MARYLAND COMMUNITY ACTION PARTNERSHIP

A NETWORK OF COMMUNITY ACTION AGENCIES SERVING MD, DC & DE

Two-Generation/Whole Family Maryland State Implementation Checklist

Purpose

This Two-Generation Toolkit was designed by Maryland Community Action Partnership to assists community action agencies to guide in the design and implementation of effective two-generation strategies.

This toolkit is intended to be a starting point and will supply you with the key elements needed to implement a two-generation/whole family approach. However, this cannot be a complete resource; organizations will need to take additional steps in order to be successful.

Two-Generation/Whole Family Checklist

1. Have you determined your guiding coalition?
2. Have you contacted your local DSS and determined partners for 2-G implementation/ your collective impact efforts?
3. Have you completed your design plan (MOU) to implement 2—G?
4. Do you have a common agenda and goals to which all programs and partners agree?
5. Have you identified individual and family outcomes that can be tracked and measured?
6. Have you developed a Logic Model and Theory of Change?
7. What training have staff engaged in for family centric coaching and/or have you hired staff for 2-G alignment?
8. Have you developed a process for helping families set goals?
9. Have you developed a common outreach and recruitment strategy?
10. Is there an established, regular method for communication, reflection and action planning among all partners—and an agreed upon common language?
11. Do you have a plan in place to integrate services in new ways and places that put families first?
12. Are you assessing families at intake and as determined by logic model?
13. Do you screen and simultaneously enroll families into multiple programs at one time, and/or identify the best sequence of service use for any single family?
14. Have any enhancements been made to data systems to track parent, child, and family outcomes?

1. Have you determined your guiding coalition?

A Guiding Coalition is a group or team of people with enough influence, capability and credibility to lead a change or transformation program. The Guiding Coalition need a common goal to work towards, they need to have trust and confidence in each other and to invest time in building relationally.

The key to the success of a Guiding Coalition is that it comprises 'a diverse many, rather than a limited few'. Too often, groups are made up of only senior managers and leaders, many of whom are detached from the reality of what gets delivered on the ground, and even if they're not, are likely to be perceived by many in the organization as being disconnected. As always, perception and reality have a habit of coming together in unhelpful ways.

A key role for the Guiding Coalition is to enroll more people in the change or transformation. Pockets of urgency are likely to be alive and well right across the organization, but unless it's modelled from the top, engaged and harnessed, it is likely to fizzle out, resulting in a backward step rather than a delivery of change for the future. Creating opportunities for people from all areas and levels of an organization to be part of the change process is essential and will ensure there is enough critical mass to overcome the inevitable resistance in other parts.

The success of aligning services, systems and resources depend on significant engagement from a leadership team, in effect a "guiding coalition" that works with the partners to keep your whole family approach focused and on track. This guiding coalition also works with the leaders in all the partner organizations who have authority to make and implement decisions that will help the organization work for families.

Additional things to consider:

- How will you ensure the Core Leadership team is moving in the same direction?
- Describe your regular check-in and communications plan
- How often will you meet?
- Who is responsible for setting the agenda and driving the meetings?
- How will issues be brought to the table and worked through?

2. Have you contacted your local DSS and determined partners for 2-G implementation/ your collective impact efforts?

Effectively serving children and families together may require different partners and different types and levels of partnership. For example, your organization may have a large number of partners who agree to a common agenda, meet regularly and communicate effectively. But from time to time, there may be a smaller group that needs to work as a task subgroup or workgroup..

The nature of collective impact is that we develop solutions together. It is challenging and requires partners to constantly examine their work and make a commitment to stay at the table.

Having a Partnership Agreement or MOU will serve as a clear articulation of the roles of both the organization and community partner in a Collective Impact or place-based partnership. At a minimum, the agreement should serve as a declaration of the community results and/or indicators that you intend to jointly impact.

United Way of Lancaster County, using the collective impact model, has brought together more than 100 local nonprofits, schools, faith-based groups, funders, government entities, and others - all organizations that already make Lancaster County a great place to live - and have challenged them to think systemically. We have asked them what problems they experience with the systems they work in, and how they would form unique alliances to tackle those issues.

