



Community Action  
Economic Mobility Initiative

# Design Plan

## Why Create This Whole Family Approach Design Plan?

The overall goal of the Community Action Economic Mobility Initiative is to provide technical assistance and support for Community Action Agencies (CAAs) to pursue a new approach to break the cycle of intergenerational poverty. This initiative is a five-tier system of support to help CAAs with varying levels of readiness learn and shift to a whole family approach.

Over 30 CAAs are engaged with the Community Action Partnership in learning cohort efforts that includes technical support to integrate parent and child data across programs which will aid CAAs in realigning and restructuring resources internally and catalyzing efforts in the community to support parents and children together. Each CAA has committed to developing a team at the agency to develop a whole family approach and to participate in peer learning activities.

The theory underlying the Community Action Mobility Initiative is, when services are integrated to meet the needs of parents and children together, efficiency is improved and outcomes are enhanced for parents, children and families.

Generally, whole family approach strategies:

- Provide parents with high-quality financial education, job-driven workforce development services, and access to other supports that enable them to achieve financial stability.
- Ensure children's access to high-quality early childhood development, and to enriching, quality school and education experiences as they grow older.
- Structure strong parent engagement strategies, including parent education and social-emotional supports, to help them meet the health and developmental needs of their children – *as well as* their own.

A whole family approach is integrated and not siloed in nature. Additionally, instead of being a siloed program, it is an organizational mindset that supports a set of systems and practices that place children and their parents at the center. Agencies, along with their partners must work with families as a whole to provide opportunities for – and meet the needs of – children and their parents together. That means intentionally linking, coordinating and aligning **high-quality** services for children with **high-quality** services and supports for their parents. This also means looking at the **intensity and duration** of services and making sure they are sufficient to meet the needs of families to achieve progress and lasting change. This requires everyone in the agency and partners to address the following items – and potentially other actions:

- Build common goals and an agenda to which all programs and collaboration partners agree.
- In collaboration with all partners develop a clear theory of change and logic model.
- Help families set whole-family goals for both parents, children and the family – and develop a common tool and process for helping families set those goals, no matter which program or service they access first.

- Transition your approach from “*managing cases*” to “*coaching*” families to facilitate their own progress.
- Provide and/or connect families to services to address their unique needs at the right time in key services depending on assessed needs and family voice/priority which may include but are not limited to five core components determined to be critical to families getting ahead: High-quality Early Childhood Education, Health and Well-Being, Post-secondary and Employment Pathways, Economic Supports, and Social Capital.
- Improve and integrate services to make them more compelling for families and easier to access.
- Enroll/engage families in multiple services or programs at one time – in a sequence that aligns with their priority goals.
- Craft a shared outreach and communication strategy to reach the entire market of your target families.
- Create routine methods for partners and service providers to communicate, reflect and plan action.
- Develop progress measures and track and share data on activities, participation and “family” results.

This Community Action Economic Mobility Initiative Design Plan is meant to help your team think through and detail the essential elements of your whole family approach. It is organized by Components – and each Component section asks you to answer a set of questions. Answering all the questions will produce a “picture” of your effort – and a better sense of the work you have ahead of you. As you complete this design plan, you may find there are things you have not yet thought about, or challenges you don’t yet know how to address. Don’t let this stop you! Please consult staff at the Community Action Partnership or your coach (once you have been assigned a coach) if you run into any difficulties and need help – that’s why we are here!

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## SUMMARY: Our Whole Family Approach

**After you have completed all the components of the Design Plan**, please come back to this page and complete both sections of this component.

### Whole Family Approach Narrative

Write a one-paragraph summary of your Whole Family Approach goals and plan at a high level. This summary should be able to stand on its own, and could be used to briefly convey the design and aspirations of your approach – for example, on a website, in a report, or in a request to a donor.

Component 2

## Identifying The Problem

The first part of identifying the problem, or answering the “**what**” question, is making sure that the problem to be addressed is actually a problem and that it can be clearly defined through data analysis and communicated to others.

### 2a. PROBLEM: What is the problem that our whole family approach plans to address?

Write a brief statement about the problem. Is it an unmet need, an identified need for improvement or an unaddressed mandate? Use multiple sources of data to identify or confirm this is a problem.

### 2b. ROOT CAUSE: Why does the problem exist?

After identifying the problem, the next step is to identify the root cause of the problem. This can be done through a process called [Root Cause Analysis](#). A key principle of Root Cause Analysis is that the underlying causes of a problem must be understood before the problem can be addressed. The basic approach of Root Cause Analysis is to continue asking and answering why the problem exists until the problem’s cause or causes are understood.

*Component 3*

**TARGET: Who is Experiencing the Problem?**

After the problem has been identified, describe who is at risk of experiencing it, in other words, **who is the target population?** Later in **Component 9**, you will think more deeply and perhaps narrow your focus to a particular population whom the approach seeks to address.

