CALIFORNIA STATEWIDE TRAINING CURRICULUM DEVELOPMENT GUIDE

This guide provides guidance on the key curriculum components needed to provide standardized training in California. Each curriculum component is defined and examples are provided. This document also includes links to online resources and examples.

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Introduction

The State of California has a vast pool of child welfare trainers and curriculum developers. To ensure statewide consistency and ease of delivery, the California Social Work Education Center (CalSWEC), in conjunction with the California Department of Social Services (CDSS) and the Regional Training Academies (RTAs), has developed the *California Statewide Training Curriculum Development Guide (Guide)*. This Guide will provide recommendations for the curriculum development process, along with supplemental components outlined.

Through standardized, statewide curricula, trainers who train multiple topics will develop a familiarity with the resources. Trainees will benefit from consistent Trainee Guides and the ability to easily locate resources. A standardized, statewide curriculum developed, resourced, and evaluated in a consistent manner will improve reporting to the federal government. The intended use of this Guide is to serve as a resource to Curriculum Development Teams, Curriculum Developers, and those who will bid for a curriculum development project with the State or Children and Family Services Division (CFSD) staff who have training needs. Within the Guide, curriculum development processes are outlined. Within the Appendix section, resources are provided to guide curriculum development with attention to Adult Learning noted within the CDSS Adult Learning Theory Tips and to guide facilitation of Curriculum Development Teams through use of the Super 8 and the Facilitator's Checklist for True Consensus Building. To understand the process around subcommittee activities to develop curriculum and the decision-making authority, the Child Welfare Statewide Training System chart is also provided.

Children and Family Services Division (CFSD) Training and Workforce Development and Delivery Consultation Framework

POLICY

Child and Family Services Division (CFSD) staff from the program area requesting training will consult with the Workforce Development and Training (WDT) Subcommittee of the County Welfare Directors Association of California (CWDA) Children's Operations Committee to collaboratively develop training and workforce development and delivery plans.

PURPOSE

The WDT Subcommittee serves as the guiding subcommittee for the CWDA to discuss, analyze, forecast, and plan workforce development. This includes the identification of training needs to support initial and ongoing staff training, and implementation of new mandates and initiatives. In collaboration with the CDSS, the WDT Subcommittee will:

- Discuss the impact of current and pending policy on workforce development and training within counties.
- Work with the CDSS to budget and develop training plans to support counties in the implementation of statewide initiatives and ongoing operations.
- Strategize and plan methods to improve the child welfare workforce, including pre-service education requirements, employee retention, and in-service training.
- Represent the CWDA in workforce development and training-related workgroups that are prioritized by the Children's Operations Committee (e.g., ICPM, CWS-CARES).
- Serve as a focus group for proposed regulation changes or additions and provide expert-level considerations and feedback to representatives of the CDSS.
- Review and approve recommendations for initial staff and supervisor training to meet regulation requirements (MPP 14-600 et al.).
- Strategize and plan for relevant ongoing staff trainings to meet regulation and PIP requirements.
- Act as subject matter experts to representatives of the CDSS and assist in the understanding of operational-level workforce development and training.
- Strategize and plan for implementation to support fidelity in delivery of training as well as application in the field.

When it is determined that a statewide, standardized curriculum needs to be developed, CFSD staff will consult with the WDT Subcommittee through the following steps:

- CFSD staff will contact the Training Support Unit (cwstrainingquestions@dss.ca.gov) to be added to the WDT Subcommittee Agenda.

- When CFSD staff are prepared to discuss training needs with the WDT Subcommittee, the following information should be provided:
    A. Brief introduction and background of the training topic.
    B. Requirements for and objectives of the training:
        - Is this a mandated training? Is this a result of legislation/litigation?
        - Who is the target audience?
            - CWS
            - Probation
            - Behavioral Health
    C. Mandated for all or made available to all:
        - What is the intent of the training?
        - Is this an evolving practice that would require frequent and ongoing revision?
    D. Funding availability and limitations:
        - Is this a funded mandate? What is the funding source?
        - What are restrictions to the funding source?
        - Are there reporting requirements?
    E. Timeline for deliverables:
        - When does the training need to be available?
        - Are the deadlines flexible? Is the scope of the project flexible?
        - How often does the training need to occur?
    F. Available expertise and resources:
        - Is there an identified Subject Matter Expert(s)?
        - Are there workforce development tools and strategies that reinforce training and practice?
        - Does curriculum already exist?
    G. Have stakeholder groups been identified to be included in the vetting of the curriculum?
    H. Which entity is available to deliver the training?
        - In-house trainers or contracted trainers that need to be identified and developed?
        - Will the training be delivered regionally, or should it be centralized?
        - What is the best style of delivery, e.g., classroom, coaching, learning collaborative, conference?
        - What is the best modality for delivery, e.g., in-person, toolkit, video, eLearning? Virtual delivery? If in-person there will need to be a pilot of the curriculum with statewide participant representation.
    I. Evaluation plan:
        - Who will design the evaluation?
            - Will the curriculum developer submit evaluation items to the evaluation development team for review?

        - Will the curriculum developer request that the evaluation development team construct the evaluation items?
    - Use of the Statewide Satisfaction survey is required for all trainings.
    - Ensure that the training day includes protected time for all evaluation measures.
- Create an action plan based on the WDT discussion and share with the Training Support Unit. Please see the Appendix section for a sample action plan.
    - If the plan involves the use of the Statewide Training System to implement, the Training Support Unit will assist in creating contract language to facilitate the amendments as needed.
    - If the plan involves entities outside the Statewide Training System, a contract with the vendor will need to be implemented.

Criteria to Consider for Curriculum and Workforce Development

FUNDING SOURCE

Every funding source has requirements regarding the intended audience and the training topic. A vendor with an existing contract may be used if the contract includes the same funding source that will be used to develop the curriculum. Adding funding to an existing contract, or creating a new contract, will add at least six months to the curriculum development timeline.

FUNDING AMOUNT

Ensure sufficient funding for all deliverables necessary for the creation, vetting, piloting, and revision of curriculum. Because curriculum demands are often underfunded, look for vendors that have funding available from another project to offset the costs.

TIMELINE FOR DELIVERABLES

Curriculum needs may come with short timelines for creation and implementation. Determine which vendor is best able to accommodate short-term deadline demands. This may be done through consideration of the vendor's history performing similar deliverables or related experience in the topic area.

EXPERTISE

Development of high-quality curriculum requires exceptional proficiency in the training topic itself and calls for expertise in the principles of adult learning theory, curriculum writing, implementation, and knowledge of the child welfare system as a whole. It is essential to select a vendor who not only has subject matter expertise, but who has access to other Subject Matter Experts (SMEs) in the field and demonstrates an ability to situate specific course material within the broader context of the child welfare system.

WORKLOAD

Because curriculum needs come with short timelines and brief turnaround times, it is necessary to evaluate the vendor's workload to determine whether they have the capacity to increase their deliverables in a short period of time, should the need arise. Delays and/or failure to meet contracted deadlines may result in penalties to the vendor.

CAPACITY

It is important to determine the most cost-effective and timely approach to developing curriculum with consideration for quality. A method to identify, review, and leverage any existing resources shall be developed. Consider currently resourced SMEs—on staff or under contract—who can meet deliverable needs.

ACCESSIBILITY

It is critical that all curricula and associated materials meet the standards set by The Americans with Disabilities Act of 1990 (ADA), [Section 508, specifically, WCAG 2.1, Level AA conformance](https://www.w3.org/TR/WCAG21/) (https://www.w3.org/TR/WCAG21/).

