# DAY 1 AGENDA

This chart will serve as your timing guide during your session. Place it clearly in your sight and near a clock - so you can follow it closely during the session. Use this chart, too, to assign facilitators to topics and activities.

| Start time | End time | TOTAL Time | MODULE | FACILITATOR |
|---|---|---|---|---|
| 8:30 | 9:30 | 60 | Welcome, Introductions, and Course Overview | |
| 9:30 | 10:00 | 30 | Project Officer of the Future Overview | CDC |
| 10:00 | 10:15 | 15 | Break | |
| 10:15 | 11:00 | 45 | Understanding Your Partner's Context: Case Study | |
| 11:00 | 12:00 | 60 | Assessing Your Partner's Context | |
| 12:00 | 1:00 | 60 | Lunch | |
| 1:00 | 1:45 | 45 | Exercise: What Do You Need to Know About Your Partner's Context? | |
| 1:45 | 2:30 | 45 | Understanding Your Partner's Program or Research Plan | Partner |
| 2:30 | 2:45 | 15 | Break | |
| 2:45 | 3:30 | 45 | Exercise: Thinking About Program Strategy | |
| 3:30 | 4:30 | 60 | "The Burden of Chronic Disease" Video and Discussion | CDC |
| 4:30 | 5:00 | 30 | Explanation of On-the-Job Exercise #1, Plan-Practice-Record, Day 1 Evaluation | |
| | **5:00** | | Adjourn | |
| | | **8 hr. 30 min.** | | |

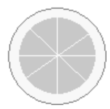
**SHOW**

**PRESENT**

## *Welcome, Introductions, and Course Overview*

(60 minutes)

***Key Points: "The Juice"***



- The learning environment should be safe and comfortable.
- Learners have a wide range of experiences.
- Everyone has something to contribute, and participants can teach one another.
- Because this is a collaborative learning experience, everyone must agree on certain ground rules for learning together.

**Objectives:**

- Know how to make the most of this program.
- Appreciate what is expected of participants.
- Become familiar with the goals and schedule for this course.

**Facilitator Note:**

Arrive at least a half hour before start time to familiarize yourself with the room, specifically:

- Lighting and light switches/adjustment
- Temperature
- Arrangement of participant tables & chairs
- Location of facilitator table and podium
- Audio-visual equipment


**SHOW** slide.

**SAY:**

- Welcome to *Understanding Your Partner's Context and Being a Program Champion.*
- I am NAME, and will be facilitating this course along with NAME, my co-facilitator.
- In the back of the room are (NAMES). They are here to observe the course so they can make any necessary adjustments to the course design.

**POINT OUT** session logistics:
*Modify each of the following points to be specific for this session.*

- Meeting room(s)
- Lunch
- Restrooms
- Fire Exits
- Participants materials
- Name tents

**INTRODUCE** NCCD/OD representative who is there to welcome participants. The following are talking points for that representative:

- Project officers are valuable to the organization.
- The Center has invested in these courses because we value and depend on our project officers.
- Some participants here today may not be project officers. Your work is also critical to the organization, and this course will help you better understand your role and your work.
- Thank you for taking the time to expand your knowledge and capabilities, to grow as professionals, as public servants, and as people.

**INTRODUCE** Manager of PORTALS
After Manager concludes remarks, s/he will introduce NACDD representative.

NACDD Welcome

NATIONAL ASSOCIATION OF
CHRONIC DISEASE DIRECTORS
Promoting Health. Preventing Disease.

www.chronicdisease.org

or link from PORTALS website

**SHOW** slide.

**INTRODUCE** NACDD representative to welcome participants. The following are talking points for that representative:

- The National Association of Chronic Disease Directors (NACDD) provides state-based leadership and expertise for chronic disease prevention and control at the state and national level.
- NACDD is a professional organization whose members are the states' chronic disease program directors and their staff.
- NACDD is funded by dues and grant funds and works to reduce the impact of chronic diseases through advocacy, professional development and partnerships.
- NACDD places great value on its relationship with CDC and you as Project Officers. Working together we can make a difference in the health of the public.
- For additional information, visit the NACDD website at www.ChronicDisease.org

Welcome!

Please tell us…

- Your name
- Your Program/Division
- Number of years with CDC and as PO
- A work accomplishment you are proud of

**SHOW** slide.

**ASK** participants to introduce themselves:

- Name
- Program/Division
- Number of years at CDC and number of years as PO
- A work accomplishment you are proud of.

When introductions are complete, **ASK** for a show of hands:

- How many of you have worked with state health departments or other CDC partner organizations?

- ACKNOWLEDGE **the diversity of the group in terms of number of years of experience with CDC and in the field.**

Today's Agenda

- Welcome, Introductions, and Course Overview
- Project Officer of the Future Overview

**BREAK**

- Understanding Your Partner's Context: Case Study
- Assessing Your Partner's Context

**LUNCH**

- Exercise: What Do You Need to Know about Your Partner's Context?
- Understanding Your Partner's Program or Research Plan

**BREAK**

- Exercise: Thinking About Program Strategy
- The Burden of Chronic Disease Video & Discussion
- Summary, PPR, On-the-job Exercise, Evaluations

**ADJOURN**

CDC

Day 1-4

**SHOW** slide.
**REVIEW** today's agenda.

**REVIEW** the participant materials:

- What is included
- How it is organized –work step-by-step through each section and have participants find materials as you describe them. (e.g. Rainbow charts, exercises, resource lists, evaluation forms, and others)

## Course Goals

Upon completion of the course, participants will:

- Develop project officer skills necessary to understand the context in which the partner is implementing a program.
- Increase project officer's understanding and awareness of unique cultural variables that impact public health practice.
- Help project officers assess the politics, culture, and operational systems of their partner organizations.
- Enhance the project officers' communication skills needed to champion their programs, both at CDC and in the partner's organization.

**SHOW** slide.

**POINT OUT** the overall goals of the course.

- Develop project officer skills necessary to understand the context in which the partner is implementing a program.
- Increase project officer's understanding and awareness of unique cultural variables that impact public health practice.
- Help project officers assess the politics, culture, and operational systems of their partner organizations.
- Enhance the project officers' communication skills needed to champion their programs, both at CDC and in the partner's organization.

## High Level Course Outline

**DAY 1**
- POF Overview
- Understanding & Assessing Your Partner's Context
- Understanding Your Partner's Program or Research Plan
- Thinking About Program Strategy
- Burden of Chronic Disease

**DAY 2**
- Cultural Effectiveness
- Active Listening
- PORTALS Website
- Effective Communication

## High Level Course Outline

**DAY 3**
- Building Consensus
- Your Role as the Link Between CDC and Partners
- Building Networks and Relationships

**DAY 4**
- Success Stories
- Case Studies

CDC

Day 1-7

**SHOW** slide(s).

**PRESENT** topics covered by day.

- DAY 1
  - POF Overview
  - Understanding & Assessing Your Partner's Context
  - Understanding Your Partner's Program or Research Plan
  - Thinking About Program Strategy
  - Burden of Chronic Disease
- DAY 2
  - Cultural Effectiveness
  - Active Listening
  - PORTALS Website
  - Effective Communication
- DAY 3
  - Building Consensus
  - Your Role as the Link Between CDC and Partners
  - Building Networks and Relationships
- DAY 4
  - Success Stories
  - Case Studies

## Making the Learning Relevant

- On-the-job exercises
- Plan, Practice, Record worksheets
- Completion Checklist
- Course evaluations

CDC

Day 1-8

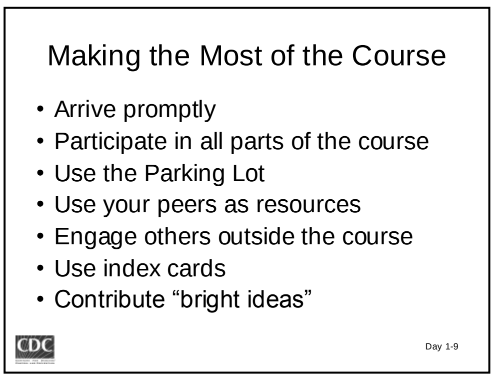
**SHOW** slide.

