



# Overdose Fatality Review: Project Management Tool Instructions

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## Overdose Fatality Review—Project Management Tool

### Overview

Overdose fatality review (OFR) is a convening of multidisciplinary teams to review a decedent’s history and facilitate deeper understanding of missed opportunities for prevention and intervention that may have prevented an overdose death.

The timeline for implementing an overdose fatality review depends on several factors, including the availability of staff members and other resources to support planning and implementation, as well as state legislation supporting OFRs.

The template provides a simple way to create a project management Gantt chart to help visualize and track implementation of an overdose fatality review. This tool will help you map out a realistic time frame for implementing your OFR and assist your team with working together to complete tasks within the timeline expected. The tool will be most helpful for planning and initiating your first OFR but can be maintained for ongoing OFR implementation.

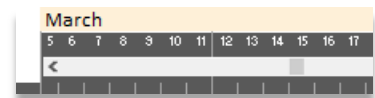
### Navigating the Tool

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
		Task/ Milestone Description	OFR Guide	Assigned To	Comments	Progress	Start	No. Days		M	T	W	T	F	S	S
		<b>OFR Orientation</b>														
		Review Module 1: OFR Member Recruitment	pp. 4-12	Facilitator, Coordinator	Also review interactive COSSAP OFR website with sample materials.	100%	1/4/2021	1								
		Review Module 2: Planning OFR Meetings	pp. 13-18	Facilitator, Coordinator	Also review interactive COSSAP OFR website with sample materials.	100%	1/5/2021	1								
		Review Module 3: Facilitating OFR Meetings	pp. 19-27	Facilitator, Coordinator	Also review interactive COSSAP OFR website with sample materials.	100%	1/6/2021	1								
		Review Module 4: Collecting Data	pp. 28-31	Facilitator, Coordinator, Data Manager	Also review interactive COSSAP OFR website with sample materials.	0%	1/8/2021	1								

**Typical tasks** are already listed for you in Column C, with a page reference to *Overdose Fatality Review: A Practitioner’s Guide to Implementation* where applicable in column D. Tasks are categorized in four phases: orientation to OFR, initial planning, meeting preparation, and meeting and follow-up. OFR resources that are typically involved in each task are listed as “assigned to” the task in column F.

The example in the template starts in January 2021, so the dates flow from this **time frame** in column H. Each task is given a realistic target number of days in column I. The sample has suggested days based on an example implementation. Some tasks happen in sequence, while others can progress simultaneously.

The **calendar** starting at column K will show a gray bar that corresponds to the date and time span for the task from columns H and I. You can use the scroll bar in line 6 to move forward and backward in the calendar. You can also change the number in cell H5 to jump to a specific day in the project timeline (e.g., if you want to view the calendar for the second month of implementation, you can enter 60 in the Day column).



	G	H	I
	Project Start Date:		1/4/2021
	Show schedule starting at Day		60

Your OFR team can use column G to **track progress** on tasks by entering estimated percent completion. For example, if you have recruited 10 of the 20 anticipated OFR members, you can enter 50 percent for that task to show that it is halfway complete.

## Using the Tool for Your OFR Implementation

It is recommended that you have a session in which your OFR team works together to update the project management template.

1. **Background:** Enter your county name in cell B2 and the names of staff members serving in project coordinator, facilitator, and data manager roles in cells D3-D5.
2. **Project start date:** In cell G3, enter the date that you begin the activities to plan for an overdose fatality review (not the date you aim to hold your first meeting). You will notice that some of the task dates in column H will automatically adjust based on your project start date.
3. **Tasks:** Review the list of tasks in Column C. Do you need to add anything, such as seeking approval from county council? Insert new tasks by inserting additional rows where needed. Or is it already complete, like securing the REDCap database? Enter 100 percent in the progress column. Is a task not relevant? Delete the line.
4. **Assigned to:** When you have identified the OFR staff resources, you can replace the role names “Facilitator,” “Coordinator,” and “Data Manager” in column E with their names and add others as needed.
5. **Comments:** You can use column F to make notes about considerations you do not want to forget.
6. **Timeline:** Go through each task and consider whether you need to adapt the dates in column H. Will it take you longer to have legal staff members review data sharing and confidentiality statements? You can change the number days in column I.
  - Working backward: Some OFRs may be working toward a target implementation date based on grant requirements or other directives. You can enter the target date in cell H38 for the “hold meeting” task. Some dates in the schedule will auto-update (e.g., selecting cases two months prior.) You can work backward from that date to adjust the dates and time spans; however, if you realize the time frame will not be realistic, you may need to push out your start date.

**Overdose Fatality Review**

EXAMPLE County

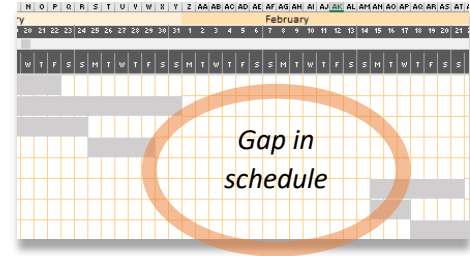
Project Coordinator:  
Facilitator:  
Data Manager:

Project Start Date:

	A	C	D	E	F	G	H	I
37		Meeting and Follow-Up						
38		Hold meeting	p. 19-27	Facilitator	Coordinator typically takes notes		5/5/2021	1

- Working forward: Your team may be starting with no end date in mind. In this case, work down the schedule to consider whether the timing of each task fits your local context or needs to be adjusted.

7. Check your work: When you have finished updating the template, use the scroll bar in line 6 to review the timeline. You may notice errors, like large gaps in the schedule or tasks that have gotten out of sequence. You can correct this by adjusting the dates in column H.



8. Share your work: Once your schedule flows smoothly, if your OFR team has worked together to complete the template, then the final product should represent an agreed-upon timeline for implementation. You should share this template with other stakeholders, perhaps with your governing committee, so that everyone has shared expectations for the timeline.

Your team may find it helpful to touch base weekly to update progress and reviewing upcoming tasks and deadlines. If you have gotten behind, you can adjust the schedule if needed to move out your expected first meeting date.

More resources on OFR implementation are available at the COSSAP OFR website:

<https://www.cossapresources.org/Tools/OFR>

For additional support on this and other OFR resources, complete a request at

<https://www.cossapresources.org/Program/TTA>