

# STEP 4

## Implementation



# Step 4: Implementation

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## a) Desired Outcomes

To develop the first year of the four year plan in detail and outline this on the required Ministry forms and a Logic Model if desired.

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

- The slate of programs that will be undertaken from April, 1999 through Mar, 2000 and the implementation details of each. This will include:
  - A critical path/timing
  - Specific resource allocation
  - The role of partners and the community
  - The contributions-in-kind from partners to support the programs
  - Projected results (outcome objectives)
  - Milestones to achieve results (process / implementation objectives)
  - The Evaluation plan to support the annual plan
  - The Social Marketing plan to support the annual plan if this was not fully developed as one of the programs.
- The organizational structure to support the functions outlined in the plan, building to the degree possible on existing structures.

In addition to the specific annual plans for each activity, coalitions will identify the links between programs and therefore enhance the synergistic effect of all programs.

## b) Necessary Preliminary Information

Before approaching this step, the group should/could:

- review the relevant information from previous steps and sessions to ensure all are familiar with the background documentation.
- approve finalized four year plan so specific details for the first year can now be addressed.
- have confirmation of what the year's budget for programs is. It will be most helpful to the groups who are planning the specific programs to know, at least in general terms, how much their program-specific budget is. Also, the assimilation of all the information will be easier if each group uses consistent budget lines and codes as funds are assigned. Be sure to have reserved the

necessary amount from the total for things like travel, training, overall activities such as social marketing or evaluation, meeting cost etc.)

- have gathered as much information as possible regarding the programs to be planned. For existing programs this would include the status of each. For new programs, it would include details of implementation, and copies of the program if possible, from those who have conducted the program before.
- If the social marketing aspect of the project is an overall undertaking in support of all the programs, information should be available at the session on the costs and availability of a variety of relevant vehicles. If it is a separate activity or program, information would be collected on it as like any other.
- invite representation from partner agencies that might find planning related to a specific program or for the specific time frame of one year more relevant and/or manageable than previous planning session. Should new players be coming on board at this time, a pre-session briefing would be recommended to give them all the information already held by other group members.
- draft an Organizational Structure that would carry the coalition through the four years. If one already exists, this should be available for circulation at the meeting in order to confirm that it is still effective.

#### c) **Workbook Links**

The Implementation section can be found on pages 39 through 45.

Several examples of completed aspects of this step can be found in this section.

Worksheets 4-1 through 4-4 can be applied to this step.

Various Logic Models throughout the Workbook may prove helpful for this step.

#### d) **Recommended Representatives**

##### *Individuals:*

At least one person for each channel needs to be very familiar with the details of the program being planned for this year. The more individuals who bring this background to bear on the specific discussions, the more engaged people will be in the development of the plan. Details on the programs can be gained through existing catalogues of interventions or from those provincial partners who have developed the programs.

Because of the detailed nature of these plans, this might be a point where individuals from the community, and especially the audience for which programs are to be developed are included, if in fact they have not been to this point.

##### *Intervention Specific Work Groups:*

Based on the current structure of the coalition or on the programs to be planned, group the programs into reasonable and manageable units for working groups to

plan. Once each working group has created their plan, they need to convene as a coalition for broader discussions.

*Full Coalition:*

Participate in the identification of links between programs and develop these. Review and approve the overall annual plan.

*Planning Sub-Committee:*

If this group was in existence for previous steps, they might continue instead of some or all working groups. If a working group does not already exist for a particular program, this group might take on that program.

The development of the Evaluation and the Social Marketing Plan for the project could fall to this group as overall activities, if there is no existing committee or group to address these.

## e) Sample Design

- Timeframe:**
- a) Program Outcome Objectives
  - b) Secondary Audiences (Intermediaries)
  - c) Program Implementation Objectives
  - d) Tasks & Responsibilities
  - e) Timelines
  - f) Resources – Partners & Coalition
  - g) Community Involvement
  - h) Identification of Reach
  - i) Coalition Review
    - Links between programs
    - Social Marketing Component
    - Evaluation Component

This step is probably one of the most familiar to community partners as detailed annual action plans are common. The elements that may be less familiar are items listed under h) above.

It is recommended that at least 3 sessions are required to complete this step.

**Session 1: (working group) 7 hrs per group of programs**

- Complete the objectives, secondary audiences, tasks and responsibilities, and timelines.

