

# 988 Implementation Plan Template User Guide

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## Plan Due Dates

9/30/21	<b>Draft plan due.</b> Submit to your assigned Grant Manager
1/21/22	<b>Final plan due.</b> Submission instructions TBD

## What is the 988 Implementation Plan Template User Guide (User Guide)?

This guide provides instructions and information to help 988 State Planning Grantee planning coalitions complete the **988 Implementation Plan Template** (see separate Word document).

The User Guide:

- Introduces 988 Implementation Planning
- Provides an overview of the Plan Template
- Defines timeframes for Phases 1 and 2 of the plan
- Provides guidance for completing each section of the Plan Template. Details about the eight core 988 planning and implementation areas are covered in another document, **Core Areas Instructions for 988 Implementation Plan Template**.

## About 988 Implementation Planning

The [988 Planning Grant Program](#) was funded by Vibrant Emotional Health (Vibrant), administrators of the National Suicide Prevention Lifeline (Lifeline), in early 2021. Eight-month grants were awarded to state and territory agencies to enable you to work with crisis centers and other key stakeholders in your jurisdiction to plan for the implementation of a new, national, three-digit number for mental health crisis and suicide response (988).

### Importance of State/Territory Support

The National Suicide Prevention Lifeline is not one large national crisis contact center. It is a network of independently operated and independently funded local crisis contact centers. With the transition from 1-800-273-TALK to 988, all states and territories are expected to see a large increase in the volume of Lifeline calls, chats, and texts.

At this critical juncture, state/territory support for Lifeline/988 crisis centers and related services is essential, so that individuals in your states who contact the Lifeline will have their calls, chats, and texts answered quickly by well-trained crisis counselors who use best practices in providing direct support and who can provide linkages to appropriate local services and resources.

We recognize that developments around 988 are dynamic and planning in the context of unknowns can be challenging. We very much appreciate the energy and hard work you are devoting to this planning work. Thank you for your dedication to ensuring that individuals in crisis in your state/territory will have access to the best possible services.

## The 988 Implementation Plan

The 988 Implementation Plan is a key deliverable for the [988 Planning Grant Program](#). Over the course of the grant period, grantee core planning groups and implementation coalitions have been using the Landscape Analysis (LA) along with other data to help guide 988 implementation planning in the eight core 988 planning areas outlined in the [RFA](#). The implementation plan is a written document that distills the results of your planning to date. It provides a clear roadmap for how your state/territory would like to address the eight core areas that are foundational to 988 planning and implementation, both leading up to the nationwide rollout of 988 on July 16, 2022, and in the year following rollout.

## Implementation Plan Materials

There are four components to the implementation plan materials:

- An **Implementation Plan Template** (separate Word document), which provides a structure and format for your plan.
- This **User Guide**, which has instructions for completing the template as well as information and resources about 988 implementation planning to help you complete the plan.
- The **Core Areas Instructions for 988 Implementation Plan Template** (a separate PDF to be provided to you), which provides guidance for completing the eight core area sections of the 988 Implementation Plan Template.
- An excel file entitled **Coverage Area Schedule Worksheet for Core Area 1** that you will complete and submit along with your draft and final plans.

## Tips for Creating Your Plan

### Keep in mind that 988 will continue to evolve

The implementation plan is intended to be a flexible, living document that you continue to work with and update even after the January 21, 2022 due date. It is intended to be a roadmap that guides your efforts through the first year following the national rollout of 988 and beyond. The 988 context is still evolving. You will want to modify plans as more becomes known about areas such as national and state-level marketing of 988, FCC decisions about texting and geolocation, volume increases, technology requirements, the availability of a unified platform, and how Vibrant's training and performance standards evolve over time.

### Certain aspects of your plan reflect a *proposal* to Lifeline

Elements of your plan serve as a proposal to the Lifeline, but the Lifeline and/or SAMHSA will make final determinations about how those proposed suggestions are implemented. Specific aspects of your plan, such as where your state/territory would like 988 calls, chats and texts to be routed, are what you **propose** to the Lifeline. **The final determination of the routing structure will be determined by Vibrant in collaboration with centers, states/territories, and if necessary, SAMHSA.** Vibrant will do their best to work with states/territories so that as many as possible of your proposals are implemented, however there may be resource, routing, expertise, and performance considerations that Vibrant will factor into such decisions. Similarly, states may make proposals about which centers provide follow-up services to 988 calls, chats and texts, but those centers must be Lifeline member centers and Lifeline/SAMHSA will make the final determination on follow-up service designations. Also, if states wish to customize national-level public messaging/marketing materials around 988, please build in steps to consult the Lifeline on these modifications to ensure consistency in public messaging about 988 services and what individuals can expect when contacting 988.