What resulted is a county-wide network of partnerships who are making strides to improve education, employment, quality of life and healthcare in Lancaster County.

Additional things to consider:

- What process will you use to keep all the partners informed?
- How will partners be involved in making changes?

3. Have you completed your design plan (MOU) to implement 2—G

The design plan is intended to help the team think through and detail essential elements of your whole family approach.

The design plan checklist provided by the Community Action partnership is designed to ask you to answer a set of questions that will produce a “picture” of your effort and a better sense of the work you have ahead of you.

As you complete the design plan, you may find there are things you may not have considered or challenges you don’t know how yet to address.

The Five Pillar Approach is designed to assist with building an organization infrastructure which delivers self-sufficiency outcome for the whole family by looking at the following areas:

- Service
- 2-G Approach
- Training
- Data Collection and Synergy
- Communication
- Community Partnerships

4. Do you have a common agenda and goals to which all programs and partners agree?

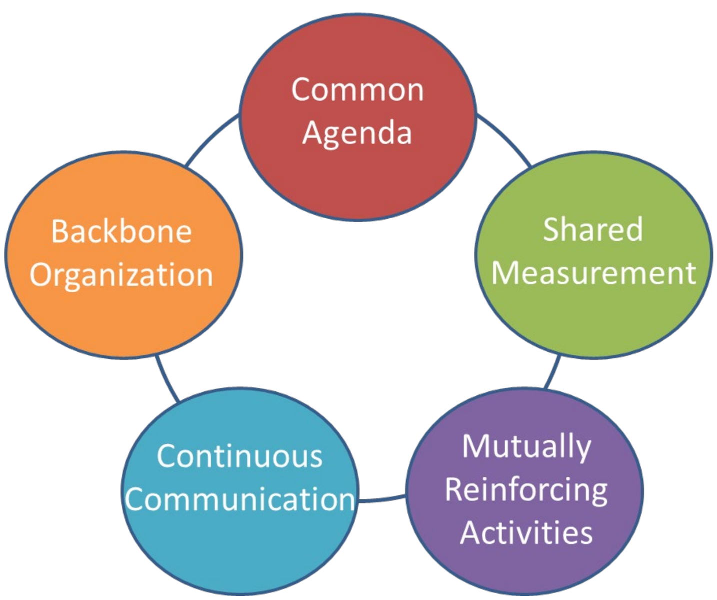
All participants must share a vision for change that includes a common understanding of the problem and a joint approach to solving the problem through agreed-upon actions.

Participating organizations agree on the ways success will be measured and reported, with a list of common indicators identified and used for learning and improvement.

A common agenda has three primary purposes, each as important as the other:

- First, it is a document of the key goals and strategies that a network of partners (the people who have joined together to change their community) have agreed to and that they will use to implement their strategy. It forms a common understanding between the partners for what they have agreed to do together.
- Second, it is the outcome of broad-ranging research and consultations and a way of sharing what those partners have learned within their broader community (including the journey of learning) and provides a rationale for the goals they have chosen to work on together.
- Third, it is a road map for how those partners have agreed to work together, including a budget and their governance model.

The building of a common agenda is about engagement: a bringing-together, for listening and dialogue, of those who care about the issues that are being worked on and who seek the common change that is desired.



5. Have you identified individual and family outcomes that can be tracked and measured?

Outcomes for both children and parents, or the adults in children's lives, are at the heart of a true two-generation program. Working collaboratively with families, programs should both articulate and track outcomes for both children and adults.

Knowing up front how to measure success is central, along with articulating the program's approach and assumptions to achieving intended outcomes. Armed with clear thresholds for near and long-term success, programs can better make programmatic refinements based on real-time learning.

Only by identifying goals and measuring progress regularly will you know if you are on the right track and know enough to make program and process adjustments if you are not. You must have data that shows things are working to establish and solidify support and partnerships for your whole family approach.

The list of outcomes for the individual and families that you choose to track will likely change over time. But to get started, think about the outcome data or results that are being collected already, and the outcomes for which you will need to collect new data, once you more fully engage.