**SAY:**

- It is important to us that this course be directly relevant to the work you do.
- We have tools that we will use throughout the course to help you do that.
- One is on-the-job exercises. You will get more out of the class and your work in small groups if you complete these.
- Another is the Plan Practice Record sheets. (Ask participants to take one out to look at it).
- There are two parts to these forms. You will fill the first part out at the end of each day, to record what you would

like to apply to your job based on what you learned.  You will hand the pink copy in at that time.

- The next part is your reflection and observation on applying the learning.  You will fill this out after you try to apply the learning on the job, and hand in the white copy when you arrive at the next session.
- There is a Completion Checklist in your binder.  This will help you and us to keep track of which parts of the course you have completed, so that we can award course certificates.
- Finally, we ask you to fill out a course evaluation at the end of each session.  These evaluations will be collected when the entire course is completed.  We systematically review these evaluations so that we can revise the course accordingly.  We take your input seriously - we want to ensure that the learning in the course is indeed relevant to your work.




**SHOW** slide.

**SAY:**

- We recognize that your time is valuable, and we want to help you make the most of your time here.
- We plan to stick to the schedule and ask you to help us to do that by arriving promptly.
- We also ask that you use the Parking Lot for issues that come up that are off the topic or for questions that we don’t know the answer to.  At the end of each day we will look at the Parking Lot to ensure that we’ve addressed all the items.
- Get to know your fellow learners and learn from them.
- There is a wealth of experience in this room.
- Take what you are learning back to the job.
- Talk with your colleagues, your mentors, your supervisor and your partner about these assignments, when appropriate.
- Use index cards to write down any thoughts, ideas or comments you were unable to share in the class.
- We will be compiling a list of “Bright Ideas” that come up during the course – tips and best practices.

**Facilitator Note:** Before class, create a flipchart entitled “Ground Rules” with the following points:

- Keep focus on improving the public’s health.
- Respect your colleagues and our partners.
- Come prepared to participate and contribute to your colleagues’ learning experiences.
- Be punctual.
- Conduct one conversation at a time.
- Give feedback that is specific and helpful.
- Keep confidential matters confidential.

- Do not use cell phones or any electronic devices in the classroom.

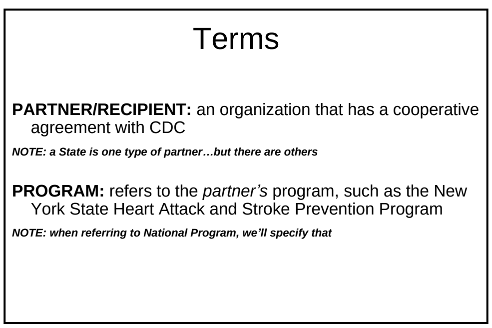
**SHOW** flipchart.

**SAY:**
- This is a collaborative learning environment.
- It is important for us to agree on what is important to us in our learning environment.
- Ground rules help us clarify this.
- Here are some suggested ground rules for our time together.

**ASK:**
- What ground rules would you like to add or remove?

**FLIPCHART** responses.

When agreement is reached, **POST** the flipchart for future reference throughout the course.




**SHOW** slide.

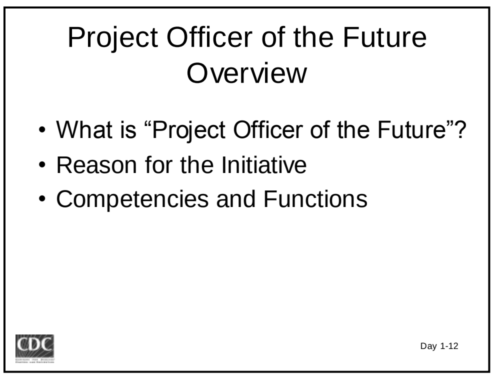
**ASK:**
- What questions do you have about the course?

**SAY:**
- There are some terms I would like to clarify for this course.
- In this course, we use both the words “recipient” and “partner” to refer to any organization that has a cooperative agreement with CDC.
- A state is one type of partner but there may be others as well.
- We use the word ‘program’ to mean the partner’s program – for example, ‘New York State heart attack and stroke prevention program’.
- When we are referring to the national program, we will specify that.
- You may have heard the term FOA or Funding Opportunity Announcement used more recently instead of Program Announcement or RFA. We will be using FOA, RFA, and PA interchangeably throughout the course.
- Finally, we will also use ‘Project Officer’ and “program consultant’ interchangeably throughout the course.

## *Project Officer of the Future Overview*

(30 minutes)

| ***Key Points: "The Juice"*** |
| --- |
| • POF is designed for project officer's specific learning needs.<br>• Learners are primarily responsible for their own learning experience. |




**Objectives:**

- Understand the background and rationale for Project Officer of the Future.
- Identify the competencies expected of the Project Officer of the Future.
- Identify the functions that a project officer performs and the roles that they play.

**SHOW** slide.

**SAY:** During this short overview we will talk about the Project Officer of the Future Initiative as a whole, and this course in particular.

**ASK:** How many of you have taken another Project Officer of the Future course? (show of hands)

**FACILITATOR NOTE**: **If only a few participants raise their hands, proceed according to the script that follows. If more than half of the participants raise their hands, you may wish to have those participants who have attended other courses provide their insights to the POF program, using these questions instead:**

- **Why did CDC initiate the Project Officer of the Future professional development program?**
- **What public health challenges is it designed to address?**
- **How was it designed?**
- **What are the 10 major competencies that it was designed to address? (Mention that a list of these is provided in the participant binder. This course addresses Program Planning and Evaluation; Public Health Theory, Content, and Practice; Resource Linkage, Development, and Management; Management and Leadership).**
- **What were identified as the 8 major functional areas of Project Officers' work?**
- **One of the products that came out of the job**

**function analysis was the Rainbow Chart. Who would like to explain elements of the Rainbow Chart? (A copy of the Rainbow Chart is in the participant binder).**

- **Do you have any further questions about the Project Officer of the Future initiative?**

Project Officer of the Future is…

**A professional development program that offers you the opportunity to:**

- Broaden and sharpen your expertise
- Prepare to meet the challenges you and our CDC partners face
- Enhance your contributions as change agents
- Connect with other project officers
- Help CDC and its partners improve the health of the public.

CDC Day 1-13

**SHOW** slide.

**SAY:** So what is Project Officer of the Future? It is a professional development program that offers you the opportunity to

- Broaden and sharpen your expertise
- Prepare to meet the challenges you and our CDC partners face
- Enhance your contributions as change agents
- Connect with other project officers
- Help CDC and its partners improve the health of the public

State Public Health Workforce

Current Vacancy Rates
- As high as **20%** in some state PH agencies.

Turnover Rates
- **14%** in some parts of the country.

Retirement
- Average age of state PH workers: **47 years**
- States could lose up to **45%** of their experienced public health workforce through retirement.

Source: "Strengthening the Public Health Workforce", APHA Fact Sheet on Infrastructure, 2005.

**SAY:**

- Some of you may have wondered why CDC is doing this initiative, and why now.
- We want you to be able to learn the aspects of your job quickly, and build a network of other project officers you can learn from as well.
- It is especially important for you to have access to breadth and depth of knowledge, especially given some of the challenges of the public health workforce.

**SHOW** slide.

**SAY:**

- Turnover rates in state health agencies are up near 14% in many areas.
- Many of the recipients you work with at any given time might be new, and will rely on you to take the place of some of the institutional knowledge that has been lost in the turnover process.

Inadequate PH Infrastructure

- Less than half of public health workforce have had training in public health
- Less than half of state and local public health agencies have adequate communications and information systems
- Less than half of local public health agencies have the capacity to provide the essential public health services

Source: http://www.phppo.cdc.gov/about.asp

CDC Day 1-15

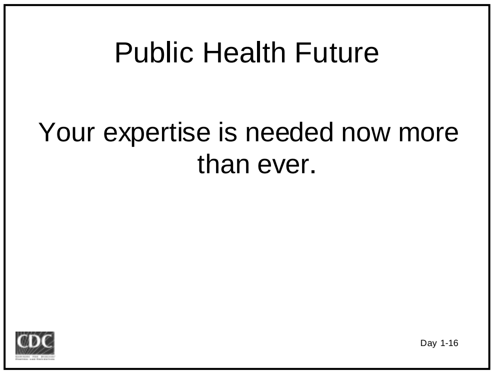
**ASK for a show of hands:** How many of you have run into this?

