



National American Indian & Alaska Native

ATTC

Addiction Technology Transfer Center Network
Funded by Substance Abuse and Mental Health Services Administration



Tribal Opioid Response (TOR) Grantee Technical Assistance Orientation Call

October 16, 2018

Behavioral Health is Essential to Health | Prevention Works | Treatment is Effective | People Recover



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Overview of the TA Orientation

- *Introductions of TOR grantees*
- *Introductions to your partners in the effort*
- *Introduction to the National American Indian and Alaska Native ATTC*
- *Goals and expectations for the TOR grant*
- *TA Opportunities*
- *Strategic Planning models*
- *Questions/Answers*



Introductions of TOR grantees

- *Grantees: 134 tribal communities and organizations*
- *Roll Call*
- *Create a section on the webpage for introductions*





Introductions to your partners in the effort Tribal Opiate Response - TA Team

National American Indian and Alaska Native ATTC

- Anne Helene Skinstad, PhD,
Director National AI/AN ATTC
- Sean A. Bear 1st BA, CADC,
Meskwaki Nation, Co-Director
- Kate Thrans, BA, Research
Associate
- Jeff Ledolter, BA, Program
Manager

Tarbell Facilitation Network

- Harold Tarbell, Harold Tarbell
is a member of the Mohawk
Nation at Akwesasne,

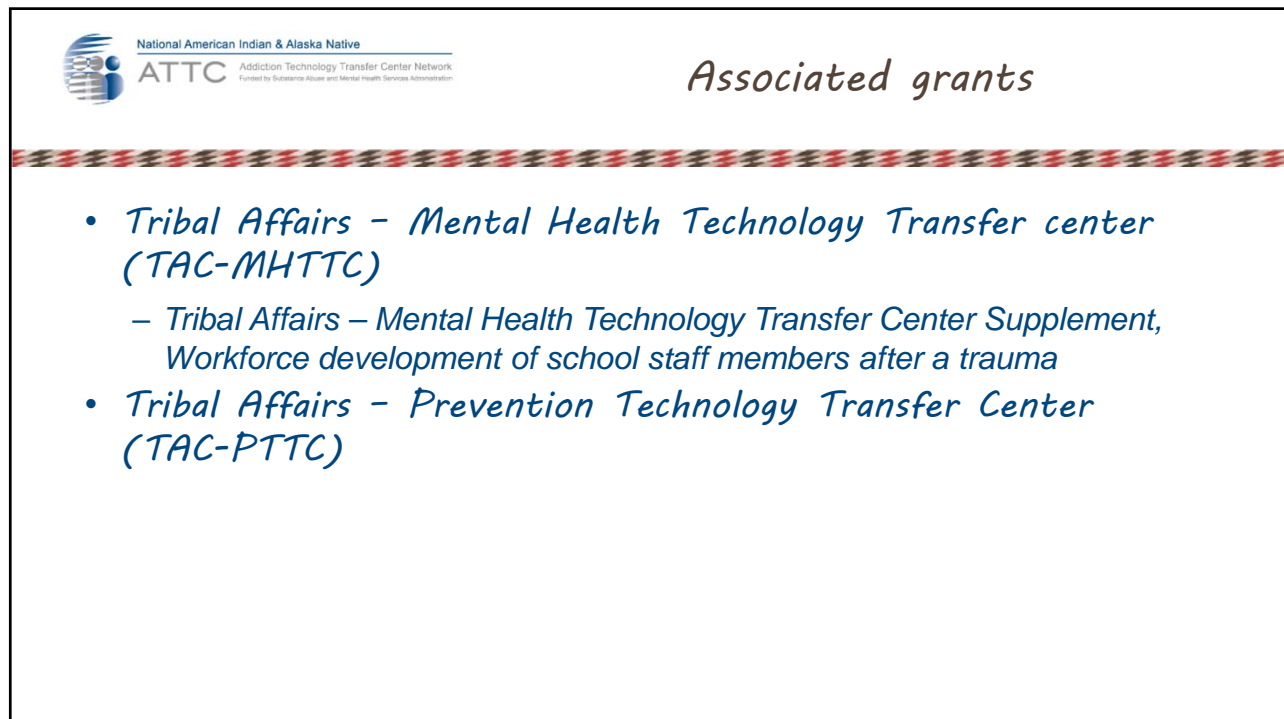
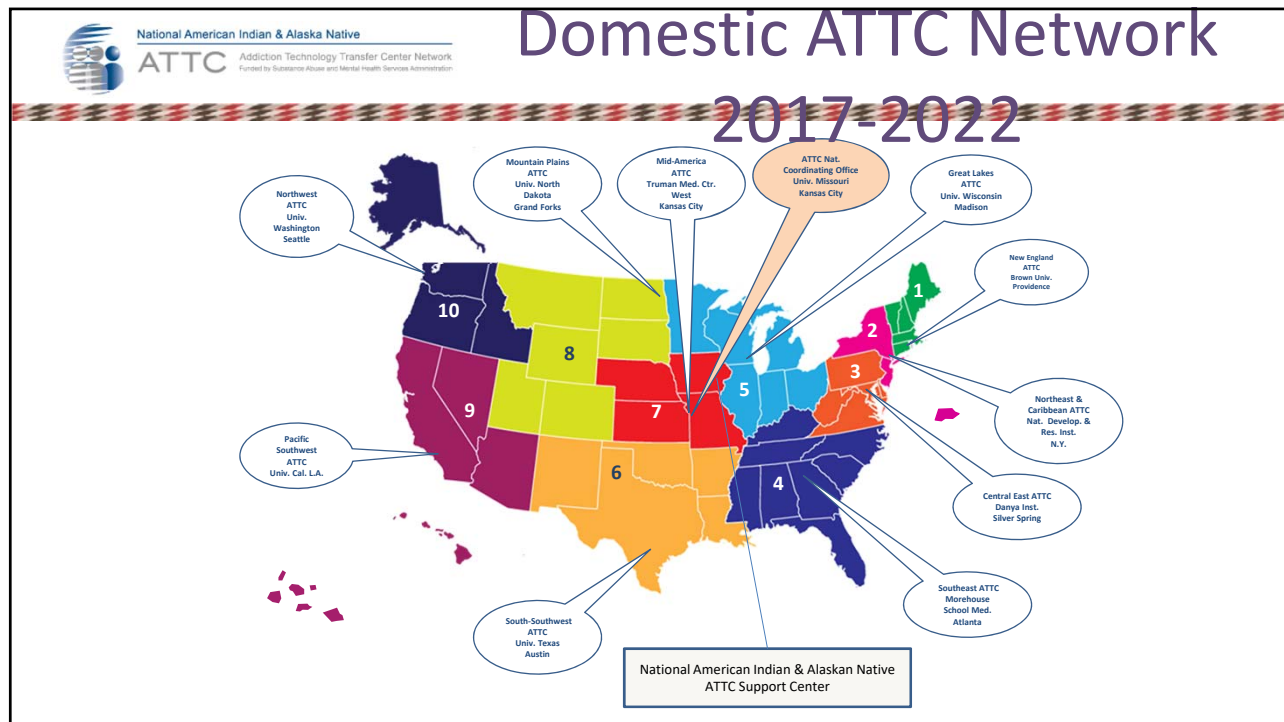