## Create a plan tailored for YOUR state/territory

To prepare the draft plan, your planning group will need to review each of the core areas and determine what steps your state/territory proposes to take over the next two years to make progress. You will want to analyze the current status of your efforts and vet possible action steps using data from the Landscape Analysis, conferring with your Lifeline (and non-Lifeline) crisis centers, getting input from other coalition stakeholders, reviewing the [Community of Practice](#) (CoP) materials, collecting supplemental data as needed. You will want to determine which planning steps are highest priority for immediate action and which have a longer time horizon for planning.

## Create your proposed plan in partnership with your Lifeline centers

It is important to work closely with your Lifeline centers on crafting your plan. As current members of the Lifeline network, they have unique and essential perspectives on call center data and metrics, operations, coverage areas, and more. They are the experts on being part of the Lifeline network and are your essential partners in 988. Their inputs can help ensure that you are accurately interpreting the aims of each core area and that you fully understand the potential pros and cons of various courses of action.

## Use state/territory-specific data and background to guide planning

Fully understanding your state/territory's current crisis centers, services and systems is an important prerequisite for creating an implementation plan that is tailored to your unique situation. The goals and action steps you propose for each area of the plan should be based on available data and other state/territory-specific information. You will be asked to briefly summarize data and other state/territory-specific information that guided your plans.

The data sources listed in the box **Examples of Data Sources** (below) are rich, but do not provide a complete assessment of all crisis services in your state/territory. As you lay out your plan for the next two years, build in appropriate steps to gather additional data, inventory current efforts, obtain additional perspectives, monitor activities, and conduct assessment and use those results for improvement.

## Work in consultation with your coalition members

A key benefit of the 988 Planning Grant Program is the opportunity to bring diverse stakeholders together. Talking through 988 issues with partners helps everyone better understand what is already in place, what is needed, and how 988 fits into a bigger picture. Your coalition has been meeting monthly. Reviewing meeting minutes or notes as you work on the plan can remind you of key insights and perspectives raised by your partners. While completing the plan, continued stakeholder input is critical to build on current efforts, incorporate diverse perspectives, ensure feasibility, generate buy-in and support, and ensure the commitment of key partners in carrying out their roles for plan implementation. Because the 988 environment will continue to evolve even after the number is officially launched, we recommend that you continue to meet regularly with implementation partners and key stakeholders to assess progress, celebrate successes, identify emerging gaps or needed adjustments, and fine-tune your longer-term state/territory strategy accordingly.

## Focus on lived experience and equity

How you structure and deliver crisis services is important. As you plan, continue to consider how to evolve your services towards a vision of a recovery-oriented, health- and equity-focused crisis response system. Continue to engage and center the voices of people with lived experience, peers, communities of color, and other groups who have been historically marginalized. Continue to ask yourselves if you are building in meaningful participation strategies that involve community members in structuring and co-

creating the crisis services and resources they will use. While community engagement is mentioned explicitly in some core areas such as the 988 planning coalition, a focus on lived experience and equity are fundamental planning principles that cut across all eight core areas. These considerations are foundational to all planning and should be interwoven throughout the goals and action steps as appropriate for all core areas.<sup>1</sup>

### **Examples of Data Sources**

- Your state/territory-specific [988 Call Volume and Cost Projection Report](#) outlining the anticipated volume and cost for Year 1 of 988 implementation.
- The data summarized in your Landscape Analysis (LA) report about the current capacity of Lifeline centers in your state/territory and the state/territory reflections you added in Phase 2 of the LA.
- Other Lifeline data:
  - Call Center Monthly Data Reports: data submitted by Lifeline centers to Vibrant by the 12<sup>th</sup> of each month (April through September) and reported back to the main grant contact. The data points include, for example:
    - Lifeline call volume (calls received and answered), answer rates, average handle time and average answer speed
    - Calls by gender, age categories, veteran and military status
    - Calls by caller’s suicide experience: thoughts of suicide currently (past 24 hours) and recently (past two months); past suicide attempts; loss survivor; third-party callers concerned about someone at risk of suicide.
    - Callers at imminent risk for suicide; calls resulting in emergency dispatch; percent of dispatches that were collaborative or involuntary; calls where imminent risk was reduced, and other categories.
    - Changes in center routing, hours, or technology.
  - State Reports: Summary of Centers’ coverage areas, hours, metrics, and volume emailed to state agency main contact and Lifeline center contacts on the 15<sup>th</sup> of each month.
  - Quarterly In-state Answer Rate Reports: most recent quarter posted on Lifeline’s [public website](#).
  - In-state answer rates by county: report forthcoming from your grant manager.
  - You may request certain call volume metrics from Vibrant via this [Data Request form](#).
- Additional data or information that you have gathered about crisis systems and capacity in your state/territory.
- Progress reported in the monthly Grantee Progress Reports that you submitted to your grant manager (especially useful for “progress to date” sections).
- Information about the core areas provided in the CoP, which can be accessed on the [988 Grant Planning Site](#).
  - Minutes or notes from 988 implementation coalition and/or workgroup meetings.
  - Additional input and feedback you solicit from diverse stakeholders during the plan development process, including identifying strengths, gaps, and challenges.

