



06

## Bringing it all Together: Building a Strategy for Your State



Person completing this chapter: \_\_\_\_\_

Role: \_\_\_\_\_

Date: \_\_\_\_\_

Additional Individuals and Affiliations Completing this Chapter: \_\_\_\_\_

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## CHAPTER CONTENTS

1. Introduction
2. Identify CYSHCN Priorities in Your State
3. Assess Your Capacity
4. Select a Priority and Write SMART Objectives
5. Next Steps

## WHO THIS CHAPTER IS FOR:

- The primary audience for this chapter is state Title V program leaders and staff.
- If applicable, we encourage you to collaborate with colleagues in other departments within Title V or other state agencies who play a role in financing the system of services for CYSHCN.

## WHY THIS CHAPTER MATTERS:

- This chapter is intended to bring together what you have learned about coverage and financing from this workbook and how you may apply it to your work in your state. In this chapter, you will begin to design your own roadmap to guide your work to improve coverage and financing of care for CYSHCN.
- In this chapter, consider priority needs and goals through the lens of Medicaid and financing. Consider how you can utilize financing strategies to address the needs of CYSHCN in your state.

## WHAT YOU WILL LEARN:

- You will map topics from this workbook onto the priority needs of CYSHCN in your state.
- How to conduct a SWOT analysis
- How to write SMART objectives
- You will practice applying systems thinking when considering your role in financing the system of services for CYSHCN

## 1. INTRODUCTION

As you have worked through the chapters of this resource, we hope that you have increased your knowledge of financing and the system of services for CYSHCN and have begun to consider ways that you can bring a focus on financing to your public health role, whatever that may be. As a reminder, the purpose of this resource is threefold:

- To increase Title V program staff knowledge about topics related to financing and the system of services for CYSHCN, especially Medicaid.
- To increase Title V staff ability to describe their role in financing and the system of services for CYSHCN.
- To facilitate the identification of strategic priorities for state Title V programs and specific levers and concrete steps to address those priorities



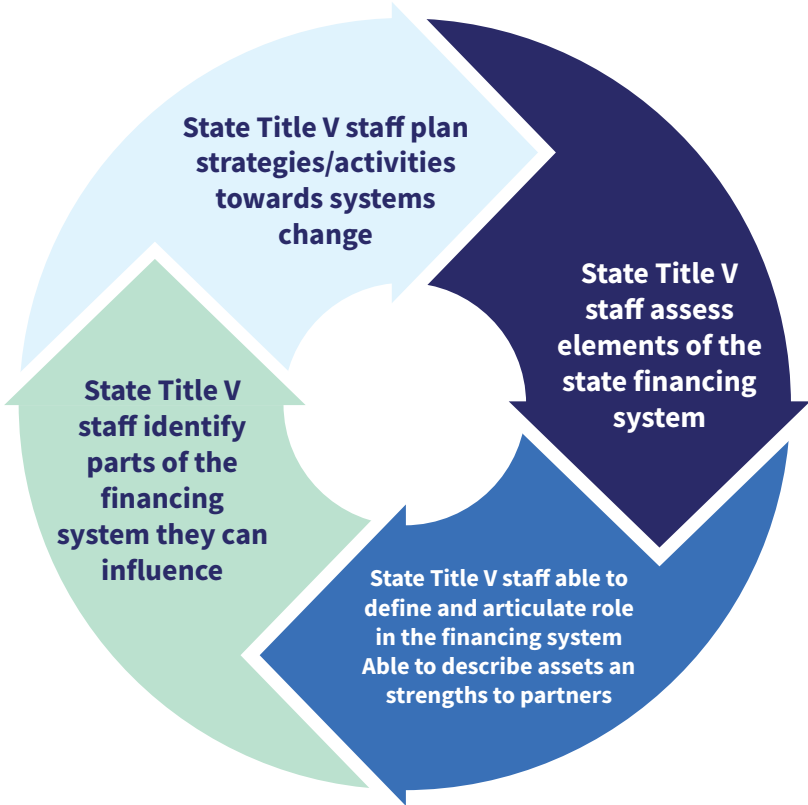
Thinking at a systems level is an important step in creating change that results in improved health outcomes.<sup>119</sup> The role of financing in the system of services for CYSHCN is complex, but throughout this workbook, you have gained a deeper understanding of the roles of Title V and Medicaid in that system. You have assessed elements of your state financing system by identifying key data indicators, naming entities that play a role in the financing landscape, and describing processes and programs. By reflecting on your contributions related to financing, you have practiced articulating your role in financing the system of services for CYSHCN and started to think about what elements of the financing system you may be able to influence.

