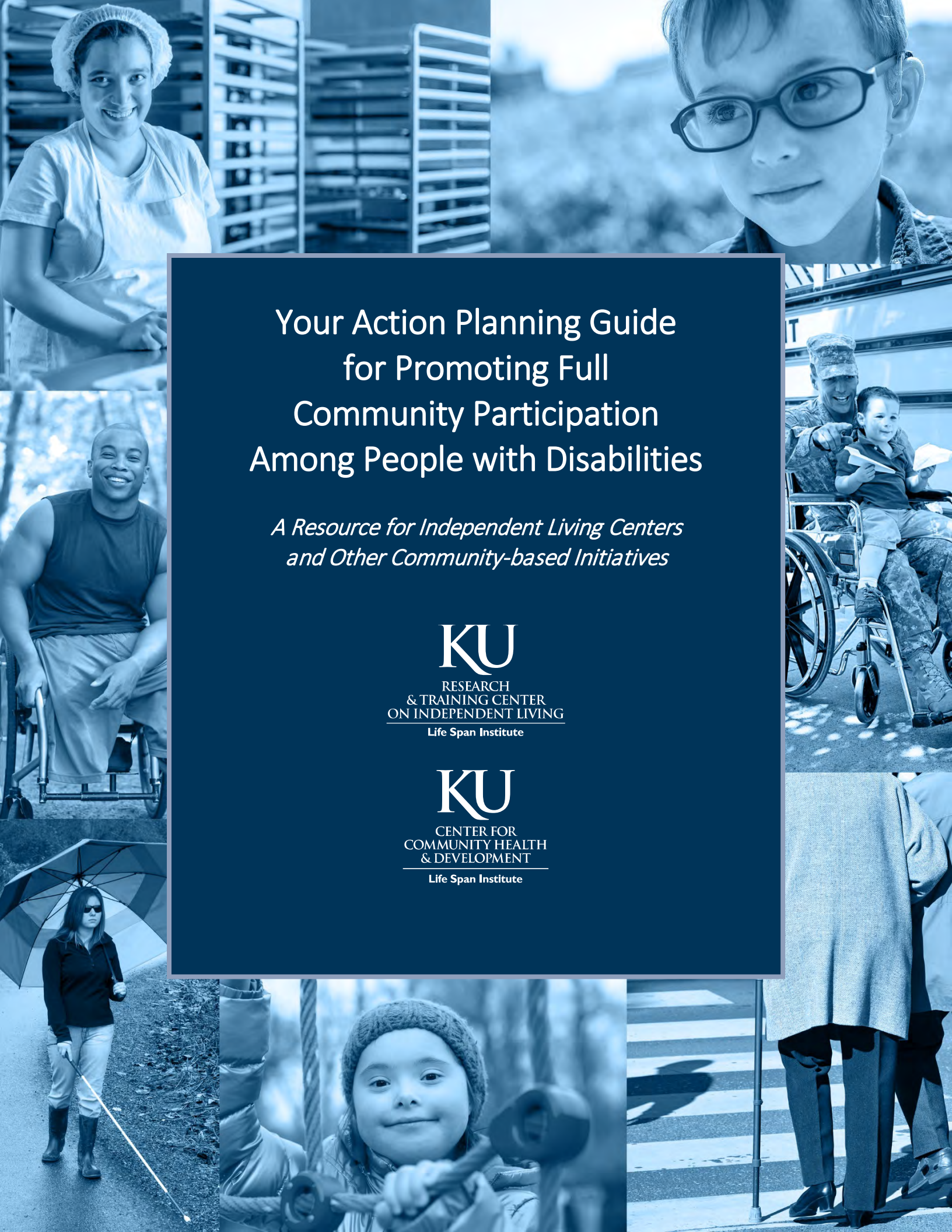

Your Action Planning Guide for Promoting Full Community Participation Among People with Disabilities

A Resource for Independent Living Centers and Other Community-based Initiatives

KU
RESEARCH & TRAINING CENTER ON INDEPENDENT LIVING
Life Span Institute

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CENTER FOR COMMUNITY HEALTH & DEVELOPMENT
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Preface

Our common vision is for communities in which all people live well. However, despite the many successes resulting from the Americans with Disabilities Act in the 25 years since its passage, many people with disabilities still experience significant barriers to meaningful participation in many aspects of their communities. Enhanced efforts are needed to effect change to provide opportunities for people with disabilities to fully engage in community life. This requires a collaborative approach to change that facilitates community participation.

The purpose of this Action Planning Guide is to support the community's efforts to plan for enhancing community participation among people with disabilities. We hope this guide will be useful to anyone interested in bringing about community change and improvement, but it may be particularly helpful for staff of Centers for Independent Living and other community-based organizations who will operate as facilitators of these processes.

Ensuring community participation for all requires broad-based efforts involving many different sectors of the community. Often referred to as **community coalitions or partnerships**, these initiatives involve key community leaders and representatives of grassroots organizations. They bring together representatives from government, social service agencies, faith-based organizations, businesses, health organizations, and other sectors of the community that share a concern about the problem or have a stake in its solution. The aim of such initiatives is to *change* communities and systems to improve outcomes for people with disabilities.

The group's **action plan** is its vision for a healthy community for people with disabilities made concrete. How could education be changed to better serve all students? What changes in housing could be made to ensure accessible and affordable housing for all? How can the business community do its part? How about government? Service providers? Taken together, the proposed changes in all relevant sectors of the community provide a **blueprint for action**.

Why Change Is Needed

People with disabilities face barriers to participation in community living, and experience disparities in their lives in areas including:

- Employment
- Socialization
- Self-reported quality of life
- Housing
- Transportation
- Health care
- Civic involvement

Complex factors such as limited financial resources (Carpenter, Forwell, Jongbloed, & Blackman, 2010; Kessler Foundation & NOD, 2010), lack of personal assistance services (Gibson & Verma, 2006; LaPlante, Kaye, Kang, & Harrington, 2004), and health disparities (Froehlich-Grobe, Lee, & Washburn, 2013; Reichard, Stotzle, & Fox, 2011) diminish community participation of people with disabilities.

In the United States:

- 56.7 million people — 19% of the population — had a disability in 2010, according to a broad definition of disability, with more than half of them reporting the disability was severe (U.S. Census Bureau).
- A 2010 poll conducted by Harris Interactive for the National Council on Disability (NOD) reported that only 21% of adults with disabilities aged 18-64 had full or part-time jobs compared to 59% of the corresponding non-disabled population (Kessler Foundation & NOD, 2010).
- Adults aged 21 to 64 with disabilities had median monthly earnings of $1,961 compared with $2,724 for those with no disability (U.S. Census Bureau).

We work toward a day in which all people live in communities that support their full engagement for a high quality of life. This guide is an attempt to foster work that will take us closer to this vision.

The World Health Organization defines barriers as, “Factors in a person’s environment that, through their absence or presence, limit functioning and create disability. These include…

- a physical environment that is not accessible,
- lack of relevant assistive technology (assistive, adaptive, and rehabilitative devices),
- negative attitudes of people towards disability,
- services, systems, and policies that are either nonexistent or that hinder the involvement of all people with a health condition in all areas of life.”

According to the Centers for Disease Control and Prevention (CDC), seven common types of barriers for people with disabilities include:

- Attitudinal
- Communication
- Physical
- Policy
- Programmatic
- Social
- Transportation

For more information, please visit: https://www.cdc.gov/ncbddd/disabilityandhealth/disability-barriers.html.

To view an example of people who used this method, please see our video “Stoplights Don’t Stop Us!” on the YouTube channel www.youtube.com/user/rtcil.

Using This Guide

We have outlined a complete process for change. You may be familiar with some of the stages of planning already, but this guide prompts you to plan for the entire process. We use resources from the Community Tool Box, http://ctb.ku.edu/en, an online resource for community change and improvement.

Overview of the Guide

- Chapter I provides background information on key issues and concepts in planning.
- Chapter II offers an overview of the planning process, with particular emphasis on clarifying the vision, mission, objectives, and strategies.
- Chapter III provides help in considering which sectors of the community should be involved in the initiative.
- Chapter IV, the heart of this guide, assists in identifying particular changes that can be sought to more fully support community participation by all. These changes are categorized by goal area for easy review.
- Chapter V outlines a process for building consensus on community changes to be sought.
- Chapter VI offers guidance on finalizing the action plan.
- Chapter VII outlines a strategy for documenting progress on goal attainment and promoting renewal of the initiative.

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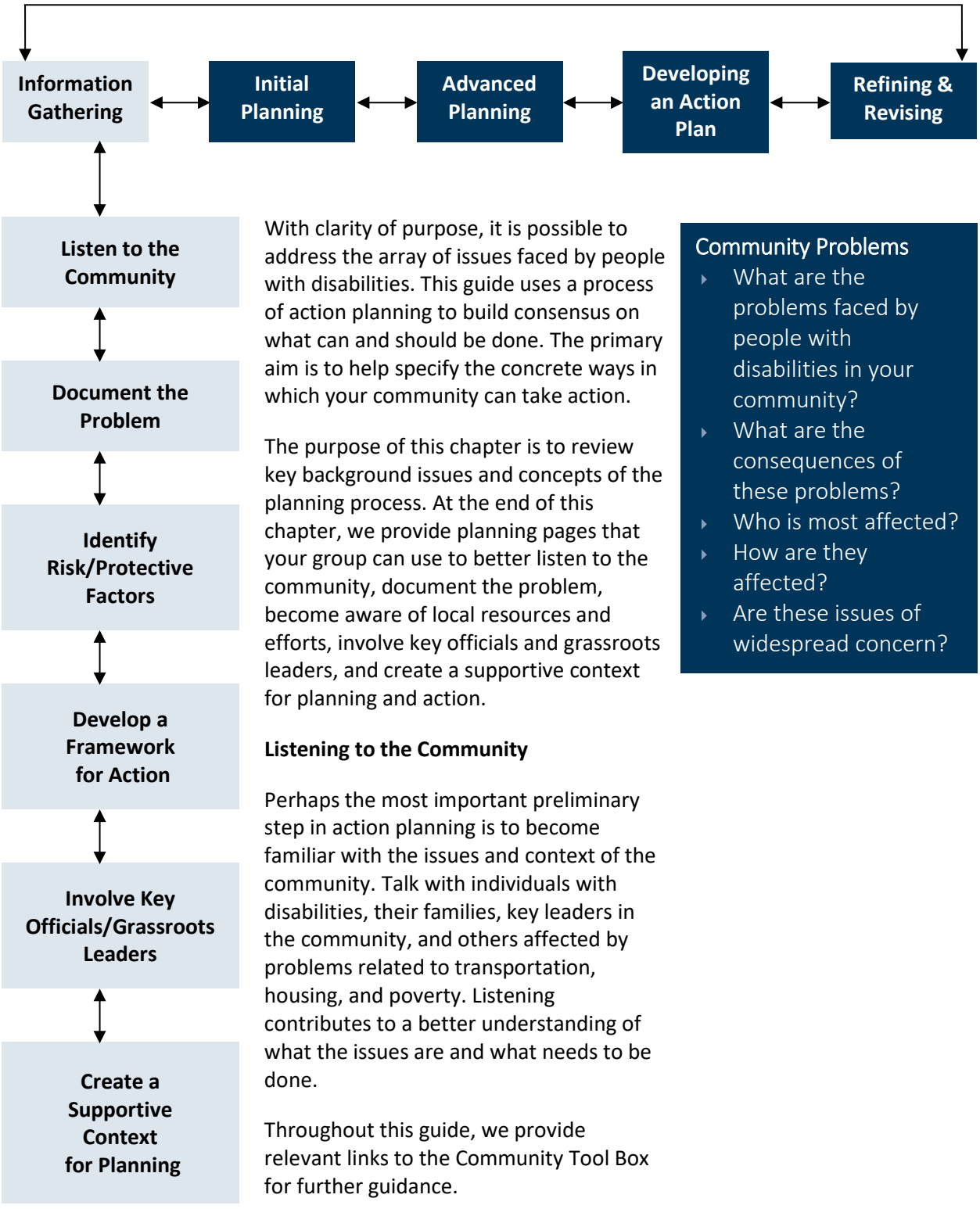
Chapter I.

Information Gathering



With clarity of purpose, it is possible to address the array of issues faced by people with disabilities. This guide uses a process of action planning to build consensus on what can and should be done. The primary aim is to help specify the concrete ways in which your community can take action.

The purpose of this chapter is to review key background issues and concepts of the planning process. At the end of this chapter, we provide planning pages that your group can use to better listen to the community, document the problem, become aware of local resources and efforts, involve key officials and grassroots leaders, and create a supportive context for planning and action.

Listening to the Community

Perhaps the most important preliminary step in action planning is to become familiar with the issues and context of the community. Talk with individuals with disabilities, their families, key leaders in the community, and others affected by problems related to transportation, housing, and poverty. Listening contributes to a better understanding of what the issues are and what needs to be done.

Throughout this guide, we provide relevant links to the Community Tool Box for further guidance.

Community Problems

- What are the problems faced by people with disabilities in your community?
- What are the consequences of these problems?
- Who is most affected?
- How are they affected?
- Are these issues of widespread concern?