JBS International

- Pamela Petersen-Baston, MPA,
MCAP, CPP; Erica Jorde,
MSW; and Roxsana Galdamez,
BA



The National American Indian and Alaska Native ATTC







TOR TA Center

- *Section of the National AI/AN ATTC webpage will be dedicated to providing TA TOR grantees*
- *Introductions of TOR grantees*
- *Template for the Strategic Plan*
- *Position description*
- *Interview guide*
- *Drop box*
- *Other*



Goals and major requirements

- *Pam P. Baston*



Technical Assistance (TA)

- *On behalf of Humberto Carvalho, MPH, the Public Health Advisor – Project Officer for the Supplemental American Indian Alaskan Native Addiction Technology Transfer Center (AI/AN ATTC) technical assistance contract, congratulations on your successful Tribal Opioid Response (TOR) grant award!*
- *Today's call will focus on technical assistance (TA) available to all TOR grantees. Please direct any questions about your specific grant award or matters other than TA to your Public Health Advisor/Government Project Officer (GPO).*



Tribal Opioid Response (TOR) Goals

The goals of the (FY) 2018 Tribal Opioid Response grants (Short Title: TOR) are to address the opioid crisis in tribal communities by:

Increasing access to culturally appropriate and evidence-based treatment, including medication-assisted treatment (MAT) using one of the three FDA-approved medications for the treatment of opioid use disorder (OUD).

