

# Forming an EBPP Planning Team

## Seek Existing Groups

Before forming a new planning team for the EBPP process, look to engage an existing group with a shared mission. This will save time and effort to build a planning team, reduce duplication of efforts in your community, and decrease the number of meetings your stakeholders have to attend. Good options for existing groups could be a local coalition, your Collaborative Management Process (CMP) coalition, or another diverse group that is related to your issue or focus population. Consider asking key stakeholders if they know of an existing group.

If such group exists, approach the group to present the idea of the EBPP process to them. Be sure to be prepared to explain why this is an important process for the group to engage in, why it is important for the community, an overview of the process, and what will be required to successfully complete the process.

## Identifying and Recruiting Key Stakeholders

If no existing coalition or group exists in your community, you will need to form one. It is recommended that a consistent core planning team is formed to review and compile information across the EBPP process. This will assist members in understanding the whole data picture and in identifying gaps and/or duplicative resources, and will ultimately lead you to a stronger, more robust, and more applicable final plan. The formation of this team may also be useful for future planning and efforts to address barriers to quality data collection at the community level. However, when forming your team, be careful not to ask anyone to join unless you are clear on why they should be at the table.

As a group, utilize the [Strategic Recruitment Tool](#) and brainstorm a list of people who will serve as your planning team. Consider the following to ensure your recruitment is targeted.

1. Who are the professionals with expertise in the problem area you are addressing? Consider professionals providing direct service, indirect service, advocates, and others for the focus population.
2. What groups, organizations, and/or agencies have a common interest in your issue or problem area and would benefit from collecting or having access to information and data?
3. Who has access to or holds data you need to assess the current conditions in your community?
4. Who will be affected by the changes you intend to bring about in the community? Who has lived experience with the issue you are hoping to address? Who is part of the focus population you intend to work with?
5. Who has had some previous experience with collection and/or analysis of data?
6. Who has expressed an interest in participating in the assessment process?

Once you have identified your key stakeholders for outreach and engagement, use the [Sample Contact Roster](#) to gather, centralize, and track your outreach efforts and progress.

## Elevator Speech/Email

It will be helpful to develop an elevator speech or email for stakeholder outreach and recruitment. You can use the included email templates to create your elevator speech. Remember that an initial email invite should be considered your first step, and plan to follow up your email with a personal conversation. Consider addressing the following areas as a part of this communication:

- Background information
- Benefits for the community/target population
- [Overview of the EBPP Process, with an example](#)
- Timeline of process
- Time commitment of participation
- Customized – WIIFM (What's In It For Me), Why that person/agency
- Request to connect to discuss this opportunity in more detail

## Extend Invitations through Existing Relationships

Your recruitment efforts will be more successful if someone with an existing relationship to the potential planning team members extends the invitation personally. If this is not possible, a warm introduction from a mutual contact will also improve your chances of successful recruitment. However, be sure the person extending the invitation is fully prepared with a solid understanding of the elements of the elevator speech/email listed above and a clear picture of the WIIFM for the potential planning team member.

## Spread the Leadership Roles

In addition to recruiting stakeholders, it will be important to also identify and recruit at least four people who are willing to take active roles in coordinating and leading the EBPP activities. See [“Organizing your EBPP Planning Team”](#) for role descriptions.

## Suggested Team Make-Up

The Planning team membership should reflect a diverse group of individuals and organizations in the community. It may be useful to encourage representation of the following sectors within the EBPP team/committee:

- Government
- Law Enforcement and Corrections
- People with lived experience of the issue(s)
- Behavioral Health
- Education
- Non-profit or civic
- Health care
- Media
- Local business
- Youth
- Parents
- Advocacy

Youth may also serve a helpful role in capturing data from youth focus groups, observations, and community surveys. Diverse membership will facilitate access to a variety of sources and types of data.

