COMMUNITY ACTION PLANNING

A Community Blueprint Organizer's Guide

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TABLE OF CONTENTS

INTRODUCTION

Congratulations on your decision to put "compassion into action" by adopting the Community Blueprint initiative in your community. You are doing important and essential work to improve services for veterans, military service members and their families through community collaboration. Communities across the United States are in various stages of the Community Blueprint process – from working in newly formed groups to collaborating in more established groups. Individuals have started groups to meet the complex and growing needs of veterans, service members and their families, working to fill existing gaps, avoid duplication of services, and maximize and improve existing services. Individuals have been inspired to join the initiative for various reasons and, whatever the motivation for adopting the Blueprint, the process offers a unique opportunity for civilians, veterans, service members and their families to volunteer and serve alongside one another. For the initiative to be successful, it will take collaboration, coordination and focus. This manual serves as a guide for groups to navigate and move through the various phases of the community action planning and activation process – and thus increase the chances of success.

THE COMMUNITY BLUEPRINT

Members of 80 national nonprofit organizations have spent the past two years visioning and creating tools to help community leaders and volunteers coordinate service, leverage community assets and meet the needs of veterans, service members and their families. While individual communities may have different needs, the following eight impact areas have been identified as common threads:

- Volunteerism
- Behavioral Health
- Education (K-12)
- Higher Education
- Employment
    - Veteran Employment
    - Military Spouse Employment
- Family Strength
- Financial Management and Legal Assistance
- Housing Stability and Homeless Assistance
- Reintegration

Additionally, community solutions have been identified to assist communities in developing successful programs in these impact areas. You and your community should use this list as a guide, but are not discouraged from planning additional programs on your own. As you begin to implement this tool, participating communities will be provided with technical support.

Several sites are utilizing AmeriCorps VISTA members while other sites will be supported by national nonprofit organizations. Just remember that you have the support of Points of Light and the Community Blueprint Advisory Council. This manual is designed to provide anyone implementing the Community Blueprint with a guide for how to start the conversation in your community and how to ensure buy in from those community organizations that are critical to implementing the defined plan of action. Here are the five steps to implement the Blueprint in your community:

1. Recruit Leaders
2. Convene and Assess the Community
3. Develop an Action Plan
4. Act
5. Measure Success

What if I am not from the community? When entering into a community, it is imperative for the organization to take time to meet with local leaders from the public, nonprofit, faith-based and business sectors to learn about the community's culture, and its informal and formal political structure. You will also want to learn about the current landscape of services and resources that exist to support veterans, service members and their families. A good starting point is to coordinate with the mayor's office and establish meetings with those organizations that are providing services or are experts in the eight impact areas. Take time to recognize the great work that is already being done, and offer your services as a facilitator and convener to help coordinate the work that is under way.

STEP 1: RECRUIT LEADERS

As you begin to map out how the Community Blueprint will conceptually look in your community, it is important to bring community members together to introduce the Blueprint concept, answer any questions community members may have, and inspire people to get involved and support the Blueprint implementation. This community convening can be structured as a town hall meeting, a community forum or simply a community meeting. The key is to make sure you have the right people in the room. Here are some community leaders and members you may want to reach out to and invite to the community convening:

- Veterans, service members and their family members (including spouses of the fallen)
- Bank official(s)
- Community foundation Leaders(s)
- Other local foundation leaders
- Civic organization representative(s)
- City manager or city planner
- Director of emergency services, police and fire chiefs, sheriff
- Faith-based community member(s) and interfaith council member(s)
- FRG (Family Readiness Group) member(s)
- ISFAC (Inter-Service Family Assistance Committee) member(s)
- HandsOn Network affiliate member(s)
- Judge(s) (not limited to Veterans Court), state bar representative(s) and pro-bono lawyers specializing in veterans issues
- Mayor and/or town councilmen
- National Guard and/or Reserve representative(s)

- Nonprofit leader(s)
- Press
- School board member(s) and colleges and universities representative(s) (i.e. Veteran Certifying Officer)
- Representative from the local shelter(s)
- Social services representative(s)
- Local VA representative(s)
- Local workforce veteran representative(s)
- Veterans Service Organization (VSO) representative(s) as well as those from other nonprofits focusing on the military community
- Staff member from local and state elected representatives
- Additional knowledgeable persons from each impact area
- Local university or college leaders