**SHOW** slide.

**SAY:**

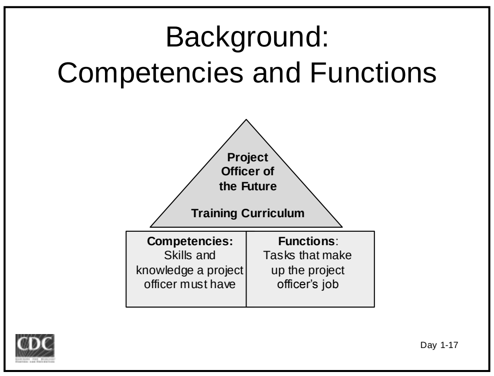
- In addition to the turnover challenge, there is a training and infrastructure challenge.
- Much of the public health workforce does not have training in public health, and many states are lacking good communication and information systems.

- As we enter into cooperative agreements with these states, it is important for you to be prepared to work within these realities and step into the gap wherever possible.




**SHOW** slide.

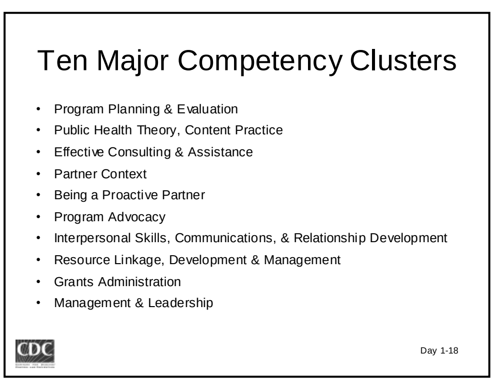
**SAY:**
- In short, as the current and future leaders in our field, your expertise is needed more now than ever!




**SHOW** slide.

**SAY:**
- We wanted to be sure that the curriculum really did address your needs as project officers, so we started the process by doing research on two items.
- First, competencies: what skills and knowledge are necessary for project officers?
- Second, job functions: what are the aspects of the project officer's job?

**FACILITATOR NOTE:** If participants ask what research was done, tell them that a formal job analysis/functional analysis was done to understand the functions. For the competencies, we asked project officers and partners what they thought a project officer needed to know or do, and used that as a foundation (concept mapping). We also looked at a number of reports outlining public health workforce competencies in general.




**SHOW** slide.

**SAY:**
- This is a list of the major competency areas.
- You have a handout detailing all of the competencies within each of these 10 major areas.
- You are not expected to master all of these yourself, but to have all of the skills and abilities within your team will be a real benefit to you.
- Some of the competency areas we will address in this course are Effective Consulting and Assistance, Partner Context, Being a Proactive Partner, Program Advocacy, and Communication Skills.


**SHOW** slide.

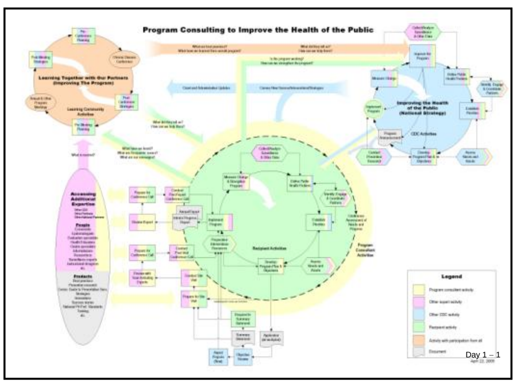
**SAY:**

- Remember that we looked at both competencies and job functions to design the curriculum.
- Here is a list of the eight job function areas.
- It summarizes the bulk of a project officer's job in a cooperative agreement.

**SAY:**

- There is a range of contributions that Project Officers can, and should be making to the success of our partnership programs, all focused on improving the health of the public.
- One of the products that came from the job function analysis is the "Rainbow Chart".
- If you look in the Chart section of your binder, you will see a copy of the "Rainbow Chart".

**FACILITATOR NOTE:** Also show the Rainbow Chart on the wall.




**SHOW** slide.

**SAY:**

- Here is the Rainbow Chart focusing, showing your role, the recipient's role, and the roles of other CDC and outside experts in the cooperative agreement process. You also have a copy of this in the Chart section of your binder.
- You will also find each functional area mapped out in what we call "swimlanes".
- These are technical documents, so don't worry too much about understanding all the details. But if you look at the first page of the "swimlanes", Strategy, you will see the subtasks within this function.

**REFER TO RAINBOW CHART ON WALL:**
**SAY WHILE POINTING TO THE BLUE GLOBE:**

- You can, should, and often do make important contributions to the development of our national program strategies—the blue.

**SAY WHILE POINTING TO THE GREEN GLOBE:**

- You provide important technical and administrative assistance and support to our partners during their implementation of their programs, helping them to stay focused, accelerating their progress in improving the health of the people they serve.

**SAY WHILE POINTING TO THE PINK/GRAY OVAL:**

- You also bring additional resources to your partners, both experts and evidence-based products, to support their efforts on a timely basis.

**SAY WHILE POINTING FROM THE GREEN TO THE BLUE GLOBES:**

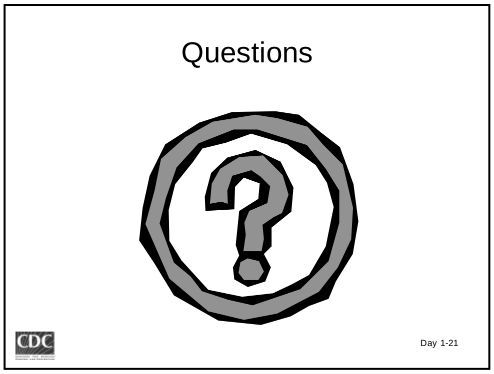
- Based on the assistance and support that you provide to your partners, it is important that you share lessons learned and give voice to what our partners can teach us.
- In doing this, you will contribute new ideas and realism that will strengthen the national strategy.

**SAY WHILE POINTING TO THE TAN GLOBE:**

- Project Officers also contribute to the planning and conduct of workshops, national meetings, and conferences.
- You ensure that our partners are able to share their successes, what they have learned, and their perspectives during these events that contribute directly to strengthening the national strategy.

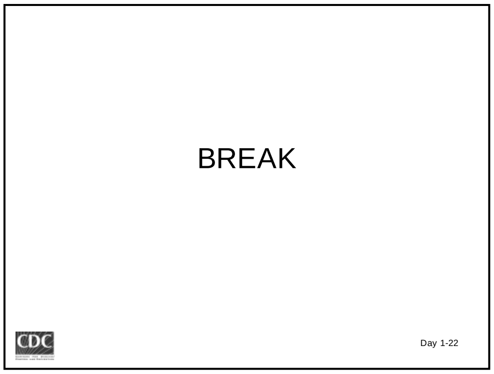
**SAY:**

- Over time, we recommend that you become familiar with both the Rainbow Chart and Swimlanes that can be found in the Chart section of your participant binders.
- We are also developing Standard Operating Procedures (SOP's) for each of these step-by-step functions. You can access these and other SOP's on the PORTALS website.




**SHOW** slide.

**ASK:** Do you have any questions at this point?




**SHOW** slide.

**Break – 15 minutes**

**FACILITATOR NOTE:** Try to have the title slide for the next unit on the screen before participants return for the beginning of the next session.

## *Understanding Your Partner's Context: Case Study*

(45 minutes)

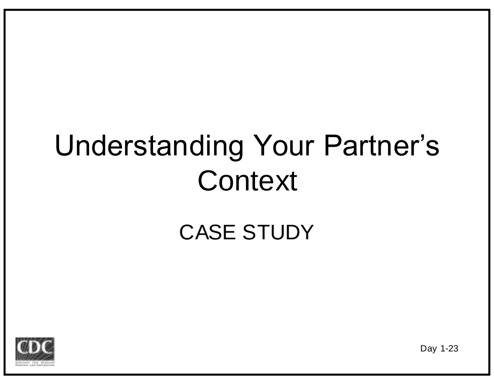
***Key Points: "The Juice"***

- Programs are not always implemented as originally planned, due to contextual constraints.
- Information about constraints and assets can come from a number of places, including other project officers who have worked with the same partner.

**Objectives:**

- Appreciate the extent to which organizational context affects the implementation of partner programs.
- Identify aspects of organizational context a project officer must consider before advising a partner.

