

# Action Planning Step 2: *Orienting Staff Back Home*

## **Purpose of this activity**

To identify how you will conduct a local orientation for staff in your region by developing a draft agenda and identifying roles, materials needed, and next steps.

## **Why conduct an orientation back home?**

- Increase understanding among all staff of the *system* certification process – what it is and why the state is embracing *system* thinking – to improve buy in and willingness to change.
- Communicate your role as a pilot region – what you are committed to doing, why you opted to apply (your story), benefits to your community, what you have done so far – to improve buy in, set expectations for what’s to come, and hopefully ‘rally the troops’ for their role in leading the State’s effort and leaving a legacy for other regions that will follow.
- Share your assessment results, along with the priorities (and action plans) and training needs you identified to ensure a common understanding of where you’re headed.
- Get feedback on your assessment results, priorities, action plans, and training needs you identified to ensure they are as complete as possible, to both maximize your chances of success and create a sense of ownership among all staff.
- Have fun and create some enthusiasm!

## **To Do List**

- Set the agenda.
- Identify Roles.
- Identify which staff you want at each orientation to ‘mix’ where possible and ensure all staff can attend, but client services are not disrupted.
- Identify location(s).
- Send the Invitation.
- Create any Materials Needed.
- Identify how you will capture staff input at the orientation.
- Identify how you will analyze input provided and make any adjustments to your priorities, action plan, and training needs identified.
- Conduct orientations.
- Make any adjustments needed to your priorities, action plan, and training needs, and share with the State by 12/17/12, if possible.
- Debrief on the orientations and provide feedback on your experience as a pilot (what worked, what didn’t, what would you recommend other regions do or avoid?) in your routine monthly progress report.

## **Agenda Template**

Feel free to modify subject matter, timeframes, order, activities so that it will work for you – this is just a sample to kick start your preparations. Be sure to identify roles, materials that need to be developed, and due dates.

Time	Activity	Who/Materials	By When
1:00pm/ 9:00am	<b>Welcome/Purpose/Introductions</b> - Why we’re here - Review agenda/materials - Brief Introduction Game (e.g., have stand by funding stream and/or geographical location and/or type of work they do. Can make fun by adding in silly stuff like those who like Justin Bieber. Or relate to ‘change’ theme by having them all stand and sit down if they’ve changed their hair style in last 2 months, then last year, then last 5	Who? What methods?	

Time	Activity	Who/Materials	By When
	years; note how different people feel differently about change and that alone means we can expect challenges, regardless of what we're changing or whether it's an improvement)		
1:15pm/ 9:15am	<p><b>System Certification Process Overview</b></p> <ul style="list-style-type: none"> <li>-WHAT: What is Oklahoma's Workforce System Certification initiative?</li> <li>- WHO: System vs. Center (Optional activity: Take a Stand)</li> <li>- WHY: Why is the State doing this? How did it evolve?</li> <li>- HOW: Framework/Standards/Draft Measures/Timeline</li> </ul>	Who? What methods? Power Point Presentation	
1:45pm/ 9:45am	<p><b>Our Role as a Pilot Region</b></p> <ul style="list-style-type: none"> <li>- Why did we volunteer?</li> <li>- How will this help our customers, our communities, our ability to get our jobs done and meet funders' expectations? What's in it for me? (<b>Optional activity to do instead of list on power point: Have a contest where the group that can name the most benefits for the community/customers/ staff within a 2 minute time period will win a prize</b>)</li> <li>- What's expected of us as a pilot?</li> <li>- What have we done so far?</li> </ul>	Who? What methods? Power Point Presentation	
2:00pm/ 10:00am	<p><b>Report on Draft Assessment Results</b></p> <ul style="list-style-type: none"> <li>- Review draft Priority Areas and plans for moving your system forward and successfully applying for system certification that you identified at the state orientation.</li> <li>- Review draft Training Needs you identified at the state orientation.</li> <li>- Invite feedback, stress importance of everyone understanding where you're going and helping ensure the action plan is on target, if you are to succeed.</li> <li>- Take questions for clarification, but defer input for next section.</li> <li>- Provide directions on next part of the agenda – who goes where to provide feedback and input.</li> </ul>	Who? What methods? Power Point Presentation  Flipcharts for capturing Q&As	
2:30pm/ 10:30am	<p><b>Break/Move into Workgroups</b></p> <ul style="list-style-type: none"> <li>(1) Employer Services issues/plans/training needed.</li> <li>(2) Job Seeker issues/plans/training needed.</li> <li>(3) Governance issues/plans/training needed.</li> </ul> <p>Will some groups be so large that you need to break them in half (e.g., have 2 job seeker groups meet)?</p>		

Time	Activity	Who/Materials	By When
	Do you have adequate space, facilitators, and note takers to accommodate working groups?		
2:45pm/ 10:45am	<p><b>Workgroup Planning Time</b></p> <p>-Facilitated discussion about priority issues, plans, and training needs identified by the region's team at the state orientation.</p> <p>-Address questions such as: Is this accurate? Is this complete? Are we missing anything big? Looking at each item, any feedback on or suggestions about what the issue is, strategy to improve it, and training needed?</p>	<p>Who?</p> <p>Facilitator(s) for each break out group Note Taker(s) for each break out group</p> <p>What methods?</p> <p>Slides Flip Chart Large Group Discussion on each item or break into smaller working groups?</p>	
3:45pm/ 11:45am	<b>Break/Move back into large group</b>		
3:55pm/ 11:55am	<b>Work Groups Report Out</b>	Who? Volunteer from each workgroup or the facilitator?	
4:15pm/ 12:15pm	<p><b>Celebration</b></p> <p><b>Wrap Up/Next Steps/Closing Comments</b></p>	Who? What methods?	

- Continue working through the 'to do' list as time permits....
- When/how will you finish any planning that remains?