TIPS FOR RECRUITING LEADERS

When recruiting leaders for this initiative keep the following tips in mind:

- It is critical to recruit a few key leaders (those who are respected in the community and those who are truly dedicated to supporting the initiative) so that they can help you lead the initiative and rally support from others. It is always helpful to have a few key leaders endorse the effort so they can help you recruit others.
- Try to get some pro bono support for facilitation of the convening.
- You may want to talk to your local community foundation, college or university to see if there is anyone who is trained as a facilitator that can help facilitate the convening.
- Pick your leaders for knowledge, power and personality over politics.
- Identify the right leader or facilitator for this convening.
- You need someone who is willing to talk about the tough issues. Someone who will inspire others to act and someone who is fairly well known and respected in the community. This is critical. Take a good look at yourself, as this individual may not be you. It is your job to find out who this person is and convince them to play a key role in the implementation of this initiative.
- Ask experts for referrals to others they value.
- When reaching out to people in the community always ask if there are others who should be involved in this conversation. Ask them if they could make an introduction for you.

Is it being done already? Local government or nonprofits may have recently conducted local analyses or planning efforts that may inform and improve parts of your effort, or perhaps lead you to completely avoid certain impact areas (e.g., “We just completed a local comprehensive plan on veteran mental health.”). Usually the mayor’s office, a local VSO (e.g., The American Legion, VFW), your local military installation, National Guard or Reserve armory, Community Foundation or Department of Veteran Affairs would know of major recent planning efforts.

STEP 2: CONVENE AND ASSESS THE COMMUNITY

Once you have all your leaders recruited, it is time to plan and implement the community gathering or convening. This convening process can take a few days or it could take a couple of months. It is important to remember that every day we wait looking for perfect data, etc., is another day veterans, service members and their families in your community are left waiting for support.

It is important to respect the process and ensure community buy in, but always try to balance that with the urgency to move forward with the creation and implementation of a plan.

After all, this process is about serving those who have and continue to serve us.

Convening experts, veterans, service members and their families as well as other citizens is the first step in creating a community action plan. This convening process could lead to one or more of the following decisions:

- Conduct a comprehensive analysis of the community to identify the greatest needs
- Select an impact area(s) outlined in the Blueprint to focus on
- Identify and activate around one or more of the community solutions outlined in the Blueprint
- Conduct a comprehensive analysis while you implement one or more community solutions

All of the above options are correct. This decision will depend on the amount of time and resources the community has to devote to this issue.

Here are the critical steps to convening community members:

1. Prepare:

   - Plan Logistics
     Identify time, day, location, food, etc. Check out the planning checklist in the *Other Resources* section.

   - Identify and Communicate with Other Leaders and Facilitators
     You may want to think about the best way to get the information across to those in the room. Would a panel of local experts be useful to talk about the issues they see when delivering services? Might it be helpful to have a member of the panel or an introductory speaker from the local military community talk about the challenges they face and possible solutions moving forward. There are many ways to deliver information, it is critical to remember that your goal with this convening is to facilitate learning, awareness, collaboration and, most of all, inspire people to action.

     This takes the right people in the right place at the right time, sending the right message.

   - Research and Gather Data to Present to Group:
     It is critical to conduct some basic level of research to find out what community-based agencies are already doing to serve the military community in your area. Are these groups meeting all or some of the needs? Where are the gaps? Are these areas outlined in the Blueprint or do you need to add another focus area? Here are some resources to help you conduct some basic research in your community.

Where to Find Data:

- Recent and relevant community analysis reports by municipalities, nonprofits, etc.
- U.S. Census Bureau data to know demographics of the area, including veterans, service members, their families, etc.; see *Other Resources* for more information
- Citizen Soldier Support Program
- National Center for Veterans Analysis and Statistics for the veteran breakdown by groupings such as congressional district, etc.; see *Other Resources* for more information
- National Resource Directory; see *Other Resources* for more information
- Impact area specific sources such as:
    - U.S. Bureau of Labor and Statistics, congressional reports and state equivalent for unemployment numbers; see *Other Resources* for more information
    - Police reports as an indicator of veterans, service members and their families that might be experiencing difficulties

Tip: While census data can be helpful, it may not show what is missing in the community. Because of this, it is always a good idea to ask the military community in your area what they need. This will either confirm what you already know from looking at the data, or help you discover something that the data won't be able to tell you. So often, organizations get so wrapped up in their next big project that they forget to slow down and ask their target population what they need. Ask, and listen to the answers, and something unexpected may come your way.

