



PHA Health Strategic Planning Workshop | February 21, 2018

## PARTICIPANT WORKSHEET

### About This Worksheet

This worksheet is intended to guide your reflection throughout the PHA Health Strategic Planning Workshop and facilitate conversation with your colleagues convened for the workshop. The workshop is broken into three modules:

- **Module 1: Taking Stock of Values, Activities, and Partners**
- **Module 2: Setting Goals Internally and with Your Partners**
- **Module 3: Committing to an Action Plan**

The three modules should help your team answer the following question by the end of the day:

**“What needs to happen to improve resident health in your community in the next 1-2 years?”**

### Materials Your Team Will Need

- Printed copies of this worksheet for all those participating in the workshop
- Pencils/pens
- A couple stacks of post-it notes or other notepads
- Several sheets of plain 8.5 x 11” paper
- A flat surface to organize post-its such as a dry erase board or clear tabletop.

### Share Your Results

At the end of today’s workshop, we encourage you and your team to share your insights, goals, and plans with the CLPHA team by emailing Steve Lucas at [slucas@clpha.org](mailto:slucas@clpha.org).

Name: \_\_\_\_\_

## MODULE 1: TAKING STOCK

**1A. List out all current efforts and resources, including existing health-related initiatives (e.g. programming/education, service coordination, other system alignment efforts) and available funding or other assets. Think about whether these initiatives are high functioning or if they need refinement or retooling.**

**1B. List out any health-related initiatives or goals the PHA has wanted to start but has not. What are the restraints or barriers to doing this work?**

**1C. List out all current partners (organizations, agencies, researchers/experts) that support your agency's health-related initiatives. Add a checkmark next to any partners participating in this workshop with you.**

**1D. What, if any, barriers exist for the agency as it relates to health partnership building?**

**1E. What kind of existing community infrastructure or initiatives (e.g. city-wide efforts to improve community health) can the PHA tap into to achieve its goals?**

**1F. Record any additional notes you want to capture.**

## MODULE 2: SETTING GOALS

**2A. Imagine it has been two years, and you have improved resident health outcomes as you hope to. What do you see, feel, and hear? In this way, identify what “success” looks like for your efforts.**

**2B. Complete the table below to summarize (1) strengths of the team and context that will lead to victory; (2) weaknesses of the team and context that threaten victory; (3) potential dangers of succeeding in the initiative/goal; (4) potential benefits of pursuing this course of action.**

Strengths	Weaknesses
Potential Dangers	Potential Benefits

## MODULE 3: COMMITTING TO ACTION

**3A. Individually, make a list of 8-10 actions most important to reaching your team's goal(s).**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

*3B. Star the 3-5 most important items from your list or write them below.*

*3C. Follow the instructions of the workshop facilitator to identify task clusters with your team. (You may need your sticky notes and markers for this portion of the activity.)*

**3D. Write out your team's identified task clusters. (Optional)**

**3E. Either above or below, identify staff or any external partners best positioned to complete tasks in clusters your team has identified.**

**3F. What else, if anything, is missing for you to be successful in reaching the goals you have set?**

---

We encourage participants to share their insights, goals, and action plans with CLPHA so that we can help support you in achieving your vision. Email any notes or photos of your group exercises to Steve Lucas at [slucas@clpha.org](mailto:slucas@clpha.org).