<sup>119</sup> National MCH Workforce Development Center. (n.d.). *Introduction to Systems Thinking* [Video]. MCH Navigator. <https://www.mchnavigator.org/transformation/systems-integration.php>



This chapter offers guidance for how you can identify areas of alignment between your knowledge of the needs of CYSHCN in your state based on your Title V Needs Assessment and what you have learned from this workbook. It also presents opportunities to further practice describing your assets and strengths. After identifying intersections between key topics in your state and financing concepts, you will select a priority focus area and write objectives to assist you in addressing this need.

**Figure 1. Purpose of the Workbook**



As you develop goals and objectives in this chapter, the activities and questions in this chapter will draw on your responses to the reflection questions and 10 Essential Public Health Services questions in previous chapters.

**2. IDENTIFY CYSHCN PRIORITY AREAS IN YOUR STATE**

As part of your state Title V Block Grant needs assessment, you have already described many of the strengths and barriers in the system of services for CYSHCN in your state. This section will help you identify opportunities to apply the knowledge, skills, and insights you gained from engaging with this workbook to priority issues for CYSHCN.

For this section, please refer to your state Title V Needs Assessment, specifically the section related to CYSHCN, or other information you may have about the needs of CYSHCN in your state. You may also consider consulting with family partners within your Title V program or colleagues within your state’s Family to Family Health Information Center, Family Voices chapter, or community-based organizations. Take the needs that you identify and use them to complete the table below. The needs you list in this section may be “Priority Needs” that you used as the basis for writing State Action Plans, or they may be needs you have not yet done strategic planning around. To inform your thinking, we encourage you to revisit your responses to questions in previous chapters that asked you to reflect on your roles and partnerships.

## Example Priority Need

Need identified from needs assessment	<b>Topic from this workbook</b> <i>Check boxes for topics relevant in your state that relate to the need. Revisit your responses to questions throughout previous chapters to remind yourself of ways that your work may intersect with these elements of Medicaid, and include notes about the links between the topics and the priority need.</i>
<i>Sample Response: Increase access to treatment following a positive developmental screening result</i>	<div> <input type="checkbox"/> State Plan Amendments  <i>Notes:</i> </div> <div> <input type="checkbox"/> Waivers (including HCBS Waivers)  <i>Notes:</i> </div> <div> <input type="checkbox"/> Medicaid Eligibility  <i>Notes:</i> </div> <div> <input type="checkbox"/> Medicaid Enrollment  <i>Notes:</i> </div> <div> <input type="checkbox"/> TEFRA  <i>Notes:</i> </div> <div> <input type="checkbox"/> Health Homes  <i>Notes:</i> </div> <div> <input type="checkbox"/> Medicaid Managed Care  <i>Notes:</i> </div> <div> <input checked="" type="checkbox"/> Medical Necessity/Prior Authorizations  <i>Notes: Title V CYSHCN staff hear feedback from family leaders that prior authorizations for certain services are frequently denied, suggesting an opportunity to provide education to providers and for communication with Medicaid colleagues.</i> </div> <div> <input checked="" type="checkbox"/> EPSDT  <i>Notes: Title V CYSHCN staff recently collaborated with the state's EPSDT coordinator, a relationship that could be built on to address treatment access issues</i> </div>

Go to the next page to fill this out for your own state.

***Your Turn: Use the next four pages to examine your state's priority needs***

Need identified from needs assessment	<b>Topic from this workbook</b> <i>Check boxes for topics relevant in your state that relate to the need. Revisit your responses to questions throughout previous chapters to remind yourself of ways that your work may intersect with these elements of Medicaid, and include notes about the links between the topics and the priority need.</i>
Need 1:	<div data-bbox="516 384 812 457"> <input type="checkbox"/> State Plan Amendments  <i>Notes:</i> </div> <div data-bbox="516 548 914 621"> <input type="checkbox"/> Waivers (including HCBS Waivers)  <i>Notes:</i> </div> <div data-bbox="516 711 753 785"> <input type="checkbox"/> Medicaid Eligibility  <i>Notes:</i> </div> <div data-bbox="516 875 774 949"> <input type="checkbox"/> Medicaid Enrollment  <i>Notes:</i> </div> <div data-bbox="516 1039 617 1113"> <input type="checkbox"/> TEFRA  <i>Notes:</i> </div> <div data-bbox="516 1203 703 1276"> <input type="checkbox"/> Health Homes  <i>Notes:</i> </div> <div data-bbox="516 1367 807 1440"> <input type="checkbox"/> Medicaid Managed Care  <i>Notes:</i> </div> <div data-bbox="516 1530 971 1604"> <input type="checkbox"/> Medical Necessity/Prior Authorizations  <i>Notes:</i> </div> <div data-bbox="516 1694 617 1768"> <input type="checkbox"/> EPSDT  <i>Notes:</i> </div>