**FACILITATOR NOTE:** Part of the purpose of this case study exercise is to encourage participants to identify missing information and ask appropriate questions. For this reason, participants each have additional information about the case. Each participant will provide this additional information as the participants ask for it.




**SHOW** slide.

**SAY:**

- If you look at the center of the rainbow chart, you will see that the green Recipient Activities globe is the largest one. It is the center of the action.
- If you are to be effective in helping partners and influencing what happens in that sphere, you have to understand the context of the program.
- Likewise, if you want to bring lessons learned from the 'green globe' back to the 'blue globe,' you have to be able to speak knowledgeably about the context.

**SAY:**

- Your partner's organizational context affects how the partner implements the national program strategy.
- There are a whole range of contextual factors that affect programs.
- We will examine these factors later this morning.
- First, we will work through a case study that will give some examples of how these factors play out.

**ASK** participants to open their binders to the "Understanding Your Partner's Context Case Study" and Organizational Chart on Pages ________.

**ASK** a participant to read the case aloud to the entire large group, or ask participants to read the case silently.

When the reading is complete, **SAY:**

- Take five minutes to think of questions you have or additional information you need in order to decide what your next steps are.
- Write down your questions.

**WAIT FIVE MINUTES.**

**DISTRIBUTE** the "additional information" cards – one to each participant. Tell them to review these cards, but not to share the information with anyone at this point.

**SAY:**

- We will now share with each other our requests for additional information.
- If someone asks for additional information and you have it on the card I gave to you, please share it.
- If you are not asked for the information, keep it to yourself at the moment.

**FLIPCHART** all additional information offered.

**CUT QUESTIONING SHORT AFTER TEN MINUTES.**

**Flipchart**

**ASK:**

- Based on this information, what challenges does this program have, and what assets are available to them?

**FLIPCHART** challenges and assets on another flipchart, so you can keep the "additional information" flipchart visible to the participants.

**ASK:**

- Does anyone have any remaining questions or information they would like to know about this case?

Once all questions have been asked, **ASK** participants to share any remaining information they have on their cards.

**SAY:**

- Review the list of challenges and assets on the flipchart.
- Did the additional information change anything?

**Case Study Exercise Debrief**

**ASK** (solicit one or two responses for each question):

- How was your overall assessment of the partner's context affected by the introduction of legislative context information?
- Fiscal context information?
- Why was it important to know these things?
- How different would your assessment have been if you did not have the benefit of the information your colleagues shared with you?
- Did any of your colleagues here today ask questions you hadn't thought to ask?

**SAY:**

- There are some important things to take away from this case study, as we move into the next section.
- One, there are many contextual factors, and it is difficult to give realistic and effective technical assistance if you don't understand the program's context.
- Two, your colleagues can help you to think of the right questions to ask.
- Three, information can come from a number of sources, including other project officers.

## *Assessing Your Partner's Context*

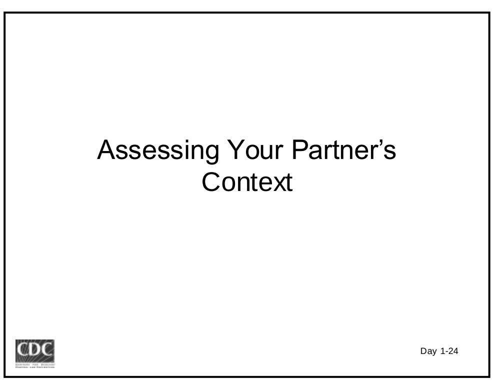
(60 minutes)

***Key Points: "The Juice"***

- Understanding your partner's context will help you both work on a realistic plan that has a greater likelihood of success.
- Technical assistance will only be effective if these constraints (and assets) are taken into account.
- Project officers should know which context variables to look for, and understand the implications of these assets and constraints for program success.

**Objectives:**

- Describe factors that influence organizational context.
- Appreciate the variability of CDC's partners' contexts.
- Identify aspects of a partner's context that a project officer should be familiar with.
- Categorize observations within a comprehensive framework for analyzing their partner's context.
- Identify sources of data that will provide information about aspects of a partner's context.
- Choose the most efficient and effective ways to use sources of organizational information.
- Pose questions that will help you gain knowledge about each of the significant aspects of the partner's context.




**SHOW** slide.

**SAY:**

- The case study included many different aspects of context.
- Now we will organize and describe these aspects, so you can be methodical in your own assessments of partner context.
- We will focus on six aspects of partner context and identify sources of data that will provide information about partner context.
- This will help you to prepare for your case study presentation on Day 4, which we will talk about more at the end of today.

Partner Context Variables

| | Organization/Agency | Community/State |
|---|---|---|
| Organizational Structure and Politics | | |
| Culture | | |
| Financial, Physical & Data Resources | | |
| Human Resources/Staff | | |
| Partnerships | | |
| Physical Context | | |

**SAY:**

- Please divide into 6 groups of 2 – 3 people.

**SHOW** slide with variables chart.

**SAY:**

- This Partner Context Variables chart shows six aspects of organizational context:
  - Organizational Structure and Politics,
  - Culture,
  - Financial, Physical and Data Resources,
  - Human Resources/Staff,
  - Partnerships, and
  - Physical Context.
- Notice that there are two columns: Organization/Agency and Community.
- That is because each of these variables can apply to the organizational level or the community level.
- For example, organizational structure within the agency is about how the program office is set up; within the community, it deals with the political environment or the way public health programs are delivered in the community.
- Each group will take one of these six aspects, and generate questions or information that would be important to know within that major topic, on both the community and organizational levels.
- You will share this with the large group when we reconvene.
- Please take 15 minutes to brainstorm with your group.

**ASSIGN** a category to each group. If there are not enough groups to cover each category, don't give any of the groups two categories to discuss – there won't be enough time. Simply review the omitted category yourself in the debrief.

**RECONVENE** group.

**SAY:**

- I will ask each of the groups to share with the large group the questions and issues they discussed.
- Please have one member of your group flipchart the questions.
- Turn to page _______ in your binder. There is a Partner Context Variables chart similar to the slide I just showed you, in which you can add your notes from our discussion.

**ASK** the first group, **Organizational Structure & Politics:**

- What are some questions we might ask about politics and organizational structure?

**GROUP 1 will report out and flipchart questions.**

**MENTION any questions that did not come up:**

- On the agency level:
  - Who within the department or agency has authority over the program?
  - Who has budget authority? How is the budgeting process handled?

- On the community or state level:
  - Who has direct or indirect authority, and ***what are their priorities or special interests***?
  - Are there any reporting lines that extend from your agency or department outward?
  - What are the legislative priorities?
  - What laws and policies affect your program (e.g. no smoking in public places; age of sexual consent in STDs/teen pregnancy work; Medicaid reimbursement policies; etc.)?

**ASK** the next group, **Culture:**

- What are some questions we might ask about culture?

**GROUP 2 will report out and flipchart questions.**

**If there is time, MENTION any of these that did not come up:**

- In your partner organization:
  - What are acceptable and unacceptable ways of working together?
  - Do programs in the organization tend to work together or stay separate?

- In the larger community,
  - What cultures and ethnic groups live there, and what are their values?
  - What values and regional identity does the state, territory or city have as a whole?

**At the end of the discussion, SAY:**

- We will spend the morning of Day 2 hearing from a panel and talking in-depth about cultural effectiveness.

**ASK** the next group, **Financial, Physical, and Data Resources:**

- What are some questions we might ask about this area?

**GROUP 3 will report out and flipchart questions.**

**If there is time, MENTION these:**

- What other sources (or potential sources) of funding are there?
- What assets are there? Sometimes the community has an asset that doesn't immediately strike you as one.
- For example, one recipient was located in an area where bowling was very popular, and there was a bowling alley that had been in disuse. The program decided to use it as a center for the activities of the program, and it was very successful.
- How available is necessary data? Where can your partner find the data they need?
- A list of possible data sources is in your binders for your reference on Page ________.

**ASK** the next group, **Human Resources/Staff:**
- What are some questions we might ask about this area?

**GROUP 4 will report out and flipchart questions.**

**If there is time, MENTION these:**
- How many people work on the program?
- Are there enough people with the right qualifications?
- Is there professional and cultural diversity on the staff?