Reducing unmet treatment need and opioid overdose-related deaths through the provision of prevention, treatment and/or recovery activities for OUD.

Source: Funding Opportunity Announcement (FOA) p. 4



Strategic Plan Requirement

- Use the results of a current needs assessment if available to the tribe (or carry out a strategic planning process to conduct needs and capacity assessments) to identify gaps and resources from which to build prevention, treatment and/or community-based recovery support services (FOA p. 5).
- Complete a comprehensive strategic plan, based on the most current epidemiological data for the tribe, to address the gaps in prevention, treatment, and recovery identified by the tribe. Tribes may use existing plans if they have one available (FOA p. 7).



Optional Strategic Activities Plan Template for a 'Rapid Strategic Planning' Process (partial example)

1. Required Activities

Grantees are required to implement the activities below on which your program will focus – Funding Opportunity Award (FOA) pps. 5-7
 For each item below, please create objectives and associated actions above.

Use the results of a current needs assessment if available to the tribe (or carry out a strategic planning process to conduct needs and capacity assessments) to identify gaps and resources from which to build prevention, treatment and/or community-based recovery support services. Complete a comprehensive strategic plan, based on the most current epidemiological data for the tribe, to address the gaps in prevention, treatment, and recovery identified by the tribe. Plans must be completed within 60 days of award. Tribes may use existing plans if available (FOA pps. 5, 6, 7).

Objective 1	Activities	Responsible Party(ies)	Target Date	Date Completed
	What specific activities need to be completed to meet the objective?			
	1.1.1:			
	1.1.2:			
	1.1.3:			
Objective 2	Activities	Responsible Party(ies)	Target Date	Date Completed
	What specific activities need to be completed to meet the objective?			
	2.1.1:			
	2.1.2:			
	2.1.3:			



Strategic Planning TA Available

- *A sample template (partially displayed on previous slide) for a 'rapid strategic planning process' will be made available.*
- *A series of upcoming webinars will provide detailed guidance.*
- *An optional TA meeting (post-plan due date) will also have a strategic planning break out session for grantees wanting to further develop their submitted plan.*
- *Grantees interested in a more comprehensive true strategic planning process will have access to TA for that purpose as well.*



Evidence-based Approaches

- *Grantees will develop and provide opioid misuse prevention, treatment, and recovery support services for the purposes of addressing the opioid abuse and overdose crisis within the tribes. This service array should be based on needs identified in the Tribe's strategic plan.*
- *The use of these funds requires that evidence-based treatments, practices and interventions for OUD be used by grantees and subgrantees. SAMHSA requires that Food and Drug Administration-approved medication-assisted treatment (MAT) be provided to those diagnosed with OUD. FDA-approved MAT for OUD includes methadone, buprenorphine products, including single-entity buprenorphine products, buprenorphine/naloxone tablets, films, buccal preparations, injectable buprenorphine products, buprenorphine implants, and injectable extended-release naltrexone (FOA p. 6).*



Evidence-based Experience Based Approaches

- *In addition to these treatment services, grantees will be required to employ effective prevention and recovery support services to ensure that individuals are receiving a comprehensive array of services across the spectrum of prevention, treatment, and recovery.*
- *SAMHSA will monitor use of these funds to assure that they are being used to support evidence-based and experience-based treatment and recovery supports and will not permit use of these funds for non-evidence-based approaches (FOA p. 6).*



Evidence-based Approaches

- *A component of the Tribal Behavioral Health Agenda (TBHA) is the American Indian and Alaska Native Cultural Wisdom Declaration (CWD) which elevates the importance of tribal identities, culture, spiritual beliefs, and practices for improving well-being. This grant announcement supports the CWD and inclusion of traditional practices in the grant application (FOA p. 5).*
- *SAMHSA will monitor use of these funds to assure that they are being used to support evidence-based treatment and recovery supports and will not permit use of these funds for non-evidence-based approaches (FOA p. 6).*
- *At the latest, award recipients are expected to provide services to the population(s) of focus by the fourth month after the grant has been awarded (FOA p. 6).*