Community Tool Box Online Resources:

- Chapter 3: Assessing Community Needs and Resources
  http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources
- Chapter 13: Developing a Plan for Building Leadership
  http://ctb.ku.edu/en/table-of-contents/leadership/leadership-ideas/plan-for-building-leadership/main
- Chapter 4: Getting Issues on the Public Agenda
  http://ctb.ku.edu/en/table-of-contents/assessment/getting-issues-on-the-public-agenda
- Chapter 17: Analyzing Community Problems and Solutions
  http://ctb.ku.edu/en/table-of-contents/analyze/analyze-community-problems-and-solutions

As any community organizer will attest, it is critical to listen before taking action.

In addition to talking one-on-one, consider hosting public forums or focus groups, in which people can express their views about the issues and what can be done about them. Such public meetings should be convened with people from different neighborhoods, socioeconomic groups, and ethnic and cultural groups. This will expand available perspectives on issues and options.

Conducting Listening Sessions

One method of becoming familiar with the issues consists of structured opportunities to listen to a variety of members of the community. These listening sessions go by different names including focus groups or "social reconnaissance." They are straightforward and effective tools for gaining local knowledge about the issues and context. We recommend using these public forums to learn about the community's perspectives on local issues and options.

Listening sessions record information on four aspects:

- The problem or goal
- Barriers and resistance to addressing the concern
- Resources for change
- Recommended alternatives and solutions

Discussion leaders set a limited time for brainstorming each aspect, using flipcharts to record the product of discussions. Brief reports based on the findings can be used to publicize the issue in the media, thereby enhancing the credibility of the consumer independence initiative.

Documenting the Problem

In addition to hearing firsthand experience about problems experienced by people with disabilities, it is important to document the issue using existing information sources. Many health departments have data from required reporting mechanisms that can be used to document the level of employment, civic engagement, or access to healthcare. For example, data may be available on the percentage of people with disabilities who have health insurance. Perhaps public records can be used to create a scorecard for priority outcomes such as transportation and access to public places.

Such information can be used to help document the level of the problem and to consider whether further action is necessary. Later, these data can be used to determine how effective your group was in addressing the problem or goal. (Note: Increased community awareness and activity may beget changes in reporting, changes in service rates, and other activities that may make it difficult to conclude that there was an effect or that observed effects were due to the initiative.)

Helpful Data Sources

- The *state or county health department* can help you determine health indicators.
- The *state social services department* should be able to tell you the number of recipients of Medicaid and food stamp program participants.
- *Hospital admission and exit records* exist and can give you information on births, causes of death, etc.
- *Census data* are available for your community in the United States. This demographic information can be found on the Bureau of Census web site: www.factfinder.census.gov.
- *Behavioral Risk Factor Surveillance System (BRFSS)* provides data regarding health-related risk behaviors, chronic health conditions, and use of preventative services: https://www.cdc.gov/brfss/index.html.
- *Community Commons* has premade maps of data from the state level to the block level, tools to create your own maps, and reporting tools for areas such as health, equity, environment, education, economy, and food: https://www.communitycommons.org/
- *Police records* can tell you crime rates and the incidence of problems such as domestic violence or motor vehicle accidents.
- *Chamber of Commerce data* provide information about job growth, the unemployment rate, etc.
- *Nonprofit service agencies*, such as the United Way (http://www.unitedway.org) generally have records on a variety of different issues.
- S*chool districts* can tell you school enrollment rates, attendance, and test scores. For comparative school district rates, check with your state department of education.
- *The U.S. Centers for Disease Control and Prevention* can give you information on the rates of many diseases: http://www.cdc.gov/
- Your *reference librarian* in a nearby public library can be very helpful.
- *Statistical Abstract of the United States* is a good general source in print for national information. It is done annually, and is available in most local libraries.
- Many other *web-based resources* contain useful, up-to-date information. Try using key words, such as “people with disabilities” with the search engine of your internet browser.

Identify Risk and Protective Factors

Those most affected by full community participation outcomes include:

- People with disabilities
- Family, spouses, guardians, and caregivers
- Broader community systems
- Service providers in health and human services

A number of factors, if ignored, contribute substantially to risk for adverse outcomes. These factors, if addressed, can help protect against problems affecting the well-being of people with disabilities. Although our knowledge is incomplete, research and experience suggest some factors that may contribute to community participation by people with disabilities.

Below is a list of personal factors and environmental factors (social and physical) that may affect community participation by people with disabilities.

Personal factors may include:

- Knowledge, skills, and beliefs, such as knowledge of available resources and the ability to influence one's environment
- Experience, history, social status, and cultural norms, such as a history of discrimination in work, social, or service situations
- Biological/genetic influences, cognitive, mental, or physical abilities, chronic illness, and gender and age, such as the type and degree of existing health or physical or mental disability

Environmental factors may include:

- The availability of supports and services, such as social support, support for basic and specialized needs, and human and material resources
- The level of accessibility and usability of the physical environment, communication and communication technology
- Availability and accessibility of public transportation
- Consequences of efforts, such as social approval or disapproval, incentives and disincentives, and costs of time and effort
- The availability of relevant assistive technology (assistive, adaptive, and rehabilitative devices)
- Community attitudes towards people with a disability
- Policies or infrastructure that affect who gets benefits and under what conditions, workplace policies, and limitations on eligibility
- Exposure to hazards, including risky situations
- Living conditions such as the availability of usable and affordable housing, access to transportation
- Poverty and disparities in economic status, such as those which affect the ability to meet basic needs

We can use this analysis of factors—and our experience and knowledge of our local communities—to identify promising strategies and tactics for improving full community participation.

Develop a Framework

A framework (sometimes known as a "model" or "theory") helps guide the process of community action and change. How is our community to navigate the course from initial understanding and planning down the long road to improved community participation? A clear framework helps communicate the pathway for improvement, focusing local efforts on changing conditions for community participation for people with disabilities.

An illustrative "Framework for Promoting Community Participation of People with Disabilities" follows. It has five interrelated phases:

- *Planning and building capacity* (e.g., listening to the community, documenting the problem, building leadership)
- *Targeted action* (e.g., community organizing, contacting key officials, advocacy, social marketing)
- *Community and systems change* (e.g., bringing about new or modified programs, policies, and practices relevant to the mission in all appropriate sectors of the community or broader system)
- *Widespread behavior change in relevant behaviors* (e.g., people with disabilities actively participate in their communities)
- *Improving participation and well-being outcomes* (e.g., increasing the number of people with access to transportation)

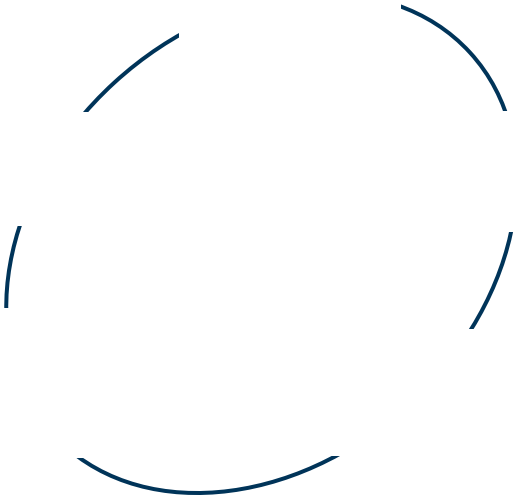


Figure 1. Framework for Collaborative Community Action on Health (Adapted from the Institute of Medicine, 2003).

Each community develops its own framework (or model or theory) for action. This creates a pictorial explanation of how change and improvement can occur. The community's framework will reflect its unique goals, needs, assets, and situation.

Becoming Aware of Local Resources and Efforts

It is important to be aware of existing programs and resources. You can find this out by talking with people with disabilities, service providers, family members and guardians, and others. Gather information about the scope of existing services and their effectiveness. Knowing the issues and the environment is critical to successful planning. Some questions to keep in mind:

- What programs, task forces, or coalitions with similar purposes already exist in the community?
- How many people are involved?
- Who are they serving?
- Could the services and programs be more effective? How?
- Were there past initiatives with a similar mission?
- Why and how did their efforts end?

Barriers and Resistance

- What key individuals or groups might oppose your efforts?
- Can they be involved in your initiative?
- What other barriers might limit the effectiveness of the initiative?
- How can barriers and resistance be overcome?

Investigating these questions is crucial to ensure that your group does not reinvent the wheel, and to maximize potential by joining forces.

Involving Key Officials and Grassroots Leaders

The planning process should be inclusive. Arrange opportunities for participation by all stakeholders. Key stakeholders from each sector can be recruited, such as leaders from schools, faith-based organizations, health organizations, centers for independent living, government, service providers, non-profit organizations, and grassroots community organizations. See the Community Tool Box Chapter 7, Section 6 for information on Involving Key Influentials in the Initiative (http://ctb.ku.edu/en/table-of-contents/participation/encouraging-involvement/key-influentials/main).

Participants should reflect the diversity of the local community. Coalition leaders must ensure that the planning group extends beyond service providers of relevant agencies. Are people with disabilities and their families involved? People of different socioeconomic backgrounds? If the community is culturally diverse, are African Americans, Hispanics, or other racial or ethnic minorities involved in planning?

Creating a Supportive Context for Planning and Action

Successful initiatives create a supportive context for planning and action. Aspects of the group that are particularly important include its leadership, size, structure, organization, diversity, and inclusivity.

Leadership

Leadership refers to the process by which leaders and constituents work together to bring about change by setting priorities and taking action. Successful groups have a person or small group that accept responsibility for success. Leaders have a clear vision of a community that promotes full community

participation and the ability to attract others to the vision. They also have the capacity for listening and other qualities that enable them to relate to others within the group. Good leaders have the courage and perseverance to help the group transform the community. For further information and how-to tools for fostering leadership development, visit Chapter 13 of the Community Tool Box at http://ctb.ku.edu/en/table-of-contents/leadership/leadership-ideas.

Size

The group must have a manageable size and structure. Most groups operate best with a maximum of 15 people. If many people are interested in working on the issues, a larger group can be structured into smaller groups, such as task forces organized by goal areas, which can report back to a coordinating council or the coalition as a whole.

Some groups use a "planning retreat" in which members can focus specifically on the goals and means of the initiative. This can be accomplished in half- or full-day sessions.

Structure

The organization of the group is also important. In larger groups or communities, action planning might initially be done in subcommittees or task groups that are organized by goal area. In smaller groups or communities, the entire group might work on the action planning.

Diversity

The group should be diverse and integrated. It should include officials from important sectors, such as directors or administrators from the transportation sector, as well as people concerned about what is going on in the sector, such as people with disabilities, families, and caregivers, who are affected by and interested in bringing about change in transportation access for people with disabilities. The group must consider how the continuing participation of persons in positions of authority can be maintained while preserving the involvement of other community members without official titles.

Inclusivity

Planning sessions must be well-publicized and open to members. The entire group will provide review and approval of the coalition's action plan, as well as its vision, mission, objectives, and strategies.

For information on Group Facilitation, refer to Chapter 16 of the Community Tool Box: http://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation

Overall Tips on Planning

Several overall aspects of the planning process are worth noting.

- **Be Inclusive**
  Good planning seeks out key players with diverse viewpoints. Once a diverse group is at the table, it is important to get them to communicate. Effective leaders often call on silent members during pauses in the discussion. They convey the value of each person's voice on the issues. Occasionally, it may be necessary to discourage an overly enthusiastic member from talking too much or dominating meetings. Leaders may do so by thanking them for their comments and indicating the importance of hearing from other members of the group.

- **Manage Conflict**
  If the group is effective in attracting diverse views, conflict among members may result. Group facilitators can recognize differences, perhaps noting the diverse experiences that give rise to divergent views. To resolve conflicts, leaders may attempt to elevate the discussion to a higher level on which there may be a basis for agreement. By reminding the group that we are all about the same shared vision of promoting full community participation, leaders can help members find common ground.

- **Use Brainstorming Rules**
  Group facilitators must avoid making judgments about ideas and suggestions. Brainstorming rules apply – acknowledge all ideas and note them without criticism.

- **Be Efficient**
  Planning meetings must be efficient, starting and ending on time. It may be helpful to have an agenda or to build a consensus at the beginning of the meeting about what will be accomplished and in what time frame.

- **Communicate Products of Planning**
  Planning will result in a useful product for taking your next steps. Try to structure every planning session so that it results in a product, such as a list of issues or ideas. Show off the product at the end of planning meetings, and distribute copies of the products of planning to all members at the next meeting.

- **Provide Support and Encouragement**
  Provide support and encouragement throughout the process of planning. Good planning takes time; it usually requires months to produce a detailed plan of action. Acknowledge the contributions of all participants, especially key leaders. Let the group know when it is doing a good job. Positive feedback feels good, particularly to those who are used to being ignored or criticized for their work.

Summary

This chapter provided a background in the key issues and concepts of planning. The next chapter provides an overview of the process of planning for action, with particular emphasis on reviewing the group's vision, mission, objectives, and strategies for promoting community participation for all.

Planning Page: Information Gathering

Listening to the Community

Please review the ideas in this chapter. Use these planning pages to conduct listening sessions in the community. This will help refine your group's understanding of the issues, barriers and resistance to addressing the concern, resources for change, and recommended alternatives and solutions.