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<sup>1</sup> For more information, see

- [CoP Session 11: Embedding Cultural Sensitivity and Racial Justice into Crisis Contact Center Operations](#)
  - Recording of panel presentation and Notes/Presenters’ Answers to Questions
  - Additional Resource (video): Beyond Cultural Competency: Community Connection
  - Additional Resource (video): Beyond Cultural Competency: Addressing Systemic Racism Through a Crisis Center Lens
- [From Harm to Health: Centering Racial Equity and Lived Experience in Mental Health Crisis Response](#) (The Front End Project, Fountain House)
- See additional resources under Overall Resources.

## Prioritize handling 988 contacts

All crisis services are important, and we want you to be thinking about how you will work with partners over the coming years to ensure comprehensive and coordinated services across the crisis continuum. However, given that readiness for 988 implementation is the focus of this particular planning grant, and call centers are a key entry point for the full crisis continuum, a critical focus for your planning is how the state/territory will initially support the Lifeline crisis call centers that will answer 988 calls, chats, and texts.

## Be ambitious but realistic

Given that the 988 rollout in July 2022 is less than a year away, bold actions are required to prepare. However, when creating your plan, also be as realistic as possible about what you can accomplish and by when. It can be discouraging to consistently fall short of milestones. Balancing boldness with feasibility will provide your coalition with clear wins and enable you to build on that momentum and continue to adjust your plan based on additional 988 guidance and tools that will continue to roll out and evolve during the first year. Also be candid in your plan about the challenges ahead and think now about how you can move ahead despite these challenges. Finally, resist the urge to be overly positive about your current situation. Vibrant and SAMHSA will use the proposed plans that you submit to gauge the readiness of states and territories for 988 implementation and to identify key areas that need additional focus and change. Sharing challenges can help them better anticipate and address needs.

# Two Phases for 988 Planning

## Two Phases for 988 Goals and Action Planning

Because the time leading up to the nationwide rollout of 988 in July 2022 (pre-launch) and the first year after 988 implementation (post-launch) will have different priorities and goals, there are two phases for your implementation plan.

The chart below illustrates the two phases:

### Phase 1: Prelaunch, 10/1/21 - 6/30/22

Phase 1 is the 9-month period from when you submit your draft plan on 9/30/21 until the end of June 2022. From October through January 2022, you will continue to make progress on planning for 988 and reflect those updates in the updated and revised plan you submit on 1/21/22.

### Phase 2: One Year Post-Launch, 7/1/22 - 6/30/23

Phase 2 is the 12-month period that starts in July 2022, the month when 988 will be able to be called from any phone (indicated by the red border). Vibrant and SAMHSA recognize that you will have to make assumptions to create your Phase 2 plan. However, it is valuable to start creating the roadmap for the year after 988 launch, even recognizing that you will need to adjust your plan as you go.

<b>Phase 1: Prelaunch</b> 10/1/21 - 6/30/22 (9 mos)				Oct 2021			Final plan due 1/21					Jun 2022
<b>Phase 2: One Year Post-Launch</b> 7/1/22 - 6/30/23 (12 mos)	Jul 2022											Jun 2023

988 national rollout

## Overview and Key Priorities

### Phase 1: Pre-Launch Phase (Oct 1, 2021 – June 30, 2022)

This is the preparation phase before the 988 number is launched in July 2022. During Phase 1, your agency and planning coalition will want to continue to lay a strong foundation to be as prepared as possible for the 988 launch.

Priorities include collaborating with and supporting your Lifeline member centers to ensure 24/7 statewide/territory-wide coverage for the expected volume of Lifeline/988 calls and some degree of in-state coverage for 988 chats and texts (coverage for 988 chats/texts is important even if your state promotes 741741 -- Crisis Text Line -- and will continue to do so). Securing funding is another priority. The 988 State Volume and Workload Estimates provided by Vibrant Emotional Health in April 2021 provide tangible benchmarks for the resources and funding needed during the first year of 988 implementation.

Planning and preparation for 988 will not be concluded when the grant period ends. During Phase 1, it is critical that states and territories continue to convene external stakeholders to enable ongoing input, planning, and collaboration. Partnerships are key to many of the required actions to prepare for 988, including securing funding, advancing legislation, and planning enhancements to the crisis continuum. It is also critical to center the voices of people lived experience and other historically marginalized populations.