2. <u>Schedule Convening:</u>

   Identify a date and time that works for most people invited. Make sure you check with the local community calendars, as well as those community leaders you are inviting to avoid any scheduling issues.

3. <u>Convene Community Members and Leaders:</u>

   - <u>Introductions:</u>

     Be sure and have time allotted for leaders and participants to introduce themselves. It is important for the people in the room to understand who and why people are in the room from the very beginning. Remember, the Community Blueprint model is all about collaboration and working together to meet needs. This is a great way to get people thinking about collaboration from the very beginning of the gathering.

- Set Context and Identify Barriers and Challenges:

  Provide background information on purpose of convening and review issues that the military community is facing so that everyone has the same foundational knowledge and understanding of the issue(s) that need to be addressed. This is also a great time to remind people of the purpose of collaboration and working together to solve the issues. You can also spend time discussing some of the basic challenges that exist in the community regarding meeting the needs of this population and providing the services that the military community needs.
- Identify Assets:

  It is helpful for the group to also spend time on assets they can bring to the table to help implement your Community Blueprint initiative. This may be a program, trainings, resources, staff time, a volunteer database, measurement tools or even space to convene impact area working groups or future meetings.
- Establish Working Groups:

  After the all community leaders and representatives have convened, it is a good idea to develop Community Blueprint working groups. These groups can be established based on the eight impact areas in order to help establish clear objectives and goals, foster a strong sense of cooperation, and assess, plan and act.

4. Identify Next Steps and Follow Up:

   Once community members have established working groups and have had a chance to meet and talk with one another, the working groups will be responsible for identifying one or two leaders or facilitators and identifying a date and time to get together to go through the development phase. As the community convener and facilitator, it is your role to establish a follow up date to reconvene the larger group so that the smaller working groups can report out about their assessment and their overall plan of action. Remember, the groups need enough time to convene, assess and plan, but you also do not want to let too much time go by in between the scheduled meetings or you may lose the attention of the members. In addition, always remember to remind the working groups of the urgency to move quickly, as there are veterans, service members and their families suffering who need a community-wide approach to service delivery.

TIPS FOR FACILITATING CONVENING

- Respect all organizational perspectives - as they can differ widely
- Be ready to sooth organizational tensions
- Make sure participants feel great (and recognized) from day one for their contribution to this VITAL effort (everyone is busy)
- Use PR to reward them (and maintain accountability)
- Be sure and check out the facilitation tips in the *Tools* section

STEP 3: DEVELOP AN ACTION PLAN

THE ROLE OF WORKING GROUPS

A key first step for the working groups during the development phase is to agree on the purpose of the collaboration and define the working group's role within it***.*** It is essential to understand that at the heart of the Community Blueprint process is strengthening collaboration efforts across diverse fields – referred to as cross-sector collaboration. This is defined as cross-sector partnerships, involving government, business, nonprofits, communities and/or the public as a whole. It involves an appreciation for what different fields, organizations and individuals bring to the table. Working group members must be open to forming partnerships with a wide variety of stakeholders within their own working group and throughout the impact areas – always with the intention of assisting our nation's veterans, service members and their families.

We know that we must use a holistic approach in meeting these needs and we know that this requires collaboration and partnership. This may require individuals to set aside their individual interests, biases or past histories and forge new or different partnerships. By demonstrating an understanding of the big picture, group members should be able to state the following:

- I have a solid understanding of what the Community Blueprint is and why we are adopting this in our community.
- Cross-sector collaboration is at the heart of Community Blueprint – and I am open to joining with individuals from a wide variety of fields and backgrounds.
- I am willing to put forth a sense of goodwill, set aside my ego (or past biases), be open to different viewpoints, and work together to "serve those who served."

SELF-REFLECTION

It is also essential that groups thoughtfully and thoroughly examine themselves. Groups may be tempted to skip this task by assuming that they understand their roles and specialties – and that the “real work” is done when plans are put into action. However, a well thought out assessment will pay off in the long run.