Here are just a few potential outcomes of two-generation strategies:

- CAP-Tulsa's Career Advance® program recruits parents from Head Start programs for post-secondary education and health care workforce training opportunities. The program's results are striking. A 2017 report shows 61 percent of Career Advance® participants attained a career certificate, compared to 3 percent of the comparison group. In addition, 49 percent of program participants found employment in the health care sector by the end of the program's first year of operation. Reflecting the program's two-generation approach, attendance in Head Start increased and chronic absenteeism decreased.

- The Washington State Institute for Public Policy was created by statute to conduct cost-benefit analyses and evaluate state programs. The Institute evaluated programs that address the needs of two generations including training and work experience for adult welfare recipients and adults who are not welfare recipients. Services were, at their core, two-generation strategies in that they provided support to both parents and children. They included job search and placement assistance, adult basic education, English as a second language courses, General Equivalency Diploma preparation, vocational training and support services such as childcare or housing support.

Services for adult welfare recipients showed a cost-benefit ratio of $1.30 and had an estimated 55 percent chance of producing benefits greater than its costs. Services to adults who are not welfare recipients showed a cost-benefit ratio of $1.65 and a 78 percent chance of producing benefits greater than its costs.

6. Have you developed a Logic Model and Theory of Change?

A logic model is a graphic depiction (road map) that presents the shared relationships among the resources, activities, outputs, outcomes, and impact for your program. It depicts the relationship between your program's activities and its intended effects.

While logic models are not unique to two- generation programs, the consideration given to how parent and child inputs, activities, outputs, and outcomes interact (the arrows) and with what intensity (duration and dosage) they are offered across generations is unique and of utmost importance to program design and implementation.

In other words, two-generation program leaders are very intentional about the relationship between the activities and results they promote for both generations. This is why it is so important for two-generation programs to have strong learning cultures.

Targeting and tracking the integration of activities and outcomes across generations requires more programmatic sophistication than simply offering an unrelated menu of services to either or both generations.

Logic models are useful for both new and existing programs and initiatives. If your effort is being planned, a logic model can help get it off to a good start. Alternatively, if your program is already under way, a model can help you describe, modify or enhance it.

Remember that your logic model is a living document, one that tells the story of your efforts in the community. As your strategy changes, so should the model. On the other hand, while developing the model you might see new pathways that are worth exploring in real life.

A Theory of Change (TOC) is a living tool that links:

- What you do
- Who you are targeting for results?
- Why and how you do it
- What you expect to achieve

Developing a Theory of Change requires thoughtful conversations about how to strengthen programs. It structures your thinking and provides a platform to understand and measure results for learning and improvement.

A theory of change can be a helpful tool for developing solutions to complex social problems. At its most basic, a theory of change explains how a group of early and intermediate accomplishments sets the stage for producing long-range results.

A more complete theory of change articulates the assumptions about the process through which change will occur, and specifies the ways in which all of the required early and intermediate outcomes related to achieving the desired long-term change will be brought about and documented as they occur.

To best realize the value of creating a theory of change as part of planning and evaluating social interventions, the Aspen Institute Roundtable on Community Change (Roundtable) developed an approach to help community builders create the most robust theories of change possible.

The framework emphasizes the importance of using family goals to target individual family members, setting individual goals, and aligning tailored and appropriate solutions. This lens also emphasizes prioritizing relationship-building over programs and designing flexible evaluation approaches, while working for systems change to support families in their efforts.

Learning for Action has a worksheet that helps you with the steps in creating a TOC.

LEARNING *for* ACTION

Overview of Theory of Change Worksheets

The six worksheets (1A-1F) that are a part of Phase 1 walk you through each step of the Theory of Change framework. This is not necessarily a linear process – start wherever feels the easiest and most natural for you. Use the "Getting Started" questions and tips below as a starting point, or if you get stuck at any point.

The need

- What specific aspects of a problem is your work intended to address?
- What is your organization's opportunity to affect this problem?

Target population

- Who are the specific groups of people for your recruiting and retention efforts?

Core components

- What are the core components and specific activities of your program?
- What is the level and length of participation needed to achieve outcomes?

These core program components are the drivers of change.

Outcomes

- What are the 2-3 measureable changes that you believe will occur as a result of participation?
- What are the outcomes or outcome metrics that will tell you participants are on track to achieve the expected results?

Hypothesis

- What aspects of your theory call for data collection, so you can know if it is working in practice and how to improve over time?