**Your final 988 Implementation Plan is due to Vibrant and SAMHSA during Phase 1, on 1/21/22.**

### Phase 2: One Year Post-Launch (July 1, 2022 – June 30, 2023)

In the first year of 988, you will roll out the messaging planned during Phase 1 and continue to build and evolve crisis center capacity, funding strategies, and service linkages. Continuous monitoring and communication across partners will be needed to assess progress, spot unanticipated roadblocks or challenges early on, and make small or large adjustments to your original approach. Statewide/territory-wide primary coverage and high answer rates for 988 must be maintained and improved when necessary. By June 2023, states/territories also should aim to ensure statewide/territory-wide 24/7 coverage and target answer rates for 988 chats/texts and well as providing full in-state backup coverage.

Your stakeholder coalition is strongly encouraged to continue convening. Collaboration is essential to transform crisis services in a systematic way. Input from key stakeholders will be critical for getting a complete picture of implementation status, as well as helping to make critical adjustments that will improve 988 implementation in contact centers and throughout related crisis services. Continuing to coordinate and refine public messaging about 988 will remain a high priority throughout Phase 2, including collaborating with the Lifeline if your state / territory wishes to customize national-level 988 messaging for specific populations or regions.



# Implementation Plan Template Organization and Instructions

## About the Template

The implementation plan template (see separate Word document) provides a standardized structure and format for your plan, but the content of each state's and territory's plan will be unique based on the current realities in your jurisdiction. Your plan will be shaped by factors such as your current Lifeline and other crisis center capacity, the structure and nature of related crisis services, your history of legislation and funding for crisis services, the planning steps you have accomplished already, and other state/territory-specific assets and challenges.

The template is organized around the eight Core Areas for 988 planning outlined in the [RFA for this grant program](#). The template also includes a section for broader background and context that is relevant to multiple core areas.

## Navigation

The table of contents (TOC) in the **Plan Template** matches the section outline shown on the right. The TOC is clickable. You can jump to any section by holding the CTRL button and clicking on the section. CTRL-click on "Return to Table of Contents" beneath the major headers to navigate back to the TOC.

In the Template, holding the CTRL button plus the letter "F" opens a menu on the left. Clicking on [Headings](#) (under the search bar) displays a list of the eight core areas. Click on any heading to go to that core area.

### **Implementation Plan Template Sections**

- Grantee Agency, Contacts, and Lifeline Centers
- Overall Background and Context
- Core Areas
  - Core Area 1: Statewide 988 Coverage
  - Core Area 2: Funding for Call Centers
  - Core Area 3: Capacity for Target In-State/In-Territory Answer Rates
  - Core Area 5: Lifeline Standards, Requirements, and Performance Metrics
  - Core Area 5: 988 Stakeholder Coalition
  - Core Area 6: Comprehensive Resource Listings; Plan for Expanded Services
  - Core Area 7: Follow-Up Services
  - Core Area 8: Marketing 988

## Plan Template Instructions

### First page header

**988 Implementation Plan for Select a State/Territory**  
**988 Planning Grants**  
**[Click Here to Add Date of this Version](#)**

### **988 Implementation Plan for [Select a State/Territory]**

- Use the drop-down menu to select the name of your state/territory

### **Date of this Version**

- Use the drop-down menu to date each draft.
- The draft plan you submit should be dated 9/30/21.
- Remember to update the date as you revise the draft plan.
- The final plan you submit should be dated 1/21/22.

## Grantee Agency, Contacts, and Lifeline Centers

**Grantee Agency, Contacts, and Lifeline Centers**

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Grantee:

988 Grant Primary Contact

Backup 988 Grant Contact

List the Key Grant Staff

- 

Number of Current Lifeline Centers in the State/Territory

- Active:
- Onboarding (in the application process):

Any changes in Lifeline centers? (Yes or no - see instructions in User Guide)

- If yes, please explain:

**Grantee:**

- Insert the name of the state/territory agency that was awarded the 988 planning grant.

**988 Grant Primary Contact:** ,

- Insert the name and email address of the primary contact person for the 988 grant. This person will be contacted if questions arise about the plan and will receive feedback on the draft plan.

**Backup 988 Grant Contact:** ,

- Insert the name and email address of a second contact associated with your 988 grant. This person will be copied on the plan feedback as a backup in case the primary contact has changed.

**List the Key Grant Staff**

- Copy the list from your most recent monthly report

**Number of Current Lifeline Centers in the State/Territory**

- **Active:**  of active Lifeline centers at the time of the plan.
- **Onboarding (in the application process):**  of centers that are somewhere in the application process but not yet taking Lifeline calls/chats/texts at the time of the plan.