Evidence-based Approaches

- SAMHSA's services grants are intended to fund services or practices that have a demonstrated evidence base and that are appropriate for the population(s) of focus. An evidence-based practice (EBP) refers to approaches to prevention, treatment, or recovery that are validated by some form of documented research evidence. Both researchers and practitioners recognize that EBPs are essential to improving the effectiveness of services in the behavioral health field (FOA p. 10).
- All grantees are required to use evidence-based MAT in patients diagnosed with OUD. Grantees will also utilize other EBPs in conjunction with the required EBP for this FOA (review Expectations and Required Activities for additional information on EBP for OUD. The National Institute of Health, National Institute on Drug Abuse website <https://www.drugabuse.gov/> has more information on EBPs (FOA p. 10).



Medication Assisted Treatment (MAT) TA

- Webinars and other TA formats (including an upcoming optional face-to-face TA meeting) will be available for tribal grantees interested in learning more about Medication Assisted Treatment (MAT) and opioid misuse prevention and recovery support.



Other Expectations

- *Grantees who currently receive opioid-related funding from other federal programs, must coordinate activities to eliminate duplication of services and programs (FOA p. 9).*



Key Personnel

The key personnel for this program will be the Project Director. This position requires prior approval by SAMHSA after review of credentials of staff and job descriptions.

Your project must have this key personnel regardless of whether or not they receive a salary or compensation from the project. These staff members must make a substantial contribution to the execution of the project.



TA Tools Available (Partial Views)

JOB DESCRIPTION

Title: TRIBAL OPIOID RESPONSE (TOR) PROJECT DIRECTOR
Supervisor: XXXXX

NOTE: This position requires prior approval by SAMHSA after review of credentials of staff and job descriptions.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

The Project Director will ensure that implementation activities of the TOR initiative align with SAMSHA's stated TOR goals and expectations to:

- Increase access to culturally appropriate and evidence-based treatment, including medication-assisted treatment (MAT) using one of the three FDA-approved medications for the treatment of opioid use disorder (OUD). (The Funding Opportunity Announcement states "All grantees are required to prioritize the delivery of MAT services.")

Tribal Opioid Response (TOR) Project Director Interview Questions

Applicant Name: _____ Interviewer Name: _____

Interview Date: _____

The interviewer can ask the applicant to describe and rate their experience with each of the TOR-relevant work areas according to the scale below:
 1 = Solid experience (3 or more years)
 2 = Some experience (e.g., 1-2 years)
 3 = No experience

Experience	1	2	3	Examples/Notes
Effective substance use disorder (including opioid use disorder) prevention, treatment, and recovery support experience and co-occurring mental health disorder experience				
Experience managing or delivering prevention, treatment, and/or recovery support to AI/AN persons with substance use disorders (SUDs)				



Data Collection and Performance Measurement



All SAMHSA recipients are required to collect and report certain data so that SAMHSA can meet its obligations under the Government Performance and Results (GPRA) Modernization Act of 2010.



The TOR grantee technical assistance (TA) available from the AI/AN ATTC will not cover data collection. Your Public Health Advisor/GPO can guide you to SAMHSA TA on data collection and GPRA.



Funding/Financial Considerations

- *Grantees must use funding to supplement and not supplant existing opioid prevention, treatment, and/or recovery activities.*
- *TOR grantees will need to direct any funding related questions as well as any financial-related TA needs to their Public Health Advisor/GPO. The AI/AN ATTC will not provide TA on this matter.*
- *The National AI/AN ATTC may provide TA on sustainability.*



Strategic Planning

- *Harold Tarbell*

Definition of Strategic Planning

- *Strategic Planning is a systematic process through which an organization agrees on - and builds commitment among key stakeholders to - priorities that are essential to its mission and responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities.*
- *It is a management tool to help an organization do a better job and support 'leaders' in making conscious choices about overall priorities, goals and objectives, and where to focus limited resources to achieve a purpose.*