Your group might arrange town meetings or focus groups in which to discuss these issues. Be sure to invite a variety of people, including people with disabilities and their families, nonprofit staff members, local government, staff of centers for independent living, health care providers, and other interested community members.

THE PROBLEM OR ISSUE

- What are the problems related to full community participation in your community?
- What are the consequences of these issues?
- Who is affected?
- How are they affected?
- Are these issues of widespread concern?

BARRIERS AND RESISTANCE

- What key individuals or groups might oppose your efforts?
- Can they be involved effectively?
- What other barriers might limit the effectiveness of the initiative?
- How can the barriers and resistance be overcome?

RESOURCES FOR CHANGE

- What resources and capacities are needed to address the mission?
- What local individuals or groups could contribute?
- What financial resources and materials are needed?
- Where might these resources be obtained?

Resources Needed: **Potential/Existing Sources:**

People/Organizations:

Financial:

Materials:

SOLUTIONS AND ALTERNATIVES

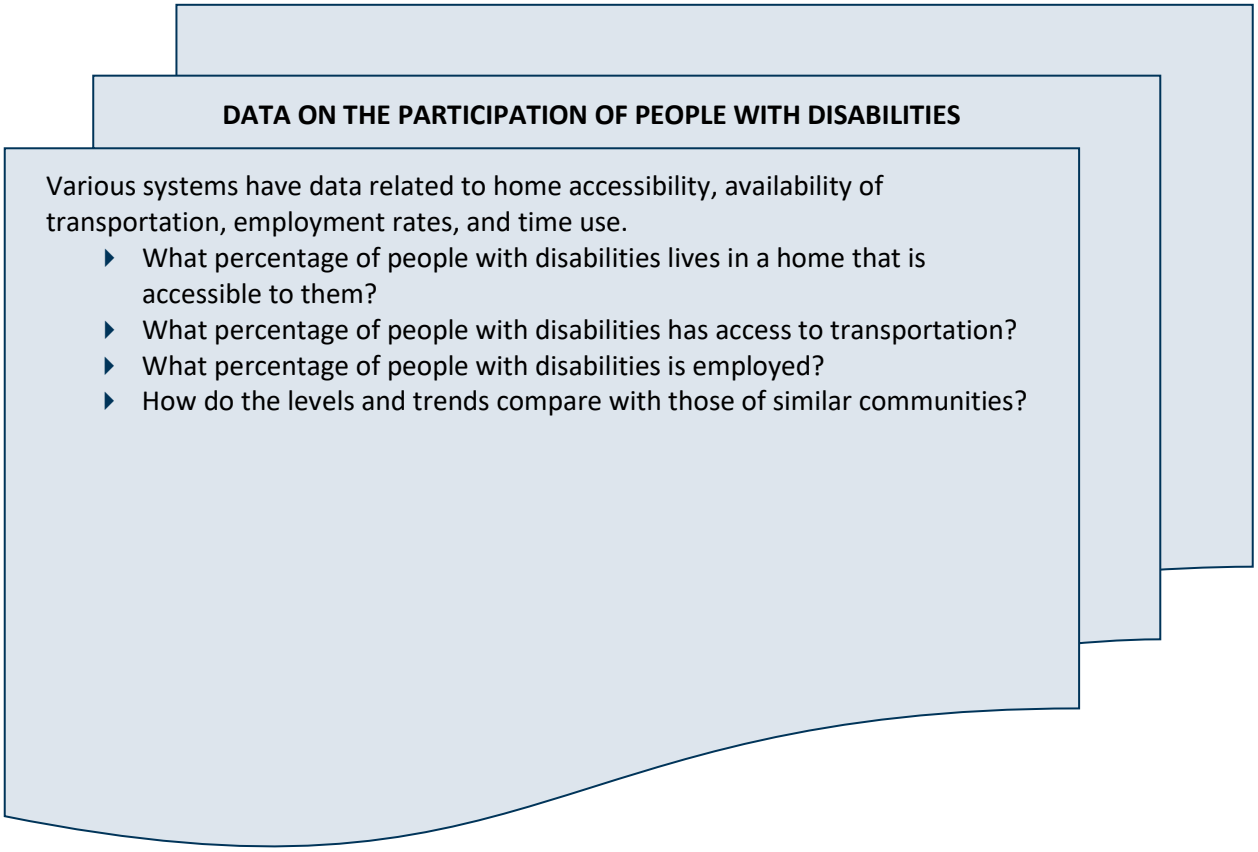
- What are some alternatives for addressing the problem or goal in light of the anticipated barriers and resources?
- These ideas may provide an initial indication of what solutions might be acceptable to the community. (The group will refine these ideas in its actions plan that is described in later chapters of this guide.)

Planning Page: Information Gathering

Documenting the Problem

Use this planning page to focus your group's efforts to document community problems or importance level of goal related to full community participation.

Your group might collaborate with officials of local centers for independent living, school districts, and transportation and health departments to obtain existing data that could be used to document the problem.



Planning Page: Information Gathering

Identifying Factors that May Affect Full Community Participation and Developing a Framework for Action

As appropriate, use this planning page to refine your group's understanding of factors that may affect the mission of promoting full community participation. Also, outline (draw a picture or flow chart and explain briefly) the framework for action (or model or "theory" of change) that your community initiative will use to address its mission.

Your group might use past planning products, interviews with community leaders and outside experts, and relevant models. It may be helpful to refer to the list of potential influential factors on p. 4 and the illustrative "Framework for Full Community Participation" on p. 5.

SOME FACTORS THAT MAY AFFECT FULL COMMUNITY PARTICIPATION

- What *personal factors* affect attainment of the goals? These may include knowledge, skills, and history.
- What *environmental factors* affect participation of people with disabilities? These may include a physical environment that is not accessible, lack of relevant assistive technology, negative attitudes of people towards disability, and services, systems, and policies that hinder involvement.
- How can we use this analysis of influential factors – and our experience and knowledge of our local communities – to identify promising strategies and tactics for promoting community participation for all?

FRAMEWORK FOR ACTION

- Is the community initiative already using a framework for action (or model or "theory" of practice) to guide its efforts?
- If appropriate, how can (should) it be adapted?
- What is the logical path from initial understanding and planning to improvements in outcomes at the community level?
- How can this framework for action help guide our group's efforts?

Planning Page: Information Gathering

Becoming Aware of Local Resources and Efforts

Use this planning page to refine your group's understanding of *existing* programs and resources as well as *current* and *past* efforts of groups with a similar mission.

Your group might use interviews with community leaders to help with these questions. Informants might be drawn from key officials in health and human services, and the business and government sectors, as well as grassroots leaders in communities particularly affected by the concern.

EXISTING PROGRAMS AND RESOURCES

- What are the existing programs and resources for promoting full participation of people with disabilities?
- How many people are they serving?
- Do these services and programs meet community needs?
- Can these services be made more effective?

CURRENT AND PAST INITIATIVES

- Are there task forces or coalitions *currently* involved in promoting full community participation?
- If so, who are they?
- How many people are actively involved?
- Are these groups as effective as they could be?
- Were there *past* initiatives with a similar mission?
- Why and how did their efforts end?

Planning Page: Information Gathering

Involving Key Officials and Grassroots Leaders

Please review the ideas in this chapter. Use this planning page to refine your group's understanding of which key officials and grassroots groups should be involved in the initiative.

Your group might use interviews with community leaders to help with these questions. Informants might be drawn from key officials in health and human services and the business and government sectors, as well as parents and leaders in communities particularly affected by the concern.

KEY OFFICIALS

- Who can make things happen on this issue?
- What individuals are in a position to create (or block) change?
- What contact people from the initiative would be most successful in getting these key officials to become involved in the initiative?
- Consider involving those who may initially be for (and against) the initiative.

Key Officials to Involve: **Contact Person:**

KEY GRASSROOTS LEADERS

- Who is particularly affected by this concern?
- What individuals and groups make things happen?
- What contact person from the group is in the best position to reach out?

Key Grassroots Leaders: **Contact Person:**

Planning Page: Information Gathering

Creating a Supportive Context for Planning

Please review the ideas in this chapter. Use these planning pages to consider how your group will position itself for success. In particular, note the leadership of the planning group and its preferred size and structure, organization, and plans for integration of key leaders and people affected by the concern.

LEADERSHIP

- Has a person or small group accepted responsibility for the initiative's success?
- Consider how the leaders can enhance their vision of a community where people with disabilities actively participate with the community.
    - How can the leaders attract others to the vision?
    - How can leaders enhance their skills to better relate to others?
    - How can the group select for and support those with the attributes necessary to help transform the community?

GROUP SIZE AND STRUCTURE

- What is a manageable size for the planning group?
- If more people wish to be involved, what structure will be used to include them? **(**Perhaps the planning group might be composed of a smaller executive or steering committee that would report to the group.)

GROUP ORGANIZATION

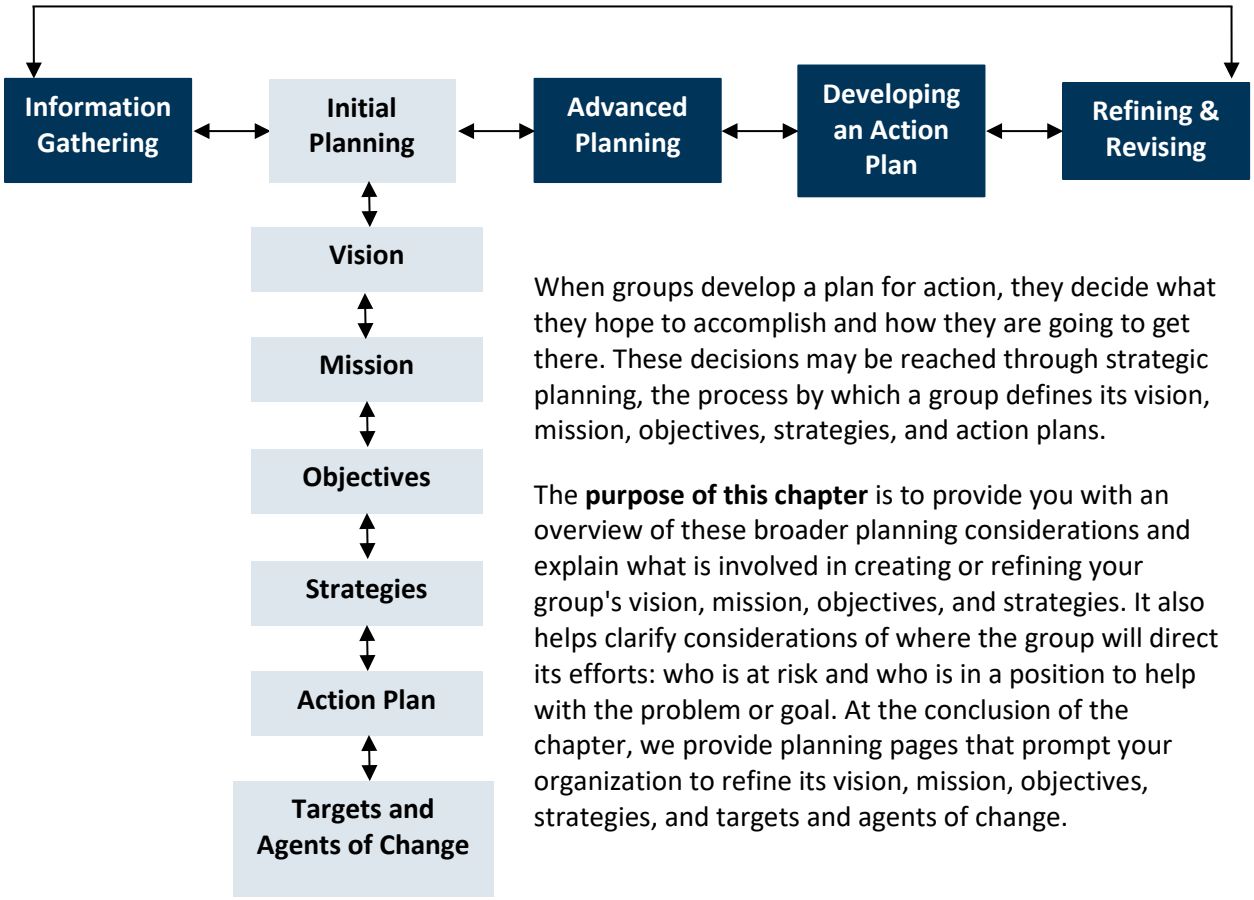
- How will the planning group be organized? (In larger groups or communities, planning might initially be done in subcommittees or task groups organized around community sectors, such as schools or faith-based organizations. In smaller groups or communities, the entire group might do this.)

GROUP DIVERSITY AND INTEGRATION

- How will diversity and integration of differing perspectives be assured?
- How will influential people be involved?
- How will other people affected by the concern be involved?
- How can the continuing participation of those with resources and authority be maintained while preserving the involvement of other community members without official titles?

Chapter II.

An Overview of Strategic Planning: Vision, Mission, Objectives, Strategies and Action Plan



When groups develop a plan for action, they decide what they hope to accomplish and how they are going to get there. These decisions may be reached through strategic planning, the process by which a group defines its vision, mission, objectives, strategies, and action plans.

