## "Designing for Co-Responsibility"
(Hosted by Dr. Clare Kilbane. Panelists include: Bob and Mary Ryan.
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# Initiative Strategic Planning Worksheet

**Mission Statement:** Capture your initiative in a short, compelling statement. What is your purpose and what do you hope to achieve?

*Include your ideas here:*

**Vision:** Envision what your community will be like if you fulfill your mission. Use descriptions and examples to allow others to understand what you hope to achieve. This will inspire others to share in your initiative and its success.  Be sure to describe how the process involved in your initiative will be connect to its "telos."

*Include your ideas here:*

**Goals:** In bullet points, summarize what you hope to achieve. It may help to break these goals into categories (e.g., parish, school, families). It may also assist you to consider goals for the PROCESS (what you will achieve while implementing) and also for the OUTCOMES (what you will achieve if you are successful with the initiative).

As you formulate your goals, it may be helpful to conduct a needs assessment so you can determine how you might combine existing needs (based on real data as opposed to assumptions about needs) with your anticipated goals.

*Include your ideas here:*

**Action Plan:** In this section, you'll explain how you'll achieve your vision.

*Include your ideas here:*

**Constituents:** Explain who will be involved in the initiative and what their general roles will be. This will help you understand how to work together effectively. Also consider detailing what particular talents or resources each will contribute.

*Include your ideas here:*

**Phases:** Break the accomplishment of the vision into phases. Describe what will be achieved in each phase. The phases might be named "planning," "piloting," "scaling-up" to communicate the intended major stages of achieving your vision.

Along with breaking your progress into phases, it will help you to include information about what resources and incentives will be required in each. It may also be helpful to address how knowledge and skills that are needed will be developed. Also include plans for communicating with those who will benefit from knowing about your progress as you complete each phase.

*Include your ideas here:*

**Resources:** Describe what resources are needed for your initiative to succeed. This might address facilities, education, finances, specific individuals, talents, support from individuals, groups, or organizations, etc. It may help to conduct a resource inventory before you begin so you have a sense of what might be available to assist your initiative within your community.

*Include your ideas here:*

**Incentives:** Explain what is needed to promote involvement and investment from all those involved. Propose a plan for acquiring incentives and communicating about them.

*Include your ideas here:*

**Skills/Knowledge:** Explain what skills/knowledge different constituents need to be successful fulfilling their roles. Make sure that you address how they will acquire these competencies in your planning.

*Include your ideas here:*

**Timeline:** Break each of the phases in your initiative into time periods (e.g., by day, week, month, season, quarter) articulate what will happen in each stage to get you to your goals. Use bullets for easy reading and include short explanations. If your initiative is complex, you may benefit from having separate timelines for various aspects that are coordinated.

*Include your ideas here:*

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| **Evaluation:** Explain how attainment of goals (for both process and outcomes) will be monitored and evaluated. |
| *Include your ideas here:* |
| **Guiding Principles:** What are the guiding principles for how you will plan and implement your initiative? These might be philosophical statements or expectations for individual behaviors or processes. Use this section to fill in missing aspects of the initiative. |
| *Include your ideas here:* |
| **Patron and Prayer:** Consider entrusting the success of your initiative to a special saint. Craft a prayer that can be shared among constituents and the community to bless the people, process, and outcomes of your initiative. |
| *Include your ideas here:* |

