ORGANIZATIONAL SELF-ASSESSMENT (OSA) TUTORIAL

Conducting the OSA and Utilizing the OSA Action Planning Workbook

1. The Core Implementation Team (CIT) determines how to disseminate the OSA across the organization. The OSA may be printed and completed by hand, or the CIT may transfer the questions into an electronic survey platform to complete online. Additional considerations are listed below:

    a. Decide whether the instrument will be completed by all staff or by a representative sample of staff based on the size of the organization or the focus of the initiative. For example, if the organization is focusing their trauma-informed primary care initiative in one program, only assess that program.

    b. When disseminating the OSA explain what the tool is, its importance to the trauma-informed primary care implementation process, how to complete it, and how the CIT will use the information.

    c. Everyone should have adequate time and space to provide thoughtful responses to the OSA.

        i. Provide 2-3 weeks for staff to complete the tool. During the week after responses are due, check in with supervisors to ensure everyone who planned to complete the tool was able to. Develop a plan to allow for late responses, as needed.

        ii. Allow staff approximately 30 minutes of protected time to complete the tool.

    d. Additionally, ensure the responses are anonymous and provide reassurances that there will be no repercussions for negative responses. The goal of the process is to honestly understand the organization's current status regarding the OSA standards.

2. Once data is collected, the CIT or assigned data team aggregates responses across the organization/program and puts them into the OSA Action Planning Workbook in the tab labeled "OSA."

    a. Enter the aggregate responses in column B "Assessment 1" and label it with the survey time period.

    b. A graphic display of the data will auto-populate on the tab labeled "Results."

    c. The final tab, "Goals Template," provides a list of key indicators based on the OSA results. Use this tab for action planning.

Ensure the responses are anonymous and provide reassurances that there will be no repercussions for negative responses.

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Developing a Plan Based on the OSA Action Planning Workbook

This process helps the CIT create an action plan to address identified gaps between the current organization and the envisioned organization. Instructions for using this workbook to create an action plan:

1. Use the final tab in the OSA Action Planning Workbook ("Goals Template") to guide action planning.
    a. The aggregate score for each Change Concept from the most recent OSA will auto-populate into column E; the cells are highlighted green.
    b. A list of key indicators for each level of the Likert scale are detailed below the aggregate score.
2. Compare the aggregate score in the green cell to the list of indicators under the corresponding level and identify an activity to incorporate into a goal for that Change Concept.
    a. Depending on the resources and capacity of the CIT and the organization, choose 1-2 indicators for the Change Concept with the highest aggregate score. Choose 1-2 indicators for the Change Concept with the lowest aggregate score. Choose 1 additional indicator from another Change Concept.
        i. Focusing CIT energy on no more than 5 indicators helps ensure adequate time and resources to address them.
        ii. Choosing a few indicators from the strongest Change Concept will give the CIT an "easy win," helping spur momentum and maintain morale through the change process.
        iii. Choosing a few indicators from the weakest Change Concept will offer opportunity for the most growth.
3. Using the Action Steps and Implementation Tools in the Trauma-Informed Primary Care Change Package, document components of goals and action steps as follows:
    a. **Column F** – Goal based on the selected indicator(s)
    b. **Column G** – Person(s) responsible for this goal
    c. **Column H** – Status of the goal
    d. **Column I** – Challenges and barriers
    e. **Column J** – Additional notes

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Communicating the OSA Results

Upon completion of the action planning process, the CIT:

1. Creates a communication plan to share the results of the OSA and the planned action steps with those who completed the tool and other stakeholders.
    a. It is not necessary to share all the data from the OSA. However, sharing the aggregate response by Change Concept will reassure those who completed it that their input was valued and meaningfully put to use. Share additional values as appropriate.
    b. Be sure to preserve anonymity when sharing comments.
2. Copies the graphs from the tab labeled "Results" for easy-to-read depictions of the data.
3. Utilizes the Communicating for Buy-In Tool to craft communications sharing the data.
    a. **Stakeholder** – What are the stakeholders' needs, concerns, and wants?
    b. **Message** – What key points will likely align with the needs, concerns, and wants of the stakeholders?
    c. **Messenger** – Who is involved in delivering the message?
    d. **Venue (Time, Place, Duration)** – What venue works best? When is optimal timing? How long is the initial communication?
    e. **Expected Outcome** – How do you know that the message had the desired effect?
    f. **Follow-Up Activities** – What will your follow-up activities entail?