

STEP 1

Taking Stock



Section 3: Taking Stock (Step 1)

a) Desired Outcomes

To gather relevant information about the community and the status of the coalition.

To examine the gathered information and identify the implications of what is known in order to bring the group to a point of readiness to make decisions regarding their directions and actions.

b) Necessary Preliminary Information

Before approaching this first step, the group should:

- Understand the reason/outcomes for the planning session (*see Section 1 of the Workbook*)
- Be oriented to the framework of the five steps in the workbook (*see pages 4-7, and Section 2: A Model for Comprehensive Heart Health Program Planning in the Workbook*)
- Establish the milestones and overall timeframe for their planning process, working backwards from the deadlines (see a sample in Section 2 of this Guide)
- Identify the decision-making process (who will make the decisions regarding the programs and what approvals are required before finalization?)
- Be familiar with the concept of the OHHAP Demonstration sites – the lessons learned in program planning¹ and the “What Worked for Us” catalogue of interventions (perhaps also information regarding the CHHI)
- Have some orientation to health promotion theory and concepts (such as Stages of Change, Diffusion of Innovation, Sustainability) and terminology (channels, population health, channels etc.) (*see Section 1 of the Workbook*)
- Have gathered the information to be analyzed during the first step. Much of this may be in the original Proposal. Consultants are encouraged to become familiar with this document prior to their visit. Local information would likely include, at minimum:
 - Local CHHIOP data
 - Needs Assessment results
 - Local OHS data
 - Local Health Promotion Plan (DHC)
 - Inventory of existing Heart Health programs/services/resources.

¹ See Executive Summary Newsletter of the OHHAP Final Report and Presentation Package 1, available from the HHRC for specific information and overhead templates.

c) **Workbook Links**

The Taking Stock section can be found on pages 15 through 17. Worksheets 1-1 through 1-7 can be applied to this step.

d) **Recommended Representatives**

Individuals:

Gather the information for reflection in advance of the group meeting.

Full Coalition:

Participate in the discussions related to the background information.

The Taking Stock step sets the stage for all of the coming decisions regarding program direction for the coalition. If partners are to be engaged in the subsequent steps it is important that they see “the big picture” and fully understand the community for which they are programming.

e) **Sample Design**

Timeframe: 3.5 hours

The time for this section will vary greatly depending on how much background all participants have with the concepts, the guidelines and the programs. It will be important to have all participants at the same point of understanding. Those with more background could be involved in the transfer of information. Consultants are encouraged to determine ahead of time what amount of information their community needs at this time.

As well, the material on Evidence of Best Practice may not be relevant or of interest to all participants. A brief overview may suffice, letting them know more information is available for those interested in this aspect.

SECTION	DETAILS	TIME
Introductions	<ul style="list-style-type: none"> • Individuals • Design/Outcomes for the session (Purpose OH²) • Icebreaker Activity • Overview of the 5 steps 	20 min.
6 Elements of Taking Stock - Overview	<ol style="list-style-type: none"> 1. Local Community Information 2. Existing & Potential Programs 3. Provincial Direction 	5 min.

² OH = Overhead; FC = Flipchart; HO = Handout

SECTION	DETAILS	TIME
	<ul style="list-style-type: none"> Based on planning for this session, provide clarification on any other guidelines that warrant reinforcement with this group (eg. Primary prevention, comprehensive approach, women) 	
Local Established Strategic Directions	<ul style="list-style-type: none"> Share the elements already established for the local coalition (Vision, Mission, Guiding Principles, Audiences, Settings, Goals) – clarification required? Encourage group not to revisit content – if necessary, move this to next Step of Setting Direction. This should be determined before the session. 	10 min
Evidence of Good Practice	<ul style="list-style-type: none"> Centre for Health Promotion def'n - OH Lessons Learned from OHHAP in program planning International Best Practices in Heart Health – Section 1 outlines the criteria & process used 	5 min
Local Capacities	<p>Local CHHIOP data could fit here. Reality Check – broad discussion of local direction</p> <ul style="list-style-type: none"> Balance of building on existing vs. integrating new programs? (relative %) What are partners looking for in programming to keep them involved? What scope of programs are reasonable given the resources (people, finances) Other realities? 	15 min
Summary	<ul style="list-style-type: none"> Summary OH – all elements / filter Implications, stakeholders & their needs, SWOT & PEST analysis, inventory of programs, guidelines and capacity have been generated. If next step follows directly, keep posted and refer to. If next step at another time, decide how to capture the information and ensure it is available to inform future discussions. Preview next step. 	10 min

f) Evaluation Link

- Once full slate of programs generated and implemented, the identified needs of stakeholders can be used to assess appropriateness.
- The identified needs of stakeholders can be used to establish program objectives.
- Provincial guidelines can be used as local outcome objectives.

g) **Supplementary Material**

- Grid of Program Options
- Provincial Guidelines
- Presentation Package I & Executive Summary of Final Evaluation Report of the OHHAP newsletter³
- “What Worked for Us” Catalogue of Interventions and “International Best Practices in Heart Health”³

h) **“Icebreaker”**

“Braid Three Ropes”

- Ask for three volunteers, and have each hold the end of a skipping rope (use Jump Rope for Heart ropes to support the HSFO and give the ropes to the volunteers when finished) and position themselves so the ropes are extended; you hold the other 3 ends.
- Provide them with the direction to “Braid the ropes.”
- Watch what happens and encourage the audience to offer their reflections on what is happening. (they might move their bodies in an under and over pattern, they may pass the ropes to one another).
- Once they get into some kind of rhythm, ask them to change their technique.
- Process the experience.
 - What did you observe about the process?(somebody needed to take charge; took a while to get the hang of it but came easier then; hard to change once first pattern established; not given many instructions to go by so had to come up with what worked yourself – draw analogy to working together as partners in the community or the behaviour change process)
 - What might the 3 ropes represent? (partners, risk factors, approaches)

i) **Overheads**

- Program Planning Framework
- Step 1: Taking Stock
- Purpose of Taking Stock
- Six Elements of Taking Stock
- CHHIOP Provincial Information (4)
- Provincial Guidelines (3)
- Best Practice Definition
- Summary of Taking Stock

³ These have been previously distributed to all Health Units and are available from the HHRC.