The **purpose of this chapter** is to provide you with an overview of these broader planning considerations and explain what is involved in creating or refining your group's vision, mission, objectives, and strategies. It also helps clarify considerations of where the group will direct its efforts: who is at risk and who is in a position to help with the problem or goal. At the conclusion of the chapter, we provide planning pages that prompt your organization to refine its vision, mission, objectives, strategies, and targets and agents of change.

VMOSA is a practical planning process that can be used to develop a blueprint for moving from dreams to action steps to outcomes. It stands for:

- Vision
- Mission
- Objectives
- Strategies
- Action Plan

For additional guidance, see Community Tool Box Chapter 8, Section 1: http://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/vmosa/main

An Overview of Strategic Planning

The remainder of the guide will be devoted to preparing detailed action plans consistent with the identified vision, mission, objectives, and strategies. Strategic planning is a process of determining how to get from “here” (where we are now) to "there" (where things ought to be). Once begun, it continues throughout the life of the program or initiative.
VMOSA is one approach to strategic planning that can help place (and keep) an organization on the path to success.

A **vision** states the ideal conditions desired for the community. A group concerned about community participation of people with disabilities might use the following brief phrases to capture its vision:

For more information on developing strategies, refer to the Community Tool Box Chapter 8, Section 4 for more information: http://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/develop-strategies/main

"Transportation for All" or “Accessible Health Care for All.” The vision should convey the community's dream for the future. A vision should be: a) shared by members of the community, b) uplifting to those involved in the effort, and c) easy to communicate (it should fit on a T-shirt).

The **mission** describes what the group is going to do and why. The mission might refer to implementing a community-based effort to reduce the incidence of a negative condition, such as barriers that prevent individuals with disabilities from receiving needed health services. A group’s mission may be mandated by its funding source, or it may be created by its leadership. The mission may look something like this:

“To improve accessible health care for all by building community partnerships, improving available services, and through policy advocacy.”

Objectives refer to *specific measurable results* of the initiative. They include: a) key behavioral outcomes, such as a change in the percentage of young people with disabilities to finish high school, b) related community-level outcomes, such as the incidence of written or auditory health messages that help people with visual or hearing impairments receive the message and c) key aspects of the process, such as adopting a comprehensive action plan for improving outcomes related to full community participation. These goals set specified levels of change and dates by when change will occur.

Example Objectives

a) By the year 2026, increase by 20% the number of people with disabilities in the community that obtain a high school diploma or GED.

b) By the year 2030, increase by 30% the number of people with disabilities in the community that are employed and making a living wage.

For more information on developing Objectives, see the Community Tool Box Chapter 8, Section 3: http://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/create-objectives/main

Strategies refer to *how* the initiative will be conducted. A group may use a variety of strategies to meet its objectives and fulfill its mission.

Some examples of strategies:

- Use media to promote public awareness of available resources.
- Build a successful community coalition that involves relevant sectors of the community
- Enhance grassroots involvement in initiatives to increase full participation.
- Promote coordination and integration of existing services and resources.
- Create new programs and policies related to creating accessible environments for people with disabilities.

Action plans describe how strategies will be implemented to attain the objectives. Action plans include action steps for *community and systems changes to be sought* in all relevant sectors of the community. Action steps indicate what actions will be taken (what), the responsible agents (by whom), the timeline (by when), resources and support needed and available, potential barriers or resistance, and with whom communications about this plan should occur. Example community and systems changes and action steps for identified changes are provided in later chapters.

For further information on developing action plans, see the Community Tool Box Chapter 8, Section 5: http://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/develop-action-plans/main

Identifying Targets and Agents of Change

When the group has determined where it is going and how it is going to get there, it will focus on key actors whose behaviors need to be changed and people who are in a position to make the changes. Clarifying whose behavior must change to address the problem will help in later planning for action.

Potential **targets of change** could include people with disabilities, family members, service providers, teachers, business owners, and elected and appointed officials.

Potential **agents of change** include all those in a position to contribute to the solution, including people with disabilities, family members, caregivers, neighbors, service providers, teachers, business people and merchants, faith-based leaders, and elected and appointed officials.

For further information on identifying targets and agents of change, please refer to Chapter 8, Section 3 of the Community Tool Box: http://ctb.ku.edu/en/table-of-contents/analyze/where-to start/identify-targets-and-agents-of-change/main

Summary

This chapter outlined key ideas in strategic planning. The planning pages that follow provide an opportunity to apply these ideas to your own community initiative.

Planning Page: Strategic Planning

Refining Your Group's Vision, Mission, Broad Goals, and Strategies

Use these planning pages to refine your group's vision, mission, objectives, and strategies.

VISION

The vision describes the ideal condition desired for the community. It conveys the community's dream for the future. It must be a shared vision; uplifting and easy to communicate. An example vision statement is: "Full Community Participation."

Please state the vision of your group:

MISSION

The mission statement describes the special task or purpose of the group. It describes *what* the group intends to do and *why*. It must be concise, outcome-oriented, and inclusive. An example mission statement is: "To promote the community participation and well-being of people with disabilities through a community partnership."

Please state the mission of your group:

OBJECTIVES

Objectives state the goals toward which project activities are directed. Objectives describe how much will be accomplished in *specific measurable results* and state the time frame for accomplishments. Objectives must be challenging, important, potentially measurable, timed, and feasible to accomplish. Please list the objectives of your group, inserting the appropriate dates and target percentages:

- By the month/year ____, the number of adults with disabilities who experience delays in receiving primary and periodic preventive health care due to specific barriers will decrease by ___ percent.
- By the year ____, the proportion of all occupied homes and residential buildings that have visitable features will increase by ___ percent.
- By the year ____, the proportion of adults with disabilities who participate in leisure, social, religious, or community activities will increase by ___ percent.

List your objectives here:

STRATEGIES

Strategies describe *how* the objectives are going to be met. **Broad strategies** for enhancing full community participation include: increasing personal experience and competence, decreasing environmental stressors and barriers, and enhancing environmental support and resources.

Specific strategies related to changing **individual behavior** include: a) providing information and enhancing skills, b) altering incentives and disincentives, c) modifying access, barriers, and opportunities, d) enhancing services and supports, and e) modifying policies and practices.

Specific strategies related to **organizational and community development** include: a) community assessment and monitoring, b) public awareness and media campaigns, c) integrating and coordinating local agencies and resources, d) coalition building, e) modifying access to products and services, f) developing resources to enhance family and peer support, g) advocacy and nonviolent protest, h) enforcement of existing policies and laws, and i) changing policies and laws.

List the strategies to be used by your group:

Planning Page: Strategic Planning

Refining Your Group's Choice of Targets and Agents of Change

Please review the ideas in this chapter. Use this planning page to refine your group's choice of targets and agents of change.

TARGETS OF CHANGE

Targets of change are those who directly experience the problem or are at risk, or those people who contribute to the problem through their actions or lack of action.

Please list the targets of change for your group:

AGENTS OF CHANGE

Agents of change are those who are in the best position to contribute to the solution and those who have a responsibility to contribute to the solution.

Please list the agents of change for your group:

Action Planning Workshop

An Example Outline for Two Half-day Working Sessions

An effective action planning session allows a diverse group of participants to:

1. **Clarify a common purpose** through listening, gathering and reviewing data, and building a shared vision and mission.
2. **Generate and critique options** through consideration of risk and protective factors, broad and specific strategies, and the community's framework for action. This process identifies particular changes in communities and systems (i.e., new or modified programs, policies, and practices) to be sought to achieve the mission.
3. **Obtain consensus about community and systems changes to be sought** through ballot voting about the importance and feasibility of proposed changes, or by having participants use dot stickers or post-it notes to share preferences for changes to be sought.
4. **Decide how to proceed as a group** through open discussion to identify action steps (i.e., who will do what by when) to bring about the identified changes.

Background work before the session/workshop:

- ***Listening sessions*** *with a variety of people including those most affected.*
- ***Documenting*** *the problems or goals, including data on the priority/importance levels of problems or goal attainment.*
- ***Product of Session/Day One****:* A new (or renewed) statement of the group's Vision, Mission, Objectives, and Strategies. (These may require review or approval by a broader group.)

Action Planning Example Agenda

Day One (1/2 Day)

8:30	Registration and continental breakfast
9:00	Welcome and introductions
9:20	Overview of the action planning process
9:30	VMOSA … What Is VMOSA (Vision, Mission, Objectives, Strategies, Action Plans)?
9:45	Vision: Promoting full community participation: Creating your own community's vision
10:15	Mission: What we are trying to accomplish and why: Stating your mission
10:45	Objectives: How much of what we will accomplish by when: Creating your objectives
11:15	Strategies: How we will get there: Identifying a set of broad and specific strategies
12:15	Questions/Wrap Up: Group summarizes accomplishments of day
12:30	Adjourn

- ***Homework Before Session/Day Two**:* Review the "Inventory of Potential Community and Systems Changes for Promoting Full Community Participation". Bring recommended changes to be sought: a) by specific strategy (i.e., providing information and enhancing skills, modifying access, barriers, and opportunities, enhancing services and support, changing consequences, and modifying policies) and b) by community sector (e.g., community organizations, business, government).

- ***Product of Session/Day Two***: A set of prioritized community and systems changes (i.e., new or modified programs, policies and practices to be sought in each relevant sector of the community [e.g., community organizations, schools, faith communities, businesses, government]).

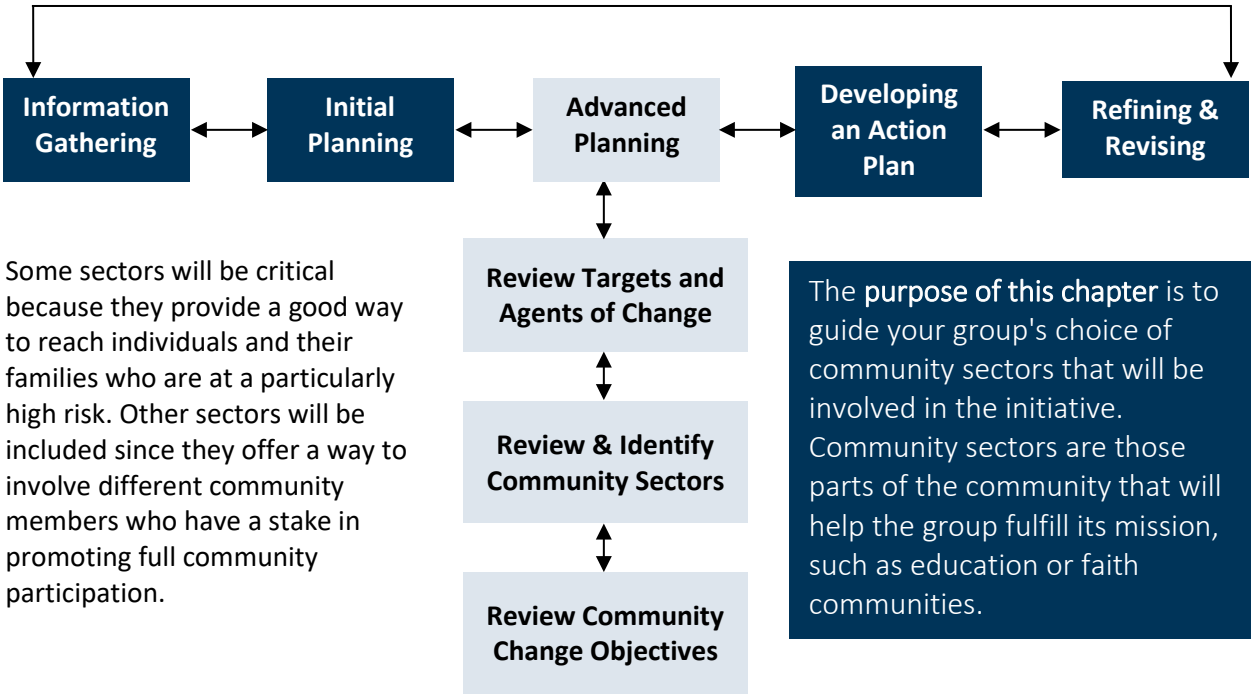
Action Planning Example Agenda

Day Two (1/2 Day)

9:00	Review of day one and overview of day two
9:15	Identify targets and agents of change: Who should benefit? Who can contribute?
9:30	Identify community and systems changes by strategy (work in small groups organized by strategy)
10:15	Small group reports
10:45	Identify community and systems changes by sector (work in small groups organized by sector)
11:15	Small group reports
11:45	Build consensus on community and systems changes to be sought (e.g., vote using dot stickers or post-it notes placed on large sheets of paper around the room, each featuring a potential change to be sought)
12:15	Next steps: ▸ Build consensus/seek approval from the larger group (if appropriate) ▸ Reiterate action steps for each change to be sought (who will do what by when) ▸ Plan for documenting progress, celebrating and promoting renewal
12:45	Questions/Wrap up: Group summarizes accomplishments of the day
1:00	Adjourn

Chapter III.

Working Together to Promote Full Community Participation: Involving Key Sectors of the Community



Some sectors will be critical because they provide a good way to reach individuals and their families who are at a particularly high risk. Other sectors will be included since they offer a way to involve different community members who have a stake in promoting full community participation.