*The size of the team should reflect the needs of the community. It should be small enough to allow for the participation of all members, while remaining diverse in membership. It is recommended that a team be no smaller than 6 members, but no more than 20. An ideal team size for this process is 10-15.*

## Notes on Timing and Commitment

Typically, this process takes six to nine months from the first full meeting of your EBPP team assuming you are meeting monthly and work (such as data collection) is completed in between meetings. It can be completed in a shorter time frame if there is significant support from multiple people, especially if those people are data literate and have ready access to local data (either directly through their work role or via already established relationships) and if your committee is willing to have extended or more frequent (i.e. weekly) meetings. On the other hand, it may take longer, especially if you have frequent turnover in your EBPP team, if you meet less than monthly, or if it takes longer for your group to understand and process the data and make decisions. Groups that have decided to meet less than monthly have found that the momentum for moving through this process wanes and it creates additional barriers to completion.

It is recommended that your EBPP team meet at least monthly, complete work assignments between meetings on time, and seek commitments from members to see the entire process through.

## The First EBPP Team Meeting

Once you have recruited all or most of your EBPP planning team, it is time to set up and facilitate your first meeting! Use the [Sample Meeting Agenda for Initial EBPP Team Meeting](#) to start off on the right foot and set yourselves up for success!

# Strategic Recruitment of Key Stakeholders Chart

Stakeholder	How will they be involved or affected?	What criteria will they use to judge our success?	Why are they important to us?
<i>Example: Superintendent of schools</i>	<i>Responsible for the education of youth</i>	<i>Success in improving truancy</i>	<i>Knowledge, resources</i>

# Sample Contact Roster

Who is being contacted? Contact information	WIIFM? What will their motivation to join be?	What is their community affiliation?	How should they be contacted?	Who will make the contact and when?	Date contact made?	Follow up needed?
<i>Name Address Phone Email</i>	<i>Parent whose child is in the JJ system and wants to make the system work better for youth</i>	<i>Title or Position</i>	<i>Mail, Phone, E-mail or All</i>			

# Sample Recruitment Emails - For Professionals

To [Name] –

Our group will be engaging in a planning process to review our local data and make sure that the strategies and programs we fund are matching the needs that show up in our community. We also want to make sure our strategies are effective and evidence-based, and that we, as a community, are able to evaluate whether or not we are getting the results we hope for.

Your participation would be very valuable to the success of this project. Will you consider joining us? The benefits of being a part of this group are having a voice and an active role in making our community a healthier place for our youth and families. [Address the What's in it for me for this person], which we know you value.

Below I have included more information. I would love to speak to you in more detail about this opportunity. Are you available for a quick [phone call, video call, in person meeting] [provide 2-3 time slots you are available] to discuss? I do hope you will be able to join. We need your input!

Thank you for your consideration.

[Signature]

Overview of the project:

- The planning project will run from [Month Year - Month-Year]. Most of the project will be focused on the development of our [X (plan, goal, etc.)]
- We will be having regular accommodate the schedules of everyone participating. You may also be asked to join a work group which will meet in addition to the regular meetings, but you may decline the request.
- This project will support us in developing a [Data-Driven Plan, Evidence-Based Plan, Report to Funders, Grant for Funds, Recommendations] which will be used to [broad community change goals].
- [##] people will be helping lead this effort and will help be responsible for logistics of the project (i.e. communicating with the community, coordinating meeting dates/times/locations). You may be invited to take on a leadership role, but you may decline the invitation.
- We are able to provide [compensation (be specific as to how much, incentives (be specific as to what), food/meals, childcare, translation/interpretation services, transportation, accessibility accommodations] to support your full participation in our meetings,
- After we broaden community representation in the group, we will be:
  - a. Identifying and collecting local data for the planning process
  - b. Analyzing and interpreting the data for selecting priorities
  - c. Selecting Evidence-based strategies that match our priority needs
  - d. Create an Implementation Plan for rolling out the strategies
  - e. Developing our Evaluation Plan so we can track and monitor our success while we implement

Attached you will also find an Overview of the EBPP Process to provide additional context on what we plan to do.

# Sample Recruitment Emails - For Community Members

To [Name] –

We are convening a group to identify needs and barriers in our community and then decide how to best meet those needs or overcome those barriers. We want to make sure our strategies are effective and evidence-based, and that we, as a community, are able to evaluate if we are getting the results we are hoping for.

Your participation would be very valuable to the success of the project as you bring experience and knowledge that is key to having a representative and holistic view on the community and coming up with solutions that will really work for everyone. Will you please consider joining us?

The benefits of being a part of this process are having a voice and an active role in making our community a healthier place for our youth and families. [Address the 'What's in it for me' for this person], which we know you value.