Strategic Planning

Lessons Learned

- Focus on the most important issues:
 - If you don't have any really important choices to make about your organizations future, you don't need strategic planning
Strategic vs. Operational vs. Crisis
- Be willing to question both the 'status quo' and 'sacred cows':
 - Don't allow 'new ideas' to be characterized as inherent criticisms of the past
- Have multiple tools at the ready
- Produce a document:
 - It is a symbol of accomplishment, a guide for internal operations and a marketing tool
- Make sure its translated into other plans (annual operating plans, tactical plans, project plans)

What Strategic Planning is NOT

- Does not predict the future
 - Over time an organization must monitor changes in the environment and assess whether its assumptions remain essentially valid
- Not a substitute for judgment of leadership
 - The data analysis and decision making tools of strategic planning only support the intuition, reasoning skills and judgment of the people involved
- Rarely a smooth, predictable, linear process
 - It is a creative process that requires flexibility as you work through its various phases

Generic Process Model

7 Step Process

- *Getting Ready*
 - *Who will do the work. What are the issues/choices. Research.*
- *Developing a Vision and Mission*
 - *Purpose. Change. Focus/Business*
- *Assessing the Environment*
 - *Trends and SWOT*
- *Agreeing on Priorities*
 - *Critical Strategic Issues. Core Strategic Directions*
- *Writing the Strategic Plan (3-40 pages)*
 - *Why we exist . What trying to accomplish. How we will do it*
 - *Intro. Profile. Vision. Mission. Values. Strategic Issues. Core Strategies. Goals and Objectives.*
- *Implementation*
 - *How organization is informed by and contributes to its achievement (operational, program and project level*
- *Monitoring and Evaluation*
 - *Quarterly, Annually, 3-5 years*
 - *Performance Measurement/Evaluation*

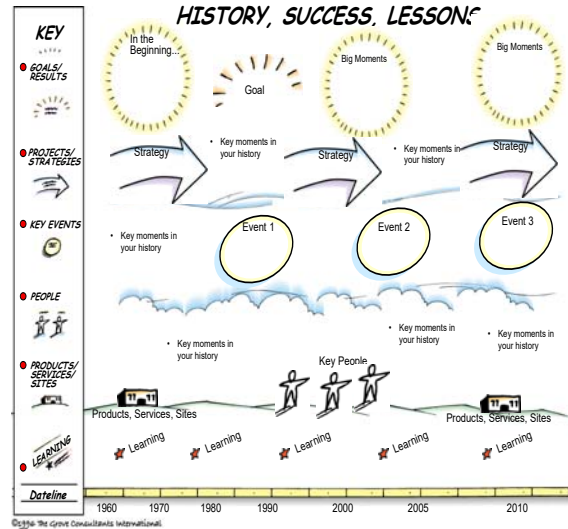
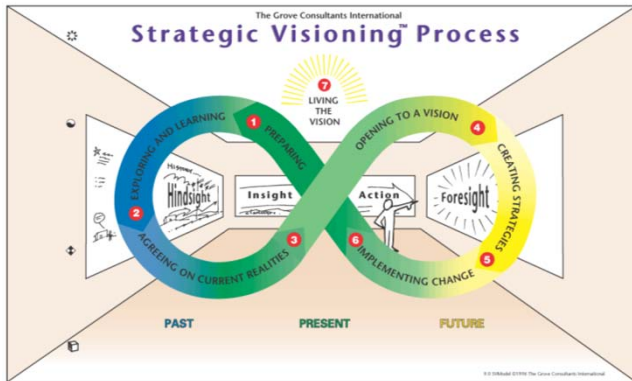
Sample Strategic Workplan