The **purpose of this chapter** is to guide your group's choice of community sectors that will be involved in the initiative. Community sectors are those parts of the community that will help the group fulfill its mission, such as education or faith communities.

Important Activities:

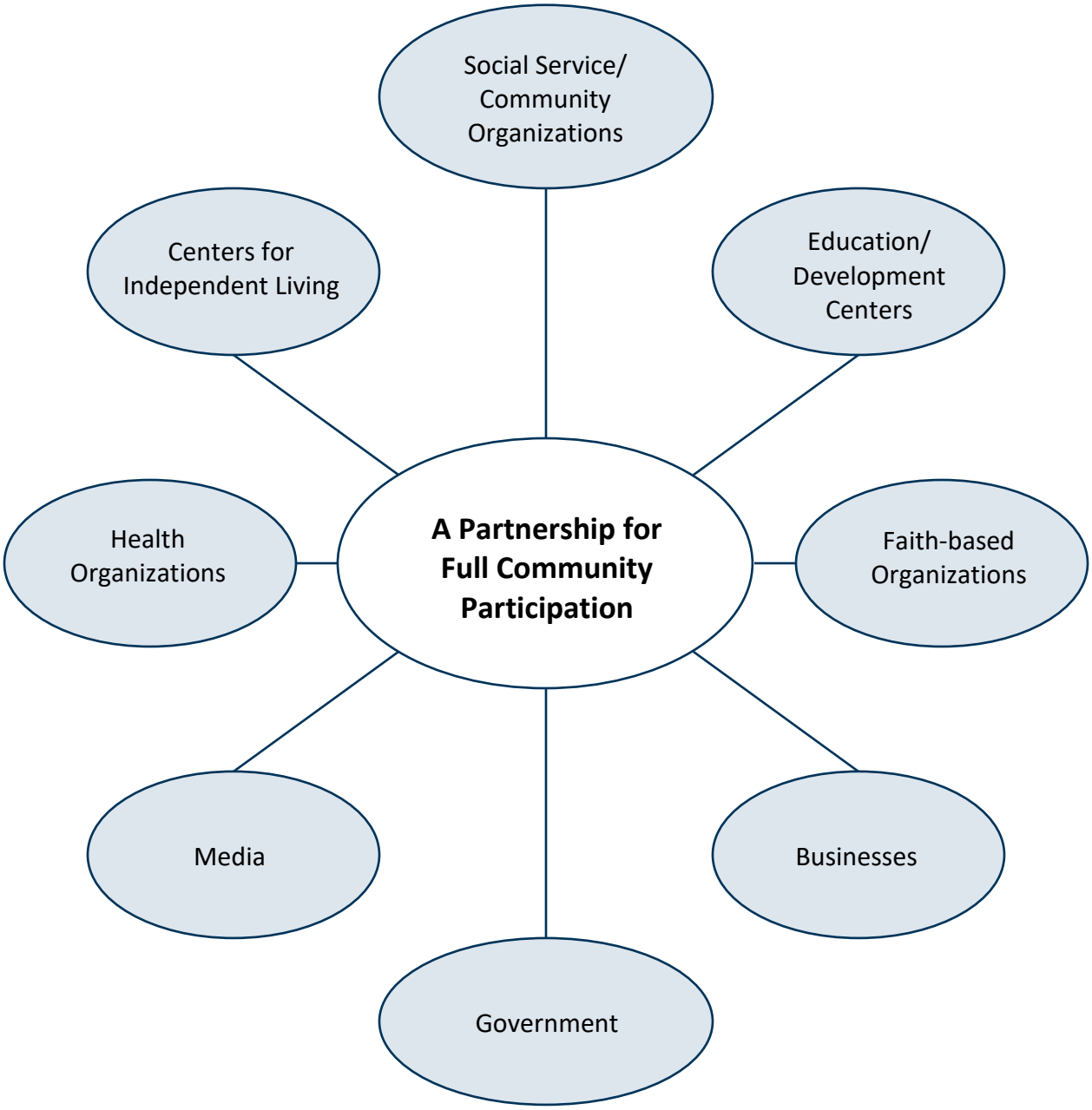
1. **Review the targets and agents of change** identified in the previous chapter. These are the people whom your group hopes to influence and involve in its efforts.
2. **Review the community sectors** diagram on the next page from an example coalition promoting community participation and well-being of individuals with disabilities. Consider which of these sectors of the community might be most useful in promoting this goal. Modify the chosen sectors and delete or add new ones to fit your community's specific needs, resources, barriers, and experiences.
3. Use the planning page at the end of this chapter to **identify the community sectors** with which your group will collaborate. Each sector should help reach your group's targets of change and/or involve your selected agents of change. Your organization's own particular sectors will reflect the overall vision, mission, objectives, and strategies, as well as local resources and opportunities.
4. In preparation for the next important chapter on preparing an action plan, review the example **community change objectives** that could be sought in each sector. Consider how these changes in communities and systems could work together in a comprehensive and concrete vision for promoting full community participation.

Key Community Sectors

An Example Partnership for Full Community Participation

Here is a diagram of community sectors that might be involved in a community partnership for the promotion of community involvement and well-being of individuals with disabilities. These are the community sectors or groups through which that organization intends to fulfill its mission.

Which community sectors should be used to address your group's mission? Which of these offer good prospects for changing behaviors and involving community members with a concern about the health and community participation of individuals with disabilities?

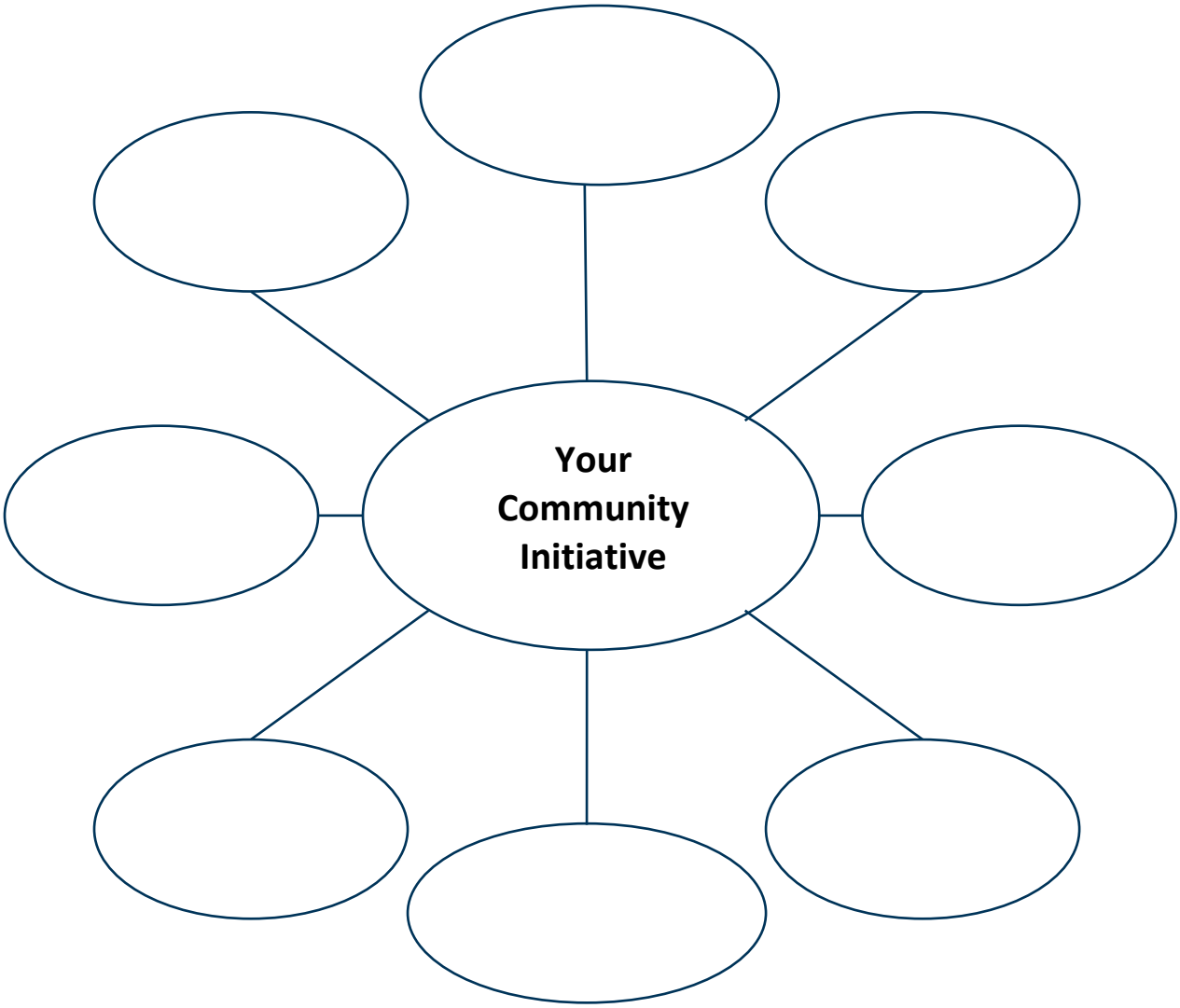


Planning Page

Choosing Community Sectors to Involve

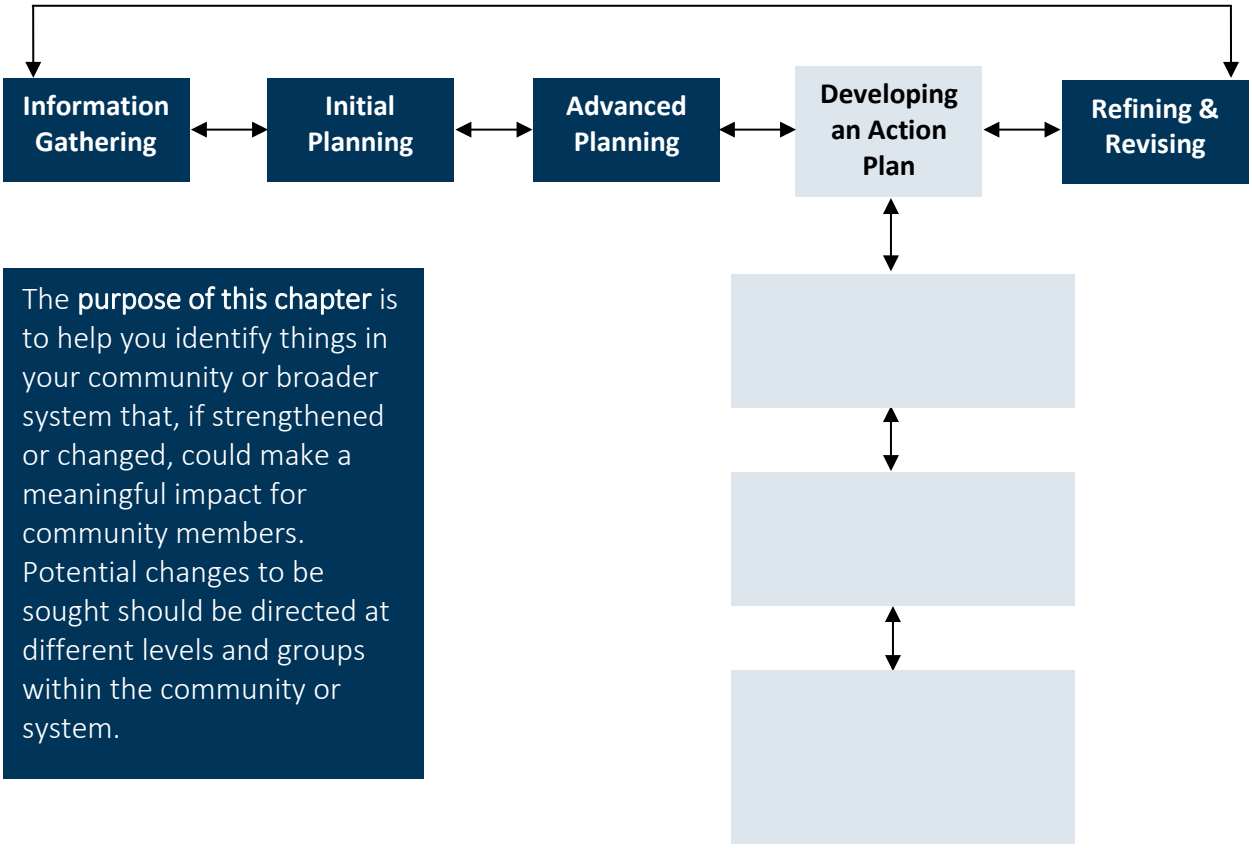
Please review the diagram for the full community participation partnership on the previous page. Use this page to list proposed sectors of the community in which your group hopes to have an influence. Potential sectors include housing, schools, health organizations, transportation, and faith-based organizations.

Review the targets and agents of change identified in the previous chapter. Consider what community sectors will best enable the group to reach the targets of change and involve potential agents of change. Consider the following questions: Does the sector provide a way to reach large numbers of people? Does it provide access to community members who have an interest or responsibility for promoting the well-being of individuals with disabilities? Is this part of the community important to the mission? Is it feasible to involve the sector in the group's efforts? What other sectors could or should be involved?