For the development and revision of eLearnings in our curricula, use the eLearning Accessibility Checklist as your guide to accessibility requirements.

VALUES

It is essential that all curricula reflect the values of the Integrated Core Practice Model (ICPM). Consultation of the ICMP must be made prior to curriculum development.

Four Phases of The Curriculum Development Process

There are four key phases in the development of a statewide, standardized training curriculum: Planning, Developing, Implementing, and Evaluating.

PHASE ONE: PLANNING

During the **Planning Phase**, a problem statement is crafted and a needs assessment (https://www.opm.gov/policy-data-oversight/training-and-development/planning-evaluating/) is performed. A needs assessment might include one or more stakeholder brainstorming sessions, a survey of stakeholders to gather their vision and goals for the curriculum, and/or a focus group. These facilitated discussions under the needs assessment occur to determine the desired outcomes for the curriculum and reporting needs, which will guide the Request for Proposal (RFP) process and the Scope of Work (SOW), vendor selection/management, curriculum design and the evaluation instrument, and whether the curriculum has met stakeholder requirements. The problem statement describes the problem to be addressed and notes relevant research literature to guide development of the learning objectives and outcomes, the curriculum map, and what the evaluation instrument will seek to measure.

Diverse representation of community members and stakeholders is important in such planning sessions in order to develop culturally responsive curricula. Should curricula pertain to a specific cultural group or community, subject matter experts from that specific group or community should be represented throughout the planning phase, for example, Native American representation, LGBTQIA representation. Former foster youth should always be included in the planning process. Caregivers and parents with lived experience in the child welfare system should also be included whenever feasible.

Phase One: Planning	Assignee
Perform a needs assessment, e.g., stakeholder brainstorm, survey, or focus group, to establish a clear philosophy and goals that will guide the design of the curriculum and the evaluation instrument. **Prospective questions:** • What is driving the need for the curriculum (legislation, litigation, county request, or compliance support)? • What data are available to clarify the need (e.g., input from youth and families, SafeMeasures or SDM, federal case reviews)? • What are the reporting needs of this curriculum and for what audience? How and how frequently should this report be disseminated? • Are there curriculum design and evaluation reporting needs? • Are there subject matter expert and vendor selection needs?	Workforce Development Team (WDT) Subcommittee
Convene a Curriculum Development Team of Subject Matter Experts (SMEs) selected through consultation with the Training Support Unit,	CDSS/CalSWEC/RTA/Vendor

CalSWEC, and the training system. **This team will be charged with the following activities:**	
Draft a Scope of Work to inform curriculum and evaluation, to be informed by the need assessment, and to manage the project. **Prospective questions:** • Will this curriculum address an emerging content area that requires research (e.g., a literature review or outreach to or interview of SME)? • Are there existing curriculum or tools that can be used or updated?	Curriculum Development Team
Define the outcomes for the Training Program or Course.	Curriculum Development Team
Develop learning objectives for the training course or training program.	Curriculum Development Team/ Evaluation Team
Design a curriculum map that aligns with workforce development and training needs to inform the sequencing of each training course and to inform evaluation design.	Curriculum Development Team
Design a Request for Proposal (RFP) based on the SOW.	Curriculum Development Team
Disseminate the RFP for vendor solicitation through stakeholders and through making available to the public.	Curriculum Development Team
Coordinate an RFP review panel of SMEs and Stakeholders.	Curriculum Development Team
Design an evaluation tool to inform the review panel's process and selection of a vendor. The evaluation tool should use a defensible methodology, e.g., expertise, best value, lowest cost, etc.	Curriculum Development Team
Oversee an RFP review process and vendor selection.	Curriculum Development Team
Select a vendor and execute a vendor contract, inclusive of the Scope of Work and a project completion estimate in consultation with the CDSS Contracts Unit if necessary.	CDSS/CalSWEC/RTA/Vendor
Develop a Project Schedule to oversee the execution and management of the vendor and the curriculum and evaluation development.	Curriculum Development Team
Notify the Evaluation Team that the Evaluation Guide will need to be edited to include the new training.	Curriculum Development Team

PHASE TWO: DEVELOPING

During the **Developing Phase**, the Curriculum is developed through the oversight of a Curriculum Development Team of SMEs and in conjunction with a vendor. A Project Schedule (designed under the Planning Phase) is executed to guide the curriculum development through a vetting, pilot, and final revision process (specific details outlined in the table below). Within the development phase, a Toolkit of Resources, Training-for-Trainers, eLearning modules, and an Implementation Checklist may be developed. The evaluation measure is developed during this phase of the project to support implementation in alignment with the rollout of training curriculum.

Phase Two: Developing	Assignee
Develop the curriculum (PowerPoint, Trainee Guide, Trainer Guide, Resources, Copyright Notices, Supplemental Materials/Handouts, Virtual Delivery Guides, Bibliography, etc.). Review and/or design the evaluation instrument designed to measure learning, transfer, and/or training outcomes. Ensure that the training day includes protected time for all evaluation measures.	Curriculum Development Team/Vendor/ Evaluation Team
Develop eLearning Modules, e.g., prerequisite, refresher, or stand-alone, as needed.	Technology Team/ Vendor
Vet the curriculum through circulation of the draft curriculum statewide to various SMEs and other stakeholders to gather feedback. Review and/or design the vetting survey. Should curricula pertain to a specific cultural group or community, subject matter experts from that specific group or community should be included in the vetting process, e.g., Native American Representation, LGBTQIA representation. Former foster youth should always be included in vetting draft curriculum, and caregivers and parents with lived experience in the child welfare system should be included whenever feasible.	Curriculum Development Team/ Evaluation Team
Prepare and analyze results from the vetting survey. Revise the curriculum post-vetting and pre-pilot. Integrate feedback received from vetting(s).	Curriculum Development Team/Vendor/ Evaluation Team
Determine the pilot participants, e.g., Social Workers, SMEs, stakeholders, trainers, etc.	Curriculum Development Team
Determine the observers of the pilot, e.g., Social Workers, SMEs, stakeholders, trainers, etc., and provide a flyer for travel approval, a registration link for onsite logistics, and a Qualtrics formative evaluation survey to capture Observer feedback.	CalSWEC/RTA/ Vendor
Select an experienced trainer to train the pilot. Establish if there is a need for a teaching assistant, and if so, what aspects they will assist with. Determine the date, time, and location of the pilot. Determine the format for debrief sessions	Curriculum Development Team/Vendor

and conduct post-pilot debrief sessions with both participants as well as observers.	
Pilot the curriculum and the evaluation instrument.	Curriculum Development Team/Vendor/ Evaluation Team
Revise the curriculum post-pilot and pre-implementation. Integrate feedback received from the pilot(s) into the final format. Vet and ensure that all curricular materials meet ADA Accessibility Requirements. Analyze evaluation instrument results and adjust the instrument as necessary.	Curriculum Development Team/Vendor/ Evaluation Team
Finalize the curriculum and make available for training. Finalize the evaluation instrument and make available for training.	Curriculum Development Team/Vendor/ Evaluation Team
Develop "Train-the-Trainer" Materials, and ensure that they are in compliance with the ADA. https://www.cdc.gov/healthyschools/professional_development/documents/17_279600_TrainersModel-FactSheet_v3_508Final.pdf	Curriculum Development Team/Vendor
Build a Toolkit of Resources for Trainees to access post-training and ensure they are in compliance with the ADA.	Curriculum Development Team/Vendor
Develop or identify materials to guide implementation, i.e., an implementation checklist or risk register, and to measure fidelity.	Curriculum Development Team

PHASE THREE: IMPLEMENTING

During the **Implementation Phase**, the key material is the implementation checklist (developed during the developing phase). This tool will serve as the base of any implementation process assessment and measurement of fidelity.