# Survey Construction Tips

1. Write a short survey to promote participation and completion.
2. Communicate with your audience about how the information from the survey will be utilized and who will be reading/ using the data. Transparency and respect are essential to any relationship.
3. Allow people to "opt out" of the survey if they do not want to participate.
4. Make sure those responding know why it their input is important and why they should help you by sharing a response.
5. If the survey is not anonymous, ensure that the data from the survey is handled in a confidential manner. Do not leave it in the copy machine, share it with others unless you were clear about that with the respondents.
6. When possible, make the survey anonymous, this generally increases the honestly of the responses. If the survey is anonymous, make individuals aware that they should be careful not to identify themselves through their responses.
7. Focus your survey on gaining just the information you need most. Do not waste your own time (and that of others) generating information you can't actually use.  If you create a quick survey, people will respond to future requests.
8. Use simple words and phrases that place the communication of questions at your audiences' reading level.
9. It is a good idea to have others read through your survey to ensure it is easy to understand what you are asking.
10. Relax your grammar- use phrasing your respondents will understand.
11. Do "due diligence" to ensure that the format of the survey (paper/ electronic) as well as the dissemination methods include everyone. Use more than one method if you need to. Electronic survey tools should work on different phone and technology platforms. Be aware not everyone has internet access or cell service.
12. Conduct the survey and communicate with a sensitivity to include people who speak different languages and represent different cultures.
13. Start with interesting questions or easy questions.
14. Don't write "leading questions" that encourage or coerce someone into choosing a specific answer.
15. Ask only one thing at a time in each survey item (i.e., question).
16. Anticipate the answers you will receive and provide choices when possible. These are easier to analyze later on. Open-ended items are easy to write but harder to analyze later.
17. Avoid using double negatives.
18. Avoid vague or overly general questions.
19. Don't make lists of choices to choose from too long.
20. Put your questions in a logical order.  If necessary, group them together around certain topic headings.
21. Use closed-ended questions rather than open ones when possible- include "other" as an option (this makes interpreting data simpler).
22. Try to accommodate all possible answers. If you can't think of the entire range of possible answers, include a category for "other."
23. It may be helpful to test your survey with a small group to ensure it works before you roll it out with a larger one.
24. Revise your survey after using it and analyzing the results before using them again in the future.
25. It can be helpful to incentivize or reward people for completing a survey but this can make it more difficult to ensure anonymity.
26. Be sure to thank your respondents for participating in your survey.

# Needs Assessment Construction Worksheet

Complete this worksheet to help you think through designing your needs assessment.

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| **Audience:**  What group would you like to know more about? |
| *Type or write your response here.* |
| **Audience characteristics:**  What are the specific characteristics of this audience that will affect their ability to respond honestly and clearly to your survey inquiry? For example: Are they literate? Do they speak English? Do they have internet access? Can they type? Will it be possible to notify all the people you'd like to have complete the needs assessment? |
| *Type or write your response here.* |
| **Analysis of audience characteristics:**  Given the characteristics you have uncovered, are there any special plans you will need to bring into the design or implementation of your needs assessment so what you learn can be more representative of the audience you want to gain information from? Explain. |
| *Type or write your response here.* |
| **Goals:** What do you think you'll be able to do differently because of conducting your needs assessment survey?  Brainstorm a list of things you might learn and be able to act upon. |
| *Type or write your response here.* |

**Needs Assessment Survey Questions:** Given what you help to learn through your needs assessment survey, what questions do you plan to ask? Write them below. Is there anything special about how you will organize or ask your questions? Consider how the order and wording used in the questions as well as what type of open or closed ended item you will use.

*Type or write your response here.*

**Anticipated Outcomes:** How do you think your audience will respond to the different questions in your needs assessment? How do you assume people will respond? Are there questions you honestly can guess about a response to?

*Type or write your response here.*

# Audience Analysis Worksheet

**Name of initiative:** _____

| What are the goals I am trying to achieve through specific programming or this initiative? | What do I already know about my "audience" that is important to consider in relation to these goals?  In relation to the type of experiences that will result in meeting these goals? | What information do I most need to know about the "audience" to make a difference in meeting these goals? Making experiences more successful? | How can I acquire needed information about my audience most efficiently/ effectively? *(Asking a senior colleague, "focus group," survey, etc.)* On the back, craft the "language" to use when inquiring. |
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| **Goal 1:** | | | |
| **Goal 2:** | | | |
| **Goal 3:** | | | |