

MODULE 5:
Developing an Action Plan

FACILITATOR NOTES

What you need to say/do

1. Ask participants to turn to Module 5 in their materials.
2. Present the Module Objectives for this lesson and the Introduction.
3. There are four activities in this module.
4. For Activity 1, participants will meet in *agency-specific* groups to discuss an actual collaboration agenda for their agency.
5. Activity 2 is agency-group reports to the full group.
6. For Activity 3, participants meet in the large group for action planning

What you need to know

1. This module will take approximately 2 hours.
2. The Introduction will take about 2 minutes.
3. This module requires that participants be in their agency-specific groups (Activity 1) **and** a large group (Activity 3).
4. **One caveat to meeting in agency-specific groups:** If the seminar encompasses multiple regions in a state (such as two distinct counties, as opposed to one county or a small geographically defined area) then participants *should remain in their regional small groups from the previous modules*. If the entities are counties or parts of the state that have different policies and goals, each group should create its own action plan.
5. Depending on the schedule, either a lunch break will follow Activity 2 (Schedule 1) or the seminar will adjourn following Activity 3 (Schedule 2).

Handouts/Exhibits

- **Exhibit 5-A:** Building an Agenda—Agency Specific Discussion
- **Exhibit 5-B:** Action Planning Worksheet

Seminar Objective

Child support, TANF, and workforce investment managers will understand how working collaboratively will help to achieve agency goals and will help clients and families.

Module Objectives

Participants will be able to describe what issues they want to address to improve services to children and families through collaborative partnerships, who needs to be involved, and specific steps to initiate action.

Introduction

In the previous module, we discussed the elements of a highly successful collaboration. In this module, we will focus on the steps that need to be taken at the local and state level to promote collaboration. This module is comprised of four activities.

- First, participants will meet in agency-specific groups to discuss an agenda for the agency.
- Second, agency-specific groups will report their discussions to the full group.
- Third, the large group will come to consensus about issues, next steps, and responsible parties.

FACILITATOR NOTES

What you need to say/do

1. Instruct participants to meet in agency-specific groups (a departure from previous exercise formats).
2. Advise the groups that a note-taker should record the important points in this discussion. Each group should identify one person who will share the discussion with the full group in Activity 2. If flipcharts are available, suggest that the note-taker record the discussion directly on the flipcharts.
3. Instruct participants to read the directions for Activity 1, **Agency-Specific Discussion**.
4. Refer to the intersections identified by the small groups in Module 4. They should be displayed so that the agency-specific groups can refer back to them during their discussions. *Ask the full group to vote on the three or four intersections that they want to focus on first.* The three issues should be the ones of the highest priority or the ones that can be most realistically addressed. *These will be the basis for the all of the Module 5 activities.*
5. Encourage participants to record their own thoughts on the worksheet (**Exhibit 5-A**). This will serve as a record of the discussion that they can take away with them.
6. After 30 minutes, instruct participants to stop their discussions and record any important points that they have not already written down.

What you need to know

1. This activity should take about 30 minutes.
2. This activity encourages participants to discuss what local agency staff can do to improve services to children and families through collaboration, as well as areas where they will need assistance from state-level agency staff and other agencies.

Handouts/Exhibits

- **Exhibit 5-A:** Building an Agenda—Agency Specific Discussion

ACTIVITY 1**Agency-Specific Discussion**

For this exercise, participants should meet in agency-specific groups. Thus, all child support representatives will meet in one group, TANF representatives in another, and workforce investment representatives in another. The full group will determine which intersections from Module 4 (**Exhibit 4-A** worksheet and large group reports) will be the focus of the action planning. The three or four issues selected by the group should be the ones of the highest priority or the ones that can be most realistically addressed. Use these intersections as the basis for the discussion. With respect to each intersection, answer the following questions. Record your thoughts on **Exhibit 5-A**, which is attached at the end of this module.

1. What specific issues/areas can agency staff at the local level take on to improve services to children and families through collaboration?
2. What do you need from the other two systems to address these issues/areas?
3. What do you need from state-level staff to address these issues/areas?