Phase Three: Implementing	Assignee
Determine who will need to be trained on this curriculum. Determine who will train the curriculum. Coordinate with training entities.	Curriculum Development Team
Develop plan for technical assistance to support use of practices covered by the curriculum to fidelity.	Curriculum Development Team/ Training Entity
Develop the following: • An implementation timeline, inclusive of a plan for rollout • A plan for a statewide or cohort implementation model • Implementation fidelity considerations • A means to gather and review feedback about the curriculum from trainers and other regional training academy staff from trainers and other regional training academy staff	Curriculum Development Team/ Evaluation Team
Roll out the new training program or course.	Curriculum Development Team/ Training Entity
Secure training facility. Create list of and print session materials. Contract trainers. Prepare trainers ("Train-the-Trainer" Sessions). Contract trainers. Create training schedule. Create and distribute flyer. Register participants. Create rosters, tent cards, etc. Hold training sessions. Determine plan for fidelity evaluation, both of training delivery and of use of the content in the field.	Training Entity

PHASE FOUR: EVALUATING

During the **Evaluating Phase**, data collection and reporting are the premier considerations, as through the evaluation instrument the success of the training will be measured and findings will be used to inform ongoing revision. It is important to note that the creation of evaluation instruments must be done in tandem with the development of curricula, not added post-completion.

Phase Four: Evaluating	Assignee
Evaluate training at the level of Satisfaction, Learning, and/or Transfer at intervals.	Evaluation Team
Update the training program or course informed by the evaluation findings.	Curriculum Development Team/ Evaluation Team
Evaluate the success of the training program or course.	Evaluation Team/ WDT/CDSS
Conduct a "lessons learned" follow-up review of overall process: • What worked well? • What was effective? • What challenges arose? • What were lessons learned? Suggestions for improvement. Who is included in this review? What happens to this information?	Curriculum Development Team/ Evaluation Team

Curriculum Development Implementation Checklist

**This tool was adapted from the California Core Practice Model (CPM) Implementation Plan Template.*

STEP #1. WHAT IS OUR PROBLEM STATEMENT? WHAT ARE THE FINDINGS OF OUR NEEDS ASSESSMENT? WHO IS ON OUR CURRICULUM DEVELOPMENT TEAM?

Use your Problem Statement and the findings of your Needs Assessment to select your Curriculum Development Team. List the members of your Curriculum Development Team below:

How is the team identified? Who should be included? Why?

STEP #2. DEFINE SUCCESS: WHAT CHANGES DO WE WANT TO SEE AS A RESULT OF TRAINING?

Articulating what success looks like helps you to strategically target the Curriculum Development Team's efforts toward specific learning objectives and to guide the Evaluation Team's crafting of an evaluation measure that will gather relevant data for the generation of useful reports on learning outcomes.

Engage your curriculum development team in defining success.

In collaboration with your team, consider all the priorities identified in Step 2 and ask yourselves, "What changes are we hoping to see by the end of the planning horizon and by the end of training if these priorities are addressed?"

STEP #3A. SET THE PLAN BOUNDARIES: WHERE DO WE START? WHERE DO WE WANT TO GO (WHAT OUTCOMES ARE WE TRYING TO ACCOMPLISH)? WHAT DO WE NEED TO MEASURE TO KNOW THAT TRAINING WAS A SUCCESS?

In collaboration with your Curriculum Development Team and Evaluation Team, assess the needs of the curriculum and the priorities that are to be achieved. Use the table below to define the priorities on which to focus your curriculum development, ongoing evaluation and reporting needs, and to guide the work of your Curriculum Development Team:

Priorities for Curriculum Development

Scope of Work	**Glossary:** Spell out acronyms and include definitions. **Needs Assessment/Problem Statement:** Describe the problem that this training would address and note any relevant research. **Objectives of the project/deliverables:** Note goals that will result from the delivery of the training curriculum. **Project schedule:** Note how the group will work, how frequently, and for how long, e.g., calls, conferences, meetings, and important dates for the project, e.g., milestones, tasks, and deliverables, etc.
Learning Objectives	What measurable knowledge should trainees have, what measurable skills should they be able to perform independently and/or while back on the job, or what attitudes should they acquire upon successful completion of the training course?
Curriculum Mapping	In what course or segment will trainees be introduced to or master the necessary and defined learning objective (e.g., knowledge, skills, or attitudes)?
Using Data for Understanding & Continuous Quality Improvement	How will trainees demonstrate that they have achieved the learning objectives of training, i.e., to what degree is demonstration of achievement of a specific learning objective necessary?

STEP #3B. SET THE PLAN BOUNDARIES: WHAT'S OUR PLANNING HORIZON?

Through a project plan identify the span of time your workgroup will need for carrying out the curriculum development and implementation processes. The planning horizon begins with the target start date for action on any of the plan priorities and ends when sufficient progress has been made to reassess circumstances and revise the plan. A typical planning horizon is 12 to 18 months. Think about your fiscal cycle and other considerations in choosing an appropriate planning period. Enter the target dates below:

Curriculum Implementation Planning Horizon

Target Start Date	**Target Date for Reassessment(s)**

Key Components of Curriculum Materials

Every curriculum should consist of a Trainer Guide and a Trainee Guide. Providing trainers across the state with these standard materials will help to facilitate their preparation process. Further, this practice allows for consistent statewide messaging and should reduce inconsistencies in training delivery.

The Trainer Guide should include, but is not limited to:

a. Table of Contents
b. Acknowledgements/Copyright information
c. Introduction
d. Evaluation Overview
e. Agenda
f. Learning Objectives
g. Lesson Plan including PowerPoint
h. Training Segments
i. Materials Checklist
j. Supplemental Handouts
k. References and Bibliography

The Trainee Guide should include, but is not limited to:

a. Table of Contents
b. Introduction and Acknowledgements
c. Evaluation Overview
d. Agenda
e. Learning Objectives
f. Training Content including PowerPoint
g. Supplemental Handouts
h. References and Bibliography
i. Other Resources (as needed)

Trainer Guide

The Trainer Guide defines the content to be covered by the trainer (see Appendix A) and details the standardized information to be conveyed to trainees. To ensure uniform messaging across the state and fidelity to the curriculum, the Trainer Guide must be written in a clear easy-to-follow manner.

The components of the Trainer Guide are described below.

TABLE OF CONTENTS

A Table of Contents should identify how to locate resources within the Trainer Guide.

ACKNOWLEDGEMENTS

An Acknowledgements page should be included to thank the stakeholders and contributors to the curriculum and should include the language below:

> This curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to: [The CalSWEC Citation Guidelines](https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf)
> (https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf)

INTRODUCTION

The statewide curriculum is intended to be generalized and applicable across the state. It conveys universal knowledge and essential skills for the topic area to the target audience. This section provides both the framework for the curriculum and functions as an orientation for the trainer on how to use the guide for the proper delivery of the material. For example:

> For an overview of the training, it is recommended that trainers first review the Agenda and Lesson Plan. Next, trainers should review the activities for each training segment in the Trainer Guide as well as the training content and course materials provided in the Trainee Guide. This will help familiarize the trainer with each topic, training activity, and intended flow of the course. It is helpful if trainers print both the Trainer and Trainee Guides for themselves so that they can easily refer the trainees to activities during class.

