

- Because the 5-year plan is community owned and community driven, first thing to think about is who to involve – want broad representation from within the community – not just service delivery agencies/practitioners – need to hear from other stakeholders and families and caregivers
- When thinking about community members to engage, also think about applying an equity lens
- Once you've identified which groups of people you want to engage, you may consider a stakeholder mapping exercise to define their role in the work/system, what perspective you hope they'll bring to the work, specific individuals you may already know, whose voice is still missing

Stakeholder group	Perspective they bring: ▪ Deliver Triple P ▪ Triple P target audience (families/ caregivers) ▪ Don't deliver Triple P but have regular interaction with families/caregivers (e.g., childcare, medical) ▪ May not have regular interaction with families/caregivers, but influence policy, funding streams, broader environment (e.g., local government)	What piece of the work they might shape/what you're hoping they'll provide feedback on	Specific individual to consider contacting + their organization + county	If we choose this individual, whose perspective is being left out? Are we OK with that tradeoff?	What do we know about this individual/group already (this may shape what data you bring to them/how you "pitch" this/invite them in): ▪ What motivates them? ▪ What interest do they have in the work/outcome? ▪ What do they know about the work/Triple P already? ▪ Do we know their opinion of our work (positive, negative, neutral)?

Part 2 of this document: A potential framework for engaging the community

- Once you've figured out who to engage, next step is to think about how to engage them. The 5 year strategic plan template can seem overwhelming – it's very detailed, it's long, and it's complex, so moving through the whole 5-year plan with all community members probably won't make sense. But don't lose the forest for the trees. There are some basics about community engagement and strategic planning that shouldn't get lost in the details. If you're having trouble figuring out how to make sense of all this and where to start conversations with your community, here's a framework that we modified from the [Tribal Health Department] that may help you think about how to wrap your head around all this.
- When you think about engaging community members, you may think about the 4 broad steps below and "sprinkling in" pieces of the 5-year plan under these larger topic areas.



Looking at this framework, some of the initial steps (who are we, where are we) may seem unrelated to the meat of strategic planning and it may be tempting to jumping straight into filling out the strategic planning template with your community. But the framework above is really helpful for laying out some critical, foundational steps that will help set you up for a more fruitful and meaningful strategic planning effort. Let's break down each step and why it matters – remember, the community should be involved all along the way. You may not involve all stakeholders in the same steps, but community engagement is key:

- **STEP 1: WHO ARE WE:**
  - Some regions may already have a vision statement, values statement, and/or group agreements about how they engage with community partners, in fact, this is one of the first things the 5-year plan asks you to fill in.
  - If you have them, it is important to re-visit them and update them; if you don't have them, should consider developing them.
  - Although these things can seem "fluffy" or like extra work that might slow you down from the "actual task at hand" (the 5-year plan) these pieces are *critical* foundations for setting the stage for Triple P scale-up in your region.
  - A ***vision*** clearly defines the end-state you want to arrive at and what success looks like. So not just that you'll have Triple P scaled up in your region and have adequate reach in the community, but what you'll be able to achieve when you make that happen – what benefits will families, children, and the community see? A vision should act as your effort's north star – the ultimate way to keep you on course and know if your goals and strategies are heading in the right direction. It means we have a much larger picture of our business, or our life, than simply setting and reaching short term goals and tackling problems as they come along. A vision guides you in the decisions you make, in how you respond to events and experiences. It is your reference to make sure that how you feel, think and act in every sphere of your life is in line with that vision.
  - ***Values statements*** list out values you all hold – these are equally important in setting the stage for goal-setting and how you will work with the community because they are the principles, beliefs, and underlying assumptions that guide you. These can also help you make decisions in the future because you don't want to make decisions that don't align with your values. It's important to acknowledge and respect others' values. Values could be things like – accountability, collaboration, equity, respect, traditions, transparency – it's important to define them and then set guidance for how you'll ensure values are upheld (example, if a value is diversity, you might specify actions you'll take to make sure that value is upheld, such as recruiting qualified, diverse staff representative of the communities you serve)
  - ***Parameters*** – these may be things that are out of your control, but may be important for partners to know. Things like deadlines (when is the 5-year plan due?), budgetary constraints, etc. It's important to share these up-front to be transparent.
  - ***How we want to work together*** – we at the Impact Center often refer to these as "group agreements" – you're entering into a long-term relationship with your coalition/CLT/community partners, it's important to set group agreements for how you work together so you can do things like acknowledge power differentials, set boundaries for how to engage in ways that are respectful and equitable, etc.
  - **ASK YOUR IMPACT CENTER SUPPORT TEAM:** need help coming up with exercises for how to create vision/values statements and how to set group agreements? Ask us! We have resources and can help you think through this.