V. STRATEGIC WORKPLAN

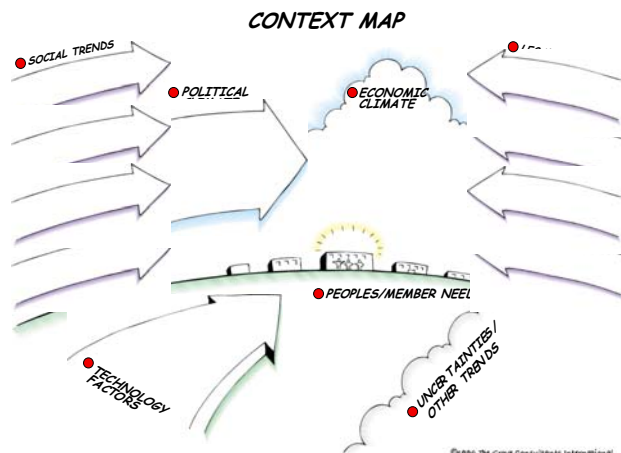
Core Strategy: Establish and maintain an effective relationship between the Council and the MCA administration (e.g. Programs and Services, etc.)		
Outcomes:	Improved balance between Council's representative political authority and their responsibility to establish a secure policy environment within which programs are administered Teamwork based on respect for each others roles, responsibilities, perspectives and expertise	
Objectives:		Timeframe
	<input type="checkbox"/> Increase understanding of the respective roles and responsibilities	Short term March 2007
	<input type="checkbox"/> Establish a clear process for interaction between the Council, Portfolio holders, the Chief Administrative Officer and Senior Managers (e.g. joint meetings, regular briefings, joint planning sessions, etc.)	Medium term August 2007
	<input type="checkbox"/> Identify an annual opportunity for the Council to engage in a dialogue with staff	Medium term December 2007
	<input type="checkbox"/> Schedule joint training sessions for Council and Senior Managers (e.g. fund raising, policy development, communications/advocacy, evaluation, etc.)	Medium term December 2007
	<input type="checkbox"/> Strengthen the joint Council/Administration policy development processes	Long Term March 2009
Outputs:	Documentation describing roles, responsibilities and processes (e.g. policy development, communication, training)	

Grove Graphic Visioning

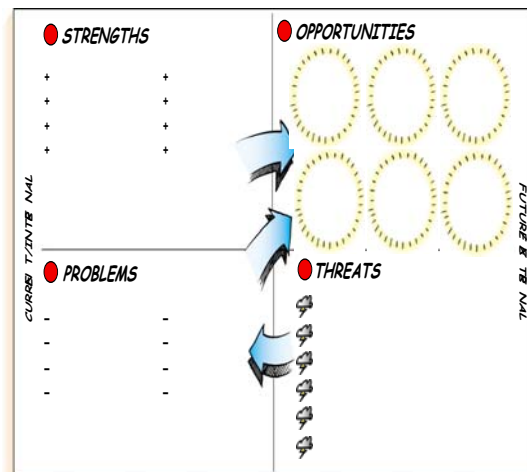
Process and Profile



Environmental Scanning

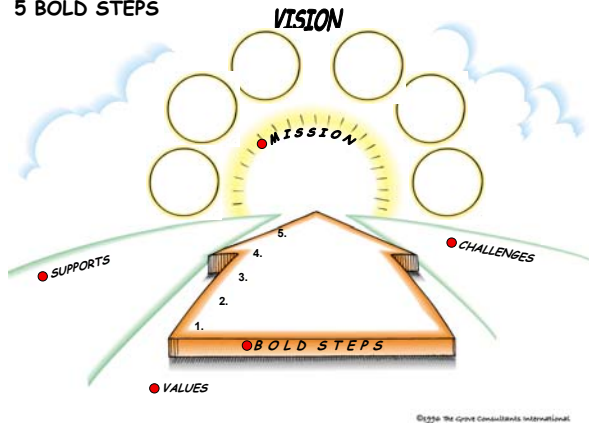


YOUR SPOT ANALYSIS

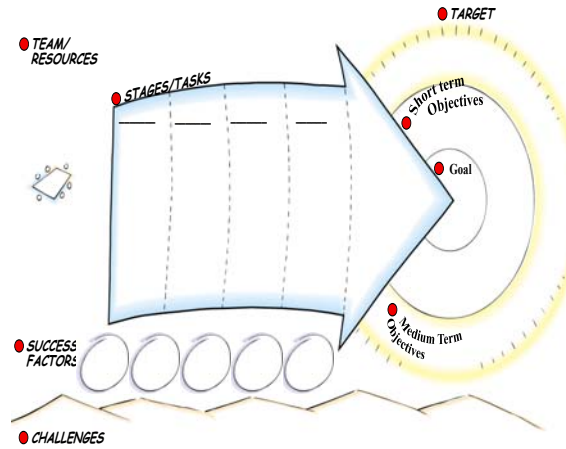


Core Strategies and Game Plans


5 BOLD STEPS



GAMEPLAN



Balanced Scorecard



A Strategic Management System Connects the Dots Between Strategy and Action

Strategic Objectives Are Continuous Improvement Activities that we have to implement for success

Strategy Maps visualize strategy

High Level Strategy Elements provide high level context

Measures are used to track organizational performance.