EVALUATION OVERVIEW

The evaluation overview informs trainers that evaluations are accessed and completed electronically through the Learning Management System (CACWT), and that they should refer to the latest version of the Evaluation Guide for instructions on how to administer evaluations. This section should be completed in conjunction with the CalSWEC Evaluation Lead in the In-Service Training Team.

AGENDA

The Agenda is a simple, sequential outline indicating the timing of the segments in the training day and which Learning Objectives are being covered. This consists of the start and end times, length, and an overview of each activity, including lunch and breaks. The Agenda in the Trainer Guide should mirror that of the Trainee Guide to serve as a mutual agreement to remain on schedule.

The Agenda is divided into major sections by Day 1, Day 2, and Day 3 of the training, as applicable. It contains two column headings: (1) Segment and (2) Methodology and Learning Objectives. The Segment column provides the topic and training time for each segment of the training. The Methodology and Learning Objectives column reflects the specific activities and objectives that are covered in each segment.

Please note: Evaluation of the curriculum needs to be built into the agenda and the lesson plan to ensure that enough time is allowed for trainees to complete evaluations during the training day. The Evaluation Lead should be consulted to ensure the agenda includes correct time allotment for evaluations.

LEARNING OBJECTIVES

The Learning Objectives serve as the basis for the training content. All Learning Objectives for the curriculum are listed in both the Trainer and Trainee Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. Each objective should be a clear, concise, and measurable statement identifying what Knowledge, Skill, or Value participants will gain from the training. Learning Objectives are numbered in a series beginning with K1 for Knowledge, S1 for Skills, and V1 for Values and should be sequenced to facilitate the scaffolding of content within the curriculum. The Learning Objectives are also indicated in the Lesson Plan for each segment of the curriculum.

Knowledge objectives focus on declarative learning—the concrete information trainees should know and be able to identify, explain, or define. Knowledge objectives are best used for key information the trainer wants to convey (e.g., laws, policies, theoretical concepts, and definitions). If the training introduces a law or policy and provides a desk guide for future review and study, the Learning Objective should state the concept the participant will identify rather than define or explain it. Here is a sample of Knowledge objective:

> K1 - The participant will be able to explain the terms “non-dependent minor” and “supervised independent living placement.”

Skill objectives focus on applied learning—the real-world skills for which participants should demonstrate proficiency (e.g., completing a form or interacting with a family member). Typically, this is accomplished by incorporating a scenario, case example, or role-play activity to accomplish the goal. Skill objectives should build on the declarative knowledge identified in the knowledge objectives. It is important to allow time in the training to convey the basic knowledge related to the skill, show how to perform the skill (by demonstrating it or showing a video), and then allow the participants to practice the skill while providing feedback.

Because Skill objectives take time to teach effectively, be judicious in how many are included in a training. Here is a sample of Skill objective:

> S1 - Given a case example or scenario, the participant will be able to demonstrate an initial conversation with a non-dependent minor that includes information about: non-minor dependent status, AB12 eligibility requirements, and supervised independent living placement.

Value objectives identify the underlying value changes participants must make in order to apply their newly acquired knowledge and skills successfully. This section should outline the paradigm shifts and new perspectives that will help participants carry forward the skills and knowledge they have gained. Engage participants in thinking about values by allowing time to consider and discuss case examples or difficult situations. Here is a sample of Value objective:

> V1 - The participant will value the role of non-dependent minors in making decisions and developing supervised independent living placements.

LESSON PLAN

The Lesson Plan is the main component of the Trainer Guide and is comprised of segments that provide step-by-step instructions on how to deliver the training content. It includes detailed descriptions of how to set up and carry out the activities, as well as tips for preparing, presenting, and processing the activities.

Please note: Evaluation of the curriculum needs to be built into the agenda and the lesson plan to ensure that enough time is allowed for trainees to complete evaluations during the training day. The Evaluation Lead should be consulted to ensure the agenda includes correct time allotment for evaluations.

TRAINING SEGMENTS

Each segment should specify the corresponding PowerPoint slide(s) (if applicable), any required materials, and the amount of time to be designated to each activity. Including PowerPoint slides with curriculum materials allows trainers to use standardized visuals to convey key points. Importantly, rather than serving as a script (unless fully standardized), slides are intended to outline talking points and discussion questions for the trainer that can help them reinforce the information in the Trainee Guide. Whenever possible, trainers should be encouraged to facilitate focused, meaningful group discussion in order to deliver content. It is best to keep the slides simple and concise. Slides should have no more than three key points. Too much content on one slide may be a distraction if participants begin reading slides rather than listening to the trainer.

One training segment might focus on identifying the broad components of law (such as AB12) and may include several activities used to communicate key information about the law, demonstrate a skill related to implementation and application of the new legislation, and allow trainees to consider values relevant to its use. The first activity may ask trainees to read a fact sheet about the law individually, the second may pair trainees for a scripted role-play, and the third could bring the group together for a discussion about related values.

Each training should use a variety of modalities to help trainees thoroughly understand each segment's topic of focus and intentionally facilitate development of knowledge, skills or values. The Lesson Plan maps the segments and activities to be completed throughout the training and identifies the following:

- Order of segments
- Time needed for each segment
- Order of activities within segments
- Training modality and timing for each activity
- Materials needed
- Learning Objectives to be conveyed by each segment
- The corresponding PowerPoint slide(s) for each activity

MATERIALS CHECKLIST

To facilitate the training preparation process, the Materials Checklist provides a complete listing of materials needed for the training. Materials specific to individual training activities are also noted in the Lesson Plan.

SUPPLEMENTAL HANDOUTS

Supplemental Handouts refer to links for additional handouts not included in the Trainer Guide. Supplemental Handouts may include worksheets or reference guides for training activities for later use.

REFERENCES AND BIBLIOGRAPHY

The References and Bibliography indicate the sources that were reviewed by the curriculum designer(s) to prepare and write any main, supplemental, and content information, training tips, training activities, or other information included in the training materials. It may include additional resources that apply to a particular content area. The References and Bibliography may include the following:

- All-County Letters (ACLs) and All-County Information Notices (ACINs) issued by the California Department of Social Services (CDSS)
- Legal References (as applicable)
- General References and Bibliography

Trainee Guide

The Trainee Guide may consist of handouts, desk guides, resource guides, information sheets, and activity worksheets provided to the participants during the training. For ease of reference, format the guide with titles, page numbers, and a Table of Contents. This allows the trainer to direct the participants to the content for each activity. Participant materials should include reference information so that others (trainers or participants) can access original source material or identify when materials may be outdated.

These materials are vital for the successful transfer of information. The better organized they are, the more the participants will be able to understand and use them on the job.

TABLE OF CONTENTS

A Table of Contents should clearly identify how to locate resources within the Trainee Guide.

INTRODUCTION AND ACKNOWLEDGEMENTS

The Introduction and Acknowledgement section should provide context for the curriculum. This section will detail the history of the training topic to provide background, give specific instructions on the use of the guide, and acknowledge the stakeholders and curriculum writers who created the curriculum. This section must also include the following statement:

> This curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to:
> [The CalSWEC Citation Guidelines](https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf)
> (https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf)

EVALUATION OVERVIEW

This section provides trainees with a summary of the purpose of the evaluations, and provides them with an explanation of how the data will be stored, analyzed, and reported. It also alerts trainees that completion of the class includes completing all evaluations electronically through the Learning Management System (CACWT). This section should be completed in conjunction with the CalSWEC Evaluation Lead in the In-Service Training Team.