Chapter IV. Preparing Your Action Plan

Identifying Community and Systems Changes to Be Sought



The **purpose of this chapter** is to help you identify things in your community or broader system that, if strengthened or changed, could make a meaningful impact for community members. Potential changes to be sought should be directed at different levels and groups within the community or system.

This chapter provides an inventory of possible changes that your group might seek. Final decisions about which changes or improvements to pursue should be made by your community.

The Inventory of Potential Community and Systems Changes is organized by goal areas:

- Independent living skills
- Access to education, communication, and information
- Access to services
- Accessibility of public places/physical design
- Advocacy and civic engagement
- Employment
- Health care
- Housing
- Mental health and peer support
- Sustainability
- Transportation
- Recreation

Developing the Action Plan consists of three steps:

Step 1: Review, modify, and expand the inventory of potential community and systems changes by referring to the following examples of possible changes that might be sought by your group (p. 35). Scan the inventory of possible objectives and mark the community and systems changes that seem relevant. Then brainstorm to see if you can identify others not listed in the inventory. Modify these potential changes and delete or add new ones to fit your community's specific needs, resources, and barriers.

Step 2: Use the planning page to list a tentative set of changes to be sought.

Step 3: Use your community's framework for action to draft a simple flowchart that shows how the planned changes in communities and systems fit together, forming pathways that lead logically to widespread behavior change and improved outcomes.

Note that the potential changes in the inventories are directed at many different levels of the community and broader system. Some may address the behaviors of certain individuals with disabilities and their families, while others seek to change the behaviors of influential people, such as policymakers or clergy. Some changes are directed at the environment by altering the programs, policies, and practices of important institutions or organizations. Your group should attempt to make changes in a variety of different sectors in your community. Such changes may bring about a more meaningful and lasting solution.

We strongly encourage planners to involve as many stakeholders as possible in the process described in this chapter. For example, a planning group of 20 could break into diverse work teams of five people – one team for each goal area. Once all of the steps are completed, those smaller teams could review and exchange their respective findings and rationales with one another. This exchange of ideas could then serve as the basis for a planning team's recommendations to the broader group.

A Key Question:

What combination of changes in programs, policies, and practices are necessary to make a difference with the mission of promoting well-being and community involvement of individuals with disabilities?

FIRST STUDENT

Inventory of Potential Community and Systems Changes

Independent living skills

By _____ (date), provide the Living Well with a Disability course by the University of Montana Research and Training Center on Disability in Rural Communities to community members with disabilities. (http://healthycommunityliving.com/index.html)

By _____, provide Living Well with a Disability to residents of assisted living or nursing homes.

By _____, collaborate with people with disabilities to determine needs and interests, and provide appropriate workshops or classes to build independent living skills, such as communication skills, local transportation options, financial literacy, and computer skills.

By _____, coordinate with local education agencies to provide pre-employment transition skills programs to students graduating from high school. The curriculum can include topics such as driver's education, personal finance, budgeting, goal setting, interviewing, and attitude and behaviors.

By _____, provide support groups for people with potential, current, and past transitions from assisted living to the community for networking and sharing personal stories.

By _____, coordinate with local assisted living facilities to give presentations to residents to increase awareness of emancipation and transition services for people wishing to live more independently.

By _____, coordinate with local schools and centers of education to participate in career fairs, job fairs, or college fairs to increase awareness of transition services for students.

By _____, coordinate with the local fire department and disaster assistance (Red Cross, etc.) to provide emergency preparedness training and education.

By _____, provide disaster preparedness resources such as fire department alert stickers, contact lists, and safe haven addresses.

Access to education, communication, and information

By _____, increase needed access to assistance in the classroom by working with the school district to have services integrated into the education plans of students with disabilities.

By _____, assure that videos used by educational institutions that serve people with disabilities have closed captioning or written versions for people with hearing loss.

By _____, increase awareness among students and parents of the Individuals with Disabilities Education Act (IDEA) and the rights that it assures to students with disabilities.

By _____, assure that educational resources provided by schools abide by the Standards for Web Site Accessibility (http://www.osec.doc.gov/webresources/accessibility/Policy6_WebSiteRules.htm).

Access to services

By _____, network with organizations that provide services to people with disabilities to ensure awareness of all available resources for people with disabilities within the community.

By _____, coordinate with schools to deliver informational presentations to teachers, students, and parents to increase visibility and awareness of available services.

By _____, coordinate with churches and faith-based organizations to deliver presentations to church leaders, groups, members, and youth to increase visibility and awareness of available services.

By _____, coordinate with hospitals to deliver informational presentations to administration, doctors and nurses to increase awareness of available services.

By _____, coordinate with senior centers, offices of aging, support groups, and other organizations to conduct outreach presentations about available services.

By _____, coordinate with neighborhood associations to provide information on available services.

By _____, conduct a community event in relation to different types of disabilities, such as a Brain Injury Awareness Day, to educate about available CIL services.

By _____, participate in local health fairs, college fairs, and career fairs to promote available services and connect with the public.

By _____, provide access to sign language interpreters or readers for people with hearing or vision difficulty when they are in a health care or health services setting.

By _____, coordinate matching assistive technology with individuals who are interested in using these devices.

By _____, provide assistive technology and technical assistance to individuals, such as video readers and talking watches, for people with low vision.

By _____, initiate a telecommunications access program for people to make video phones and other up-to-date technology more available to people who need it.

By _____, communicate with county and state authorities to ensure that voting sites recognize the right of people with disabilities to have someone with them while voting.

Accessibility of public places/physical design

By _____, check for ADA compliance and usability of public places, such as: restaurants, retail stores, hotels, conference centers, medical and other offices, theaters, recreation centers, sports stadiums, educational facilities, historic sites and other tourist attractions. Communicate with management if changes are required for full use of facility by people with disabilities.

By _____, check for ADA compliance and usability of outdoor spaces such as public parks, monuments, squares, gardens, sidewalks, street crossings, and pedestrian pathways. Communicate with city or county leadership if changes are required for full use of outdoor spaces by people with disabilities.

By _____, check for ADA compliance and usability of polling places. Communicate with management if changes are required for full use of the facility by people with disabilities.

By _____, work with city and property managers to implement changes to parking in public places to increase ease of use by people with disabilities.

By _____, coordinate with community partners to provide educational awareness of Universal Design for community leaders, people with disabilities, and other stakeholders.

By _____, facilitate the installation of covered shelters or benches for bus stops.

By _____, facilitate changes to crosswalks (e.g. increased crossing time, verbal cues, and lighting) and other pedestrian safety features.

By _____, work with local restaurants to provide braille or large print menus and other printed material for patrons.

Advocacy and civic engagement

By _____, speak at events/advocacy days at the state capitol. For example, testify in support of adopting or maintaining programming and policies that make it easier for people with disabilities to live and participate in community life.

By _____, become involved in the statewide plan for independent living (SPIL), presenting to the statewide independent living council (SILC) or an action committee or work group to increase full community participation for people with disabilities.

By _____, provide informational packets or phone calls on voting registration, voting rights, and the voting process for people with disabilities and others in the community.

By _____, provide advocacy training to increase advocacy skills at the individual and group level.

By _____, hold voter registration booths in public places (such as local supermarkets) and distribute voter materials such as applications for advanced ballot voting.

By _____, disseminate issue “blasts” or factsheets disseminated broadly to increase civic participation and voter turnout.

By _____, organize (or participate in) a town hall meeting to shed light on upcoming issues and actions.

By _____, facilitate local advocacy groups of people with disabilities to identify problems and research and advocate solutions at the community level.

By _____, facilitate ADA anniversary celebrations to increase awareness and demonstrate solidarity for a more inclusive, barrier-free community. For example, demonstrate at the capitol building, provide a platform for personal testimony, or host an open house for the community.

By _____, conduct awareness events at schools including topics and activities such as disability history, accessible van demonstration, disability simulation, and disability etiquette.

By _____, conduct awareness events in the community including topics and activities such as disability history, rallies, proclamations, presentations, and disability etiquette.

Employment

By _____, offer the Working Well with a Disability course to people with disabilities (http://healthycommunityliving.com/index.html).

By _____, provide employment training and job readiness education for people with disabilities.

By _____, facilitate a job club or other networking opportunity for adults who are seeking to advance in their careers.

By _____, coordinate a mentoring event to bring together youth with disabilities and adults with disabilities who are a part of the workforce.

By _____, increase awareness and outreach to expand the use of WIPA by social security beneficiaries with disabilities.

By _____, provide reasonable accommodation training and information to major employers.

Health care

By _____, develop a resource center or hub for information and connections to services for aging and disability.

By _____, host information sessions to explain Medicaid benefits and changes to Medicaid at the local, state, and federal level.

By _____, coordinate with local health education providers such as hospitals, clinics, or universities to provide information to people with disabilities about health promoting behaviors, preventative health screenings, and up-to-date recommendations for increasing health in particular areas, e.g. heart health or oral health.

Housing

By _____, advocate for a city ordinance to require visitability standards for new housing construction.

By _____, establish a program to provide home modifications to people with disabilities such as wheelchair ramps and shower grab bars to increase the ease with which they can use their home.

By _____, provide support to people with disabilities for locating and affording accessible housing.

By _____, provide education on housing issues, such as renting rights, landlord-tenant laws, incentives for modification for accessibility, and other resources.

Mental health and peer support

By _____, collaborate with youth mental health efforts and youth suicide prevention efforts.

By _____, provide stress-reduction activities (i.e., meditation, etc.) as a part of regular meetings or support groups or as a stand-alone class.

By _____, launch support groups for specific disabilities, such as low vision, brain injury, or multiple sclerosis.

By _____, launch a peer support group for all people with disabilities in the community.

Sustainability

By _____, develop a sustainability plan for your effort (see http://ctb.ku.edu/en/sustaining-work-or-initiative).

By _____, initiate and maintain independent fundraising in the community (events, auctions, soliciting donations, selling food or other goods, etc.)

By _____, apply for grants to provide new or expanded services, advocacy, or education within your service area.

Transportation

By _____, establish a regular training for transit personnel in the public transportation service area on safely and respectfully transporting people with all types of disabilities.

By _____, provide transportation vouchers to people with disabilities for use for public transportation.

By _____, establish a cab voucher program to increase availability of on-demand travel for people with disabilities.

By _____, assist people with transportation plans to meet their specific needs.

By _____, coordinate with the city and transit authority to increase service areas.

By _____, establish a transportation fund for people with disabilities to subsidize travel expenses for the bus system or paratransit.

By _____, check for usability of public transportation, including passenger loading zones and stops. Communicate with the transit authority if changes are required for full use of public transportation by people with disabilities.

Recreation

By _____, provide classes or workshops for people with disabilities to increase knowledge of personal interests, such as photography or the arts.

By _____, coordinate a club for accessible physical activity, such as a wheelchair basketball team or exercise class.

By _____, coordinate a recreational event that includes people with disabilities, such as an inclusive 5k, field day, or sailing/rowing event.

Worksheet for Potential Community and Systems Changes to Be Sought

Community Issue/Goal:

Community partners:

Strategies:

- ❑ **Changes That Provide Information and Enhance Skills**

- ❑ **Changes That Alter Incentives and Disincentives**

- ❑ **Changes That Modify Access, Barriers, and Opportunities**

- ❑ **Changes That Enhance Services and Supports**

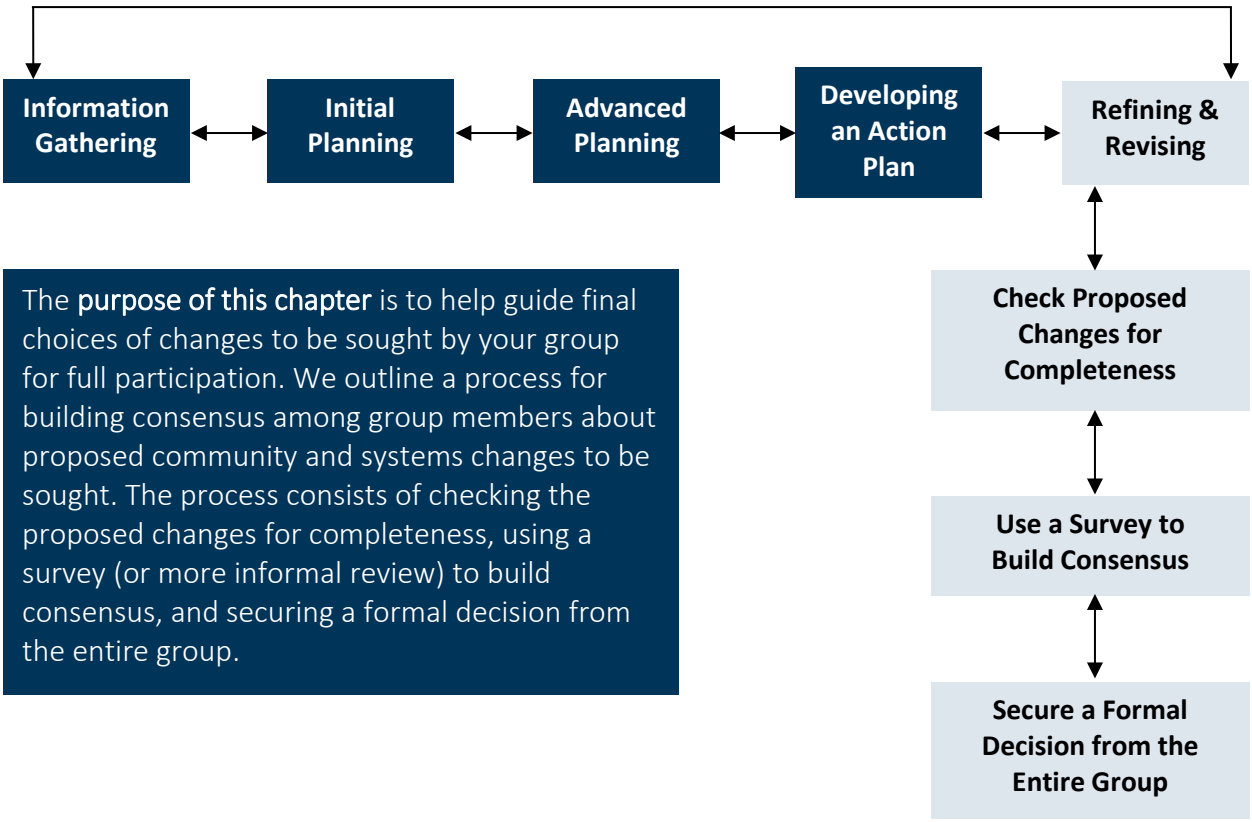
- ❑ **Changes That Modify Policies and Practices**

“A vision without a task is a dream.
A task without a dream is drudgery.
But a vision with a task
can change the world.”