Need identified from needs assessment	<b>Topic from this workbook</b> <i>Check boxes for topics relevant in your state that relate to the need. Revisit your responses to questions throughout previous chapters to remind yourself of ways that your work may intersect with these elements of Medicaid, and include notes about the links between the topics and the priority need.</i>
Need 2:	<div data-bbox="516 384 812 457"> <input type="checkbox"/> State Plan Amendments  <i>Notes:</i> </div> <div data-bbox="516 548 914 621"> <input type="checkbox"/> Waivers (including HCBS Waivers)  <i>Notes:</i> </div> <div data-bbox="516 711 753 785"> <input type="checkbox"/> Medicaid Eligibility  <i>Notes:</i> </div> <div data-bbox="516 875 774 949"> <input type="checkbox"/> Medicaid Enrollment  <i>Notes:</i> </div> <div data-bbox="516 1039 617 1113"> <input type="checkbox"/> TEFRA  <i>Notes:</i> </div> <div data-bbox="516 1203 703 1276"> <input type="checkbox"/> Health Homes  <i>Notes:</i> </div> <div data-bbox="516 1367 807 1440"> <input type="checkbox"/> Medicaid Managed Care  <i>Notes:</i> </div> <div data-bbox="516 1530 971 1604"> <input type="checkbox"/> Medical Necessity/Prior Authorizations  <i>Notes:</i> </div> <div data-bbox="516 1694 617 1768"> <input type="checkbox"/> EPSDT  <i>Notes:</i> </div>

Need identified from needs assessment	<b>Topic from this workbook</b> <i>Check boxes for topics relevant in your state that relate to the need. Revisit your responses to questions throughout previous chapters to remind yourself of ways that your work may intersect with these elements of Medicaid, and include notes about the links between the topics and the priority need.</i>
Need 3:	<div data-bbox="516 384 812 457"> <input type="checkbox"/> State Plan Amendments  <i>Notes:</i> </div> <div data-bbox="516 546 914 619"> <input type="checkbox"/> Waivers (including HCBS Waivers)  <i>Notes:</i> </div> <div data-bbox="516 707 753 781"> <input type="checkbox"/> Medicaid Eligibility  <i>Notes:</i> </div> <div data-bbox="516 869 774 942"> <input type="checkbox"/> Medicaid Enrollment  <i>Notes:</i> </div> <div data-bbox="516 1031 617 1104"> <input type="checkbox"/> TEFRA  <i>Notes:</i> </div> <div data-bbox="516 1192 703 1266"> <input type="checkbox"/> Health Homes  <i>Notes:</i> </div> <div data-bbox="516 1354 808 1428"> <input type="checkbox"/> Medicaid Managed Care  <i>Notes:</i> </div> <div data-bbox="516 1516 971 1589"> <input type="checkbox"/> Medical Necessity/Prior Authorizations  <i>Notes:</i> </div> <div data-bbox="516 1677 617 1751"> <input type="checkbox"/> EPSDT  <i>Notes:</i> </div>



