

The Finance Project Sustainability ToolKit Group Call Summary from June 22, 2018

Resources discussed during the call:

From: Sharon Johnson regarding funding to support participation in planning
Please contact Nebraska Thrivent associates who can help: Darren Murray@Thrivent
or

Sharon J Johnson | Program Coordinator
CHILDREN AND FAMILY SERVICES

Nebraska Department of Health and Human Services

OFFICE: 531-220-6077 | FAX: 402-742-8356

From: MaryJo Alimena Caruso regarding *Science of the Positive*

Linkenbach, 2007 *Science of the Positive*
<http://www.montanainstitute.com/publications/>

Spirit, Science, Action, Return
<http://www.montanainstitute.com/what-is-the-science-of-the-positive/>

and *Person-Centered Planning*

Beth Mount is the person that I referenced who developed the characteristics of a good facilitator and composition of planning teams that I found helpful. Her book *Person Centered Planning* can be found here:

<https://www.capacityworks2.com/books--workbooks.html>

It is specifically referenced along with the visual of what I was describing on pages 16-25 (great visual on 22) in this document: <https://rtc.umn.edu/docs/pcpmanual1.pdf>

More can be found at Inclusion Press: www.inclusion.com

Participants in the call: Cheryl Smith, Tracy Cieniewicz, Cindy Findley, Doris Green, Nadine Walter, Mary Jo Alimena Caruso, Susan Summers

Discussion Points

Updates and strategies for using the Finance Project ToolKit Self-Assessment Tool:

- Doris, New York, completed the tool and sent it to planning group members for review. The group decided to hire a private consultant to help with the process. Doris posed the question about the merits of conducting the needs assessment prior to New York's state summit in August.
- Cindy, Arizona, is starting with strategic goals first, followed by self-assessment.
- Cheryl, Alabama, has not started the process officially. Alabama just held a statewide coalition and will start the process after. Cheryl suggested that in years past they would have an outside expert to facilitate the process—someone who doesn't have a vested interest in the outcome. Some states used someone within

the coalition with expertise in planning processes (such as Julie Waters conducting periodic SWOT Analyses).

- Mary Jo, Pennsylvania, shared that it was helpful not to rush the process, and to use an outside facilitator.

Identifying and Engaging the Right People for Planning

- The planning process is a reflection of the strength of the team. A strong team results in a strong process.
- The group discussed challenges associated with identifying the “right members” in planning, and supporting planning team members to “buy in” to the planning process.
- MaryJo mentioned that not having the “right team members” in the room can help you identify who is missing and should be included. To identify team members who will be supportive and productive for the goals of the planning team and are passionate about respite (that is, when team members don’t have the right expertise, clout, affiliations, interest/investment, etc.) ask:

If not you, then who?

Increasing the Likelihood of Buy-in from Team Members

- It can be helpful to identify small work groups within a larger planning group, to task the small group with actively producing products and meeting goals, and to use the larger group for advice and counsel.
- The group discussed the importance of providing participants with meaningful roles.
- Doris, New York, is using a core team to start the work while recognizing the need for a strong working advisory group. Building that strong group is seen by New York as an essential part of sustainability.

Dealing with Time Pressures

- Don’t rush through an artificial time process at the expense of developing and reaching sound and meaning goals and activities. MaryJo suggested two resources for a productive process: Person-Centered Planning and Science of the Positive. In short, Science of the Positive includes four components:
 - Spirit*—to ensure all engaged are passionate about the work
 - Science*—to ensure that we stop and examine what our data are telling us
 - Action*—to review and reflect upon what we are doing to achieve our goals
 - Return*—to periodically review our commitment, our data and our process

Our next call is Friday, July 27, noon Eastern time
Call in number: 866-546-3377; Access Code: 643869