

# Worksheets for System of Care Expansion Planning Teams

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Overview of Worksheets		
TEAM WORK SESSION	WORKSHEET	PURPOSE
<b>Team Work Session #1:</b> Getting Started: Defining Your Process and Outcomes for the Team Work Sessions	<b>1:</b> Self-Assessment of System of Care System of Care Expansion Strategies	<ul style="list-style-type: none"> <li>Gain consensus on team work process</li> <li>Identify team members to complete the Self-Assessment of System of Care Expansion Strategies and the process for completion</li> </ul>
<b>Team Work Session #2:</b> Analyzing the Information from the Self-Assessment of Expansion Strategies and Conducting an Environmental Scan	<b>2A:</b> Analysis of Self-Assessment of System of Care Expansion Strategies	<ul style="list-style-type: none"> <li>Analyze the key lessons learned from the Self-Assessment of System of Care Expansion Strategies</li> <li>Identify key areas of strength to build on in planning process</li> <li>Identify key areas for improvement to address in strategic plan</li> </ul>
	<b>2B:</b> Scan of Environmental Forces	<ul style="list-style-type: none"> <li>Brainstorm about major forces in the environment that have implications for your strategic plan</li> <li>Identify strengths</li> <li>Identify opportunities</li> <li>Identify challenges</li> </ul>
<b>Team Work Session #3:</b> Reviewing Your Planning Process and Goals	<b>3A:</b> Planning Structures and Processes	<ul style="list-style-type: none"> <li>Describe the planning structure(s) established to support your planning processes</li> <li>Specify the purpose/role of each structure, types of participants, and the processes to achieve the purpose</li> </ul>
	<b>3B:</b> Alignment with Core System of Care Values	<ul style="list-style-type: none"> <li>Describe strategies to ensure that your planning process and resulting plan is family driven, youth guided, and culturally and linguistically competent</li> <li>Describe strategies to incorporate a social marketing/strategic communications component in the plan</li> </ul>
	<b>3C:</b> Major System of Care Expansion Planning Goals and Strategies for Goal Achievement	<ul style="list-style-type: none"> <li>Refine proposed goals in your application</li> <li>Delineate your major goals for system of care expansion</li> </ul>
<b>Team Work Session #4:</b> Developing Strategies to Achieve Your Goals	<b>3C:</b> Major System of Care Expansion Planning Goals and Strategies for Goal Achievement	<ul style="list-style-type: none"> <li>For each goal identified in Team Work Session #3, identify the core strategies needed to achieve the goal</li> <li>Identify sub-strategies to include in your plan for each core strategy</li> <li>Build on strengths, leverage opportunities, and address challenges in selecting strategies for your system of care expansion plan</li> </ul>
<b>Team Work Session #5:</b> Next Steps and Technical Assistance (TA) Needs	<b>5A:</b> Next Steps in the Strategic Planning Process	<ul style="list-style-type: none"> <li>Review results of worksheets and determine next steps to move forward with the planning process</li> <li>Specify what needs to be done, who will be responsible, and when tasks will be accomplished</li> </ul>
	<b>5B:</b> Priority TA Needs	<ul style="list-style-type: none"> <li>Identify priority TA needs</li> <li>Specify what TA is needed, audience(s) for TA, timeline, and resources to support the TA</li> </ul>

**TEAM SESSION #2**

**WORKSHEET 2A: Analysis of Information from the Self-Assessment of SOC Expansion Strategies**

**Grantee:**

Key Areas of Strength to Build on in Planning Process:

**TEAM SESSION #2**

**WORKSHEET 2A: Analysis of Information from the Self-Assessment of SOC Expansion Strategies**

**Grantee:**

Key Areas for Improvement to Address in Strategic Plan:

**TEAM SESSION #2**

**WORKSHEET 2A: Analysis of Information from the Self-Assessment of SOC Expansion Strategies**

**Grantee:**

Challenges	Opportunities	Strengths

**TEAM SESSION #3**

**WORKSHEET 3A: Planning Structures and Processes**

**Grantee:**

Type of Structure	Purpose/Role	Participants	Processes to Accomplish Purpose

**TEAM SESSION #3**

**WORKSHEET 3B: Alignment of Planning Process with Core System of Care Values**

**Grantee:**

**System of Care Value**

**Strategies to Ensure Alignment in Planning Process and Resulting Strategic Plan**

**Family Driven**

**Youth Guided**

**Culturally and Linguistically Competent**

**Social Marketing/Strategic Communications**

**TEAM SESSION #3 and #4**

**WORKSHEET 3C: Major System of Care Expansion Goals and Strategies for Goal Achievement**

**Grantee:**

		Core Strategies Needed to Achieve Goal				
		Implementing Policy, Regulatory, and Partnership Changes	Developing Services and Supports Based on the System of Care Philosophy and Approach	Creating Financing Mechanisms	Providing Training, Technical Assistance, and Workforce Development	Generating Support through Strategic Communications
		Sub-Strategies:	Sub-Strategies:	Sub-Strategies:	Sub-Strategies:	Sub-Strategies:
<b>GOAL IN STRATEGIC PLAN</b>						
<b>GOAL #1:</b>						
<b>GOAL #2:</b>						
<b>GOAL #3:</b>						
<b>GOAL #4:</b>						





**TEAM SESSION #5**

**WORKSHEET 5B: Priority Technical Assistance (TA) Needs**

**Grantee:**

	Topic Area	What TA is Needed	Audience	Timeline	Resources
<b>Topic 1:</b>					
<b>Topic 2:</b>					
<b>Topic 3:</b>					
<b>Topic 4:</b>					
<b>Topic 5:</b>					