

SUD Organizational Development Assessment (SODA) Scoring & Planning Tool

Date

Agency

Participant(s)

Title(s)

Instructions

This *Scoring & Planning Tool* is intended to be used after the *Organizational Assessment* has been completed and scored. At this stage, the goal is to provide your organization with a tool to guide conversations and create a plan to address quality improvement initiatives.

Please see the *Implementation Guide* for detailed, step-by-step instructions on how to complete this process, as well as a sample completed *Scoring & Planning Tool* that illustrates how it can provide the framework for organizational planning. In brief, the steps include:

- 1. Record the practice area scores** under each Domain to create category average and category total scores. These scores will be calculated within the worksheet.
- 2. Reflect as a team** on specific examples or illustrations to justify the score. Record these under Strengths and Opportunities for Investment.
- 3. Analyze opportunities for investment** and record potential activities in the Recommendations area.
- 4. Crosswalk the relationships** between potential activities and note these in the Dependencies area.
- 5. Reference quality improvement resources** for each domain, as needed, and record in the Resources & Toolkits area.
- 6. Create a draft organizational plan** by sequencing the recommendations in the Next Steps section on the final page.

DOMAIN 1

Organizational Leadership and Infrastructure

Practice area	Score	Strengths
---------------	-------	-----------

- | | | |
|---|--|--|
| 1. Leadership | | |
| 2. Strategic Business Planning | | |
| 3. Key Performance Indicators (KPI) Measurement | | |
| 4. Electronic Medical Records | | |
| 5. Service Accessibility | | |
| 6. Policies and Procedures | | |
| 7. Licensing and Regulatory Requirements | | |

Category Average

Category Total Score

Opportunities for Investment

Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

- | | |
|--|---|
| 1. Leadership
National Council on Mental Wellbeing Workforce Solutions Community Tool Box | 5. Service Accessibility
Emerging Strategies to Ensure Access to Care |
| 2. Strategic Business Planning
U.S. Small Business Administration Business Plan Guide | 6. Policies and Procedures
Policy and Procedure Review Tool |
| 3. Outcomes Measurement
Behavioral Health Clinical Quality Measures Tool | 7. Licensing and Regulatory Requirements
Behavioral Health Agency (BHA) License Requirements
Community Behavioral Health Agency Tool kit - Recovery Housing and FCS |
| 4. Electronic Medical Records
SAMHSA Electronic Health Record Adoption | |

DOMAIN 2

Finances

Practice area

Score

Strengths

1. Insurance - Public
2. Insurance - Private
3. Reliance on One-Time or Limited Grant Funding
4. Fiscal Management Practices
5. Overall Financial Position

Category Average

Category Total Score

Opportunities for Investment

Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

1. Insurance - Public
[HCA Provider One Billing and Resource Guide](#)
2. Insurance - Private
[AMA Payor Contracting Resources](#)
3. Reliance on One-Time or Limited Grant Funding
[Developing a Plan for Financial Sustainability](#)
4. Fiscal Management Practices
[National Council of Nonprofits - Financial Management Resources](#)
5. Overall Financial Position
[SCORE Cash Reserve Guidelines](#)

DOMAIN 3

Workforce Organizational Readiness

Practice area	Score	Strengths
---------------	-------	-----------

- | | | |
|---|--|--|
| 1. Workplace Culture | | |
| 2. Organizational Support for Staff Diversity | | |
| 3. Compensation | | |
| 4. Staff Development | | |
| 5. Staff Retention | | |

Category Average

Category Total Score

Opportunities for Investment

Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

- | | |
|---|--|
| 1. Workplace Culture
Key Strategies for Strengthening the Behavioral Health Workforce | 4. Staff Development
Recruitment and Retention Tool kit for Behavioral Health Organizations |
| 2. Organizational Support for Staff Diversity
Promote Inclusive Recruitment Practices | 5. Staff Retention
Recruitment and Retention Tool kit for Behavioral Health Organizations |
| 3. Compensation
Washington State OFM Salary Schedules
King County Nonprofit Wage & Benefits Survey Report | |

DOMAIN 4

Clinical Staff Growth and Development

Practice area

Score

Strengths

1. Training
2. Care Team Composition and Qualifications
3. Clinical Supervision and Quality Oversight
4. Workforce Development

Category Average

Category Total Score






Opportunities for Investment

Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

- | | |
|---|--|
| 1. Training
Advancing Person-Centered Care in SUD Settings  | 3. Clinical Supervision and Quality Oversight
Clinical Supervision and Professional Development of SUD Counselors  |
| 2. Care Team Composition and Qualifications
Care Teams and Workforce Guide  | 4. Workforce Development
Addictions, Drug, and Alcohol Institute Trainings 
Workforce Expansion Guide  |

DOMAIN 5

Clinical Services and Quality Management

Practice area

Score

Strengths

1. Attentiveness to Individual and Population-Specific Needs
2. Comprehensive Screening
3. Evidence-Based Practices and Promising Practices
4. Client Outcome Measurement

Category Average

Category Total Score



Opportunities for Investment



Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

1. Attentiveness to Individual and Population-Specific Needs
[What is Patient-Centered Care?](#) 
2. Comprehensive Screening
[ASAM Criteria Intake Assessment Interview Guide](#) 

3. Evidence-Based Practices and Promising Practices
[Evidence-Based Practices Resource Center](#) 
4. Client Outcome Measurement
[Person-Centered Outcome Measures](#) 

DOMAIN 6

Ability to Address Whole-Person Health

Practice area

Score

Strengths

1. Care Coordination Procedures
2. Referral Networks
3. Partnerships
4. MAT Supports

Category Average

Category Total Score



Opportunities for Investment



Recommendations

Dependencies

Resources & Toolkits

Quality Improvement Resources

1. Care Coordination Procedures
[Sharing SUD Information - A Guide for Washington State](#) 
2. Referral Networks
[Referrals and Care Coordination](#) 

3. Partnerships
[Partnership Assessment Tool](#) 
4. MAT Supports
[Bringing Together Health Professionals - MOUD](#) 

Key Next Steps

Please use this area to prioritize and sequence the activities identified throughout this tool. The result serves as a preliminary plan for quality improvement initiatives.