FACILITATOR NOTES

What you need to say/do

1. For Activity 2, if flipcharts are used, bring them to the front of the room. If a whiteboard is used, write the following headings: Child Support, TANF, Workforce Investment. Under each heading, write the following subheadings: What agency can do, what is needed from partners, where state-level support is needed. Record each group's response under the appropriate heading.
 2. Select one group and instruct the members to report their responses.
 3. Allow each group about 10 minutes to report.
 4. When one group's time is up, instruct the next group to report. Do this until each group has reported its responses.
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What you need to know

1. This activity will take about 30 minutes.
2. Each agency-specific group will report to the full group regarding areas of collaboration, issues specific to their agency, and issues that require actions on the part of state-level players and other agencies.
3. These responses will form the basis for an action plan.
4. After this activity, participants will either break for lunch (Schedule 1) or continue on to Activity 3 (Schedule 2), depending on the format.

ACTIVITY 2

Agency Reports

Each agency-specific group will report its discussion to the large group. You will have 10 minutes to summarize your discussion in the following areas:

- Issues agency staff should take on
- What your agency needs from partner agencies
- What your agency needs from state-level staff

FACILITATOR NOTES

What you need to say/do

1. On a whiteboard or flipchart, write the following headings: Issue, Steps, Who is Responsible, Timeline.
2. Read the instructions to Activity 3, **Large Group Action Planning**.
3. Review the issues each group discussed from Activity 2.
4. Ask the group to pick the issue that should be addressed first. This should be the issue of highest priority or the one that can be most realistically addressed. If multiple issues are raised, ask for a show of hands as to which should be addressed first. If no one volunteers a response, ask “what does child support (or TANF or workforce investment) see as the most important issue” and then ask if the other agencies agree.
5. For each issue, ask what steps should be taken. These should be concrete actions that focus on near-term solutions to the issue. *The group should assign responsibility for each action step to a specific person or persons.* The group should also agree on the timeline for each step.
6. Finally, ask participants how they will continue the dialogue with their agency counterparts. *Ask them to be very specific.* Possible responses include a monthly conference call, a quarterly meeting, or a listserv. This is an area where it would be useful to consider other players who need to be involved.
7. Participants can record the conversation on **Exhibit 5-B**.

What you need to know

1. This activity will take about 1 hour—roughly 20 minutes for each issue.
2. This activity aims to start a process. Participants should determine which issues will be addressed first, the steps they will take to address the issues, and who will have responsibility for the issue. The result is a process for promoting collaboration and improving outcomes.

Handouts/Exhibits

- **Exhibit 5-B:** Action Planning Worksheet

ACTIVITY 3

Large Group Action Planning

Now that each agency has identified the issues it will take on, issues for partner agencies, and issues for state-level staff, participants will meet as a large group to discuss an action plan to improve services to children and families through collaboration. The goal of this activity is to reach consensus on an action plan. It will focus on concrete steps participants can take to implement change and continue the dialogue among partners. Use the **Exhibit 5-B** worksheet (at the end of the module) to record the discussion.

Use the categorized issues on the whiteboard/flipchart for this discussion.

- Of the issues identified at the beginning of the module, which one should be addressed first?
- What steps should be taken?
- For each step, who is responsible for taking action?
- What is the timeline for completion?

The group will repeat this process for the other issues identified earlier in the module.

After the full group has planned concrete actions, participants will discuss what steps they will take to ensure that they continue a dialogue with their counterparts following the seminar.

FACILITATOR NOTES

What you need to say/do

1. Participants should have a good understanding of next steps when they adjourn.
 2. Summarize the action plan, including the issues, the steps, and who has responsibility for each step.
 3. Summarize what steps the group will take to ensure they continue working together to improve services for children and families.
 4. Tell participants to keep the materials that they used today so that they can refer to them in the future.
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What you need to know

1. The summary should take about 5 minutes.

Summary

This seminar focused on the advantages of agencies working together to achieve agency goals and to improve services to children and families. It began by addressing the benefits of collaboration and examples of model collaboration relationships. Participants then explored how the child support, TANF, and workforce investment agencies operate in practice, including current areas of intersection and past and present collaboration efforts. Next, participants visualized what a strong collaboration would look like. Finally, participants created an action plan that mapped concrete steps that will be taken to improve program outcomes through collaboration.

Good luck in your future work together.

Exhibit 5-A: Activity 1—Building an Agenda: Agency-Specific Discussion

What Issues/Areas will Agency Staff Take On?

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What Issues/Areas should Partner Agencies Take on?

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What Issues need to be Addressed at the State Level?

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Exhibit 5-B: Activity 3—Action Planning Worksheet

What are the issues that the group agreed should be addressed in the near-term?		
Issue (Activity 2)	Steps	Who is Responsible?
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•	•	•
•	•	•
•	•	•
•	•	•