Overview of Theory of Change Worksheets

7. What training have staff engaged in for family centric coaching and/or have you hired staff for 2-G alignment?

Family-centered coaching is an emerging approach to working with low-income families that involves the whole family. Growing from a recognition that the interests and needs of the whole family affect whether a child enters school on grade level, and whether a parent can find and keep a job that supports the family, family-centered coaching is working to undo, and redo, how we work with families.

Family-Centered Coaching training provides current research and front-line methods in behavioral economics, trauma-informed care, participant-led design, and executive function skills into practical and relevant strategies and tools.

The W.K. Kellogg Foundation (The Kellogg Foundation) has a Family-Centered Coaching Toolkit, a new set of resources that supports parents and families in moving toward their goals and greater economic prosperity.

Best Practices suggest using a Family Case Manager/coach to assist families in moving to self-sufficiency by conducting whole family assessments; service and strategy development; and delivery through agency resources and community partner resources.

A SAMPLE DESCRIPTION: Family Support Coach

The Family Support Coach will support two-generation efforts to impact children and their families in education, health and well-being, economic supports, postsecondary and employment pathways with social capital opportunities. The FSC will follow national standards for family-centered coaching in implementing strategies for protective and promotive factors as identified by Strengthening Families. He/she will work collaboratively with the management team to ensure that family support services are coordinated and integrated.

8. Have you developed a process for helping families set goals?

Goal-setting discussions are most successful when there is trust. Once trust is established, people tend to be more open to discussing their strengths and objectives. Coaches can listen for cues that indicate a readiness to set goals such as excitement about a topic, comments about current struggles or reflections on the past.

When initiating goal discussions, coaches must acknowledge individuals as experts in their own lives and help them articulate what is important to them. Coaches may use information from assessments to prompt for goals. They can also help people prioritize their goals by putting “first things first” and breaking long-term goals into smaller, attainable action step.

MPath’s Bridge to Self-Sufficiency® is one notable theory of change that describes a person’s advancement from poverty to economic self-sufficiency as a journey across a bridge supported by five critical pillars—family stability, well-being, education and training, financial management, and employment and career management.

FAMILY STABILITY GOALS

NAME ________________ DATE ________ TOTAL SCORE ________ (FIRST-TIME) ________ (FOLLOW-UP)

	HOUSING	MOBILITY	FAMILY	HEALTH	NETWORK	DEBTS	SAVINGS	EDUCATION	CAREER
THRIVE 4	My housing costs are **40th or less** of my income	I own a vehicle and can afford the maintenance, insurance, and gas costs	My family's needs are being met	My health needs are being met	I can rely on networks for support and can give back	I have no debt other than my home, education, or car loans, and am current in all debts	I have savings of 3 months' expenses or more	I have completed a Bachelor's Degree or higher; or an Apprenticeship program	I am fully employed in a permanent position with health and retirement benefits
SECURE 3	My housing costs are **41-50th** of my income	I have access to reliable transportation and can get to the places I need	I am mostly able to engage in work, school, and family life; my family's needs rarely get in the way	I am mostly able to engage in work, school, and family life; health needs rarely get in the way	I can always rely on networks to provide useful advice, guidance, and support	I am current in all debts payments and am making more than the minimum payments	I have savings of more than 2 months' expenses, but less than 3 months' expenses	I have completed an Associate degree or professional certification	I am fully employed in a permanent position and see opportunities to grow
STABLE 2	My housing costs are **51-60th** of my income	I sometimes have trouble getting to the places I need	I am somewhat able to engage in work, school, and family life; my family's needs often get in the way	I am somewhat able to engage in work, school, and family life; health needs often get in the way	I can sometimes rely on networks to provide useful advice, guidance and support	I am making minimum payments on all debts	I have savings of at least one months' and up to 2 months' expenses	I have completed some job training or certificate (beyond high school)	I am employed in a stable permanent position
RISK 1	My housing costs are **61th or more** of my income	I often have trouble getting to the places I need	I am rarely able to engage in work, school, and family life; my family's needs always get in the way	I am rarely able to engage in work, school, and family life; health needs always get in the way	I can rarely rely on networks to provide useful advice, guidance, and support	I am behind in payments of one or more debts and am making payments on at least one debt	I have no savings or savings less than one month's expenses	I am working on or have a high school diploma or GED	I am temporarily employed or expect to lose employment
CRISIS LET'S TALK									
SCORE									