**Any changes in Lifeline centers? (Yes or no)**

- In the **Draft plan:** A **Yes** answer would indicate changes in the number of Centers or which Centers are serving your state/territory **since the grant started.**
- In the **Final plan:** A **Yes** answer would indicate changes in the number of Centers or which Centers are serving your state/territory **since the draft plan.**
- If **yes** to “**any changes,**” describe the changes (i.e., how many centers have become active, have entered the application process, or are no longer part of the Lifeline network). Provide the name(s) of the centers and any other relevant information.

### **Changes in Centers Example**

*“We had five active Lifeline centers at the beginning of the grant. One of those centers (Petunia Center, in the northern part of the state) decided not to continue as part of the Lifeline network, however, another crisis center (Sunflower Center, in the southeast) is now in the onboarding process and hopes to become active by Feb 2022. Once all are active, we will have the same number of centers but better regional distribution.”*

## Overall Background and Context

### Overall Background and Context

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Insert your state/territory-specific summary of background information and context relevant to **multiple core areas of 988 Implementation**. See the User Guide for instructions.

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**Top state/territory priorities for change to prepare for 988 rollout in July 2022**

Priority #1: Insert priority 1

Priority #2: Insert priority 2

*[Add additional priorities as needed]*

This section of the Implementation Plan Template enables you to provide overall state/territory background and context that is **relevant to multiple areas of 988 planning**. This overview will be a helpful shared point of reference for the planning group when referring back to the plan and will also provide critical context for Lifeline and SAMHSA experts when they review your draft and final plans. There is no page limit but be selective and succinct (approximately 1-2 pages).

You may choose to include information such as:

- Additional information about the current Lifeline crisis centers in your state/territory (beyond the number and changes noted above), including whether the state/territory agency funds, operates and/or licenses them.
- A brief description of NON-Lifeline crisis centers in your state/territory (if any) and their capacity.
- A brief overview of other state/territory crisis services and systems.
- A brief list of current funding sources for Lifeline centers and/or other crisis services (you will provide details about funding in Core Area 2).
- Any major crisis services initiatives efforts underway that affect multiple core areas.
- Key statewide/territory-wide gaps or challenges for overall 988 implementation.
- Other broad statewide/territory-wide highlights from your Landscape Analysis that are pertinent to your overall plan.
- Other background you judge to be important and that cuts across Core Areas.

See the Examples of Data Sources on page 4. One potential source for relevant overall background is your grant proposal (Section A: Progress to Date and Section B: Proposed Approach for 9-8-8 Service Preparation and Buildup), where you briefly described the following:

- Your state/territory suicide prevention program/plan related to mental health crisis services, crisis hotlines, mobile crisis response teams and crisis stabilization units and other community-based crisis receiving facilities (all that apply). Specifically note if coordination with Lifeline crisis contact centers is a formal part of your state suicide prevention plan.
- Relevant services noted in the previous bullet point which your state/territory funds, operates and/or licenses - including state and county crisis hotline(s) and other crisis contact services outside of the current Lifeline network which may have an impact on the implementation of 988.

Only insert information from your grant proposal if it helps to provide context for someone reading your implementation plan.

## Top Priorities for Change

At the end of the Overall Background and Context section, identify your state/territory Phase 1 priorities for change that are most critical in preparing for 988 implementation. You may add slots for additional priorities but try to keep these to a list of 5 or fewer.

The priorities in this section should be broad state- or territory-level priorities that reflect the findings from your Landscape Analysis as well as any other key information around the highest needs for 988 preparation. Priorities should be at a high level and indicate what is most urgent to address, move forward, or figure out prior to rollout. For example:

- Our top priority between now and July 2022 is building the capacity of Lifeline centers to handle increased contacts.
- Key question to resolve: How can we leverage the capacity of our state-level/211 crisis centers in answering Lifeline/988 contacts? What will happen with our state-level crisis services under 988?
- Our most time-sensitive priority is finalizing legislation to be introduced in the next session.
- An urgent priority for this fall is exploring the full range of funding options to support 988-related services and prioritizing our focus based on how quickly the funds could become available.

## Core Areas

The planning template follows the same format for each of the 8 Core Areas.