Future tasking and planning will be enhanced by:

1. Formally exploring and leveraging expertise
2. Establishing roles and responsibilities
3. Developing a common vocabulary

Group members should hold an open dialog and answer the following questions:

- What talents and expertise do I have to offer the group?
- What language and vocabulary do I use to define the issues or problems in our community?
- What do I expect to get out of this experience? How is our group nested within the wider Blueprint initiative?

There are also basic housekeeping rules to address, such as:

- Who is the group facilitator? Who will take notes?
- How often will we meet? Can this be done by email, teleconference, face-to-face (or any combination of these)?
- What is the best way to communicate (email, phone calls)?
- Is there anyone missing that we need to bring to the table?
- How do we make new members feel included and engage

CBN Overall Goal

- What are we trying to achieve by bringing the Blueprint into our community?
- Collaboration drives overall objective.

Working Group Goal

- What are we trying to achieve within our working group?
- Group activities must be nested within greater Blueprint objective.

Individual Goals & Roles

- What are the individual roles and goals within the working group?
- Identify and leverage expertise, talents and leadership.

ASSESS AND IDENTIFY THE ISSUES

After conducting a thorough examination of roles and expectations, the working group is poised to focus on the identified issue and establish objectives and goals. To have a complete understanding of the identified problem, it is ideal to take a look at community data. As stated earlier, you can obtain this data from Census data, various private and nonprofit reporting mechanisms, as well as the discussions that take place within the working group.

During the assessment phase, it is important to remember that this "assessment" is not a formal assessment. You will not have everyone in the room and on the working group who needs to be there, and you definitely will not have all the information and data you need. The assessment stage will always be flawed, even if you had a lot of money to hire an evaluation firm to conduct a community-wide assessment. There is simply no way to conduct a perfect assessment. Your job is to try to get as much information and data as possible, but also get comfortable with knowing that you will never know everything. At some point you must make a decision to move forward and learn as you go.

With that said, it is always healthy to remember that the group does not have all the information it needs because, as the groups starts to identify assets, gaps and make recommendations for how to fill those gaps, the group may need to conduct more research and have more conversations with people out in the community to test the idea. This may open up doors for you to invite more passionate, dedicated community members to the table to help in this collaborative effort.

Here are a few questions to get the group talking about the needs and assets:

- What is being done?
- What is valuable?
- Are all key services available to everyone in the military community?
- Are these services affordable for the military community?

<u>Synergies:</u>

- How can providers and volunteers work together to meet the needs and fill the gaps?
- How can providers and volunteers work together to improve quality?
- How can providers and volunteers work together to reduce costs?
- How can providers and volunteers work together to improve outreach?

<u>Select Priorities:</u>

- Rank by impact (How many lives will it improve? By how much?)
- Rank by times and resource requirements
- Make selections and include some early wins

CAUTION: It will be very easy for the group to jump right into the planning phase and want to identify solutions and ways for the community to address these issues. It is important to encourage the group to stay on topic and trust the process. If necessary, you can write those ideas down and come back to them during the action planning phase.

BUILD AN ACTION PLAN

After the group identifies the gaps, synergies and selected priorities, it is time to move into the planning phase. This is a time when the working group will develop a comprehensive plan and outline recommendations they will present to the larger group. The working group should do the following:

- Review the community solutions and how-to guides to identify whether one or more of these would help solve the problem.
- Identify other practices. Working groups are also encouraged to come up with their own unique practices or project(s), which can differ from those listed in the Community Blueprint tool. The planning phase is marked by brainstorming and active participation.

  Group members can stimulate creative thinking by asking the following questions:

  - What types of activities can be done to achieve the goal(s)?
  - Can the need(s) be met through events, such as town hall meetings, trainings, websites?
  - Is the solution a shift in philosophy or approach, for example, expanding collaboration or networking, increasing communication, improving customer service?
  - Is the plan practical and will the target audience respond well to it? It is a good idea to run the idea by the potential recipients and poll them: would they attend such an event or how would they respond to the new change?

- Develop clear timelines for each priority.