AGENDA

The Agenda is a sequential outline indicating the order of events in the training day. This includes the coverage of broad topic areas, training activities, lunch and break times. The Agenda in the Trainee Guide should mirror that of the Trainer Guide to serve as an agreement to remain on schedule.

Please note: Evaluation of the curriculum needs to be built into the agenda and the lesson plan to ensure that enough time is allowed for trainees to complete evaluations during the training day. The Evaluation Lead should be consulted to ensure the agenda includes correct time allotment for evaluations.

LEARNING OBJECTIVES

The Learning Objectives serve as the basis for the training content that is provided to the trainees. The Learning Objectives for the curriculum are listed in both the Trainer and Trainee Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. Each objective should be a clear, concise, measurable statement identifying what Knowledge, Skill, or Value participants will gain from the training.

TRAINING CONTENT

The training content is the main component of the Trainee Guide. It contains the handouts, worksheets, and vignettes for all training activities. Each item should have a clear title and page number that can be referenced in the Table of Contents.

The PowerPoint slide deck, printed three (3) slides to a page, may be included in the Trainee Guide. This allows participants to follow along easily and organize their notes during the training and can serve as a useful reference back at the office. Please consider conserving paper when possible. Print only what is necessary.

SUPPLEMENTAL HANDOUTS

Supplemental Handouts may or may not be included in the Trainee Guide because their size or format requires that they be printed separately. They may include worksheets or reference guides for training activities (or for later use). They may also be made available online via a toolkit.

REFERENCES AND BIBLIOGRAPHY

The References and Bibliography indicate the sources that were reviewed by the curriculum designer(s) to prepare and write any main, supplemental, and background content information, training tips, training activities, or other information included in the training materials. It may include additional resources that apply to a particular content area. The References and Bibliography may include the following:

- All-County Letters (ACLs), County Fiscal Letters (CFLs), and All-County Information Notices (ACINs) issued by the California Department of Social Services (CDSS)
- Legal References (as applicable)
- Federal References (as applicable)
- General References and Bibliography

Evaluation

In order to evaluate the continuum of training and professional education for the county child welfare workforce, evaluation data is collected during each training. Evaluation data tells us the basic demographic characteristics of new trainees, whether training has been effective, behavior changes as a result of training, which content areas require revision, and the type of revision needed (deletion, addition to content or delivery methods, etc.). Evaluations are to be completed as part of the training day. Completion of the evaluation triggers completion of the course in CACWT. The statewide evaluation is not optional. The evaluation design is based upon the Kirkpatrick Four Levels model. The types of evaluations collected are: demographic survey, knowledge evaluations (pre and post), embedded evaluations, satisfaction survey, field activity evaluations, and follow-up evaluations.

The demographic survey collects information around the demographic characteristics of trainees.

The Statewide Satisfaction Survey collects information around the degree to which trainees find the training favorable, engaging, and relevant to their jobs. It also includes questions around the online learning experience for trainings that are delivered online. The Statewide Satisfaction Survey is asked at the end of every training. If the training was delivered online, trainees are asked additional questions about their online learning experience during the last instructor-led course of each block.

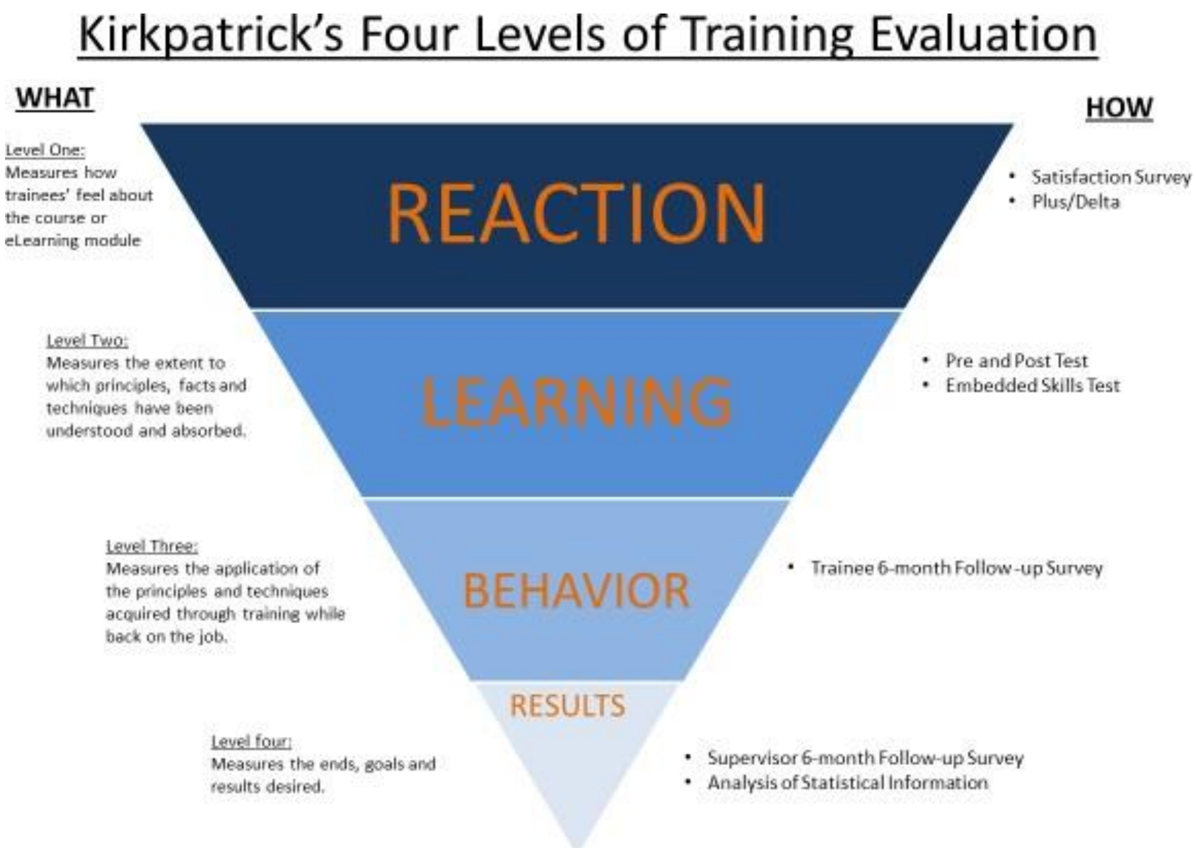
Knowledge evaluations are employed to understand the degree to which trainees acquire the intended knowledge, skills, and attitudes related to their participation in training. Some courses have a pre- and post- knowledge evaluation, while others use only a post-evaluation.

Embedded evaluations are used to evaluate skill-based competencies. Skill-based competencies are competencies that define a desired behavior, activity, or interaction, such as interviewing a child, assessing risk, identifying indicators of child maltreatment, writing a court report, writing a case plan, etc. Embedded evaluation either builds on existing exercises or designs new tasks that can be used as both instructional and evaluation opportunities. This linkage enhances trainee learning and provides feedback to trainers for course improvement, while also providing important data on trainees' acquisition of skills.

For some training series, field activity evaluations are used to collect data measuring the degree to which trainees apply what they learned during training through practice opportunities in the field. Social workers and their Field Advisors both complete evaluations related to each of their field activities.

Follow-up evaluations are used to understand the degree to which trainees directly apply to their practice what they learned during training. For a selection of training series, these evaluations are administered six months and one year after the completion of the series. The follow-up surveys are automatically deployed to the trainee by CACWT based on completion date of the training series.