Need identified from needs assessment	<b>Topic from this workbook</b> <i>Check boxes for topics relevant in your state that relate to the need. Revisit your responses to questions throughout previous chapters to remind yourself of ways that your work may intersect with these elements of Medicaid, and include notes about the links between the topics and the priority need.</i>
Need 4:	<div data-bbox="516 384 812 457"> <input type="checkbox"/> State Plan Amendments  <i>Notes:</i> </div> <div data-bbox="516 548 914 621"> <input type="checkbox"/> Waivers (including HCBS Waivers)  <i>Notes:</i> </div> <div data-bbox="516 709 753 783"> <input type="checkbox"/> Medicaid Eligibility  <i>Notes:</i> </div> <div data-bbox="516 871 774 945"> <input type="checkbox"/> Medicaid Enrollment  <i>Notes:</i> </div> <div data-bbox="516 1033 617 1106"> <input type="checkbox"/> TEFRA  <i>Notes:</i> </div> <div data-bbox="516 1194 703 1268"> <input type="checkbox"/> Health Homes  <i>Notes:</i> </div> <div data-bbox="516 1356 807 1430"> <input type="checkbox"/> Medicaid Managed Care  <i>Notes:</i> </div> <div data-bbox="516 1518 971 1591"> <input type="checkbox"/> Medical Necessity/Prior Authorizations  <i>Notes:</i> </div> <div data-bbox="516 1680 617 1753"> <input type="checkbox"/> EPSDT  <i>Notes:</i> </div>

### Reflection Questions:





What do you notice about the financing topics that the needs of CYSHCN in your state align with? Are they clustered around a few topics or related to completely different topics?

## 3. ASSESS YOUR CAPACITY

Understanding the assets your Title V Program has, what assets you may be able to access by making a change or initiating a relationship, and the challenges your program faces is important for effective strategic planning.

A SWOT analysis is a tool to assess the assets a team can draw on and challenges they may face when pursuing a new strategy or initiative. The acronym SWOT stands for Strengths, Weaknesses, Opportunities, and Threats.





**Figure 2. Elements of a SWOT Analysis**

 <b>STRENGTHS</b>	 <b>WEAKNESSES</b>
Internal factors that support or help a project or team accomplish its goals <sup>120</sup> Examples: <ul style="list-style-type: none"><li>• Team member skills and knowledge</li><li>• Agency supports</li><li>• Effective internal processes</li></ul>	Internal factors that hinder a project or team in accomplishing its goals Examples: <ul style="list-style-type: none"><li>• Gaps in knowledge or skills</li><li>• Inefficient processes</li><li>• Staff turnover</li></ul>
 <b>OPPORTUNITIES</b>	 <b>THREATS</b>
External factors that facilitate a team's work Examples: <ul style="list-style-type: none"><li>• Environmental factors, including the political environment</li><li>• Cross-sector/agency relationships (including those with community-based organizations)</li></ul>	External factors that hinder a team's work Examples: <ul style="list-style-type: none"><li>• Environmental factors, including the political environment</li><li>• Lack of external partnerships</li></ul>





<sup>120</sup> Definitions adapted from:

• Minnesota Department of Health. (n.d.). *SWOT analysis*. <https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/swot.html>  
• Centers for Disease Control and Prevention. (n.d.). *Do a SWOT analysis*. <https://www.cdc.gov/publichealthgateway/phcommunities/resourcekit/evaluate/do-a-swot-analysis.html>

**Figure 3. Sample SWOT Analysis**

Example Need: Increase access to quality care coordination for CYSHCN			
	<b>STRENGTHS</b>		<b>WEAKNESSES</b>
<ul style="list-style-type: none"> <li>• Staff expertise in care coordination best practices</li> <li>• Consensus within the division about care coordination as a priority</li> <li>• Internal data analysis capacity</li> </ul>		<ul style="list-style-type: none"> <li>• Gaps in knowledge of financing for care coordination</li> <li>• Lack of existing workflows that facilitate collaboration</li> </ul>	
	<b>OPPORTUNITIES</b>		<b>THREATS</b>
<ul style="list-style-type: none"> <li>• Existing partnership with state Family to Family Health Information Center to inform strategic planning and ensure care coordination meets families' needs</li> </ul>		<ul style="list-style-type: none"> <li>• Difficulty connecting with MCOs in the state, two of which provide care coordination services to enrolled CYSHCN</li> </ul>	

For at least two of the needs listed in the table in Section 1, complete a SWOT analysis. You may choose to consider needs that you are already working on, or ones that you have not yet developed an activity to address.

Selected Need:			
	<b>STRENGTHS</b>		<b>WEAKNESSES</b>
	<b>OPPORTUNITIES</b>		<b>THREATS</b>

**Seleted Need:**



**STRENGTHS**



**WEAKNESSES**



**OPPORTUNITIES**



**THREATS**

**Reflection Questions:**

What strengths, weaknesses, opportunities, or threats surprised you?

Who are your key partners when doing work to support CYSHCN and their families?

What common threads did you notice in the weaknesses boxes above? What weaknesses do you have the capacity to work to change?