- Identify resources. Outline resources that the community already has as well as those that they need to seek in-kind donations or funding for. You may want to explore a conversation at this point about setting up a joint fund inside the local community foundation to support this common cause.
- Identify clear accountabilities. Who is responsible for which piece of the plan and how will they leverage community members and volunteers to meet that goal?
- Identify outreach plan to the military community. How will you inform them of the plans?
- Develop a measurement plan. How will you know you have succeeded in meeting these goals? What is the measure of success? What is your projected measureable impact? It is okay that this is largely a guess? Your success measures will never be perfect. All you can do is learn and refine them over time.
- Identify reporting structure. Who will report what information to whom?
- Identify how community members and volunteers can help support the implementation of the community solutions or other proposed recommendations. Some of these community solutions, as well as many of your proposed recommendations, will require the involvement of professionals or " skilled volunteers" while others will simply require the compassion and dedication of community members. When thinking about ways to involve community volunteers, you should engage the volunteerism working group so they can help you think about ways to leverage local human capital. You also want to pay close attention to:

    - Required skill set and age
    - Number of volunteers needed
    - Availability of supplies required for volunteers to use
    - Availability of space
    - Required time or days to complete the task or project
    - Overall project scope: Can the task or project be scaled up or down as needed?
    - Impact: When will the impact of the project be achieved in the short-term or long-term?
    - Diversity: Can a broad spectrum of community members participate?
    - Overall cost of producing the project
    - Weather impact: What is the plan in case of inclement weather?
    - Accessibility to building and facilities
    - Possible legal risk(s)
    - Ability to attract new volunteers

In addition, you should decide if you want to plan a one-time, special event project, an ongoing series of projects or a combination of these options. A one-day event could be a large project involving hundreds of people, or it could be small group of volunteers working together for a day. Ongoing projects engage volunteers on a consistent basis, providing the opportunity to go beyond a one-time experience and have a sustained experience and impact in the military community.

VOLUNTEERS

To successfully complete your recommendations, you will need volunteers. It is important to reach out to your local HandsOn Action Center/Volunteer Center, City of Service and/or State Commission to help you think about the most efficient and effective ways to leverage volunteer talent.

Having too few volunteers will leave the project understaffed and could cause the project to be unsuccessful, while having too many volunteers can leave some with little to do and they might feel that their time was not utilized well.

When recruiting volunteers, remember that the personal ask is always the most compelling form of recruitment. All volunteers are welcome from the community, and we encourage you to reach out to veterans, service members and their families.

Be sure and list volunteer opportunities with your local HandsOn Network volunteer center or on All for Good, which is the nation's largest volunteer database. For more information, see the *Other Resources* section.

Volunteer opportunities can also be listed on social media websites like Facebook and Twitter, in newspapers, local service fairs, schools, community bulletin boards, restaurants and other high-traffic places.

You will need to consider how you will orient and train the volunteers working on the projects. In order for your volunteers to be an effective part of a project, they need to understand the issue(s) being addressed and the impact that it will make on the community. Volunteer orientation can be conducted prior to the project or included as part of the events on the actual day of service. Educating volunteers on the many impacts they will have on their community allows them to:

- Feel a greater part of a whole when they see all of the services the organization provides
- Gain a better understating the community's critical needs

- Gain a better understanding how to affect change within the issue area being addressed

In addition to orientation, you may need to train volunteers for the work they will be doing. You may recruit volunteers who already have the necessary skills; however, many volunteers will need some instruction. If volunteers are prepared for the project, they will feel more comfortable with the work, the project will run more smoothly and your team is more likely to achieve its goals for the project.

Check out the *Other Resources* section for more information on volunteer mobilization.

STEP 4: ACT

The action phase is marked by putting the plan into action and rolling out the proposed idea. Your exact implementation will be highly unique to your community based on factors including not just the community solutions you select, but also resources, leadership style and local culture.

In general, your implementation will run best if you adhere to some basic principles:

- Get some early wins
- Make sure the action plan has clear timelines and be sure and adhere to them
- Be sure that every goal identified in the action plan is adequately resourced
- Establish clear accountability
- Keep your eyes on the outlined success measures
- Be sure and engage the community in periodic reviews/refinements to the action plan

Group members can be satisfied that they have, indeed, put compassion into action by enacting a positive change for veterans, service members and their families in their community. Working group members should take the time to acknowledge and celebrate all of the hard work that went into the Community Blueprint process. Members should be confident and satisfied in knowing that they have actively collaborated in the common goal of assisting service members in their community.

STEP 5: MEASURE SUCCESS

Tracking impact is important for several reasons. Most of all, if everyone understands the ultimate measures of success, volunteers and participants become more focused in their activities. Lastly, it will help identify successful practices that can be shared across communities.