UNITED WAY of PIERCE COUNTY
Korbett Mosesly, Director of Family Stability Initiatives

Adapted from: Empath Bridge to Self-Sufficiency Matrix

Goals may be documented in the individual's words or paraphrased by the care manager. Using an individual's own words when documenting goals can help ensure that the goals truly reflect what matters most to the individual but may make it more difficult to measure progress if key elements for a measurable goal are missing.

To balance the need for accuracy in understanding what's most important to the individual and the need to measure progress on the goal, care managers can help an individual recast ideas and concepts into the SMART format (Specific, Measurable, Attainable, Relevant, Time-Bound).

Once a goal has been identified, a plan has been developed and necessary se most important part of the process—attaining a goal—has yet to occur. How will the care manager and the individual know when the goal has been reached?

When establishing goals, care managers and individuals should discuss how progress will be measured. Many organizations conduct assessments and review goals and care plans at

predetermined intervals (e.g., quarterly, annually). Sometimes, care managers and individuals may find more frequent contact helpful. Regardless of when meetings are held, establishing clear expectations about what will be reviewed is a good idea.

Documenting progress and identifying facilitators and barriers to goals can inform changes to the care plan. With limited exceptions (e.g., a legal representative oversees care), the individual determines whether a goal is attained. If the goal changes before it is reached, the care manager and individual can determine whether to modify the goal or the interventions, or whether to retire the goal. If the goal was not attained but is still desired, the care manager can work with the individual to understand the barriers to attainment and develop a new plan.

9. Have you developed a common outreach and recruitment strategy?

The benefits of human service programs for children and families are extensive. However, if target populations do not know about these services or do not engage with them, they cannot fully enjoy these benefits.

It is imperative to determine what practices and tactics will you and your partners use to reach, interest and engage target families so that they will choose to come to your whole family approach, set hole family goals and achieve a fuller range of parent and child services (as opposed to coming for just one service.

People use the word "outreach" to describe a wide range of activities, from actual delivery of services to dissemination of information.

Develop an outreach and marketing plan that will appeal to potential clients, convey the importance and benefits of your services, and clearly communicate what participation entails.

GUIDELINES FOR EFFECTIVE OUTREACH.

- Meet people where they are
- Be respectful
- Listen to your community
- Build trust and relationships
- Get the word out in a non-stigmatizing manner
- Offer service and information in a variety of locations (including home visits) and at non-traditional times, especially after work hours
- Make written information friendly and easy to understand
- Provide information in the primary language of those who will use the service
- Follow-up, follow-up, follow-up!

10. Is there an established, regular method for communication, reflection and action planning among all partners—and an agreed upon common language?

Communications management is about keeping everybody in the loop. The communications planning process concerns defining the types of information you will deliver, who will receive it, the format for communicating it, and the timing of its release and distribution.

Creating a Communication Strategy will outline the approach that will be used to engage stakeholders and partners. It summarizes the overall communication objectives and establishes some general principles to which communications will adhere.

Communication channels could include:

- Presentations
- In-person or conference call discussions
- A written or video summary of program information
- An informational email
- Online interactive presentations
- Newsletter or booklet.

11. Do you have a plan in place to integrate services in new ways and places that put families first?

A whole family approach is integrated and not siloed in nature. Additionally, instead of being a siloed program, it is an organizational mindset that supports a set of systems and practices that place children and their parents at the center.

That means intentionally linking, coordinating and aligning high-quality services for children with high-quality services and supports for their parents. This means also looking at the intensity and duration of services and making sure they are enough to meet the needs of families to achieve progress and lasting change.

Examples of these changes can be accomplished by combining programming in several interesting ways

1. Add adult programming to child services. This might include bringing an ELL adult program to a preschool setting so that both parent and child alike are learning English. Utah combines workforce and family policy in One-Stop Career Centers which are structured by function, rather than by funds. Functions include workforce development, educational aid, childcare and social supports.