Kirkpatrick Model of Training Evaluation



KIRKPATRICK'S FOUR LEVELS OF TRAINING EVALUATION

Level 1: Reaction

What: Measures how trainees feel about the course or eLearning module.

How: Satisfaction Survey; Plus/Delta.

Level 2: Learning

What: Measures the extent to which principles, facts and techniques have been understood and absorbed.

How: Pre and Post Test; Embedded Skills Test.

Level 3: Behavior

What: Measures the application of the principles and techniques acquired through training while back on the job.

How: Trainee 6-month Follow-up Survey.

Level 4: Results

What: Measures the ends, goals and results desired.

How: Supervisor 6-month Follow-up Survey; Analysis of Statistical Information.

Appendix

ADA COMPLIANCE

The California Social Work Education Center (CalSWEC) website meets the accessibility standards of UC Berkeley based on the Americans with Disabilities Act of 1990 (ADA), Section 508. The CalSWEC website is on the Open Berkeley platform, which by design makes the website (content, format, features) accessible to people with disabilities, including those who use assistive technology.

For further resources regarding ADA Compliance please visit the following links:

WCAG 2 Checklist
https://webaim.org/standards/wcag/WCAG2Checklist.pdf

Section 508
http://www.section508.gov/

Social Security Administration Guide: Producing Accessible Word and PDF Documents
http://www.ssa.gov/accessibility/files/The_Social_Security_Administration_Accessible_Document_Authoring_Guide_2.1.2.pdf

Creating Accessible Word Documents
http://office.microsoft.com/en-us/word-help/creating-accessible-word-documents-HA101999993.aspx

Web Content Accessibility Guidelines (WCAG) 2.0
http://www.w3.org/TR/WCAG20/

WebAIM Color Contrast Checker
http://webaim.org/resources/contrastchecker/

For Accessibility training resources, visit the following links:

CDSS Accessibility Training Videos
https://www.youtube.com/playlist?list=PLdcwkELts-sz8H1-6gijjfC8l8Br8w3sf

CalSWEC Web Accessibility
https://dac.berkeley.edu/web-accessibility

Word Accessibility Quick Checklist

a11y

Word Accessibility
QUICK CHECK

WORD ACCESSIBILITY CHECKLIST

- ☐ Document title is set in properties.
- ☐ A heading structure has been added to the document.
- ☐ Alternative Text is present and makes sense.
- ☐ Hyperlink text is meaningful.
- ☐ A logical reading order is assured.
- ☐ All 'data tables' have a simple construction.
- ☐ Table header rows have been identified.
- ☐ Color used appropriately.
  - Contrast meets standard.
  - Not used alone to convey meaning

PDF Accessibility Quick Checklist

PDF Accessibility QUICK CHECK

PDF ACCESSIBILITY CHECKLIST

- ☐ Document has tags.
- ☐ Document title is set in properties.
- ☐ Language is set in properties.
- ☐ A heading structure must exist in the document.
- ☐ Alternative Text is present and makes sense.
- ☐ Hyperlinks are keyboard activated.
- ☐ A logical reading order is assured.
- ☐ Table headers have been tagged appropriately.
- ☐ Color used appropriately.
  - Contrast meets standard.
  - Not used alone to convey meaning.

Excel Accessibility Quick Checklist

Excel Accessibility QUICK CHECK

EXCEL ACCESSIBILITY CHECKLIST

- ☐ Document title is set in properties.
- ☐ Worksheet and Workbook titles have been applied.
- ☐ Tables are created.
- ☐ All tables have a simple construction.
- ☐ All tables have a unique and appropriate name in Name Manager.
- ☐ A Title region has been identified in all tables.
- ☐ Alternative Text is present and makes sense.
- ☐ Comments or Data Validation have been added to describe visual elements.
- ☐ Hyperlink text is meaningful.
- ☐ Color used appropriately.
  - Contrast meets standard.
  - Not used alone to convey meaning

PowerPoint Accessibility Quick Checklist

PowerPoint Accessibility QUICK CHECK

POWERPOINT ACCESSIBILITY CHECKLIST

- ☐ Document title is set in properties.
- ☐ Every slide has a title.
- ☐ All slide titles are unique.
- ☐ Color used appropriately.
    - Contrast meets standard.
    - Not used alone to convey meaning
- ☐ Alternative Text is present and makes sense.
- ☐ Hyperlink text is meaningful.
- ☐ A logical reading order is assured.
- ☐ No animation or automatic transitions.

Forms Accessibility Quick Checklist

FORM a11y

Forms Accessibility QUICK CHECK

FORMS ACCESSIBILITY CHECKLIST

- ☐ Document title set in properties.
- ☐ Form fields have descriptions (e.g.: Labels, Tooltips, Data Validation, Help Text)
- ☐ *Form fields have tags (in PDF forms).*
- ☐ Required fields are identified.
- ☐ A logical reading order is assured.
- ☐ Tabbing order is correct/logical.
- ☐ Visual clues have been translated to text.
- ☐ Hyperlink text is meaningful.
- ☐ Color used appropriately.
    - Contrast meets standard.
    - Not used alone to convey meaning.

[Title of Training]

Trainer Guide

CDSS

Training Version | Year

Table of Contents

Note: The Table of Contents must be created using the built-in feature in Word.

Acknowledgements

Introduction

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Evaluation Overview

Agenda

9:00 – 9:00 am	Segment Title
9:00 – 9:00 am	Segment Title
9:00 – 9:00 am	Break
9:00 – 9:00 am	Segment Title
12:00 – 1:00 pm	Lunch
1:00 – 1:00 pm	Segment Title
1:00 – 1:00 pm	Segment Title

Learning Objectives

KNOWLEDGE

K1.

K2.

SKILLS

S1.

S2.

VALUES

V1.

V2.

Lesson Plan

Segment.	Methodology and Learning Objectives.
Day 1, Segment 1. **30 minutes.** **9:00 – 9:30 am.** Welcome, Introductions.	**Activity 1A** (9:00 – 9:10 am). Welcome, introductions, and Opening Circle. **Activity 1B** (9:10 – 9:30 am). Overview of the Day and Preview of Day 2; Group Agreements. *PowerPoint slides: 1-6.*

Training Segments

Segment 1: Welcome and Introductions to the Training

ACTIVITY 1A: Introductions Icebreaker

Estimated Time:	15 minutes
Trainee Content:	Agenda (page 4 in the Trainee Guide) Learning Objectives (page 6 in the Trainee Guide)
Materials:	Chart pad, markers, and tape (if doing group agreements) Question Cards for icebreaker activity
Slides:	1-3

Description of Activity:

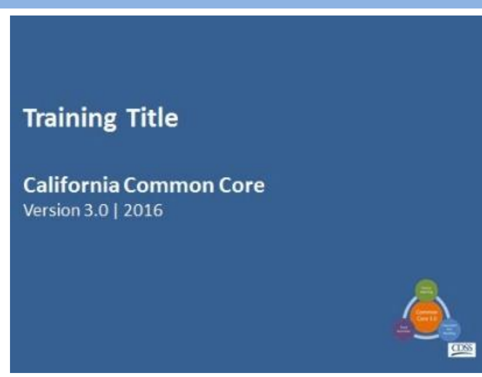
The trainer will conduct an introductory activity including a review of the Agenda and an introductions icebreaker.

