

Guidelines for Demonstrating Effective *Action Planning*

for Certification Candidates and their Mentors, Observers and Assessors

General

- All Action Plans included as evidence of work are face-to-face.
- Action Planning can be done in one session or two. All parts of Action Planning need to be included.

Content Includes

- A specific event or project with an end date (could have an exception for a time period)
- Background Information on the project, decisions already made, and givens to review with the group
- Specific and targeted Rational and Experiential Aims
- A realistic time frame to complete all of the steps in Action Planning
- Victory - a rich, concrete visualization of success (set in the future after the project completion)
- Current Reality – strengths and weaknesses are grounded in the situation and the group; dangers and benefits are grounded in success
- Commitment – developed from themes in the Victory and informed by the Current Reality
- Commitment - A clear, compelling, and concise statement or list of components that everyone is committed to posted on a flip chart
- A Consensus Workshop for the Key Actions Workshop (with the exception of full naming)
- Clusters in the Key Action Workshop organized by Committee.
- Committees met and presented their reports to create the Calendar
- Calendar includes Key Actions distributed by month, Launch activity, Victory, Committee Leadership and other appropriate categories, e.g., resources
- Coordination – had group adjust the calendar as needed for action sequencing, duplication of actions, missing actions, etc.
- Coordination – had group discern a leadership structure, determine committee authority, develop means to communicate among committees, etc.
- Resolve – whole group reflection/celebration on its accomplishments and Plan
- Thoughtful documentation of the Action Plan that the group can use to Implement the Plan.

The Facilitator Process Demonstrates ...

- Materials for each section prepared and ready to use
- An understanding of the group's situation and what they are trying to achieve – the context for planning
- Preparation of materials needed in action planning
- Ability to describe to the group each step of the process and its importance
- Maintains neutrality and energy throughout the process

Examples of Assessor Questions for Evidence of Competence

- How do you cue the group to get at the right level for Commitments?
- Describe the differences in the Key Action Workshop from other Consensus Workshops?
- What ways have you used to help the group, get into the context for their action plan (e.g., articles, photos, visits, interviews, data review, discussion of a key piece, etc.)
- Describe how you went about getting the Commitment statements
- How do you handle the group not being able to agree on the Commitment pieces?
- What modifications would you make with a very small group (5 or under) or very large (>30)

Rating Scale

- 3 Design and documentation include all elements of the Action Plan and an ability to answer questions about the Action Planning process.
- 4 - 5 Able to anticipate challenges the group may have with action planning and address them in the design, e.g., how to integrate the committees that are formed with a group's ongoing team structures; shaping a shared understanding of possibilities when members of a group may have conflicting/competing needs by creating innovative contexts, resolves, etc.; can design an action planning process for groups of different sizes and types.