Which need do you have the most strengths at hand to address?

Which need has the largest number of opportunity factors?

Which needs have the most significant weaknesses and threats?

**Having completed the SWOT analyses and considered the questions above, select a priority for CYSHCN that would be most feasible to focus on and write it in the space to the right.**

## 4. IDENTIFY A PRIORITY AND WRITE SMART OBJECTIVES

To move from identifying a priority and the tools you have to address it to developing a road map for addressing the need, this section includes a short tutorial on writing goals and objectives that will help you measure progress in addressing your selected priority.

A goal describes the effect you want your program or initiative to have.<sup>121</sup> Objectives are the “stepping stones” that will lead to that effect.<sup>122</sup> When writing objectives, consider what you want to change, for whom, and in what time frame.<sup>123</sup>



There are two types of objectives:

- Process objectives are the “ingredients” of a program.<sup>124</sup> They describe the services, materials, activities, and/or strategies that you will deliver as part of your program, to whom, and over what time period.<sup>125</sup>
- Outcome objectives describe what you’ll be making with your “ingredients”, that is, the effect you expect from the activities described by your process objectives.<sup>126</sup> Outcome objectives describe “how participants will change as a result of your intervention or services.”<sup>127</sup> They can describe change at different ecological levels and changes that will take place across various timeframes.<sup>128</sup>

No matter what type of objective you have identified, it should be SMART. This acronym stands for:

- Specific—the objective describes the “who,” “what,” “when,” and “where.”<sup>129</sup>
- Measurable—the objective articulates “how much” change will be achieved.<sup>130</sup> Select items that you have, or will have, the ability to actually measure.<sup>131</sup>
- Achievable—the objective is feasible to accomplish given program resources and other constraints.<sup>132</sup>
- Relevant—the objective will help move you toward the desired effect described in your overall goal.<sup>133</sup>
- Time-Bound—the objective includes a specific date by which you will accomplish it, and can be completed in a time frame that is appropriate to the identified need.<sup>134</sup>

<sup>121</sup> Asian & Pacific Islander American Health Forum. (2011, March 31). *Writing SMART goals and objectives* [Video]. YouTube. <https://www.youtube.com/watch?v=MAhs-m6cNzY>

<sup>122</sup> Ibid.

<sup>123</sup> Ibid.

<sup>124</sup> Ibid.

<sup>125</sup> Centers for Disease Control & Prevention, Division of STD Prevention (n.d.). *Developing Program Goals and Measurable Objectives*. <https://www.cdc.gov/std/program/pupestd/developing%20program%20goals%20and%20objectives.pdf>

<sup>126</sup> Ibid.

<sup>127</sup> Asian & Pacific Islander American Health Forum. (2011, March 31). *Writing SMART goals and objectives* [Video]. YouTube. <https://www.youtube.com/watch?v=MAhs-m6cNzY>

<sup>128</sup> Asian & Pacific Islander American Health Forum. (2011, March 31). *Writing SMART goals and objectives* [Video]. YouTube. <https://www.youtube.com/watch?v=MAhs-m6cNzY>

<sup>129</sup> Centers for Disease Control & Prevention, Division of STD Prevention (n.d.). *Developing Program Goals and Measurable Objectives*. <https://www.cdc.gov/std/program/pupestd/developing%20program%20goals%20and%20objectives.pdf>

<sup>130</sup> Ibid.

<sup>131</sup> Asian & Pacific Islander American Health Forum. (2011, March 31). *Writing SMART goals and objectives* [Video]. YouTube. <https://www.youtube.com/watch?v=MAhs-m6cNzY>

<sup>132</sup> Centers for Disease Control & Prevention, Division of STD Prevention (n.d.). *Developing Program Goals and Measurable Objectives*. <https://www.cdc.gov/std/program/pupestd/developing%20program%20goals%20and%20objectives.pdf>

<sup>133</sup> Asian & Pacific Islander American Health Forum. (2011, March 31). *Writing SMART goals and objectives* [Video]. YouTube. <https://www.youtube.com/watch?v=MAhs-m6cNzY>

<sup>134</sup> United States Department of Health and Human Services, Office of Minority Health (2016, November 14). *Using logic models for planning & evaluation*. [Video] YouTube. <https://www.youtube.com/watch?v=I4AKaZb3YB8>



Use the table below to practice writing SMART objectives related to the topic you identified in the previous section.