**ASK:** What are some of the ways your partners have coped with lack of funds to hire full time staff?

**SOLICIT** one or two responses.

**SAY:**
- One of the ways partners deal with this problem is by relying on resources outside of the organization, like local experts.
- Some states have a decentralized model in which many of the program activities are carried out by staff on the local level, or employed by health care organizations.

**ASK** the next group, **Partnerships and Collaborations:**
- What are some questions we might ask about this area?

**GROUP 5 will report out and flipchart questions.**

**If there is time, MENTION any of these that did not come up:**
- There are many types of possible partners (See Page ____):
    - voluntary organizations
    - schools
    - community organizations
    - businesses

**ASK:** How have you worked with some of these partners?

**SOLICIT** one or two responses.

**SAY:**
- We address the benefits and challenges of partnerships, and strategies for working with partnerships, in the POF course on Consulting, Leadership, and Resource Linkage.

**ASK** the next group, **Physical Context:**

- What are some questions we might ask about physical context?

**GROUP 6 will report out and flipchart questions.**

**If there is time, MENTION any questions that did not come up:**

- On the organizational level, we might ask:
    - Is there enough space in the program office?
    - Does the office arrangement allow for collaboration?
    - Does it allow for privacy when needed?
- On the community level:
    - Is it urban, rural, or suburban?
    - Is it walkable?
    - Is it safe?
    - What is the climate like?
    - How would you assess water and air quality, and living and working conditions?

**ASK:** How do you think physical environment affects the work your partners do?

**SOLICIT** one or two responses.

**HANDOUT** completed Partner Context Variables chart.

**SAY:**

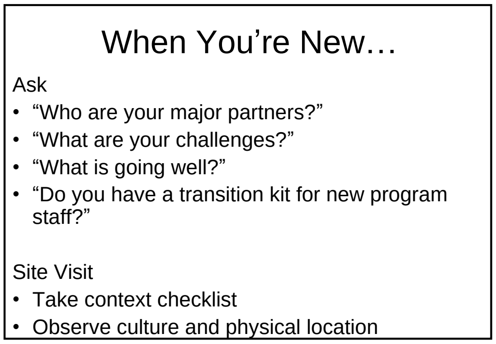
- Here, again, is a list of the variables we just discussed, with many of the major questions that you should consider when assessing your partner's context.

**ASK any or all of these questions:**

- Are there any variables not included on this chart that you'd like to add?
- Are there any you hadn't thought about before today?
- Which ones do you think will have the greatest impact on your program?

**SAY:**

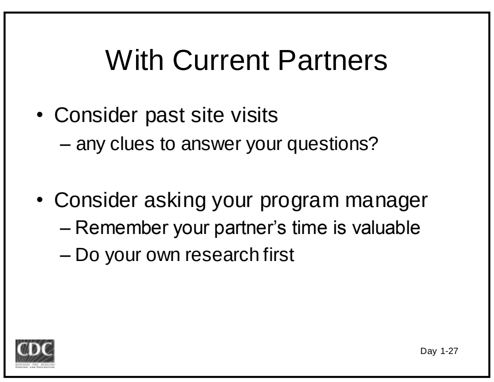
- You are halfway there when you know the right questions to ask.
- But you still need to get the answers to your questions.
- Let's talk about how to get this information.




**SHOW** slide.

**SAY:**

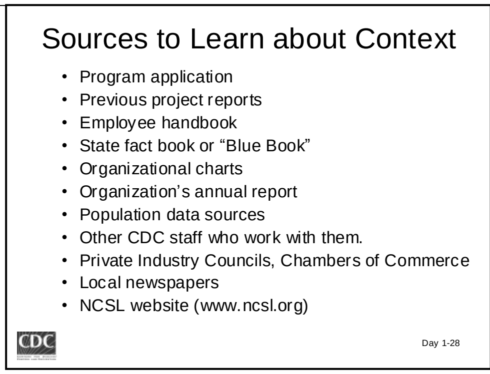
- If you have just started working with a partner, you have a good opportunity to ask some of these questions as you get to know the program manager or project director.
- One of the first things you will want to understand is the culture of the people you are working with, because it will inform how you ask the rest of your questions.
- Some questions you will be able to ask openly, such as "Who are your major partners?"
- But some questions are more political and have to be handled more delicately.
- Often you can learn a lot simply by asking, "What are your challenges? What is going well?"
- Ask your partner if they have a "transition kit" for new program staff – something they might be able to share with you to better orient you to the program.
- If you have the opportunity to have a site visit, take the context checklist with you.
- Take advantage of a site visit opportunity to soak up information that is hard to learn from a distance. For example, be perceptive about organizational culture and physical location, and how they impact the program.




**SHOW** slide.

**SAY:**

- Maybe you've been working with your partner for awhile, but didn't consider some of these questions until now.
- Think back on past site visits and conference calls. Are there any clues that might answer some of your questions?
- Perhaps your program manager can answer some of the questions for you.
- Your partner's time is valuable, so try to do your own research before taking his or her time to answer questions you can easily learn elsewhere.



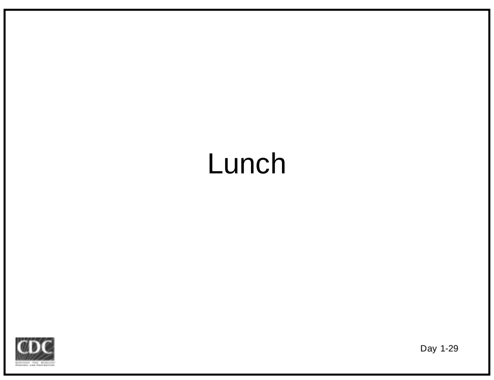

**SHOW** slide.

**SAY:** Here are some of the sources you can use for this fact-finding mission:

- Program application
- Previous project reports
- Employee handbook
- State fact book or “Blue Book”
- Organizational charts
- Organization’s annual report
- Population data sources
- Other CDC staff that work (or have worked) with them.
- Private Industry Councils, Chambers of Commerce
- Local newspapers
- NCSL (National Conference of State Legislators) website (www.ncsl.org)

**ASK:** What resources or strategies do you use to learn more about your partner’s context?

**SOLICIT** responses.




**SAY:**

- We will now take an hour for lunch
- When we return we will do an exercise to help you reflect on what you want to learn about your own partner’s context.
- Please take this opportunity to meet someone you haven’t yet met.

**FACILITATOR NOTE:** Try to have the title slide for the next unit on the screen before participants return for the beginning of the next session.

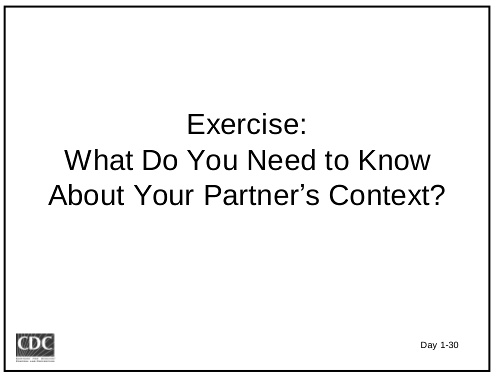
**Lunch – 60 minutes**

## *Exercise: What Do You Need to Know About Your Partner's Context?*

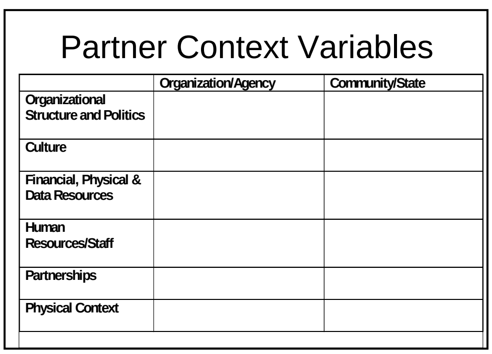
(45 minutes)

**Objectives:**

- Identify which aspects of partner organizational context are not currently clear to you.




**SHOW** slide.




| | Organization/Agency | Community/State |
|---|---|---|
| Organizational Structure and Politics | | |
| Culture | | |
| Financial, Physical & Data Resources | | |
| Human Resources/Staff | | |
| Partnerships | | |
| Physical Context | | |

**SHOW** slide.

**SAY:**

- Understanding the difficulties in implementing a partner's program requires an appreciation for their context.
- We just reviewed a number of context variables.
- Now you will have ten minutes to reflect on the context of your own partner's programs. This will help you prepare for your case study presentation on Day 4.
- Open your binders to the "What Do You Need to Know About Partner Context" worksheet (See Page _____).
- You have all of the variables listed in your binder, to use as a reference (See Page _____).
- You will have 10 minutes to write down the things you don't know about your partner but that you think might be useful to know.