Metrics should ideally be driven by the promising practice or strategy chosen by the community. For example, if you take on an employment action (e.g., job fair) you should try to measure new hires. A secondary measure could be starting wage, and success rate by sex, race, location or job type. Satisfaction surveys can also help you track qualitative feedback from the targeted beneficiaries of your impact areas.

You might consider broader "wellness surveys" to see if you are impacting the overall quality of life for local veterans, service members and their families.

Do not underinvest in measurement. Even if imperfect, it can really help focus and motivate your teams, and make sure you are in touch with the "ground truth" through the eyes of those you are trying to serve.

There are general tips and guidance on success measures for each of the Community solutions identified in the Blueprint. Furthermore, you should collectively survey the general community to collect inputs, such as the number of volunteers involved or the number of volunteer hours contributed towards supporting the military community.

Lastly, you should convene the group to discuss the following:

- What were the lessons learned? Were the working group's objective(s) met? Why or why not?
- What can be done to improve the process?
- What was done well and what should be repeated or replicated?
- Does the working group need to formulate a new plan? If so, what is the best way to go about that process?
- Can this be replicated by another working group (or another community) and is this recommended? Why or why not?
- How did the project/process improve services for service members and their families? How does the working group measure success and/or improvement?

OTHER RESOURCES

For sample planning tools and additional instructions on organizing an event for your community, please visit http://www.handsonnetwork.org/volunteers/gethandson/toolkits

To locate your local HandsOn Network volunteer center, please visit http://www.handsonnetwork.org/actioncenters/map.

To post a listing on All for Good, the nation's largest volunteer database, please visit http://www.allforgood.org/posting

LOCATING STATISTICS ON THE MILITARY COMMUNITY

Citizen Soldier Support Program

Searchable Provider Database: www.warwithin.org

Mapping and Data Center: http://www.unc.edu/cssp/datacenter/

Department of Defense's Demographics 2009 Profile of the Military Community: http://cs.mhf.dod.mil/content/dav/mhf/QOL-Library/PDF/MHF/QOL%20Resources/Reports/2009_Demographics_Report.pdf

Joint Economic Committee Report, Understanding the Economy: State-by-State Snapshot: http://jec.senate.gov/public/index.cfm?a=Files.Serve&File_id=f18b678e-10a0-4e9e-a01c-1aa3606964d5

National Center for Veterans Analysis and Statistics: http://www.va.gov/vetdata/

National Resource Directory: http://www.nationalresourcedirectory.gov/

U.S. Census Bureau – Veterans Data: http://www.census.gov/hhes/veterans/data/

U.S. Department of Labor, Bureau of Labor and Statistics – Employment Situation of Veterans: http://www.bls.gov/news.release/vet.toc.htm

HANDSON NETWORK – VOLUNTEER RESOURCES

E-learning and webinars: http://www.handsonnetwork.org/tools/handsonuniversityonline

HandsOn Library: http://www.handsonnetwork.org/tools/library

Online Service Leader Courses: http://www.handsonnetwork.org/tools/handsonuniversityonline#tabset-tab-3

Volunteer Project Playbooks: http://www.handsonnetwork.org/tools/startproject

Volunteer Leader Guidebook: http://www.handsonnetwork.org/volunteers/gethandson/toolkits

VolunteerSpot: http://www.volunteerspot.com/index

Skilled-Based Volunteering: http://www.handsonnetwork.org/nationalprograms/skillsbasedvolunteering or http://www.nationalserviceresources.org/sbv

TOOLS

SAMPLE AGENDA

When hosting your initial community meeting, it is important to have a set agenda. Here are two examples of agendas for your meeting. The first is geared for the community that is meeting to discuss all the eight impact areas. The second is for communities that are gathering to discuss a specific area(s) they have selected for their community.