For now, describe the target population and include any data or evidence you have collected to more clearly define the target population.

*Component 4*

**NEED: What are the Needs of the Target Population?**

Describe the needs of the target population. Identify needs that should be remedied for families to reach success.

# Our Whole Family Approach’s Intended Results & “Picture of Success”

Please use this page to identify the intended results or what you are trying to accomplish by developing your whole family approach. The intended results should be based on the root cause and identified problems you developed earlier and the needs and characteristics of the target population.

- In **Column A**, please list the “**Five Big Results**” that you want to become true for families that come in the agency’s “door.” You might think of these as your goals (and theirs!) for the families.
- In **Column B**, please list the **three to five most important** things that would indicate to you that you and the families had achieved the results in Column A. You might think of these as what you would **measure**.

A. What results do you intend to produce for local families through your Whole Family Approach?		B. What would success look like if you achieved this result?
1	<p><b>Families are more financially stable.</b></p> <p><i>[This example in red is for illustration only: Please just delete the text in this example (1A) and (1B), and fill in with yours!]</i></p>	The parents’ credit rating has increased by XX%.
		Each child in the family has a Children’s Savings Account for college.
		The family has a sufficient emergency savings fund. <i>(Our agency defines “sufficient” as three months of family expenses)</i>
		Working adults in the family are newly employed or in better jobs.
		The family has significantly reduced its debt burden.
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## The Journey Map

### 6a. What Services Look Like to Families Now – the “Current Journey” Map

Think about what families in your community need to do to access adult education, employment, early childhood education, financial education, housing, financial supports (public benefits, child and dependent care, housing, transportation, etc.), health and mental health services. In the space below, draw what your families have to do to access these services. This is called a “journey map.” It should represent the journey your customers take to hear about your services, apply, enroll, and participate. Be careful not to draw the actions your staff take – draw the actions that the family has to take.



## 6b. What Services Will Look Like to Families In The Future – the “Ideal Journey” Map

What would a family’s journey look like if services were better aligned and integrated? Draw that “ideal journey” here. The Ideal Journey Map may reflect the goals you set for the coming year. It may contain services that are not yet provided to your families. It should represent your vision for a family’s experience in the future.

Component 7

## Causal Links

Identifying causal links can help you avoid efforts that may be positive but do not help achieve the ultimate long-term outcome. Together, these steps—“causal links”—make up the pathway of change, from understanding the root cause of the problem to achieving the desired outcome. Often it is easier to begin with the long-term outcome and work backward toward the earliest changes that need to occur to achieve the desired outcome. Asking “**why**” questions can help determine causal links. [Guide to Developing, Implementing and Assessing an Innovation pg. 23 Causal Link.](#) **What are the series of steps that must be taken for the desired outcome(s) to be met?** Only steps that can be linked in a way that show a causal progression toward a desired outcome should be included. This component may be under development for some time and over time you may need to go back and revise the steps.

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# Assumptions

Assumptions are beliefs, principles, or expectations we have about the cause or conditions necessary for change to occur. It is important to articulate underlying assumptions related to the causal links.

<p>Please write here any important assumptions that you are making in relation to your intended service population, the scope of your project, or your overall agency approach.</p>	<b>1</b>	
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Component 9

# Our Target Families: Going Deeper with Identification & Engagement

**And so...you are constructing a Whole Family Approach.** Think about this: If **EVERY** family facing tough challenges in your area walked in the door in Year 1, would you be able to work with them **all**? Assuming the answer is “No,” the next question is: **What families do you most want to target to receive/whole family services in the first two years of operation (2018-2019)?** This section asks you to identify your “target families” and how you will engage them.

## 9a. Who are Our Target Families?

<p><b>What is the specific geography you want to serve in this 2018-2019 time period?</b></p>		
<p><b>What family population will you target to serve as your <u>first priority</u> through your whole family approach in 2018-2019?</b></p> <p><i>For example, is “Families that have a child enrolled in the Springfield Head Start program”? Or “Families in XXXX town or YYYY neighborhood living at or below 200% of poverty”? Or “Families with parents enrolled in a local community college’s career training program”? Something else? (Or some combination?)</i></p>		
<p><b>As of January 2018, what was the baseline number of these Target Families in the geography you are covering?</b></p>		
<p><b>How many of these Target Families do you aspire to serve ...</b></p>	<p>...in the <b>first year</b> (2018) of your approach?</p>	<p>...in the first <b>two</b> (2018-2019) years?</p>
<p><b>What are the <u>top five</u> most important situational, demographic, economic, social and/or cultural characteristics of these families that you need to take into account as you design your whole family approach to serve these Target Families?</b></p>	1	
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## Our Target Families: Identification and Engagement

### 9b. How will We Recruit and Work with our Target Families?

**How will you get your Target Families “in the door(s)” and participating?**

In other words, what practices and tactics will you and your partners use to reach, interest and engage target families so that they will choose to come to your whole family approach, set whole-family goals, and access a fuller range of parent and child services (as opposed to coming for just one service)?