**FACILITATOR NOTE:** Walk around the room while people are working, to give individuals the opportunity to ask for assistance. Give participants **ten minutes** to complete the exercise.

| | |
|---|---|
| **Flipchart** | **RECONVENE** group.<br><br>**ASK:** What information would you like to know?<br><br>**FLIPCHART** responses.<br><br>Once all the answers are on the flipchart, **ASK:**<br>• For the program you have in mind, which of these items are high priority items, very important to find out?<br>• Which are medium? Low?<br>• How will you learn the answers to your questions?<br>• Will some of them be harder to answer than others?<br><br>**SAY:**<br>• It's not always possible to learn everything there is to know in the limited amount of time that you have.<br>• The priority information depends on the program.<br>• Defining the priority information for your program will help you focus your information-gathering efforts.<br><br>**SAY:**<br>• You have done some excellent work in bringing out the complex issues around partner context.<br>• Let's turn our attention now to understanding our partner's program or research plan. |

## *Understanding Your Partner's Program or Research Plan*

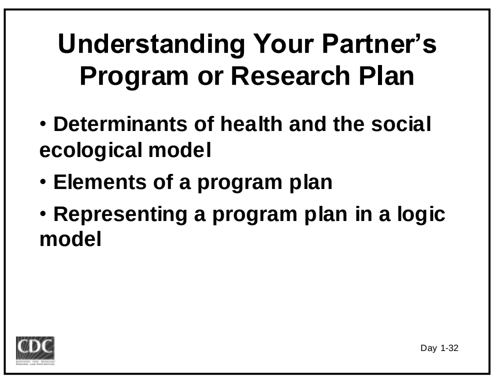
(45 minutes)

***Key Points: "The Juice"***

- It is important to use tools, such as the social ecological model, to understand factors that impact health behaviors and risk.
- Understanding a program's goals, by using a logic model or similar tool, is essential to providing good assistance.

**Objectives:**

- Analyze the philosophy of a program and the strategies that carry it out.
- Understand and describe partner program strategies.
- Describe the four categories of determinants for health and how they interact, using the social ecological model.




**SHOW** slide.

**SAY:**

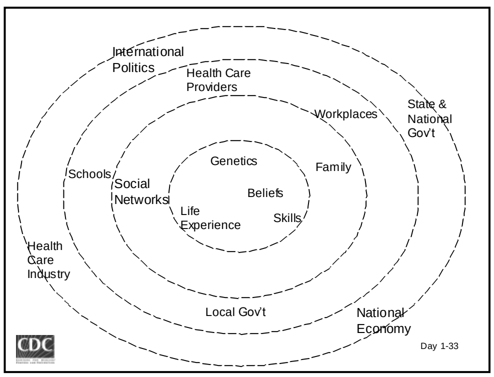
- Thus far today we've talked about understanding the context in which your partner must work.
- Now we will spend some time on understanding your partner's research or program plan.
- It is vital to understand program or research design to assist partners in achieving program success
- Understanding the health problems the program or research agenda address and the causes of those health problems helps lay a solid foundation for understanding of programs at the national level, and how they play out at partner sites.
- Understanding your partner's program or research plan is ultimately about understanding strategy. Specifically, it is about understanding CDC's strategy for the national program (blue globe) and understanding how the partner has worked within that framework to implement the program (green globe). You are the bridge between those two globes, the one who is in the best position to be fully knowledgeable about both the national strategy and the partner's interpretation of it.
- We will use the social ecological model to look at what causes health problems, and how to address the complexity of problems at multiple levels.
- We will discuss elements of a program plan.

- We will not go into depth here on how to plan an effective public health program – we will go into that in depth in the POF Course on Translating National Strategy into Partner Action.
- Our main goal here is to give you a tool to help you quickly learn about and understand the elements of your partner's program when you become their project officer.

**SAY:**
- Let's step back for a moment and think about health and wellbeing.

**ASK**:
- What do you think contributes to good health?

**FLIPCHART** responses.



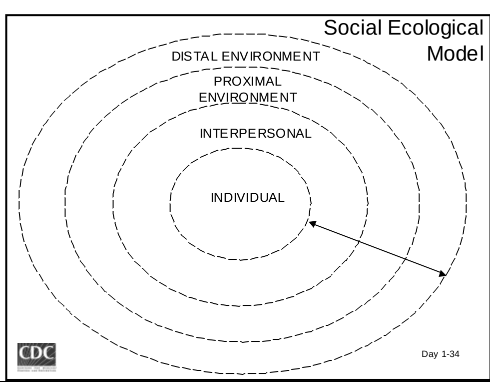

**SHOW** slide. It may be difficult to read, so ask participants to open to their own copy in their binder on Page ________.

**SAY:**
- Here is a diagram showing some examples of determinants of health.

**ASK:**
- Where on this diagram might each of the brainstormed ideas fit?

**SOLICIT** one or two responses.

**SAY:**
- Health and health behaviors are influenced by multiple factors, e.g. many physical and social factors.
- Ecological models specify that individual factors, sociocultural factors, policies and physical environments influence health behaviors.
- Environments are very complex. Efforts to understand how the environment affects health must consider the many dimensions of the environment.



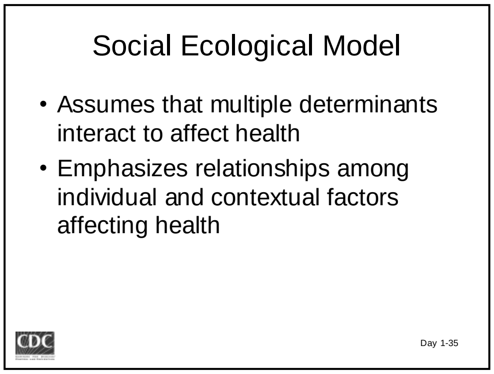

**SHOW** slide.

**ASK:**
- (Show of hands) How many of you are familiar with and have used this model, or a variation of it?
- How did you use it?

**SOLICIT** one or two responses.

**SAY:**

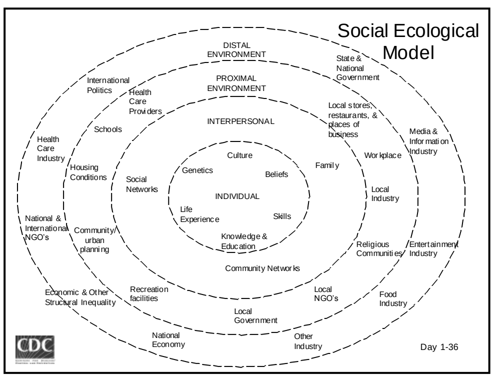
- This model suggests four main categories of determinants:
    - individual traits, genetics, life experience, beliefs, etc.;
    - social, family and community networks;
    - proximal influences/ controllers of microenvironments; and
    - distal influences/ controllers of macroenvironments.




**SHOW** slide.

**SAY:**

- Ecological models not only specify that different types of variables interact and may influence behaviors simultaneously, but also how they interact.
- For example: individual characteristics affect the social network and the proximal environment, and vice versa.




**SHOW** slide.

**SAY:**

- This slide shows the social ecological model with more examples of the variables that fall into each category.
- It is dense, and the font is small, so you may want to look at the one in your book on Page ________.

**ASK:**

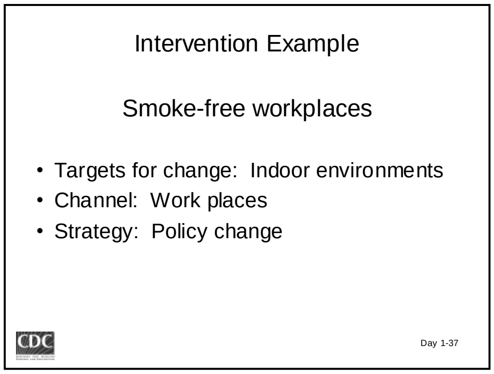
- Clearly the social ecological model could have a range of uses in public health. How do you think it applies to project officers, and your work?