- Oglala Sioux

Chapter V. Refining Your Action Plan

Building Consensus on Proposed Changes



The **purpose of this chapter** is to help guide final choices of changes to be sought by your group for full participation. We outline a process for building consensus among group members about proposed community and systems changes to be sought. The process consists of checking the proposed changes for completeness, using a survey (or more informal review) to build consensus, and securing a formal decision from the entire group.

Step 1: Checking the Proposed Changes for Completeness

The group should collectively review proposed changes for each sector. We recommend asking:

- For this sector, do these proposed changes maximize its contribution to the mission of promoting full community participation?
- What other changes in programs, policies, or practices could or should be made in this sector?

To review the overall set of proposed changes for all sectors, ask:

- Collectively, would all the changes be sufficient to improve outcomes for community participation and well-being to desired levels?
- What other changes in programs, policies, or practices could or should be made in the community?

Step 2: Using a Survey (or More Informal Review) to Build Consensus

To help attract and preserve commitments, it is important to build consensus on the changes to be sought. The group may use a survey to review the proposed changes. This can also be done less

formally, such as individually or in small groups. We recommend listing all the proposed changes, organized by community sector, along with questions about their importance and feasibility for addressing the mission of promoting full community participation for all.

For each change to be sought, consider whether the proposed change is:

- Important to the mission of promoting full community participation for people with disabilities?
- Feasible to accomplish?

The following is an example of a survey you could use to build consensus.

Proposed Changes in Social Services:	How **important** is it to...					How **feasible** is it to...				
	Not at all				Very	Not at all				Very
1. Provide skills training in independent living.	1	2	3	4	5	1	2	3	4	5
2. Provide adequate support to home modification programs.	1	2	3	4	5	1	2	3	4	5

Seek feedback from key audiences for the group. Then collect the completed surveys and compute an average rating for the importance and feasibility of each proposed change.

The results can be used to guide prioritization. Proposed changes with high importance and high feasibility ratings should be given higher priority for action; those with lower importance or feasibility, a lower priority. It may be helpful to set a cutoff for choosing priorities. For example, perhaps only those proposed changes with an average rating of 4 or higher on importance, and 3 or higher on feasibility might be included on the final action plan.

Step 3: Securing a Formal Decision from the Entire Group

Seek formal approval of the proposed changes by the membership of the group. A one-half day action planning retreat or working session can be used very effectively.

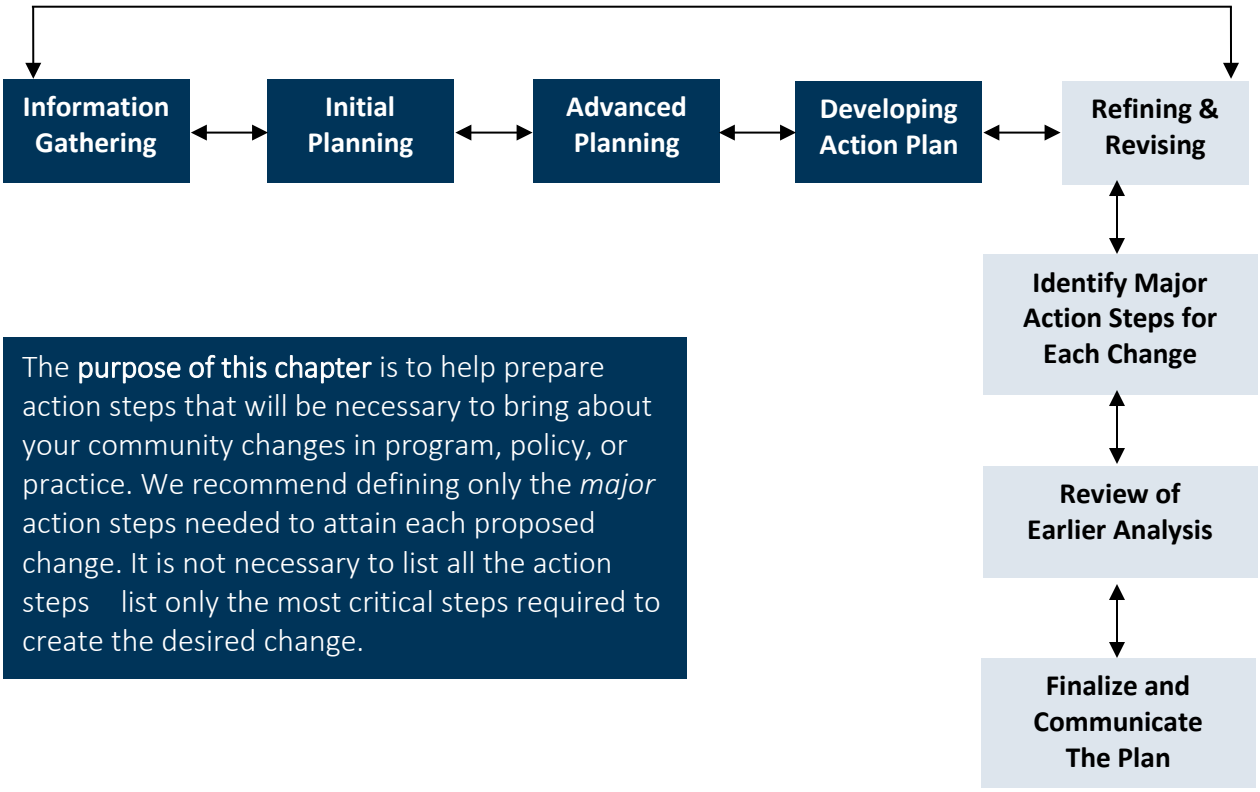
The *entire* membership should have the opportunity to make a decision on changes to be sought. Seek consensus. Use a formal vote to resolve disputes about specific changes only when necessary. Arrange for a vote of the entire membership on the complete action plan, recording the votes.

Summary

This chapter described a process for helping build consensus on the complete list of proposed changes for the community sectors to be involved in the initiative. The next chapter describes how to convert these proposed changes into a final action plan.

Chapter VI. Finalizing Your Action Plan

Listing Action Steps for Proposed Changes



The **purpose of this chapter** is to help prepare action steps that will be necessary to bring about your community changes in program, policy, or practice. We recommend defining only the *major* action steps needed to attain each proposed change. It is not necessary to list all the action steps list only the most critical steps required to create the desired change.

Step 1: Identify Major Action Steps for Each Change

The action steps detail what will occur, by whom, and by when. To prepare action steps for your action plan, define the following for each proposed change:

- What actions will be taken
- The responsible agents (by whom)
- Timeline (by when)
- Resources and support needed and available
- Potential barriers and resistance
- With whom communication about the plan should occur

Step 2: Review of Earlier Analysis

Use the information gathered in the previous chapters to guide your group's action steps for bringing about identified community and systems changes. For example, how can your understanding of potential resources and barriers be used to outline a communications plan for who should know about what?

Step 3: Finalize and Communicate the Plan

A comprehensive action plan helps communicate that the group is clearly organized and understands what is needed in order to be effective in bringing about change. The complete action plan includes action steps for each change to be sought. Organize the changes by community sector, listing each proposed change, and related action steps, in the order in which they are supposed to occur.

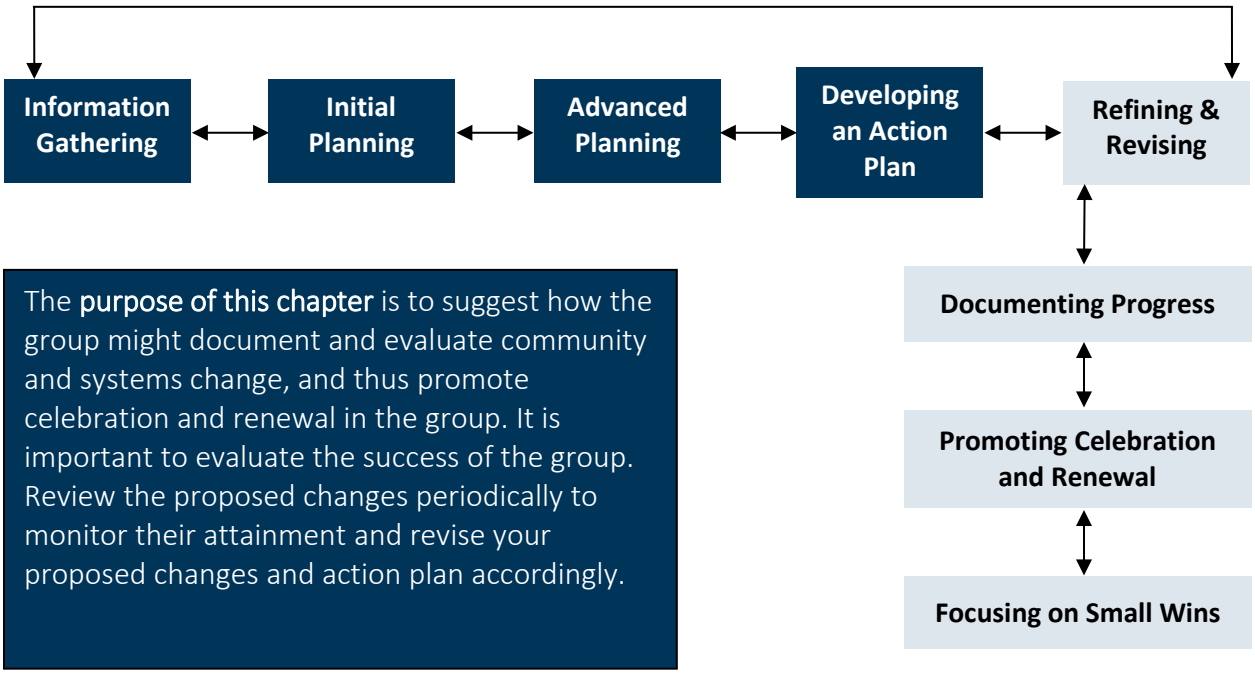
Action Steps for Identified Community or Systems Change

Use this page to outline action steps for each identified change to be sought.

Community or Systems Change to Be Sought:

ACTIONS	BY WHOM	BY WHEN	RESOURCES & SUPPORT NEEDED/AVAILABLE	POTENTIAL BARRIERS OR RESISTANCE	COMMUNICATION
What needs to be done?	Who will take action?	By what date will the action be done?	What financial, human, political and other resources are needed? What resources are available?	What individuals and organizations might resist? How?	What individuals and organizations should be informed about these actions?

Chapter VII. Documenting Progress and Promoting Renewal



The **purpose of this chapter** is to suggest how the group might document and evaluate community and systems change, and thus promote celebration and renewal in the group. It is important to evaluate the success of the group. Review the proposed changes periodically to monitor their attainment and revise your proposed changes and action plan accordingly.

By **community change**, we mean developing a new **program** (or modifying an existing one), bringing about a change in **policy**, or adjusting a **practice** related to the group's mission. Examples of community changes include establishing a new transportation program or establishing a Disability Mentoring Day for students and job-seekers with disabilities.

Systems changes are similar to community changes, but take place on a broader level. A business might implement equal opportunity practices throughout its operations in the state or nationally. Another example is a change in state agency policy to award cash incentives to grantees that reach or exceed their objectives. Documenting community and systems change is discussed further in Chapter 38 of the Community Tool Box (http://ctb.ku.edu/en/table-of-contents/evaluate/evaluate-community-initiatives/monitor-progress/tools).

We recommend monthly recording and quarterly reporting of community and systems changes. This documentation process can help you discover the factors that affect change. A lull in the rate of community changes may indicate that the action plan needs to be updated. Documenting community changes also helps us remember to celebrate our accomplishments.