Briefly describe each significant method you plan to use.

**What common initial “intake” process will you use to get baseline data on Families and help them set goals?**

**What materials/ tools will you use to do this?**

**What process will you use on a regular basis to check in with Families on their progress, collect key data – and to coach them toward their next steps?**

**What materials/ tools will you use to help with this?**

## Our Target Families: Identification and Engagement

### 9c. Family Voice and Barriers

<p><b>Bringing in Families’ Voices</b>                  The families seeking and receiving services have critical and essential knowledge and expertise about what stands in their way, and about what works and what doesn’t. Describe how you have – and how you will – engage families on a regular basis in identifying solutions and strategies to build an effective whole family approach.</p>		
<p><b>The Primary Family Progress Obstacles</b></p> <p>Based on what you have discovered and are discovering from:</p> <ul style="list-style-type: none"> <li>▪ Target Family consultation and feedback,</li> <li>▪ Partner and staff experience working with families, and</li> <li>▪ What the data you currently collect or have examined reveals...</li> </ul> <p>...describe the <b>three to five top</b> obstacles facing your Target Families that you are trying to make sure your whole family approach “solves.”</p> <p><i>Examples might include such things as: family has to go to multiple locations; family has to fill out multiple forms; current services don’t accommodate non-English speakers, etc...</i></p>	<b>1</b>	
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	<b>5</b>	

**Component 10**

# Developing, Integrating, & Aligning Services

A whole family approach will ideally offer a full set of services to families in a more integrated way. Integrating services may require you to address the following items (and potentially other actions not listed here).

- Build a common agenda and goals to which all programs and partners agree.
- Design new services or change the design of old ones.
- Integrate services in new ways and new places.
- Screen and enroll families into multiple programs at one time, and/or identify the best sequence of service use for any single family.
- Develop a consistent tool and process for helping families set goals, no matter which “service door” they walk in.
- Develop a shared set of program performance and family progress measures, and methods and tools for collecting and sharing data related to those measures.
- Develop a common outreach and communication strategy, so that you reach as many Target Families as possible.
- Develop a regular method for communication, reflection and action planning among all partners – and agree to a common language.

## 10a. The EXISTING Services We Want to Align in Our Whole Family Approach

What existing services are already available in your agency/area that you want to bring “into whole family approach” – or connect to – in order to serve children and families *together*?

*Please organize the information in a table like the one below and on the next page. Include more information as you see fit.*

Existing whole family service that we want to provide – or connect to.	For whom in the family is this service needed/relevant? <i>(e.g., parent, young child, teen, etc.)</i>	Program(s) currently providing the service	Where can the Target Families currently access this service?	Other Pertinent Information



## 10b: NEW Services We Want to Provide & Access through Our Whole Family Approach

What services are not already available in your agency/area that you want to help create and bring “into the whole family approach” – or connect to – in order to serve children and families *together*.

<b><u>New</u> whole family services we want to provide – or connect to.</b>	<b>For whom in the family is this service most needed/relevant?</b> <i>(e.g., parent, young child, teen, etc.)</i>	<b>Ideas for who or what organization(s) might provide the service</b>	<b>Where do you want the Target Families to access this service?</b>	<b>Other Pertinent Information</b>
				<i>Hit TAB in this lower right box if you need more rows.</i>

## Developing, Integrating, & Aligning Services

The idea of the whole family approach is to integrate services that are currently siloed, located in different places, and/or hard for families to find and access. Organizations and partners do so in ways that:

- Make it less costly – in time, hassle and \$\$\$ – for families to access all the services and resources they could use to get ahead.
- Make it easier for families to stick with their plan to meet their family goals.
- Build more community and peer connections for families – useful for establishing networks, mentoring, and fostering the encouragement and support that people need to keep going.

### 10c: Linking and Aligning Services

What **new links** do you plan to create between services through your whole family approach?

For example, you might want to relocate a free tax preparation (VITA) site to your organization and offer tax prep immediately following workforce training sessions held in your agency. Or you might want to link intake processes for several different existing services/programs by developing a common intake form and jointly hiring high quality frontline staff to do family intake and coaching. And so on....

Use this form to describe new links/integration you know you want to develop in your whole family approach.