**SOLICIT** one or two responses.

**SAY:**

- The model can help shape the way we think about interventions.
- Multilevel interventions may be most effective.
- It is not always possible for a single program or research project to address all the factors that cause a certain health condition.
- But effective public health programs use available science to understand where the greatest impact for the investment of resources is, and to create strategies accordingly.
- When CDC creates the national program, and when a grantee responds to it with a specific plan, both are (or ought to be) considering where the greatest impact is.
- They determine three things:
    - the most appropriate target for change
    - the best channel of delivery
    - the most appropriate strategies to address the problem.
- These three --- target for change, channel, and strategy --- are the fundamental elements of an intervention in a program plan.

**FACILITATOR NOTE:** Point to the area in the rainbow chart that shows both CDC and potential partners engaging in program planning.




**SHOW** slide.

**SAY:**

- Here is an example.
- In this case, the target for change is not a person's behavior, but the physical environment itself.
- This environmental change will naturally affect individuals and organizations, but the primary target for the change is the environment.
- The channel, or place where this intervention is implemented, is the workplace.
- The strategy was policy change.

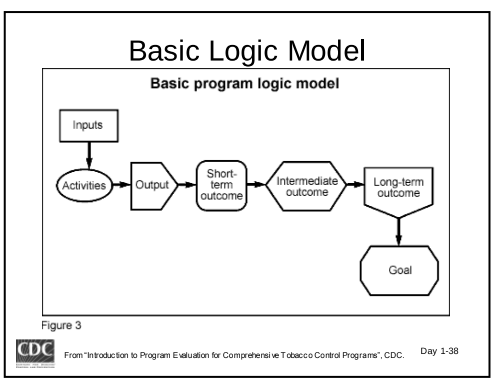
**ASK:**

- Can you share with us an example of the target for change, channel, and strategy from one of your partner programs?
- If your program is a research effort, you may want to describe the target of study and the methods that will be used.

**FACILITATE** this discussion so that participants are sharing with one another, not only for the purpose of illustrating the concept with examples, but also to learn about one another's programs.

**SAY:**

- There is more to a program or research plan than the individual interventions or research activities.
- A good plan also describes what the results of the program will be, or what the goal of the research is.
- It also describes the resources that must go into the program.




**SHOW** generic logic model slide.

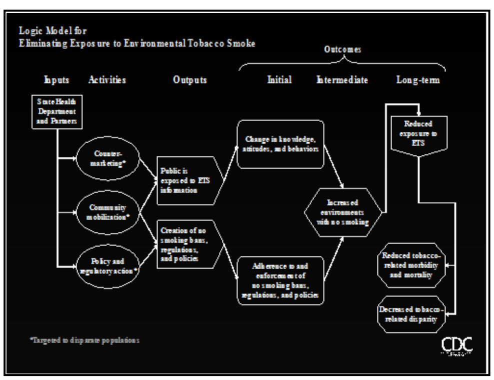
**ASK:**

- (Show of hands) How many of you have used logic models before?
- For what purpose?

**SOLICIT** one or two responses.

**SAY:**

- Logic model is a picture of how an organization or program does its work.
- Logic model links outcomes, both short and long term, with program resources, activities and processes.




- Logic model is a systematic and visual way to present and share a common understanding of the relationships among the resources you have to operate a program, the activities you plan to do, and the changes or results you hope to achieve.
- Let's review some terms often used in logic models:

**FACILITATOR NOTE:** Before giving the definition of each term, ask the group if they can define it.

  - **Resources**: human, financial, organizational, community available to direct towards work
  - **Program activities**: what the program does with resources. These are the processes, tools, events, technology and actions that are part of program implementation. These interventions are used to bring about program results.
  - **Outputs**: the direct products of program activities; may include types, levels and targets of services to be delivered by program
  - **Outcomes**: specific changes in program participant behaviors, knowledge, skills and level of functioning
  - **Impact**: changes as a result of program activities. If you want to know what part of the social ecological model the program seeks to impact, just look at the short term and long term outcomes described in the model.

**FACILITATOR NOTE:** Let participants know that logic models will be discussed in depth in the course, "Translating National Strategy into Partner Action."

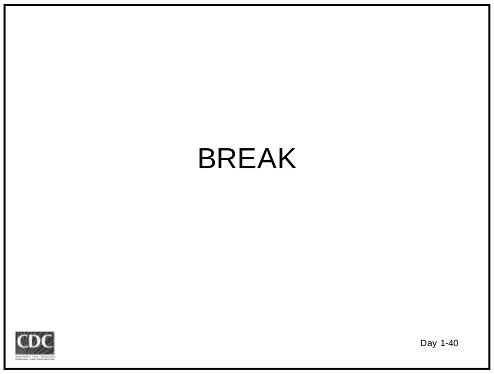
**SHOW** example logic model slide. It may be difficult to read, so ask participants to open to their own copy in their binder on Page __________.

**SAY:**

- This is a logic model for Eliminating Exposure to Environmental Tobacco Smoke
- The resources are state health departments and partners,
- The activities are counter-marketing, community mobilization, and policy change
- The outcomes are adherence to and enforcement of no smoking bans.

**ASK:** Where on the social ecological model would you place these outcomes?

**SOLICIT** one or two responses.




**Summary**

**SAY:**

- Many factors contribute to health
- Programs should address these factors with the best interventions known, based on the available evidence.
- The social ecological model and the logic model are two powerful tools for understanding a program.

**SAY:**

- We will now take a 15 minute break.
- When we return, we will do an exercise to help you reflect again on the partner's program you selected to focus on in this course.

**FACILITATOR NOTE:** Try to have the title slide for the next unit on the screen before participants return for the beginning of the next session.

**Break – 15 minutes**

## *Exercise: Thinking About Program Strategy*

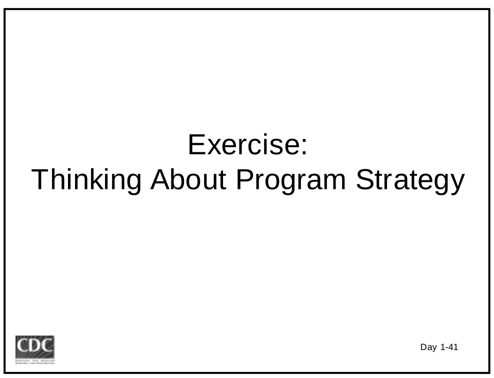
(45 minutes)

***Key Points: "The Juice"***

- Taking the time to explore your partner's program is necessary for good technical assistance.
- It is difficult to give technical assistance on part of the program if you don't understand the program as a whole.

**Objectives:**

- Understand the goals of the interventions in one of your partner programs.
- Gain additional insight into the program strategy.




**SHOW** slide.

Thinking About Program Strategy

- Choose two or three major strategies or methods used in your program or research project.
- 10 minutes: Write each strategy in the sphere it aims to address in the short term.
- Draw dotted lines to the spheres the program aims to affect in the longer term.
- Some programs may be more focused in one area and some may be more comprehensive.

**SHOW** slide.

**SAY:**

- Open your binders to Page ________: the worksheet titled ‘Thinking About Program Strategy.’
- Using the partner you chose to focus on in the course, choose two or three major strategies or methods used in that program or research project.
- Take ten minutes now to write each strategy on the worksheet in the sphere it aims to address in the short term.
- Draw dotted lines from the strategy to the spheres the program aims to affect in the longer term.

**FACILITATOR NOTE**: For those in the class who are project officers for research projects rather than programs, they can write down their research question or hypothesis on the appropriate part of the social ecological model, and draw dotted lines to the other areas of the model impacted by discoveries in this area.

**RECONVENE** group**.**

Debrief: Characterize Your Partner’s Program

- How did the model help you to think about this program?
- What insights did you gain about your program through this exercise?

CDC Day 1-43

**SHOW** slide**.**

**ASK:**

- Did this model help you understand your program in a different way, or see something you hadn’t seen before?
- If so, how?
- What insights did you gain about your program?