**Between sessions 1 & 2: (assigned individuals)**

- Research costs associated with the program as planned, identify additional partners or community involvement as needed, request confirmation of partners' contributions-in-kind, and identify the specifics of the reach (ie.

How many children will be reached in the 15 schools you will work with in this year).

**Session 2: (working group) 4 hrs per group**

- Address the resources, community involvement, and reach.

**Between session 2 & 3: (assigned individuals)**

- Prepare a draft plan for review by the whole coalition.

**Session 3: (coalition) 7 hours**

- The full coalition review session.

SECTION	DETAILS	TIME
<b>Intro's</b>	<ul style="list-style-type: none"> <li>• Individuals – sharing name activity</li> <li>• Design/Outcomes for the session (Purpose OH)</li> <li>• Overview of the 5 steps (OH) &amp; key question OH for this step (OH)</li> <li>• Icebreaker Activity</li> <li>• Review the material from previous steps that is relevant to this step.</li> </ul>	20 min
<b>The Logic Model</b>	<p>A one year implementation logic model will be created as a result of this step. This has been developed with the channels as the components but could be adjusted for a particular community. Channels have been selected because of the continuity this has with the Ministry Activity Plan sheets. <i>One based on Approaches can be found at the back of all the Worksheets in the Workbook.</i></p> <ul style="list-style-type: none"> <li>• Show the partially completed 1 year program LM to illustrate the concept. Facilitators are encouraged to adapt this (created in Microsoft Excel) with the details of the local plan developed so far (ie. Vision, Mission, 4 year outcome objectives).</li> <li>• A blank 1 Year Implementation Logic Model is also included for each channel as a worksheet for the group. Worksheet 2-3 in the Workbook offers a lightly different version to copy.</li> <li>• Groups will be identifying the 1 year objectives (both outcome and implementation), inserting the selected programs and identifying any secondary audiences with whom they will work.</li> </ul>	20 min
<b>Ministry Forms</b>	<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"> <li>• Objectives</li> <li>• Channels</li> <li>• Initiatives / Activities (Programs)</li> <li>• Risk factor</li> </ul>	

SECTION	DETAILS	TIME
	<ul style="list-style-type: none"> <li>• Approach</li> <li>• Resource Allocation</li> <li>• Timing</li> <li>• Audience / Intended Reach</li> <li>• Projected Results (Outcome Objectives and Indicators)</li> <li>• Monitoring /Evaluation Activities</li> </ul>	
<b>Session 1</b>	<p>Working groups are encouraged to:</p> <ul style="list-style-type: none"> <li>• Confirm the outcome objectives for the 4 years towards which their programs are contributing.</li> <li>• Hear the details about the programs from those who have researched them.</li> <li>• Clarify any aspects of the programs to enable group to plan their versions.</li> </ul> <p>Likely there will be more than one program that a group is addressing. (eg. All workplace, school, women's programs for instance). Decide whether time and number of people dictates that programs are worked on concurrently in sub-groups or sequentially, the group goes through as a whole each program. If the latter is the case, decide what is the best sequence in which to address the programs. If it is the former, designate a time frame after which the sub-groups will re-convene and look at the package of programs as a whole.</p> <p>Worksheet 4-2 and the Year 1 Implementation Plan Worksheet included here will assist with the following aspect.</p> <p>Each program would then have the following elements developed for it:</p> <p><b>a) Outcome Objectives:</b></p> <ul style="list-style-type: none"> <li>• Write SMART (see pg. 24 of the Workbook) statements about how far towards the 4 year goals each program will be striving in the first year.</li> </ul> <p><b>b) Secondary Audiences</b></p> <ul style="list-style-type: none"> <li>• What intermediaries, influencers, gatekeepers will you work with in the year to accomplish the outcomes? (eg. To reach students, there could be elements of a school program that involve teachers, school councils, trustees etc.)</li> </ul> <p><b>c) Implementation Objectives</b></p> <ul style="list-style-type: none"> <li>• What will you accomplish along the way to achieving the annual outcomes? These milestones will be measurable outputs that can be used as sub-activities to track progress towards annual goals.</li> </ul>	7 hrs