<p><b>Core Area 1: Ensure Statewide 24/7 Coverage for 988 Calls, Chats, and Texts</b></p> <p style="text-align: center;"><a href="#" style="color: white; text-decoration: none;">Return to Table of Contents</a></p>	<p>Core Area Header (blue banner)</p>
<p><b>Background: Current Situation, Gaps, Progress, and Proposed Approach: Statewide Coverage for 988 Contacts</b></p> <p>Insert a summary of data and background information relevant to your Statewide Coverage for 988 Contacts here that serves a rationale for your Core Area 1 goals and action steps. <b>Please see User Guide for instructions and required content.</b></p>	<p>Background specific to <a href="#" style="color: red; text-decoration: underline;">this core area</a></p>

### *Background: Current Situation, Gaps, Progress, and Proposed Approach*

For each Core Area, include a brief state/territory-specific summary of data and background information that describes the status of **that specific core area**. For most of the Core Areas, there is **required data or background information** that you must include in your plan. See the description of each Core Area in the **Core Areas Instructions for 988 Implementation Plan Template** PDF (which will be provided to you) for required information.

At the end of the background section, outline your *overall approach to this core area in each phase* based on the data and background information summarized above. This should be a brief (2-3 sentence)

overview of your state’s or territory’s approach for the Core Area in this phase, based on your state’s/territory’s current or anticipated situation, needs, and priorities. This Proposed Approach will form the basis of your Goals and Action Steps.

## Goals

### About goals

- You will likely have multiple goals for each core area.
- Goals can reflect a direction your state or territory would like to go, completion of a planning stage, creation of a written plan for the next phases of work, a change that you will have implemented, a measurable outcome, or any other tangible milestone or achievement. Goals should be something measurable or observable that will allow you to verify whether or not it was achieved by the stated date.
- The goals in your plan can line up with specific benchmarks provided by Vibrant, or you can include multiple goals that will collectively result in reaching that benchmark over time.
- Your goals can be sequential, reflecting stages of the work (for example, you might have one goal that covers Oct 2021-Jan 2022, and a second goal covers Feb-June 2022). Goals also can reflect different facets of the work. For example, for Core Area 7 (Follow-up calls), you may have one goal oriented around conducting a fuller assessment of current follow-up activities and capacity and a separate goal in the same timeframe related to identifying funding for follow-up services.
- In determining goals, consider how your work in each core area will unfold between Oct 1, 2021, and June 30, 2023. Where are you now, what has to be done, and how will the work proceed? Setting goals is mapping out your route(s) towards the final destination by planting signposts in the ground that mark where you will have reached and by when. In contrast, action steps map out the concrete actions you will take to get to each signpost or achievement.

Reminder: The summary of state/territory data and information provided in the section of that Core Area should provide a clear rationale for the goals and action steps in your plan.

### PHASE 1: ORANGE BANNER

Under this heading in each Core Area, you will create goals and action steps for **Phase 1**, listing the personnel and partners who will work on each goal and its associated action steps.

Core Area 1: Statewide Coverage for 988 Contacts			
Phase 1 Goals and Action Steps: Pre-Launch (Oct 1, 2021 – June 30, 2022)			
Goal 1.1a: By X time in Phase 1, we will have accomplished Y.			
Personnel/Partners: List key personnel and partners who will be involved in achieving/reaching this goal.			
Goal 1.1a Action Steps			
Action Steps	Start Date	Due Date	Lead and Partners
			Lead: Partners:
			Lead: Partners:
			Lead: Partners:
[Add rows as needed]			Lead: Partners:

**Outline**  
**Goal**

- Personnel/Partners for this goal
- Action Steps for this goal

Any time you add a Goal, you must also add Personnel/Partners and Action Steps for that goal. Also complete the rating scale for each goal (under the action steps).

### Under the action steps grid, complete the rating scale for each goal:

Please rate how certain or uncertain you are that you can accomplish this goal by the deadline you have indicated by clicking on one of the boxes below.

Not at all certain – Somewhat certain – Moderately certain – Very certain – Completely certain

## PHASE 2: PURPLE BANNER

Under this heading in each Core Area, you will create goals and action steps for **Phase 2**, listing the personnel and partners who will work on these goals and action steps.

Core Area 1: Statewide Coverage for 988 Contacts			
Phase 2 Goals and Action Steps: One Year Post-Launch (July 1, 2022 – June 30, 2023)			
Goal 1.2a: By X time in Phase 2, we will have accomplished Y.			
Personnel/Partners: List key personnel and partners who will be involved in achieving/reaching this goal.			
Goal 1.2a Action Steps			
Action Steps	Start Date	Due Date	Lead and Partners
			Lead: Partners:
			Lead: Partners:
			Lead: Partners:
[Add rows as needed]			Lead: Partners:

Under each Core Area, the planning group is asked to identify **any number** of Goals for each Phase. Phase 1 has space for two Goals in the template, but you can add more as needed.

### Format for goals

Your **Goals** should reflect a milestone or accomplishment you **will have achieved** by a specific time. The format is “By X time in Phase 1 (or Phase 2), we will have accomplished Y.”