Targets are the desired level of performance for each measure.

Strategic Initiatives are projects that help you reach your targets.

Mission/Vision/Values/Strategic Themes/Results

	Strategy Map/ Objectives	Measures	Targets	Initiatives
Financial	↻			
Customer	↑			
Process	↑			
Organizational Capacity	↑			

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Non Profit Sector Strategic Planning and Management System Example

Vision: Improve access to basic needs – food, water, shelter, good health and education - for children living in poverty

Mission: Support and deliver programs and services that reduce the impact of poverty on children worldwide

Strategic Themes: Strategic Partnering Excellence Advocacy Program Excellence

Strategic Results: Expand the resources pool through quality partnerships to support program delivery, fundraising and advocacy. Leaders visibly support our cause and, as a result, targeted legislative victories increase and there is more public awareness of our cause. Resources are marshaled to deliver efficient, effective and scalable programs and services.

	Measures	Targets	Initiatives
Customer/ Stakeholder	<ul style="list-style-type: none"> No. children living in poverty Aid requests processed within targets Growth in public awareness Growth in programming 	<ul style="list-style-type: none"> ↓3% per quarter ↑85% this year ↑3% this year 3 new programs 	<ul style="list-style-type: none"> Partner for Jobs Program New Star Partner Program implemented Implement Partner Relationship Management System Benchmark poverty programs
Financial Stewardship	<ul style="list-style-type: none"> Cost per child-day Administrative and support 	<ul style="list-style-type: none"> Maintain current rate for this year <16% of budget 	<ul style="list-style-type: none"> Implement program financial tracking system
Internal Process	<ul style="list-style-type: none"> Child poverty as an issue Request cycle time Children served No. articles/papers published Partner satisfaction 	<ul style="list-style-type: none"> 87% next period ↓10% this year 85% of eligible population 12 this year 94% this year 94% this year 	<ul style="list-style-type: none"> Implement Partner Relationship Management System Start Partner Delivery Workshop Program Gain endorsements from athletes Six Sigma Improvement Program
Organizational Capacity	<ul style="list-style-type: none"> Funds received Funds active rate Employee probation Employee satisfaction Program signup errors 	<ul style="list-style-type: none"> ↑7% this year 92% of funds activated within 30 days 95% completion 92% this year ↓3.5% this year 	<ul style="list-style-type: none"> Donor Analytics Project New employee on-boarding process Shared Services Project

Core Values: Integrity • Commitment • Leadership • Accountability • Compassion • Collaboration

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Closing suggestions



TA Opportunities

- *Tips and templates*
- *Conference calls before the deadline for the Strategic Plan*
 - *Eight calls from now on until the end of November*
- *TA Meeting*
 - *December 13, 14, 15, Mystic Lake Casino and Resort*
 - *Voluntary*
 - *Please indicate if your organization wants to be represented*
- *Monthly calls from then on*
- *Strategic planning webinar series*



Other TA needs

- *Our team want to support you all in succeeding and preparing for upcoming grant opportunities*
- *Other TA Needs?*
- *Please send us your TA needs*



How can we strengthen our TA efforts?

- *Please also consider sending your grant proposal to us*
 - *Our team will be the only once reviewing these applications*
 - rgaldamez@jbsinternational.com
- *Why is that important?*
- *It gives our TA team a better opportunity to understand your specific goals*
- *It gives our TA team a better opportunity to assist you, enhance your strengths and to better understand your challenges and how to work around them.*



Thank You for Joining Us Today!

- We will soon announce a dedicated web page for TOR grantees to access TA tools and other guidance and to share ideas. We can do great things together!*



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ATTC Addiction Technology Transfer Center Network
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Contact Info

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