

STEP 3

Action Planning



Step 2: Action Planning

a) Desired Outcomes

To identify the slate of activities/programs that will be undertaken over the next 4 years to help achieve the planned goals and vision within the channels and audiences previously defined.

To become familiar with the concepts of sustainability, diffusion and sequencing and apply this information to the selection of programs.

At the end of this step, coalitions will have created, revised or confirmed:

- A slate of programs for the 4 years
- A schedule over the 4 years outlining how these programs will be sequenced
- An idea of the relative allocation of resources across the full slate
- A 4 Year Program Logic Model
- The content for the Ministry Activity Plan for the overall 4 Year Plan.

b) Necessary Preliminary Information

Before approaching this step, the group should/could:

- review the relevant information from Step 1: Taking Stock that will assist in the decisions to be made in this session, especially if Step 1 was done at a previous session to this one.
- approve finalized Vision, Mission, Guiding Principles, Goals, Objectives, Indicators, Audiences, Channels.
- become familiar with the existing programs in the community, offered by the coalition and partners.
- become familiar with potential programs. Some of these can be found in the Program Options Grid provided here. As well, consult the provincial partners of:
 - PTCC, CTFO
 - OPHEA
 - Cancer Society
 - Lung Association
 - Heart and Stroke Foundation of Ontario
 - OPHA
 - OPC
 - THCU

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|----|----------------------------|-----------|
| b) | Program Identification | 2.5 hours |
| c) | Sequencing of Programs | 90 min |
| d) | Resource Allocation | 45 min |
| e) | Overall Review of Programs | 30 min |

Again, this step has a lot of material to cover. It may be necessary to divide this up into 2 sessions. Following the sequencing aspect, the group could disperse and reconvene when the notes from this session have been compiled. The results could then be approved (or revised as necessary) and the group could move onto the next aspect – Implementation. This break would also allow for time to integrate the material into the 4 Year Program Logic Model and onto the Ministry Activity Plans.

SECTION	DETAILS	TIME
Intro's	<ul style="list-style-type: none"> • Individuals – sharing name activity • Design/Outcomes for the session (Purpose OH) • Overview of the 5 steps (OH) & key question OH for this step (OH) • Icebreaker Activity • Review the material from Steps 1 & 2 that is relevant to this step. 	20 min
The Logic Model	<p>A four year program logic model will be created as a result of this step.</p> <ul style="list-style-type: none"> • Show the blank 4 year program LM and illustrate the spot where the programs will be inserted over the four years and where the outcome objectives and indicators will be inserted. 	10 min
Ministry Forms	<p>The information generated in this step will be easily integrated into the Activity Plan format. Consistent headings include:</p> <ul style="list-style-type: none"> • Objectives • Channels • Initiatives / Activities (Programs) • Risk factor • Approach • Resource Allocation • Timing • Projected Results (Outcome Objectives and Indicators) 	
Audience Analysis	<p>We know from Step 2, who we want to reach. Now we need to know as much as possible about those audiences in order to select the programs best suited to them.</p> <p>Ideally, information has been gathered prior to the session <i>based on the Workbook questions on pg. 29/30 and</i></p>	20 min per

SECTION	DETAILS	TIME
	<p><i>Worksheet 3-1</i>, and this now needs to be shared</p> <ul style="list-style-type: none"> • In a “game show format” (ie. What’s My Line?”), have someone who was involved in the gathering of the information, share the characteristics and the participants need to guess who the audience is they are describing. Have the data for each audience summarized on a separate sheet and distributed. • Following the summary of each audience, ask the whole group for any additional relevant information that is known about the group but has not been shared. • The large group now is asked to generate the “So What?” answers. What are the implications from what you’ve heard for programming? 	
Program Identification	<p>a) Review decisions to date. You know your:</p> <ul style="list-style-type: none"> • Vision, Mission, Guiding Principles • Areas of emphasis, based on the gap analysis, who the priority audiences will be and the channels through which you will reach them • Long term goals for the end of the 4 years and the objectives and indicators for these • Audiences’ characteristics. <p>Now, it is time to decide what specific programs, from those already existing in the community and potential new ones, the coalition will support over the next 4 years.</p>	10 min
	<p>b) Theories to assist with deliberations:</p> <ul style="list-style-type: none"> • Sustainability (see included material) (OH) • Diffusion of Innovation • Sequencing of interventions (OH) 	20 min
	<p>c) Potential programs:</p> <ul style="list-style-type: none"> • Circulate, from Step 1, the local inventory of programs & services that was done. • Divide the group into the number of audiences. People should select the group in which they will work based on their interest, knowledge and experience. Partners with specific programs that they are interested in having adopted by the coalition should select the appropriate group. Ensure that the person who has done the preliminary research on programs for that channel is in the right group. For each audience, there will likely have been a few channels identified so sub-divide the 	2.5 hrs