#### Goal Examples

Let us say your state/territory does not currently have any centers that cover chat/text. A process is already underway to determine your proposed plan for providing statewide/24/7 chat/text coverage.

For Core Area 1 (statewide 24/7 coverage), one option for a Phase 1 goal is to use the milestone provided by Vibrant (see the separate “Core Areas Instructions” document):

*By 6/30/22, we will have achieved coverage for Lifeline/988 chat/text provided by in-state/territory Lifeline member center(s) sufficient to handle at least 50% of Y1 988 chat/text projections.*

However, you may also want to break up that large Phase 1 goal into sequential goals, especially if different stakeholders will be involved. For example, you might create one goal (1.1a) setting a deadline partway through Phase 1 for when you’ll have determined your recommendations for which centers will provide chat/text services and their hours/days of coverage. And then create a second goal (1.1b) stating that by 6/30/22, you’ll have supported the centers (once approved by Vibrant) to build their capacity to answer 50% of Y1 chat/text projected volume.

**If you add goals, number the new goals in sequence.** Goal numbers represent Core Area, Phase, and Goal. For example:

- Goal 1.1c is Core Area 1, Phase 1, Goal c
- Goal 6.2b is Core Area 6, Phase 2, Goal b

### Key Personnel and Partners

Under each Goal, list key personnel and partners (agencies, organizations, and individuals) who will be involved in carrying out this specific goal.

- Name specific individuals/roles where possible, so that you can clearly identify responsibilities in your plan’s Action Steps. For example, instead of saying “Department of Mental Health,” name the

specific person/title who will be involved (e.g., Jack Smith, Dir. Adult Crisis Services, DMH). You will draw from this list to fill in the “Lead and Partners” column for each Action Step listed in the table.

- List initials as well as names under Key Personnel and Partners so you can use the initials in to indicate the Lead and Partners in the table.

### How to identify personnel and partners for the goal

- Engage whichever stakeholders are most appropriate for the goal. For some goals, a small workgroup will be appropriate to fully understand the issues, explore possible solutions, and make recommendations. In these cases, be sure to build in steps for consultation and input from the broader group, including people with lived experience, communities of color, and other key populations.
- For core areas/goals that directly impact crisis contact centers, we strongly recommend that the personnel/partners include at least one Lifeline center representative. Current member centers have first-hand experience operating as part of the Lifeline network and can provide valuable context and information, center operations, metrics, and the potential impacts of certain decisions.
- It may make sense to engage new stakeholders in the coalition and/or workgroups as planning proceeds. Some of the core areas require a technical understanding of the Lifeline and upcoming changes related to 988, so be sure to orient and educate new stakeholders about the relevant issues so they can participate fully.

### Action steps

List the specific Action Steps your state/territory will need to take to achieve each Goal. Action Steps should identify the key, high-level actions needed to get to your Goal, without going too in-depth on detailed tasks. If Goals are the signposts that mark concrete achievements you will have made by certain times, action steps are the steppingstones to each signpost.

#### **Action Step Examples**

Action steps reflect what you’ll actually do. Examples of action steps might be things like:

- Expand chat/text workgroup to include additional people with lived experience and representatives from groups more likely to use chat/text (Deaf/Hard of Hearing community, youth).
- Solicit Lifeline center data and input on capacity for chat, their recommendations for providing statewide chat/text coverage, and their interest in providing chat/text services.
- Inventory non-Life chat/text capacity in state and assess feasibility of non-Lifeline centers providing Lifeline chat/text.
- Estimate costs for providing chat/text services and communicate funding needs to partners working on Core Area 2, Funding.

You can add additional rows to the table if more Action Steps are needed for a particular Goal. Include a start date for each Action Step and when it should be completed. Pay attention to the *sequence* of Action Steps: what steps must you complete first to carry out later steps. Draw from the list of personnel and partners for the Core Area to identify the lead and partners who will carry out each Action Step.

As you consider possible action steps, consider these questions:

- What additional data, if any, do we need at each phase to inform our proposed goals and action steps?

- At what points are we seeking and listening to input from key constituencies such as people with lived experience, people of color, LGBTQ individuals, people with disabilities, and other key populations in our state/territory who can help us create trauma-informed and just crisis services?
- What relationship-building and consultation do we need to build into our action steps?
- Do we need to put agreements in place to accomplish our aims? If needed, how much time will it take to institute formalized in MOUs or similar mechanisms?
- What funding is needed for this core area, and what steps do need to take to explore options for securing the funding in a sustainable way?
- What steps are needed to build in monitoring and assessment of the 988 services we support?
- How can we create a supportive process that facilitates identifying challenges and supporting service providers in solving them?