Before the Activity:

Decide whether or not you will establish group agreements as part of this activity. If you plan to develop group agreements, prepare your chart pad in advance with some initial agreements such as starting and ending on time, sharing the floor, etc. Leave space for the group to develop their own group agreements.

Make sure you have enough Question Cards for all the trainees.

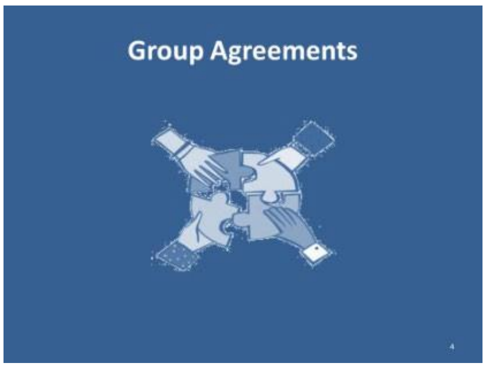
During the Activity:



Welcome the participants to the training and introduce yourself.

If needed, discuss logistics related to the training site (cell phones off, breaks, parking, bathrooms, etc.).

Provide an overview of the agenda and learning objectives for the day.



If you are doing group agreements, go over the basic group agreements included on the slide and use chart pad paper to add agreements or modify the one provided.

Offer the following brief explanations of the group agreements as needed (this will depend on whether or not this group has already worked to establish group agreements). This activity provides a model for the group work social workers will do with child and family teams, so you may wish to make that connection as well.

- **Collaboration** – We need partnership to have engagement and that works best if we trust each other and agree we are not here to blame or shame. We are here because we share a common concern for the safety and well-being of children. Remind them how this skill will be needed when working with families as they are the experts on their family. Social workers must be able to foster collaboration in order to complete a thorough assessment of the situation. Families need to feel trust before they can honestly examine themselves and dissect a problem and acknowledge their part in it.
- **Ask lots of questions** – Encourage participants to make the material relevant for themselves by asking lots of questions and evaluating the information with regard to their own experiences.
- **Be open to trying new things** – As professionals we feel more comfortable and competent sticking with what we know. Sometimes it feels uncomfortable to try new things so we tend to back away from the new thing, telling ourselves things like “she doesn’t know what she’s talking about…she has never worked in our community with the

people we work with…" But to learn something new we have to go through the uncomfortable stage to get to the other side where it feels natural and comfortable. With this group agreement, they are agreeing to try new things even if they feel uncomfortable.

- **Make mistakes** – As professionals we don't like to make mistakes. And when we make mistakes, we feel discouraged and beat ourselves up. But, if we are going to learn new things, we have to make mistakes. Even more important than the willingness to make mistakes is the willingness to admit we are wrong even when we don't want to be. Growth requires that we are open to changing our minds based on new information received. We must also be willing to put our own ideas aside to fully hear the views of others.
- **Confidentiality** – This is just a reminder that information about families or other trainees shared in the training room should be kept confidential.
- **Be responsible for your own learning** – As adult learners we realize you come with knowledge, skills, and experience. The intention of this curriculum is that you will have an opportunity to share this via large and small group discussions. Please come prepared to training having taken any prerequisite eLearning or classroom trainings. Set aside this day for your learning; please do not bring work into the classroom, this is distracting to other participants as well as to the trainer/facilitator. This includes being on time, sharing the floor, cell phones off…

Transition to the next segment:

Move on to the next segment, a review of the [Title of next segment].

Materials Checklist

Supplemental Handouts

(Handout 1 Title)

References and Bibliography

TRAINEE GUIDE TEMPLATE

[Title of Training]

Trainee Guide

Training Version | Year

Table of Contents

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Learning Objectives

KNOWLEDGE

K1.
K2.

SKILLS

S1.
S2.

VALUES

V1.
V2.

Training Content

Handout/Worksheet (Title)

Supplemental Handouts

(Handout 1 Title)

References and Bibliography

Resources

SAMPLE REFERENCES AND BIBLIOGRAPHY

All County Letters (ACLs)

All County Letter 16-28. *Another Planned Permanent Living Arrangement (APPLA)*, https://www.cdss.ca.gov/lettersnotices/EntRes/getinfo/acl/2016/16-28.pdf.

All County Letter 16-30 *Case Plan Changes for Youth Age 14 Years and Older*, https://cdss.ca.gov/lettersnotices/EntRes/getinfo/acl/2016/16-30.pdf.

All County Information Notices (ACINs)

All County Information Notice 1-23-04, California Department of Social Services, *Implementation of Concurrent Planning Promising Practices*, https://www.cdss.ca.gov/lettersnotices/entres/getinfo/acin04/pdf/I-23_04.pdf.

All County Information Notice I-21-18. California Department of Healthcare Services; California Department of Social Services. *Integrated Core Practice Model Guide*. https://www.cdss.ca.gov/Portals/9/ACIN/2018/I-21_18.pdf.

General Resources and Bibliography

Adoption and Safe Families Act, https://www.congress.gov/105/plaws/publ89/PLAW-105publ89.pdf.

California Department of Social Services Manual of Policies and Procedures (MPP) Division 31.

California Department of Social Services. Child and Family Teams Resources, https://www.cdss.ca.gov/inforesources/foster-care/child-and-family-teams/resources.

Mackereth, Beverly D. Deputy Secretary for Children, Youth and Families, 2012. *Subject: Concurrent Planning Policy and Implementation*.

Maddux, J. E. (2002). Self-efficacy. In C. R. Snyder & S. J. Lopez (Eds.), Handbook of positive psychology (pp. 277-287). New York: Oxford University Press.

Mallon, Gerald P. *Understanding and Using Concurrent Planning PPT*, National Resource Center for Family Centered Practice and Permanency Planning at The Hunter College of Social Work, NY.

Putnam-Hornstein, Emily, et. al., May 2021: Cumulative Rates of Child Protection Involvement and Terminations of Parental Rights in a California Birth Cohort, 1999–2017. American Journal of Public Health 111, 1157-1163.

CDSS ADULT LEARNING TIPS

Workforce Development Bureau

Adult learners prefer the following because they bring great professional and life experiences, wisdom, successes, honors, and education to the classroom. Therefore, their needs are different than children and college students.

1. Adults should contribute to the learning objectives, so ask them if they want to add anything to the list in the beginning of the class.
2. Share their own experiences. They should be encouraged to share what they have lived and seen, and not be shamed for their problems or “wins” or discounted.
3. You are dealing with strong egos and adults don’t want to look bad in front of their bosses and peers. Be mindful of the relationships between participants and level the playing field with extreme respect.
4. They need to be respected for their achievements, which are many times greater than those of the facilitator. The instructor must show respect for all their audience has been through and struggled for. Many participants may not have the higher education but they have achieved major victories in parenthood, personal issues, community leadership, professional successes, etc.
5. They have different learning styles, and some have identified them and proactively use their style to learn. The facilitator must design the class for all the learning styles and allow people to work according to their own methods.
6. Adults are accustomed to problem solving, so the instructor must lecture no more than 15 minutes and then give an activity.
7. Adults are used to making their own decisions and making choices. Therefore, the instructor cannot dictate to grown people, but give options.
8. Instructor should set ground rules early and ensure all the adults respect the opinions and experiences of the others since we can all learn from others’ journeys.
9. Adults don’t need punishments, just reflection, discussion, and thoughtfulness. Instructors cannot punish for wrong answers like they might for a class of children.
10. Adults need to know absolutely how this training is relevant to them, their families, their jobs, or they will lose interest immediately. It is very hard to retrieve people’s attention once they decide the training is a waste of time.
11. Adults are eager to grow and learn if it is fun, beneficial to them personally, and in small chunks of information NOT delivered in an 8-hour lecture. No lectures.
12. Laughter, levity, and longer lunches. Adults have so many worries and responsibilities, so bring lots of fun and laughter to keep their spirits high and engage their attention away from their phones. Give them permission to laugh and have joy.