Below I have included more information. I would love to speak to you in more detail about this opportunity. Are you available for a quick [phone call, video call, in person meeting] [provide 2-3 time slots you are available] to discuss? I do hope you will be able to join. We need your voice at the table!

Thank you for your consideration.

[Signature]

Overview of the project:

- The planning project will run from [Month, Year – Month, Year]. Most of the project will be focused on the development of our [X (plan, goal, etc.)].
- We will be having regular [monthly/weekly] meetings that will be scheduled to best accommodate the schedules of everyone participating. You may also be asked to join a work group which will meet in addition to the regular meetings, but you may decline the request.
- This project will support us in developing a [Data-Driven Plan, Evidence-Based Plan, Report to Funders, Grant for Funds, Recommendations] which will be used to [broad community change goals].
- [###] people will be helping lead this effort and will help be responsible for logistics of the project (i.e. communicating with the community, coordinating meeting dates/times/locations). You may be invited to take on a leadership role, but you may decline the invitation.
- We are able to provide [compensation (be specific as to how much, incentives (be specific as to what), food/meals, childcare, translation/interpretation services, transportation, accessibility accommodations] to support your full participation in our meetings,
- After we broaden community representation in the group, we will be:
  - a. Identifying and collecting local data for the planning process
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# Overview of the EBPP Process, with an example

This document provides an overview of the EBPP process with an example of a real-world application. This can be used to help potential recruiters and stakeholders understand the EBPP process and goal.

Actions/Activities	Description
<p><b>Module 1: Recruit and Engage Team</b></p>	<ul style="list-style-type: none"> <li>• Purpose</li> <li>• Group norms</li> <li>• Goals/outcome</li> <li>• Identifying &amp; Recruiting Stakeholders</li> </ul> <p><i>Group identified that they have a shared goal of reducing youth involvement in the juvenile justice system in their county, identified and recruitment additional stakeholders for the team, determined agreements, commitments, and assigned leadership roles.</i></p>
<p><b>Module 2: Identify and Locate Indicator Data</b></p>	<p>Brief overview of different types of data, selection and collection of indicator data</p> <p><i>Reviewed different kinds of data and what they are used for. Specifically, addressed primary data (collected by agency) vs. secondary data (collected by other agencies/ groups). Talked about pros/cons of each and how data might be used to make some decisions. The group determined they wanted to better understand role of mental health and substance use in relation to arrests and detention. They selected indicator data in the substance use, mental, and juvenile justice systems that they wanted to collect, especially data from the HKCS, CBI, and SB94 report. They assigned specific people to collect and organize the data before their next meeting.</i></p> <p><i>The group created an Action Plan for everyone to help collect data and assigned a team member who has experience with data to take charge of organizing the data for presentation to the group at the next meeting.</i></p>
<p><b>Module 3: Review Indicator Data and Select Priorities through an Interactive Data Analysis Gallery Walk</b></p>	<p>Large group discussion of goals</p> <p><i>Based on the data collected and presented, the group reviewed the data. They noted high number of homeless youth; lower number of substance use and most of the arrests appear to be related to non-violent crimes. Group was surprised to see that many of the youth did not report alcohol use, there were several DUI arrests.</i></p> <p><i>Group was interested in substance use data and began to question why the numbers were different than they thought. The increase in marijuana use is rising across the state – not necessarily a local problem. However, group is unsure whether the data from Healthy Kids Survey is accurate and wonder if there needs to be better screening specific to youth who are arrested. Luckily, one team member was able to provide the SAS screens from the last year specific to kids who were detained on the spot. Among those arrested, the numbers for alcohol and marijuana are much higher. Based on the data and the risk factors for involvement in the juvenile justice system (their original goal), the identified three priorities: substance use, mental health, and family involvement.</i></p>