## Revising the Draft Plan to Create the Final Plan

Although the January 21, 2022 draft is called a “final plan,” as noted above under “Tips for Creating Your Plan” (on page 2) the implementation plan is a proposed plan that SAMHSA and Vibrant will provide feedback on. After feedback is incorporated, it is intended to serve as a flexible, living document that you will continue to work with and update to help guide your efforts through the first year following the national rollout of 988 and beyond.

### Review feedback on draft plans

- The draft plans you submit by September 30, 2021, *will* be reviewed by Vibrant Emotional Health and *may* be reviewed by SAMHSA personnel.
- You can expect to receive some type of feedback on the plans. The feedback may consist of overall guidance to all grantees on improving the plans, individualized feedback on your state/territory draft plan, or both. Vibrant will provide more specifics about the review process and timing for feedback.

### Revise your plan

- Your 988 coalition will continue your planning and preparation for 988 implementation throughout the fall of 2021, following the goals and action steps outlined in your plan.
- Your final plan is due to Vibrant and SAMHSA 1/21/22.
- To revise your draft plan:
  - Revise the Overall Background and Context section to include any updated or new data or background information you have obtained. Describe any progress you have made since finalizing the draft plan that applies to multiple core areas.
  - Specific prompts are provided under each core area, but in general:
    - Review the description of the Core Area below and note any requirements/milestones and required background information specific to Phase 2.
    - Review and update the Background you provided in your draft plan for that Core Area, including updating the requested background information, describing progress specific to that core area since completing the draft, and revising the proposed approach.
    - Review and update each goal, personnel/partners for that goal, and associated action steps. If a goal in the draft plan was partially achieved, note progress in the background and revise the goal/personnel/action steps to reflect the next phase. If a goal in the draft plan has been fully achieved, note that in the background section and add new goals/action steps in the final plan to reflect your roadmap for progress going forward.



## Submit your final revised plan by January 21, 2022

- Submission instructions TBD.

## Resources

### National Suicide Prevention Lifeline: Brief Terminology Guide

- Posted under “General Tools and Additional Resources” on the [988 Grant Planning Site](#)
- The terminology guide is designed to be used alongside other documents, such as the [Lifeline Metrics Paper](#) and Lifeline’s clinical resources

### About 988 and the Lifeline

- [CoP Session 1 \(3 videos\): 988 Introduction, History & Grant Activities](#)
- [988 Planning Grants](#) page: Vibrant website
- [Lifeline Network](#) page: Vibrant website
- [Best Practices](#) page: Vibrant website

### Volume and Cost Resources

- [CoP Session 2 \(3 videos\): 988 Demand Projections & Core Tenets](#)
  - Video and slides: 988 Market Analysis, National Demand Projections, and State Volume Forecasts
  - Video and Slides: Vibrant Emotional Health’s Creating the Future Themes and Tenets for 988
- [CoP Session 8: Cost Models](#)

### Overall Crisis Services Links

- [Crisis Services: Meeting Needs, Saving Lives](#) (SAMHSA)
- [National Guidelines for Behavioral Health Crisis Care: Best Practice Toolkit Executive Summary](#) (SAMHSA)
- [Crisis Now: Transforming Crisis Services](#)
- [Building State Capacity to Address Behavioral Health Needs Through Crisis Services and Early Intervention](#) (Milbank Memorial Fund Issue Brief, November 2020)

### Cultural Sensitivity, Racial Justice, and Lived Experience

- [CoP Session 11: Embedding Cultural Sensitivity and Racial Justice](#)
  - Webinar, plus Notes and Presenter’s Answers to Questions: Embedding Cultural Sensitivity and Racial Justice into Crisis Contact Center Operations
  - Videos: Beyond Cultural Competency
    - Community Connection
    - Addressing Systemic Racism Through a Crisis Center Lens
- [From Harm to Health: Centering Racial Equity and Lived Experience in Mental Health Crisis Response](#) (The Front End Project, Fountain House)
- [Humannovations: Exploring the Global Mental Health Revolution](#) Resources focused on lived experience leadership, peer support, and social justice and trauma-informed systems change.
- Additional Resources Specific to Lived Experience and Peer Support
  - [Crisis Now Summit: Caring Is the Underpinning for Any Crisis Care System to Be Successful](#)

- [Be the Change: Ensuring an Effective Response to All in Psychiatric Emergency Equal to Medical Care](#) (October 2018). See especially “Recommendation 6: Users, peers and carers should be embedded in the design, leadership and delivery of crisis systems – co-production; peer support staff should be trained and integrated in crisis service delivery.”
- [Engaging People with Lived Experience: Brief Overview](#) (Suicide Prevention Resource Center)
- [Engaging People with Lived Experience: A Toolkit for Organizations](#) How-to, resources, tools (Suicide Prevention Resource Center)