SECTION	DETAILS	TIME
	<p>group by channels. For instance: There are 30 people in attendance. Audience 1 = Women: 15 people in this group Audience 2 = Children; 15 people in this group.</p> <p>Within Audience 1, 3 channels decided on were: Women's Groups – 5 people of the 15 in this group Grocery Stores – 5 people of the 15 in this group Family Physician Offices – 5 people of the 15 here.</p> <p>Do the same for the second Audience.</p> <ul style="list-style-type: none"> • Within their groups, examine the potential programs relevant to the audience and channel. First, examine the programs available via partners. Then move to the potential new programs on the Program Grid (HO a copy to each person) and those collected from other provincial partners (see the list at the beginning of this section). In selecting the programs that meet the needs and the gaps, look to the Guiding Principles of the coalition (all should have a copy) and Worksheet 3-2. This discussion can become very sensitive in that the programs of partners are being assessed. Be clear that the judgement is NOT on whether the program is worthwhile but whether there is a need for enhancement of it in the community and whether that support is within the means of the coalition. • Each group to select the programs that they feel need to be offered in the community at some point over the next 4 years. These should be selected with rationale based in sustainability, diffusion, and sequencing potential. The included " 4 Year Program Worksheet" may assist with organizing the programs according to their purpose. • Provide the opportunity for the channel sub-groups within an audience (ie. The women's groups, grocery stores and family physicians from the example above) to amalgamate their selections. This will indicate the number of programs selected, over the 4 years, that will reach the intended audience. As a full Audience group (ie. The 15 people from the example above) review the package of programs based on Worksheet 3-3. Revise as necessary. This group must reach consensus on the slate before moving on. Be sure to capture the rationale as to why the programs were selected. 	

SECTION	DETAILS	TIME
	<ul style="list-style-type: none"> • If one group requires significantly more time than another, then move the quicker group on to the next step. • Regroup all participants and post all programs selected on a large wall. The included sheet on “Steps to Select Existing Programs” may assist either in the small group or as a large group process. Worksheet 3-3 may also prove helpful to assess the full complement of programs for the 4 years. • Revise the full slate of programs as the reality of the scope of programs indicates. Look for “economies of scale” – perhaps a program for one audience has the potential to develop into something else rather than starting from scratch on a new program. • The resulting slate needs to be agreed to by all participants before moving on the next step. 	
Sequence Programs	<p>Now that the full slate of programs has been determined, they need to be sequenced over a 4 year term.</p> <ul style="list-style-type: none"> • Regroup in the same groups as for the development of the program slate. • Using the “4 Year Program Worksheet”, each group to identify how each program will progress from the year in which it is introduced through the remainder of the HHP funding. <i>Pages 32-24 of the Workbook address this issue.</i> • Provide a brief summary of each group’s work. Any immediate responses encouraged but overall “approval” delayed until the beginning of the next session. • Suggest that this is a good point to break so that the material generated can be synthesized and integrated into the 4 Year Program LM, for review at a subsequent session. 	90 min
Resource Allocation	<p>Although it will be very difficult to attach specific dollars to each program, it will be necessary to have a “ballpark figure” so implementation teams have an idea of the scope of the initiative.</p> <ul style="list-style-type: none"> • With all programs posted on the wall under each year (like the “4 Year Program Worksheet”), divide the large group into 3 or 4 smaller groups. Give each group 4 sets enough play money to represent one year’s funding to the coalition. It will be easier if each group’s money is a different colour. • Each group then spends their money on the board. 	45 min

SECTION	DETAILS	TIME
	Money cannot be carried over between years. <ul style="list-style-type: none"> • One member of each group records their allocation with any rationale generated. • Discuss large discrepancies. Take averages across the 3 or 4 sets to generate a draft allocation for further review. 	
Summary	Decisions made during this session include the programs in each of the channels as well as the first draft of the sequencing over time that these programs will experience. <ul style="list-style-type: none"> • Preview next step that will deal with review of this draft and the Implementation issues associated with the programs. 	20 min

f) Evaluation Link

- The programs selected will serve as the plan for implementation so activities done over the four years can be compared to this initial plan.
- The programs selected were to have been previously determined to be successful. Based on local implementation, additional input to the effectiveness could be generated.

g) Supplementary Material

- Sustainability information is contained in this section.
- References on diffusion concept are included in Section 9 of this Guide.
- Program Options grid.
- Ministry Activity Plan form.

h) "Icebreaker"

"Objective Mania"

This is not a cooperative game in that people progressively must "sit out". Adaptations to avoid this are encouraged.

Depending on the number of participants, two sub-groups may be required. Groups of about 10-15 will work comfortably. Have participants sit in a circle and give one person something that can be passed easily around the circle (eg. A marker, roll of tape). Explain the concept of objectives and the importance of an "action verb" at the beginning.

The person with the marker passes it to the person next to them, who must generate a verb that could be used to start an objective. The Facilitator records it on a FC. The marker is then passes around the circle until the Facilitator says

“stop”. Whoever is holding the marker, needs to generate another action verb, different from others already on the list. If someone can’t think of one or duplicates one, they sit back from the circle. Either set a time limit for the game or proceed until all are “out”.

Use this list of words later in the session to generate objectives.

i) **Overheads**

- Program Planning Framework (same as Step 1)
- Step 3: Action Planning
- Purpose of Action Planning
- Sustainability (3)
- Sequencing Opportunities
- 4 Year Program Logic Model