- Again, this all may seem like "fluffy" things that are slowing down the strategic planning process, but they are critical to set the foundation for a successful strategic planning venture!
- Further reading/resources on creating vision, values, group agreements:
  - What is a vision/mission statement, why they matter: https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/vision-mission-statements/main
  - Short (5mins less) series of you tube videos for what is a vision statement, what it matters, and how to develop one: https://www.youtube.com/playlist?list=PLNxpP5ijB6_ri4t7tvQlRtHTRmyZu_VWm
  - Larger strategic planning process guide that includes information on vision/mission/values statements and how to develop them (see page 29): https://www.naccho.org/uploads/downloadable-resources/Programs/Public-Health-Infrastructure/Tribal-Strategic-Planning-Guide.pdf

- **STEP 2: WHERE ARE WE**
  - Once you've defined *who* you are, defining *where* your region is right now is a critical second step.
  - Usually, groups define where they are by completing some sort of environmental scan/information gathering phase, then making sense of that data. In strategic planning, people often talk about sense-making by using SWOT analysis or other similar analysis. Basically, you want to know where you're at right now (what strengths you have) and what unmet needs there are in the community. These information-gathering and sensemaking steps help set the stage for setting your goals and how you'll get there (the "meat" of strategic planning). If you don't have a good sense of your progress to-date and what challenges/needs still exist, your goals may be unfocused or not actually important for addressing community needs. This is why this step is a critical part to strategic planning.
  - When you think of data/information to gather, you want to think about:
    - What are our existing capacities/capabilities/strengths? Think about the first few pages of the 5-year plan that maps out counties you're already in, levels of Triple P you already have, as well as other data that may tell the story of what you've been able to accomplish to-date (e.g., families served, number of active practitioners, reach by county, number of practitioners engaged in coaching, successful media campaigns to-date, active/engaged coalition/CLT members). Think of this as a snapshot of what you already have working for you.
    - What are our needs and our challenges? The flip side of strengths/existing capacities is needs and challenges. It's great to know what you already have going for you, but you also need to identify what outstanding/unmet needs exist in the community and what common challenges you face. What do community needs assessments/state-level data tell you about needs (e.g., where are most of the households with children 0-18 in our region? Where are child maltreatment rates highest?) What challenges has our region had in the past in Triple P efforts or scaling up other EBPs? What do practitioners say their

needs/challenges are? What do families/caregivers say their needs/challenges are? What do stakeholders/co-creation partners say their needs/challenges are?

        - **ASK YOUR IMPACT CENTER TEAM**: need help figuring out where to find data on strengths/needs and how to present data in a way that makes sense to your community/isn't overwhelming? Ask us! We can help you wade through state data sources (Rebecca's tool) and think about data visualization techniques (Leslie and Rebecca's tool for data walks/data placemats). We can also help you think through ways to ask community members about what their needs/challenges are.
        - Once you have strengths and needs identified (or strengths and weaknesses as they're called in SWOT analysis), and you've figured out how to bring these data to your community in a meaningful way (e.g., data placemat, data gallery walk, PPT, etc.) you need to have a conversation to make sense of the information you've gathered.
            - Are we missing any strengths/needs? What's some of our initial reaction to what we see presented?
            - What common themes are we seeing in unmet needs/strengths/challenges? Are needs/strengths/challenges consistent across groups (outcome data, practitioner needs, caregiver/family needs, cocreation partner/stakeholder needs)? Or do certain groups have unique strengths/needs/challenges?
            - What existing strengths can we leverage to help us address these needs? (aka how can we create opportunities)
    - These discussions of strengths/areas of need could be kept at a high level (the region overall and where you're at with Triple P implementation/service delivery/practitioner training/engagement) or you could start to break them down by topic/capacity bucket outlined in the strategic plan (CLT, coalition, L&IT, WFD, data, M&N, etc.)
    - Really, the goal of this phase is to get a snapshot of the current lay of the land in your region/community and to start some conversations to make sense of your current state. You're not really goal setting or action planning yet.
    - **It may make sense to prepare this step far in advance of community meetings, as you're working through who to include. So if you think about a sequential order, who to include, what data you need to bring to them to talk to them about where you are are two pieces to get in order before you start thinking about meetings with community members to discuss who are we, where are we, where are we going, how will we get there.**
    - Here are some resources that can help you think about how to frame this discussion:
        - https://www.naccho.org/uploads/downloadable-resources/Programs/Public-Health-Infrastructure/Tribal-Strategic-Planning-Guide.pdf
        - https://ctb.ku.edu/en/developing-strategic-and-action-plans
- **STEP 3: WHERE ARE WE GOING**
    - Once you have a clear snapshot of your existing strengths, unmet needs, areas for growth, you can start to map out where you are going – what most people tend to think of when they think of strategic planning.

- Here, you can start to think about areas you want to prioritize (you likely cant address every single unmet need, how will we prioritize where to start, making sure we're staying true to our vision and values)?
- This is where you can really start digging into the meat of the 5-year plan. The 5-year plan has done some of the work for you in laying out areas you should be "going to" as a community (WFD, CIT, CLT, coalition, QOMS, M&N). It even starts to lay out some goals w/in each area (e.g., all Triple P practitioners trained should participate fully in TPA training, pre-accred, accred, delivery w/in 30 days of accred). There are also lots of prompts in there that could be used to guide further thinking about where your region wants to go within each area of the strategic plan. For example, in the WFD section, having a conversation with the CLT/coalition to figure out where you're going for WFD – what you want to tackle first (e.g., start with R/S plan in Year 1, then work towards other components later).
- **ASK YOUR IMPACT CENTER SUPPORT TEAM:** unsure what some of the "buckets" are? Not sure what a Quality Outcome Monitoring System is or what it means to "design, install, use and/or sustain a Triple P coaching system"? Ask us! We can help!

