



# NATIONAL SUPPORT BUREAU

## LEAD CHECKLIST

The following is a simple guideline to help planning for a LEAD® initiative in your jurisdiction. This serves as a checklist of steps that should be taken as the process develops from an exploratory phase, to the implementation phase, to the operational phase.

### Exploratory Phase

In the exploratory phase, key sectors in a jurisdiction have heard about LEAD and want more information prior to engaging other partners. This is a time when broad stakeholder outreach has not been done and specific agency/agencies want to know more about LEAD.

- ✓ Read and review LEAD fact sheets
- ✓ Read and review process and outcome evaluations
- ✓ Contact the LEAD National Support Bureau for an initial consultation

### Implementation

The implementation phase involves gathering support, planning operations, identifying gaps and resources, and adopting protocols and procedures. It is at this point that key stakeholders provide official support and dedicate resources to develop and implement a LEAD initiative. This is the longest phase that requires considerable dedication from high level personnel in each agency and operational guidance from mid- and line-level staff.

- ✓ Conduct broad stakeholder outreach
- ✓ Create a Policy Coordination Group (PCG)
- ✓ Develop Community Leadership Team (CLT)
- ✓ Develop a Memorandum of Understanding
- ✓ Develop a budget
- ✓ Identify funding sources
- ✓ Hire or appoint a program manager
- ✓ Identify potential service coordinators
- ✓ Develop and issue requests for proposals for service provider
- ✓ Create & identify members of an Operational Work Group
- ✓ Develop media protocols and plan
- ✓ Identify geographic boundaries

- ✓ Develop & approve protocols and procedures
- ✓ Conduct training (harm reduction & protocols)
- ✓ Conduct community/business outreach
- ✓ Develop plan for soft and hard roll out
- ✓ Identify research partner and develop plans for process and outcome evaluations

### Operational Phase

In the operational phase, officers start diverting arrests, case managers begin to work with participants, the social contact referral process is explored, and dedicated prosecutors begin to track and manage participants' other justice system involvement. This phase requires continual oversight from the Program Manager to ensure protocols are working and participants are getting the desired level of support. Data should be reviewed and evaluated to ensure the goals LEAD are upheld. Policies and protocols should be evaluated and changed based upon goals, objectives, and ease of management.

- ✓ Start diversions & social contact referrals
- ✓ Hold regular Operational Work Group (OWG) meetings
- ✓ OWG, CLT, and members of the PCG provide feedback/give input to Program Manager
- ✓ Continually evaluate protocols & procedures
- ✓ Continually evaluate data
- ✓ Periodically report data and status of efforts to the public

*This document was developed by the LEAD National Support Bureau, The Public Defender's Association, and The Katal Center for Health, Equity, and Justice.*

*The LEAD National Support Bureau provides technical support for jurisdictions nationally that are exploring or implementing LEAD, and hosts learning collaboratives where the insights and lessons learned in this family of reform initiatives can be shared peer to peer among jurisdictions.*

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