Documenting Progress

Documentation can help address three key questions related to the functioning of community-based efforts.

1. Is the partnership serving as a catalyst for community and systems change?

The following example shows a cumulative graph of CIL community actions and systems changes:

Figure 1.

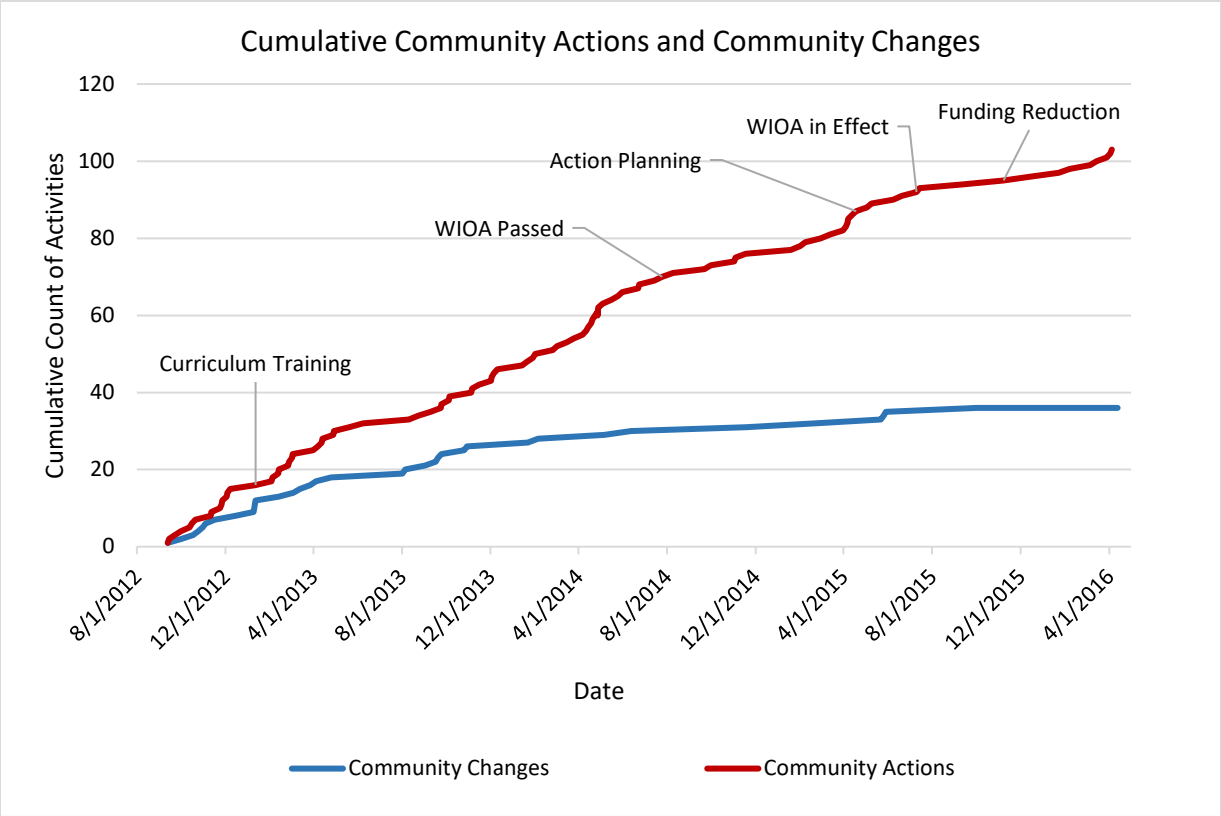


Figure 1 shows example data from a CIL, which documented actions to increase full community participation, and resulting community changes. Community actions (red) and community changes (blue) are displayed cumulatively: the onset of each new change is added to all previous changes in programs, policies, and practices.

Using Figure 1 above, we can examine the CIL's actions in the community and their success bringing about community change. Accelerations (steeper lines) in community actions sometimes precede accelerations in community changes, but a period in 2014 shows great increases in actions without corresponding increases in changes. The CIL can use this graph of activity to examine the actions taken during this period, and whether they should be adjusted to help reach their desired outcomes.

2. What factors affect the rates of community and systems change facilitated by the group?

Over more than two decades, the Center for Community Health and Development has examined community change patterns—and the factors that affect them—with hundreds of community initiatives. Research suggests that seven factors appear to affect rates of community and systems change:

1. A clear and shared *vision and mission* guide the work.
2. *Leadership* is stabilized.
3. *Action planning* is conducted.
4. *Community mobilizers or organizers* are hired who can bring about change.

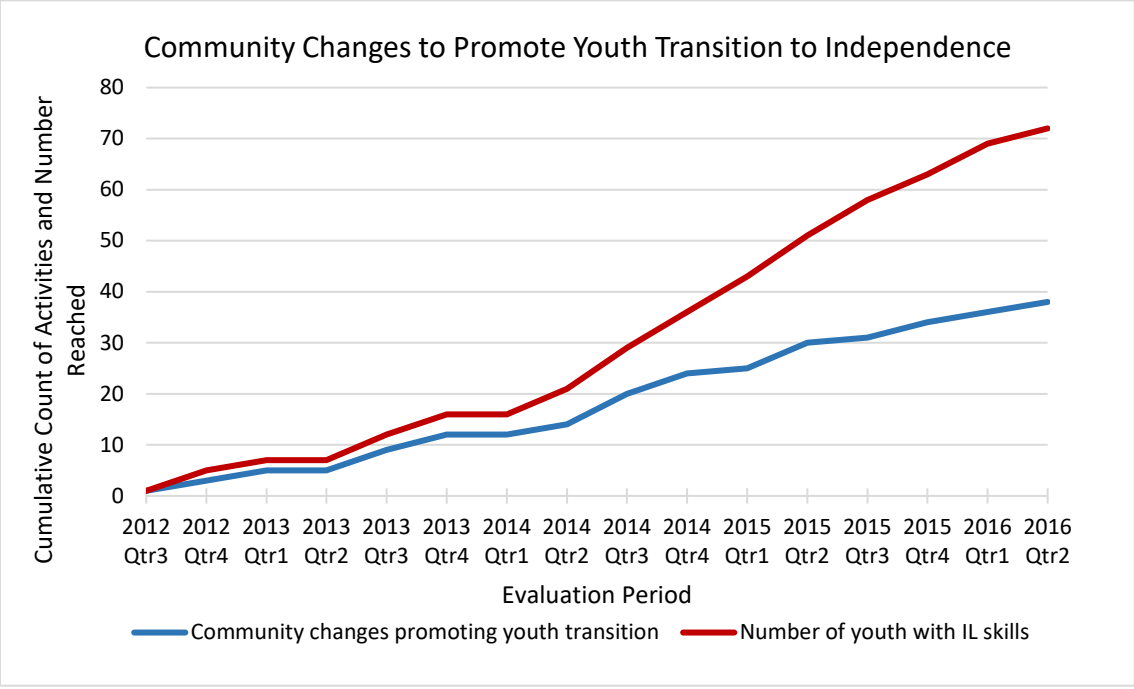
5. *Technical assistance* from a consultant or other person external to the group is available, especially to support action planning and intervention.
6. *Documentation and feedback* on rates of community and systems change are maintained.
7. *Organizers make outcomes matter* (i.e., bonus grants for high rates of change).

The data from Figure 1 above suggest the importance of several factors for the capacity of the CILs to make changes: a) training on the Community Tool Box Curriculum, b) action planning, and c) supportive external conditions, such as adequate funding.

3. Under what conditions are community and systems changes associated with improvements in more distant community-level indicators of well-being?

The figure below illustrates how these data can be used to examine possible associations between rates of community and systems change and improvements in more distant outcomes. When changes in the community-level indicator (i.e., number of youth transitioning from school to adult life who have independent living skills) are correlated with accumulated community and systems changes related to this goal (i.e., new programs and school practices to promote independent living among young adults), a causal relationship is suggested. (Note: Without formal experimental designs, this relationship is suggested, not demonstrated, since other factors could have caused the observed changes in outcomes.) Nevertheless, these and other related data such as duration of changes and their concentration in local places can help us examine the fundamental question: Under what conditions are community and systems changes associated with improvements in more distant community-level indicators?

Figure 2.



For details on the documentation system used by the Center for Community Health and Development, see http://checkbox.ctb.ku.edu. For more supports on "Evaluation," please visit the Community Tool

Box Evaluation Toolkit: http://ctb.ku.edu/en/evaluating-initiative. Or, use the gateway sections on "Evaluating Comprehensive Community Initiatives" http://ctb.ku.edu/en/table-of-contents/overview/model-for-community-change-and-improvement/evaluation-model/main and "Framework for Program Evaluation" http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/framework-for-evaluation/main.

Promoting Celebration and Renewal

Groups benefit from reflection on their accomplishments. Arrange for periodic review and discussion of group progress on the proposed changes. When new and important changes occur (e.g., a long-awaited policy change by a major employer), celebrate them! Celebrations can take the form of honoring those who are responsible for the change—for instance, giving a small party for "champions of change."

Data can also be used to promote critical reflection and adjustments. The review of progress should involve all relevant audiences for the group, including stakeholders from various community sectors. Communicate with relevant audiences how feedback was used to modify the action plan – or even the broader vision, mission, objectives, and strategies – of the group.

Review the action plan at least annually. Update the list of proposed changes to account for new opportunities and changes in context.

Focusing on Small Wins:

- Rewards outcomes, not just taking action
- Provides multiple opportunities for celebration
- Allows coalition partners to celebrate complimentary efforts
- Provides a sensitive measure of progress, which can be monitored periodically to support improvement and accountability

Why This Matters

There is a common misconception that one must design and implement a program to bring about a big vision such as promoting well-being for people with disabilities. A more promising pathway to improvement in community participation outcomes involves implementing various community and systems changes in different sectors of the community.

There is a particularly significant implication of the shift in orientation from a "program" perspective to one focused on facilitating community and systems changes: It increases the group's flexibility and responsiveness to change over time. A community partnership that thinks of itself as running a "program" might find it difficult to redesign or reinvent itself should the environment change, and that particular strategy becomes ineffective. This can feel as though the rug were pulled out from under the group, be extremely demoralizing to the effort, and fatal to its evaluation.

By contrast, a group that aims to bring about a set of strategically chosen community and systems changes is more flexible. When outside forces shift or barriers are encountered, the natural response is to revisit the list of prioritized changes and generate a renewed course of action.

Acting in accordance with current events and issues that are important to the community is a key to bringing about change. It also provides a credible response to traditional criticisms from scientists and evaluators who may see existing activities and secular trends in systems as "confounding" effects that

obscure the evaluation of a group's work. Rather, this community change approach recognizes and embraces the dynamic and evolving nature of community work.

We recommend framing the group's role as a **catalyst for change**—helping bring about of a series of community and systems changes related to the mission, rather than solely the direct provider of programs or services. This shifts the evaluation conversation from questions about attribution (e.g., what outcomes did the group produce?) to questions about contribution (e.g., how did the group help?)

Summary

This final chapter outlined a strategy for documenting the unfolding of community changes over time and providing feedback on goal attainment to stakeholders. It also highlighted the importance of renewal, suggesting that groups must modify their action plans periodically to respond to new challenges and opportunities.

Thank you for your efforts to build a more inclusive and barrier-free community for all. Best wishes as you seek to convene stakeholders in this important process for planning and implementing community change.

Epilogue

This Action Planning Guide has posted markers on the winding road of planning for full participation in our communities. Action planning includes:

- Convening a planning group in your community that consists of:
  - Key officials
  - Grassroots leaders
  - Representatives of key sectors
  - Representatives of ethnic and cultural groups
- Listening to the community
- Documenting problems that affect full community participation for people with disabilities
- Identifying risk and protective factors
- Developing a framework for action
- Becoming aware of local resources and efforts
- Refining your group's vision, mission, objectives, and strategies
- Refining your group's choice of targets and agents of change
- Determining what community sectors should be involved in the solution
- Developing a tentative list of changes to be sought in each sector
- Building consensus on proposed changes
- Outlining action steps for proposed changes
- Documenting progress on bringing about community and systems changes
- Renewing your group's efforts along the way

When you complete these activities, *celebrate* (for now)! You have developed a **blueprint for action.**

The work of transforming communities and systems to promote community participation for all will be made by joining with local people who care enough to make needed changes. As we do this important work, we realize that we walk the path of those before us. And, eventually, others will carry on this cause after we are gone.

Selected References

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“Imagination is the highest kite one can fly.”

- Lauren Bacall

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About the Center for Community Health and Development

Mission: supporting community health and development through collaborative research and evaluation, teaching and training, and technical support and capacity building. For more information on the Center, see http://communityhealth.ku.edu/.

About the Research and Training Center on Independent Living

Mission: to further independent living for people with disabilities by collaborating with consumers on productive research and by using innovative methods to disseminate useful knowledge. For more information, see: http://rtcil.org/.

About the Community Tool Box

The Community Tool Box is a free, online resource for those working to build healthier communities and bring about social change. It offers thousands of pages of tips and tools for taking action in communities. Visit the Community Tool Box at http://ctb.ku.edu/en.

"We’re still not where we’re going but we’re still not where we were."

- Natasha Josefowitz
French-American writer and lecturer