<i>Service 1</i>	<i>Service 2</i>	<i>New Linkage – Will Be Linked How?</i>
		<i>Hit TAB in this lower right box if you need more rows.</i>

## Developing, Integrating, & Aligning Services

What **policies, systems,** and **resources** need to be brought into alignment to make this whole family approach effort work now – and be sustainable into the future? By “**policies and systems,**” we mean rules that govern how services are delivered and tools or methods used to deliver services. For example, eligibility criteria for programs, screening or intake tools, shift hours at a major employer that conflict with when childcare is available, etc.

By “**resources,**” we mean financial and other resources that are needed not just to launch your whole family approach, but to sustain it over time. Examples might include determining how to qualify for a statewide TANF waiver that could bring in some dollars for your organization/partnership, or figuring out some way to borrow executives from a local company to get your systems up and running, or how to qualify for and recruit AmeriCorps volunteers to supplement your staff – etc.!

### 10d. Aligning Policies, Systems, and Resources to Advance a Whole Family Approach

<i>System/Policy/Resource to Align</i>	<i>Who controls this policy, system or resource?</i>	<i>What is Alignment or Linkage Needed?</i>
		<b>Hit TAB in this lower right box if you need more rows.</b>
<p><b>Barriers to Action</b></p> <p>What might get in the way of your site being able to integrate and align critical services, systems and resources?</p>		
<p><b>Help Wanted</b></p> <p>What kind of help do you imagine could help you “unstick” those barriers?</p>		

**Component 11**

# Partnerships, Management, & Communication

Effectively serving children and families together may require different partners, and different types and levels of partnership. For example, your organization may have a large number of partners who agree to a common agenda, meet regularly, and communicate effectively. But from time to time, there may be a smaller group of partners that need to work as a task **subgroup or workgroup**, perhaps to develop a common tool for family goal-setting, or a common screening and enrollment process.

## 11a. Critical Whole Family Approach Partners

Think carefully about the full set of partners that will be needed to create a successful whole family approach “Action Team,” and which partner(s) will be needed for what. Consider programs inside the CAA as well as those outside. As you work through this Profile – keep listing these partners here as they come up. Indicate whether the Collaborative Leaders have a current working relationship with each, or whether the relationship needs to be cultivated. For partners with whom you are already working, indicate whether there is an MOU or data sharing agreement in place. List the contact information for your key contact at the partner organization. Also list any special subgroups, and indicate who is (or should be) in them, as well as who manages each subgroup.

Please put this information in a table, using the format here, or developing your own, if you want to include additional information. Add rows as needed!

Organization	Key Contact	Title	Email Phone	Status of Relationship with Hub Lead Partners	2Gen Services They Provide/ Role	Which Subgroups must they be in?
<b>Whole Family Approach COLLABORATIVE LEAD PARTNERS</b>						
<b>PROGRAMS AND SERVICES INSIDE THE CAA PROVIDING WHOLE FAMILY APPROACH SERVICES</b>						
<b>ORGANIZATIONS PROVIDING WHOLE FAMILY APPROACH SERVICES</b>						
						<i>Hit TAB if you need more rows.</i>
<b>OTHER PARTNERS</b>						
						<i>Hit TAB if you need more rows.</i>

## Partnerships, Management, & Communication

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

### 11b. Guiding Coalition

Please list here all the **Individuals** who will function as your whole family approach Leadership Team.

Name	Organization	Title	Email and Phone	Address	Special Responsibilities?
<b>Whole Family Approach Guiding Coalition</b>					
					<i>Hit TAB if you need more rows.</i>

<p><b>Communication among Guiding Coalition</b></p> <p>How will you ensure the Core Leadership Team is moving in the same direction? Describe your regular check-in and communications plan: how often will you meet? Who is responsible for setting the agenda and driving the meetings? How will issues be brought to the table and worked through?</p>	
<p><b>Communication among Partners</b></p> <p>Likewise, what process will you use to keep all the partners – formal and informal – in the effort engaged, up to date, contributing ideas that will improve the effort, and making changes to help it succeed?</p>	





## 12c: Developing Our Measurement Plan

How will you work with partners to come to an agreement about which indicators you will use to measure whole family progress? Who will be responsible for tracking? Who will hold the data? How frequently will measures be taken? How will this data be shared with partners? With families?

## Appendix A—Theory of Change

**Theory of Change Statement:** *What is your whole family approach theory of change? If we do X, Y change will occur.*

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Needs	
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Causal Links	
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Assumptions	
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Target Population(s)
<i>Hit TAB if you need more rows.</i>

Problem

Outcomes of Interest	
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## Appendix B – Whole Family Approach ROMA Logic Model Example

Please complete a logic model(s) for your agency's intended Whole Family Approach. Be sure to include your agency's mission, the type of expected outcomes (short, medium, or long term), and the projected rates of success for each selected service/ activity. Consider developing logic models that highlight efforts that focus on the community/family perspective and if needed another model that focuses on the agency perspective. Below is a template with suggested components.

**Agency:**

**Program:**

**Level:**