BASIC/SAMPLE ENGAGING FORMAT

1. Welcome
2. Introductions
3. Fun Icebreaker or simple warm-up: What are you hoping to gain from this class? Or, how many people are “voluntold” to be here? They get a special prize! Or …. what can we do to make this a great day?
4. Agenda/housekeeping/ground rules/parking lot for ideas that are not relevant to the topic at hand
5. Video or ...?
6. Issue #1
    a. Activity
    b. Debrief

Break (Ask: how long should we break for? 10 or 15 min?)

7. Return from break: Quiz or game with prizes for returning on time. Those who are late do not get chocolate.
8. Issue #2
    a. Activity
    b. Debrief
9. Video or ...?
10. Q and A with prizes and clapping

Break

11. Pulse Check (How are we doing? Are we hitting all of our objectives? How are we feeling? Are we OK with leaving 30 minutes early?)
12. Issue #3
    a. Activity
    b. Debrief
13. Video or ...?
    a. Q and A with prizes and clapping, OR
    b. Group or team scenario challenge/activity/learning game
14. Comprehensive Check for Learning (C4L) and Prizes
15. Action Items/commitments/Accountability Buddy
16. Review the objectives for completion (Did we hit all the objectives? Did we leave anything out?)
17. Completion acknowledgment – Certificates in exchange for smile sheets, music, clapping for winners, etc.; group photo
18. Thank you and contact info of the instructor

THE ART OF FACILITATION: THE SUPER EIGHT

The Art of Facilitation
The Super Eight

CWDS Child Welfare Development Services

The steps that are necessary for any meeting to be effective.

1	Purpose	Start every meeting by clearly stating the purpose of the group and of this specific meeting. Yes, even if you said it last meeting and even if you think everyone knows. This will ground the team in a concrete purpose and set the stage for redirecting if folks get off topic.
2	Context	Set the context by explaining the history of this topic briefly and checking context of participants. Give a brief headline on what has been happening with the topic and where we are in the process. Then ask how everyone is doing to see what context others are working within.
3	Agreements	Build agreements in the first meeting (even if you have them with people in the room for another project…this is a new project and new agreements are needed). Keep agreements top of mind in each meeting by referencing them as needed.
4	Network/ Stakeholders	Check to be sure the right people are here. If not, assess if the meeting can continue. Check in on the roles of everyone involved. Who is facilitating, note taking, participating?
5	Desired Outcome	Define the goal or outcome we want for this meeting. Yes, even if you said it last meeting. This will ensure you have consensus on this and will keep the meeting on task.
6	Content	This will be the bulk of your meeting. Discuss what needs to be discussed (this should be clearly laid out in an agenda in advance of the meeting). Keep the team focused on the task at hand and enforce agreements as needed. Review the status of the previous action items. Ask, don't assign. Use solution-focused questions. As action items are identified be sure they are behaviorally based, support the desired outcome, are assigned to a specific person who will complete them, and have a specific deadline.
7	Next Steps	Define what needs to happen next by reviewing all action items that have been developed and determine the time and date of the next meeting. Begin preparing for the agenda for the next meeting by asking if there are any pressing things that will need to be addressed next time.
8	Plus/Delta	Ask what worked about today's meeting and what could be upgraded. Be open to feedback from the group. A good facilitator must be willing to accept the feedback and willing to consider how to improve or enhance their own facilitation to make the meeting effective.

Academy for Professional Excellence Inquire. Inspire. Impact. | CWDS Child Welfare Development Services

CWDS is a program of the Academy for Professional Excellence at San Diego State University School of Social Work. We work in partnership with southern region universities and their Schools of Social Work.

THE STAGES OF THE CONTENT DISCUSSION

Stages of the CONTENT Discussion

Open Stage: Gather information

Use open-ended and solution-focused questions, brainstorming, and free roaming discussion. Be sure that each person has a chance to contribute and that all opinions/ideas are expressed.

Narrow Stage: Organize the information

Narrow the information that has been discussed by considering resources, time, and staffing needed to reach the outcome. Use consensus scale to get agreement.

Close Stage: Select and agree on next steps

Prioritize next steps that will help you reach the intended outcome. Clearly define next steps by identifying who will do what and by when. Set the next meeting to revisit the plan.

Good Facilitation + Strong Project Management = An Effective Gratifying Process

Indicators of a successful meeting:

Process

Did the process used in the meeting:

- Encourage participation?
- Facilitate exchange of information?
- Lead to decision-making?

Relationship

Were the interpersonal relationships characterized by:

- Openness and honesty?
- Respect and courtesy?

Results

Did the meeting result in:

- Informed decisions?
- Clear understanding of who is responsible for which follow-up tasks?
- Agreement on deadlines?

Project Management Tips:

Good facilitation helps manage a meeting. A project plan helps manage the broader effort. Using both together leads to success and a process everyone feels good about. Use these tips to manage a project:

- Clearly define the desired outcome.
- Identify the people who are needed to reach it.
- Convene the team regularly using agreements and effective facilitation skills.
- Determine what small goals must be set and met along the way that will lead to the intended outcome.
- Set benchmarks and timeframes for each goal.
- Assign tasks to specific team members with specific deadlines.
- Write down the plan and all decisions and action items, and review/update it in each meeting to keep work moving forward.

Content adapted from Effective Facilitation Skills training by Heather Meitner, LCSW, National Council on Crime and Delinquency

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THE FACILITATOR'S CHECKLIST FOR TRUE CONSENSUS BUILDING

Leadership Strategies

Facilitator's Checklist for True Consensus Building

Adapted from The Secrets of Facilitation by Michael Wilkinson, CMF

- [ ] **Know what consensus means - "I can live with it and support it."**

- [ ] **Understand the three reasons people disagree:**
  - Level 1: Lack of shared information
  - Level 2: Different values or experiences
  - Level 3: Outside factors impacting the disagreement

- [ ] **Level 3:** With disagreements based on outside factors (level 3), take the issue to a higher source for resolution - do NOT attempt to solve the disagreement during the meeting.

- [ ] **Level 1:** Use the Delineation technique to address a level 1 disagreement.
  - Start with agreement.
  - Confirm the source of the disagreement.
  - Identify the alternatives under discussion.
  - Ask specific delineating questions to each party to determine the answers to the following key questions: How much? How long? Who is involved? What is involved?
  - Summarize the information.
  - Take a consensus check.

- [ ] **Level 2:** Use the Strengths and Weaknesses and Merge techniques to solve a level 2 disagreement.
  - Identify the strengths and weaknesses of all alternatives.
  - Select the one or two most important strengths of each alternative.
  - Create one or more new alternatives that combine key strengths.
  - Delineate the top alternative.
  - Take a consensus check.

- [ ] **Use the Weighted Scoring technique when structured comparisons and numeric values can help the team reach consensus.**
  - Define the criteria.
  - Establish weights for the criteria by designating the highest, lowest, and then remaining weights.
  - Score the alternatives by identifying the most favorable scoring first and assigning all other scores relative to it.
  - Apply weights to the scores.
  - Take a consensus check.

- [ ] **When all else fails, move on! Allow some time to pass and return to the topic later.**

leadstrat.com 800.824.2850 1 Level up.