* **STEP 4: HOW WILL WE GET THERE:**
    - Once you've figured out where you're going, you'll think about strategies to get there. These are really the action planning/action steps for how you'll get to where you're going. Who will do what, what processes you'll use, etc. A lot of the 5-year plan is asking for strategy, not results. So for example, the QOMS system doesn't necessarily ask you to pick which data points you'll measure right now, the 5-year plan is instead asking for the PROCESS you'll use to set up and maintain your data system. So things like who will be involved, how you'll go about designing it, what checks you might have along the way, etc. So think here more about how you'll go about finding the answers, not like you need to have all the answers now…you don't!
    - This section is really what the meat of the 5-year plan is looking for. How you (LIA/CIT) and the community will get there *together.* It's not expecting you to have it all figured out now, just a plan for how you'll get there.
    - It can often be hard to disentangle "where we're going" from "how will we get there" so it may make sense to have these conversations together. Some people will more naturally think of "how will we get there" (do'ers, executors, planners) while others may naturally think of "where are we going" (visionaries, dreamers). It may not be important to disentangle goals from strategy in the moment as you'll likely talk about them together in your 5 year plan (our goal for WFD is x, here's how we'll get there).
    - For topics that apply to the whole community (vision, values, where are we), it may make sense to convene larger groups (the entire CLT or entire coalition) to have these conversations. But for more tactical conversations ("where are we going" and "how will we get there") – it may make sense to break the larger coalition/CLT into smaller groups to have these conversations. For example, there may be some people who have a lot to say about WFD -- SDAs/leadership at SDAs/practitioners, coaches or people leading peer support sessions already. Other co-creation partners may have more input on the M&N piece or data. There is no one "right way" to have these conversations, but thinking through how you can set them up to be effective and efficient is critical.

- **ASK YOUR IMPACT CENTER SUPPORT TEAM:** need help thinking through how to have these conversations effectively and who might need to be at the table for certain conversations? Your support team can help you brainstorm this!

Part 3: Nuts and bolts of how to engage community partners

- Before diving into the "content" of the above and the "meat" of the 5-year plan, think about process first – how to involve the community, what you'll need to prepare to engage them meaningfully, and who to involve. Some things to consider:
  - Start with the purpose and value:
    - Explain WHY having a strategic plan matters -- Like a road map, a strategic plan indicates where an organization is heading and specifies the direction the organization will follow in order to get there. Explain why it's important for them to participate and lead the process → that it's not just something the state/funders are requiring, it serves a purpose
    - Further reading: https://envisio.com/blog/how-to-develop-a-strategic-plan-for-your-community/
  - Set out a roadmap
    - Whether you use the above framework (who are we, where are we, where are we going/how will we get there) or some other framework, giving people a bigger sense of where you'll be going together and the broad strokes of the process is helpful.
    - In addition to providing a framework, you may want to share how you envision them being involved (through existing CLT/coalition meetings? Other modes? Surveys? Focus groups? Special workgroups? Listening sessions? How frequently will you be asking for their input – monthly? Quarterly?) you may already have a sense of what level of engagement is feasible for your community, but it's important to co-create level of engagement/how you engage with them. Although you may come in with ideas of how you'd like to engage them, ask for their feedback and be open to shifting course
    - You may not engage each group of community members/stakeholders at every meeting – that's OK!
  - Have a plan for each meeting
    - Coming up with a 5-year strategic plan and including the community in the planning process can get complex quick! Although you want to involve the community, hear their ideas, and empower them to lead, you as the LIA have an important role to play in *ensuring* structure at each meeting so that you're staying on task and engaging people in a way that feels like a productive use of their time.
    - Having a plan going into each meeting is important. This doesn't mean you have to lead each meeting, but having a plan for who will lead, what activities you'll use to get input, etc. will help keep everyone on track.
    - **ASK YOUR IMPACT CENTER SUPPORT TEAM**: need help strategizing meeting facilitation techniques or activities to get people involved? Your support team can help you think through this!

        - Further resources:
            - This group in CA led some cool activities for their community strategic planning, including community workshops and forms. See how they structured their meetings here: https://www.santa-ana.org/sites/default/files/Documents/community_forum_slideshow_2.pdf Read more about their broader community strategic planning efforts here: https://www.santa-ana.org/cm/creating-our-future-strategic-planning-process
    - Be clear about how you'll follow through and create feedback loops
        - Make sure you're clear about how you as the LIA will follow through on ideas brought up, concerns/challenges raised. This means creating clear feedback loops so that your community knows you're listening, hearing, and taking action.