**SOLICIT** responses and facilitate discussion.

### Identifying Successes

- Successes are hard to see when caught up in your day-to-day activities
- Look at the program as a whole
- Help your partners identify successes by:
  - Thinking strategically about the program
  - Talking to them about their context, or in a monthly update call

**SHOW** slide.

**SAY:**

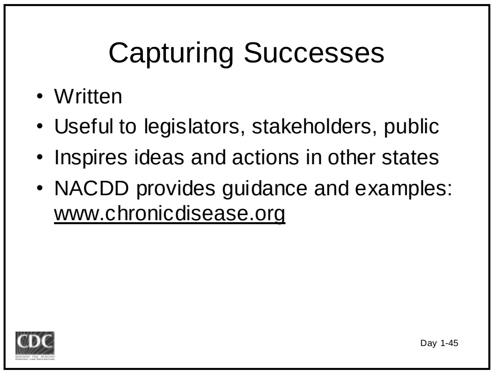
- Sometimes when we take a step back and look at the program as a whole, we are better able to see the progress the program has made toward its goals.
- This is important, because success can be hard to see, and even harder to capture, when program staff are caught up in the day-to-day work of the program.
- Whenever possible, help your partners identify their successes.

**SAY:**

- If you look at the rainbow chart, identifying success is part of the orange/tan globe, Learning Community Activities.
- We have as much to learn from program successes as we do from our 'do-differently' lessons.
- Sharing successes with the learning community will be especially meaningful if you can share details about the context in which the program worked.

**SAY:**

- Sometimes you can help your partner identify success by thinking strategically about the program, as we just did in this exercise.
- Or, you may identify a potential success story when talking to your partners about their context, or in a monthly update call.




**SHOW** slide.

**SAY:**

- Once you identify a potential success story, it's important for you and your partner to work together to capture it.
- When you consolidate the successful experience of a program into a success story, you are creating a written piece that has many uses.
- It can save a lot of scrambling when a legislator calls for information about the program.
- It can be used to explain to stakeholders, including the public, what you did, how it worked, and why it was worth the money.
- It inspires ideas and actions among programs in other states.
- The National Association of Chronic Disease Directors encourages submission of success stories, and provides some helpful guidance for writing one.
- For more information, visit www.chronicdisease.org and click on the Success Stories link.
- This is also a great place to view other success stories.
- We will go into Developing and Using Success Stories in greater detail on Day 4.

**SAY:**

- We've done some good big picture thinking about partner programs today.
- The reflection you have done here on your partner's program will be useful to you as you put together your case study presentation on Day 4.
- We will talk more about that presentation in a few moments, but first let's turn our attention to a video on the burden of chronic disease.

**FACILITATOR NOTE:** If you need time to set up the video, give the group a 5 or 10 minute stretch break.

## *The Burden of Chronic Disease: Video and Discussion*

(60 minutes)

*Key Points: "The Juice"*

- It is important to remember our ultimate goal of improving the health of the public.
- A well-timed reminder of this common goal can be a powerful tool for creating openness in communication with our partners.

**Objectives:**

- Gain a big picture perspective of the importance of working with partners to address chronic disease.

**SAY:**

- In your day-to-day work as a project officer, it always helps to come back to the purpose of your work.
- It helps to remember what both you and your partners are both working for: chronic disease prevention and health promotion.
- Next session we will talk about how active listening is one way to help create a team approach with your partners.
- We spoke today about how we can use our conversations with partners as opportunities to build trust and partnership, and to remind partners that we are in this together for the sake of public health.
- We are fortunate to have a video of a presentation made by former Chronic Disease Center Director, Dr. Jim Marks. It focuses on the burden of chronic disease, and talks about some of the greatest impacts on the public's health.
- The actual data in this video has become somewhat dated, but the messages remain relevant to us today. It points out why what we do as project officers is so important to preserving the public health.

*The Burden of Chronic Disease*
**Discussion**

- When would this information be helpful, and to whom?
- How and when might you use this information to remind partners of the ultimate goal: Improving the health of the public?

**SHOW** slide.

- You may have seen this talk before, but as you are watching today, think specifically about how, when and to whom you might communicate this information.
- Also think about when you might use the information in the video to bring your partners back to the ultimate goal and purpose of their work: Improving the health of the public.

**SHOW** video. (40 minutes)

**DEBRIEF** the video. (20 minutes)

- What significant information did you take away from the video?
- When would this information be helpful, and to whom?
- How would you communicate this information?
- What, if anything, in Dr. Marks' presentation reinforced the importance of understanding your partner's context?

## *Explanation of On-the-Job Exercise #1, Plan-Practice-Record, Day 1 Evaluation*

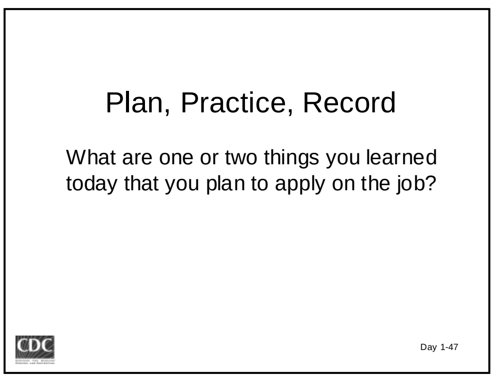
(30 minutes)

***Key Points: "The Juice"***

- Participants are responsible for applying what they are learning to their everyday work.

**Objectives:**

- Translate what you learned today into skills to do your job more effectively.
- Use program and organization analysis skills to anticipate challenges and opportunities for one of your partner programs.




**SHOW** slide.

**SAY:**

- Take out your Day 1 Plan Practice and Record worksheets (Page ______).
- This action plan, practice, and follow-up record will help you reflect on your use of new concepts or skills on the job.
- We also use this to help us evaluate this course, to help us see how well the concepts and skills taught here translate for you on the job.
- Reflect on: "What are one or two things you learned today that you hope to apply on the job?"
- Write them down. (on the white sheet of the PPR)

**ALLOW** time for writing and reflection.

**INVITE** participants to share their learning application items.

**COLLECT** the bottom colored sheet (pink copy)

**FACILITATOR NOTES:**

- STRESS THE IMPORTANCE of practicing what they write down, and completing the last portion of PPR by the next session.
- The top white copy will be collected at the next session.

On-the-Job Exercise #1

Conduct an assessment of your partner's context using the "Context Grid" worksheet from your participant binder.

- Use the information you outlined today, about both your program and partner's organization
- Collect additional information as needed
- Use the next two columns of the worksheet to indicate:
  - Which part of your program might be affected, and
  - anticipate what some of the opportunities and challenges will be (see examples on the worksheet).

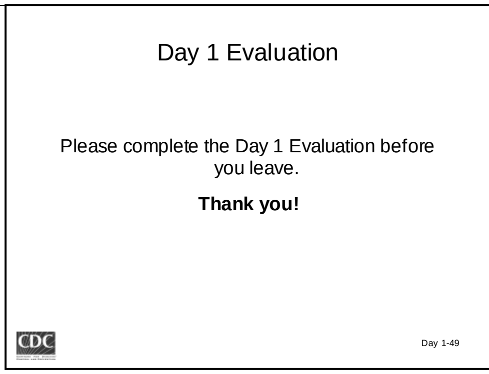
**SHOW** slide.

**SAY:**

- Open your binders to Page ________, the On-the-Job Exercise #1 worksheet. It is two pages.
- Before we meet for the next session, you will do an assessment of your partner's context.
- Use the information you outlined today during the exercises.
- Collect additional information as needed.
- Use the next two columns of the worksheet to write down which part of your program might be affected, and what the implications are for your role.
- Are there any questions?

**SAY:**

- I want to talk briefly about your on-the-job-exercise #3 for Day 4.
- Please open to Page ________ in your binders.
- For this on-the-job exercise, you will share a summary of your partner case example to tie together what you learned in this course.
- You will have 10 minutes to address these questions:
  - Briefly describe the key parts of your partners program.
  - Briefly describe the context in which they are working.
  - What is one area of context that poses a challenge for the program?
  - What is one contextual element that is an asset to the program?
  - How will you help your partner to work effectively within their context?
- You will have some time after your presentation to get input and assistance from your peers.
- Think of this week's on-the-job exercise as a foundation for your case study presentation.




**SHOW** slide.

**SAY**:

- Your feedback is very important.
- Please open to Page ________ in your binders.
- Please take a moment to complete the DAY 1 section of the evaluation in your binder.
- If you have suggestions for things that we should do differently next time we meet, please record those on the available index cards.

**REMIND** participants of the date, time and location of the next session.

**ADJOURN**