SECTION	DETAILS	TIME
	<p><b>d) Tasks &amp; Responsibilities</b></p> <ul style="list-style-type: none"> <li>• What are all the tasks to be done related to each Implementation objective and who will do them? This will assist with the “Community Involvement” aspect of the Ministry forms.</li> </ul> <p><b>e) Timelines</b></p> <ul style="list-style-type: none"> <li>• Within each implementation objective, when will each be accomplished?</li> </ul> <p>Compile the above information for each program within your group and do the “reality check”. Is it feasible that all the implementation objectives can occur within the resources and timeframe identified? Shift things as necessary.</p>	
<b>Session 2</b>	<p>Add to the elements of each program that were developed in Session 1, the following aspects:</p> <p><b>f) Resources</b></p> <ul style="list-style-type: none"> <li>• How will coalition funds be allocated to the activities of each program? Use consistent budget codes.</li> <li>• What contributions-in-kind could be solicited from partners and identify how these will be finalized.?</li> </ul> <p><b>g) Community Involvement</b></p> <ul style="list-style-type: none"> <li>• Generate this by amalgamating previous discussions.</li> </ul> <p><b>h) Reach</b></p> <ul style="list-style-type: none"> <li>• Indicate, to the best of your ability, how many people will be reached for primary and secondary audiences through how many settings (eg. 1500 students and 50 teachers in 9 schools)</li> </ul>	4 hrs
<b>Coalition Review</b>	<p>Once each group has completed their individual program plans, they all need to be addressed as a unit – either by a planning committee or the full coalition.</p> <p>There are at least 3 aspects for overall discussion prior to approval. All need to be aware of the program details and these could have been circulated in advance but will require at least a summary.</p> <ul style="list-style-type: none"> <li>• Someone from each group summarize their program details and offer the chance for clarification.</li> <li>• In the interests of time, if group size allows, divide the group into 3. One will look at inter-program links, one at social marketing (if this has not been developed as a program on its own) and one for evaluation.</li> <li>• Each of the 3 groups to identify, where appropriate, for their element:</li> </ul>	7 hrs

SECTION	DETAILS	TIME
	<ul style="list-style-type: none"> <li>• The activities</li> <li>• The tasks and responsibilities</li> <li>• The timelines</li> <li>• The resources</li> <li>• The community involvement</li> <li>• The reach.</li> </ul> <p>Given the overall slate of activities for the year, if the amount of work or the timeframe is a concern, you could have them post them all on a wall designed like a critical path by months of the year and post coloured index cards for various activities. Even if the activities remain where posted, at least all see the busy periods.</p> <p>Have the full group use Worksheet 3-3 to review the full package of programs. Use Worksheet 4-4 to ensure that all questions have been answered.</p>	
<b>Organizational Structure</b>	Given the functions identified, discuss the organizational units that are necessary and the roles of each. Worksheet 4-1 will assist with this. Build on existing units wherever possible and adapt or create others if needed.	2 hrs
<b>Summary</b>	Identify next steps: <ul style="list-style-type: none"> <li>• To complete the plan</li> <li>• in the local approval process.</li> </ul> <p>CELEBRATE UPON COMPLETION!!!!</p>	20 min

#### f) Evaluation Link

- SMART objectives will be a key component of the evaluation 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.
- The implementation objectives will assist in evaluating on an annual basis progress towards goals and should assist with this aspect of Ministry reporting.

#### g) Supplementary Material

- Ministry Activity Plan form.

#### h) "Icebreaker"

### *"Puzzles"*

The elements of a comprehensive and detailed annual plan can be very complex with many elements intertwined. However, the whole thing, once completed should be clear...much like a jigsaw puzzle.

Divide the group into smaller groups based on the teams within which they will be working to develop the plans. Give each team a jigsaw puzzle (one of about 25 pieces is probably big enough – make sure all the pieces are there!). Any puzzle picture will do ... the challenge is for them to come up with the link.

Give them a reasonable time frame to put together the puzzle as a team. Then they need to give it a name and share with the larger group how it related to the community heart health coalition.

Summary:

- "It's great when a plan comes together."
- "The whole is greater than the sum of all the parts."

#### i) **Overheads**

- Program Planning Framework (same as Step 1)
- Step 4: Implementation
- Purpose of Implementation
- Draft 1 Year Implementation Logic Model
- Blank 1 Year Implementation Logic Model