TIME	ACTIVITY	PRESENTER
07:45-08:00	Check in	
08:00-08:15	Welcome	
08:15-08:30	Overview of the issues and Community Blueprint - introductory PowerPoint	
08:30-09:50	Blueprint impact area walk-through: Overview of the issue in the community	
08:30-08:40	*Volunteerism*	
08:40-08:50	*Behavioral health*	
08:50-09:00	*Education*	
09:00-09:10	*Employment*	
09:10-09:20	*Family strength*	
09:20-09:30	*Financial management and legal Assistance*	
09:30-09:40	*Housing stability and homeless assistance*	
09:40-09:50	*Integration*	
09:50-09:55	Feedback mechanism – Questions and answers	

09:55-10:10	BREAK	
10:10-11:00	Overview of the process: Introduction to working groups	
11:00-11:20	Intro to break-outs: Theory of change	
11:20-12:30	Pick up lunch and go to break-out session: Working groups convene in separate rooms to meet and begin discussion	
12:30-01:00	Large group convenes - Wrap-up and group report outs • Group “ah ha” moments • Challenges/barriers to doing this work • Individual and group commitments	

TIME	ACTIVITY	PRESENTER
08:45-09:00	Check in	
09:00-09:15	Welcome	
09:15-09:30	Overview of the issues and Community Blueprint - introductory PowerPoint	
09:30-09:50	Impact area walk-through	
09:50-09:55	Questions and answers	
09:55-10:10	BREAK	
10:10-11:00	Possible solutions and promising practice overview	
11:00-11:20	Intro to break-out: Theory of change	
11:20-12:30	Pick up lunch and go to break-out session: Working group convenes to meet and begin discussion.	

12:30-01:00	Wrap-up and open mic ▪ Group “ah ha” moments ▪ Challenges/barriers to doing this work ▪ Individual and group commitments	

PLANNING CHECKLIST

Here is a brief checklist to consider as you plan and prepare for your convening.

The Weeks Before

- Create registration for your event. You always want people to pre-register for your event so you know who to expect. Check out the following registration tools:
  - Constant Contact
  - Eventbrite
  - Regonline.com
  - GoTo Webinar, Go To Training
  - Webex
  - Adobe Connect
- Reach out to the on-site venue contact person and confirm all logistics. Have a land or cell phone number for that person should they be needed.
- Contact your co-leaders/facilitators and confirm all logistics such as event time, venue/location, travel arrangements (if necessary), etc.
- Make sure you have addressed food and beverage needs. If it is a long agenda, be sure and have scheduled breaks as well as food and drinks available.

The Day Before

- Send a nice note to your co-facilitators and event leaders letting them know you are excited to see them and are grateful that they are taking time to be there and lead such an initiative.
- Check the room set up: If possible, see if you can arrive early and check out the location and the room set up. Note where the restrooms are located. The room is never exactly as you envision it. Arriving early will give you time to make changes and verify equipment and materials are working and in the appropriate place. Assure that the tables are arranged in a way that allows for easy interaction.

- Check all equipment. Make sure all equipment works. Allot for extra time if you are using video, connecting to the Internet, etc. Be sure and have the phone number for your technology and AV needs.
- Check materials. Make sure you have copies of participant handouts and training evaluation forms.

Equipment and Supplies

Equipment needs will vary. The following is a list of possible equipment and supply needs:

- Laptop computer
- LCD projector
- Microphone
- Extension cord or power strip
- Easels
- Easel pads
- Evaluations
- Different color markers
- Sign-in sheets
- Snacks

FACILITATION TIPS

Set Goals and Outcomes

All participants need to be clear on the goals or outcomes of the facilitated session. What is the group trying to achieve? Is it simply a time to brainstorm or is there a deliverable? As a facilitator, your goal is to encourage peer-to-peer learning and collaboration. It is good practice to ask group members what they want out of their time together.

Stay Focused

In a facilitated session, it is easy to drift off the point or go off on tangents. Keep the focus on the goals or outcomes to make sure the session stays on track.

Involve Everyone

Look for ways to involve those who are less vocal as they often have valuable contributions to make and may just need a little encouragement to voice them. Simply asking, “What is your take on that, Jim?” could be a way to get involvement. Additionally, do not allow one person or a small group to dominate the conversation.

Actively Listen

When facilitating, make sure you are listening not just to what is being said, but how it is being said. You also need to pay attention to the overall energy level of the group.

Stay Neutral

Your job is to encourage discussion, help bring out the ideas and document them. Remember your role is to stay neutral. **This means keeping your own views out of the session and do not take sides.** You can offer ideas, tools and resources but be mindful how you present these ideas.

For example: Say, “You may want to check out the following resource at www.testexample.org,” instead of “You should always use this model when implementing this type of program.”

Summarize

Facilitated sessions move at pace. A lot will be going on, so it is useful to summarize periodically. This will help to keep the group focused, on track and provide foundations to build on.