Priority you identified in the previous section:	
Consider what would need to change in order to improve that priority need. Write the effect that would be required:	
Next, re-phrase that effect as a SMART goal:	
<b>Let's write a first objective.</b>	
What's something you will do to advance your goal?	
Among whom will you do the activity above?	
When will you do this activity?	
<b>Put it all together. Objective 1:</b>	
Objective 1 is:	<input type="checkbox"/> Process Objective <input type="checkbox"/> Outcome Objective
<b>Now make sure it's SMART.</b>	
Is it specific?	<i>For your objective, name the</i>  <i>Who:</i>  <i>What:</i>  <i>When:</i>  <i>Where:</i>
Is it measurable?	<i>How much change do you expect to see?</i>  <i>What data source will you use to measure that change?</i>
Is it achievable?	<i>Is this objective feasible? What strengths or resources will you draw on to accomplish this objective?</i>
Is it relevant?	<i>Describe how your objective helps you move toward the goal identified above.</i>
Is it time-bound?	<i>What's your target end date?</i>

**Time for another one.**

What's something you will do to advance your goal?

Among whom will you do the activity above?

When will you do this activity?

**Put it all together. Objective 2:**

Objective 2 is:

- ☐ Process Objective  
☐ Outcome Objective

**Now make sure it's SMART.**

Is it specific?

*For your objective, name the*

*Who:*

*What:*

*When:*

*Where:*

Is it measurable?

*How much change do you expect to see?*

*What data source will you use to measure that change?*

Is it achievable?

*Is this objective feasible? What strengths or resources will you draw on to accomplish this objective?*

Is it relevant?

*Describe how your objective helps you move toward the goal identified above.*

Is it time-bound?

*What's your target end date?*

**Keep going! Write at least one more objective that will help move towards your goal.**

What's something you will do to advance your goal?

Among whom will you do the activity above?

When will you do this activity?

**Put it all together. Objective 3:**

Objective 3 is:

- ☐ Process Objective  
☐ Outcome Objective

**Now make sure it's SMART.**

Is it specific?

*For your objective, name the*

*Who:*

*What:*

*When:*

*Where:*

Is it measurable?

*How much change do you expect to see?*

*What data source will you use to measure that change?*

Is it achievable?

*Is this objective feasible? What strengths or resources will you draw on to accomplish this objective?*

Is it relevant?

*Describe how your objective helps you move toward the goal identified above.*

Is it time-bound?

*What's your target end date?*

**You're on a roll. Just one more.**

What's something you will do to advance your goal?

Among whom will you do the activity above?

Where will you do this activity?

**Put it all together. Objective 4:**

Objective 4 is:

- ☐ Process Objective  
☐ Outcome Objective

**Now make sure it's SMART.**

Is it specific?

*For your objective, name the*

*Who:*

*What:*

*When:*

*Where:*

Is it measurable?

*How much change do you expect to see?*

*What data source will you use to measure that change?*

Is it achievable?

*Is this objective feasible? What strengths or resources will you draw on to accomplish this objective?*

Is it relevant?

*Describe how your objective helps you move toward the goal identified above.*

Is it time-bound?

*What's your target end date?*

**Two additional dimensions of goals to consider are Inclusivity and Equity (expanding the acronym to SMARTIE goals).<sup>135</sup>**

**Inclusivity:** When you consider the goals you identified above, whose voices informed your thinking? What interested parties would you want to involve in the process of affirming that this is an important goal and implementing programs to work toward this goal?

**Equity:** Consider the goals you identified through the lens of health equity. How would achieving these goals advance health equity for CYSHCN?

Finally, identify the objective that must be met first. What is the first step you can take toward your first objective?

By what date will you complete this first activity?

<sup>135</sup> National Center for Education in Maternal and Child Health. (n.d.). Thinking upstream to plan: “SMARTIE” TA. <https://www.mchevidence.org/about/planning.php>



### **BLOCK GRANT TIP:**

Consider using the objectives that you have written above to inform your state Action Plan Narrative.

## **5. NEXT STEPS**

Thank you for utilizing The Workbook. Title V plays a vital role in the system of services for CYSHCN. By bringing a focus to financing mechanisms within that system, there is great potential for improving it with the help of Title V's expertise, skills, and relationships.

If you have any questions as you move forward in your strategic planning efforts related to financing, please feel free to reach out to us at the Catalyst Center at [cyshcn@bu.edu](mailto:cyshcn@bu.edu).