2. Add child programming to adult services. This might include bringing quality early childcare to adult education so that young parents have a place for their children to play and learn, while they are also learning. The Keys to Degrees Program at Endicott College in Massachusetts provides single parent housing, childcare in the community, and parent support services for parents who attending college. This model has now been replicated at Eastern Michigan University.

3. Merge adult and child programs within existing organizations. This might include bringing workforce development, subsidized housing information and quality infant care together within a community program that is highly respected and capable of partnering on a large scale, with a growth model. Atlanta Civic Site bundles workforce development and family supports together for low-income families. Children in infancy to 10 years old receive quality early care and after school. Parents have a family coach; work supports and an asset-building program.

4. Offer adult and child programming in intentional hub sites. This might include a program at a college, a housing program or a family resource center. Housing, educational courses, mentors, workforce training for adults, afterschool programing and youth support groups are examples of what could be co-located and bundled. The Jeremiah Program in Minneapolis, Minnesota, recently visited by legislators during the 2014 NCSL convention, offers stable housing and bundles services to single parent families. The program couple's quality early care and education for the child, while providing access to employment assistance, classrooms, life coaches and Personal Empowerment Training to adults. Of note, 40 percent of its graduates obtain a four-year degree, 60 percent receive an associate degree, and 90 percent of their children perform at or above grade level.

12. Are you assessing families at intake and as determined by logic model.

Assessment is an in-depth evaluation that confirms the presence of a problem, determines its severity, and specifies options for addressing the problem. It should also survey client strengths and resources for addressing identified problems.

Remember, Logic models can assist you in program evaluation by providing a picture of how your program is intended to work. It identifies your programs main components and how they should relate to one another. Logic models include process and outcome components.

By developing a consistent, repeatable, and streamlined client intake process, you can experience many benefits:

- Less time spent on duplicating information
- Better organization
- Improved operational efficiency
- Reduced overhead
- Increased client demographic data
- Happier clients

Additional things to consider:

- ✓ What common initial intake process will you use to get baseline data on families and help them set goals?

- ✓ What materials/tools will you use to do this?

13. Do you screen and simultaneously enroll families into multiple programs at one time, and/or identify the best sequence of service use for any single family.

A key aspect of the Annie E. Casey Foundation Center for Working Families, model is that programs bundle and sequence services rather than offering just one component or offering multiple components but leaving it up to the clients to discover and seek put additional services.

A bundled approach to providing services allows program participants to ultimately have better outcomes. Agencies can consider program options that are the best fit for families in communities with high concentrations of families and young children experiencing specific problems. Outcomes for people in more than one service also speak volumes for the work and benefits of bundling.

Early evidence indicates that clients who receive bundled services are three to four more likely to achieve a major economic outcome (such as staying employed, earning a certificate, etc.) that clients receiving only one type of service.

The bundling of services is one of the key strengths provided by community action agencies by the CSBG funding stream.

14. Have any enhancements been made to data systems to track parent, child, and family outcomes.

An outcome is a benefit experienced as a result of services provided to children and families. Child and family outcomes are connected. A positive outcome experienced by the family serves to promote the child outcomes and outcomes achieved by the child benefit the family. Data is collected on outcomes to measure individual and program progress

Fundamental to the success of two-generation programming is having high-quality data to drive decision-making processes.

Data is used to track participant progress and help inform the program design, services and equitable practices that will empower families and support them in achieving their goals.

Child and family outcomes data must be valid in order to make decisions about system and practice improvements. Ensuring quality data is a multistep process.

This includes:

- training and support for staff before and during data collection
- Improving data systems and data entry procedures
- ongoing supervision and feedback to implementers
- analysis of the data after data collection
- validity checks

Resources

1. Kotter, John P. Leading Change. Harvard Business Review Press, Kindle Edition. © Scaled Agile, Inc.

2. Community Action Economic Mobility Initiative Design Plan

3. Urban Institute, 2016. Some elements adapted from Scott et. al., 2016.

4. Goals to Care How to keep the in "person-centered" The National Committee for Quality Assurance

5. How to Develop a Common Agenda for a Collective Impact: A 5 Step Guide by Paul Born

6. Participant Manual, 'Introduction to ROMA" Version 5.0