Actions/Activities	Description
<b>Module 3: Identify and Collect Resource Data</b>	<p>The group assigned their local 311 database administrator to coordinate the effort to collect information on resources related to substance abuse, mental health, and family involvement available in the community. Four other organizational representatives who provide direct services related to their priority areas also offered to help collect data, and a parent agreed to be responsible to reach out to a policy advocacy organization to get information about their work around policies related to youth and families. Everyone returned their data to the 311 database administrator, who organized it to present to the group.</p>
<b>Module 3: Analyze Resource Data and Identify Priority Gaps</b>	<p>Group reviewed list of resources. There were a good number of services for both mental health and family involvement in the community, although it looked like there were some barriers for the people most in need to access the services. However, current substance abuse providers in town appeared to be lacking. It was determined that there are only two options – local AA group and an out of town residential treatment program that serves youth from the area. Group discussed need for more options for youth who do not need residential placement for substance abuse, especially for youth who are not yet addicted, both those who have begun to experiment with substance use and youth before they start experimenting.</p> <p>The group discussed the readiness of their community for different options, their resources, and where they could have the biggest impact. Three of the group members worked for organizations that were identified as potentially having barriers, and two indicated that their organizations were actively working internally to reduce or eliminate those barriers, and the third agreed to take the message back to his organization to see if they would work on the same. Therefore, the group determined that the best use of their resources would be to address the need for additional evidence based strategies to address youth substance abuse in their community.</p>
<b>Module 4: Search the Databases for Evidence-based Programs and Practices (strategies)</b>	<p>The group broke into smaller work groups and researched find information related to substance use programs using a wide variety of the clearinghouses and registries. They found two potential options:</p> <ol style="list-style-type: none"> <li>1. A program specific to those youth arrested for DUI. Findings indicate a decrease in DUI arrests, but no change in substance use.</li> <li>2. An online treatment program based on CBT activities. Rates for both marijuana and alcohol were lower at the end of the treatment.</li> <li>3. An in-school prevention program that is shown to prevent substance use for indicated populations (youth who have been experimenting with substances but are not addicted)</li> </ol>
<b>Module 4: Compare EBPP Options and Select EBPP</b>	<p>Group worked through the goodness of fit worksheets and determined the DUI program was too costly for them and they do not have buy-in from the schools to conduct the in-school program at this time. However, the online program is free and it looks like it is a good fit for the youth who would be accessing it. There will be a need to train clinicians and work with the local mental health center to support it, and the group determined that they have the resources and the buy-in for that. The group selected the online program for implementation with their resources now, and noted that they would like to work to build buy-in with the schools for the prevention program in the future.</p>



Actions/Activities	Description
<b>Module 5: Implement EBPP</b>	<p><i>The group recruited and trained the clinicians, and worked with the local mental health organization to provide the support needed. The group trained all probation officers on the new program. In piloting the program to determine its effectiveness, half of the youth on probation who showed indications of alcohol or marijuana use were referred to the new online program, and the other half received referrals to the local AA group (which was the current practice).</i></p>
<b>Module 5: Evaluate EBPP</b>	<p><i>Group developed an evaluation plan to screen for substance use at probation intake and then at the end of their probation and will track the rate of DUIs for these youth for 1 year following completion of the online program. The group will single out those youth who completed the new online program to determine if they had any different outcomes than the youth who attended the AA group, and the youth who received a referral but did not complete or participate in either intervention.</i></p>
<b>Next Steps</b>	<p><i>Group would like to continue to meet to further discuss implementation, fidelity and evaluation results as the program moves forward. Once the online program is sustained, the group will move on to building buy-in and readiness with the schools to implement prevention programming.</i></p>

# Organizing your EBPP Planning Team

In order for your Planning Team to be most successful in this process, there are five important roles for stakeholders to take on the EBPP Planning Team, including four leadership roles and the all-important role of Member. People joining your EBPP Planning Team may self-select for these roles, or roles may be offered to certain people based on their skills, role in the community, time available, or general fit. If possible, you may want to consider paying or providing incentives for people to participate on the EBPP planning team or to take on leadership roles if they are not compensated through their professional job, such as youth or community members, both for their time at meetings and their work in-between meetings. You may also consider hiring an outside Facilitator, who can also serve as the Convener, if you have the resources.

## Member

The Member's role is to be committed to the process and to commit resources, especially their time, both in and out of the regular meetings to keep the process moving forward. The tasks asked of the members change throughout the process, but it is important for every member to support the goal of the team by committing to and completing tasks outside of attending meetings throughout the process. The Member's role includes:

- Being an active member of the EBPP team and to actively voice your opinions, thoughts, ideas and knowledge during meetings and throughout this process
- Regularly attending scheduled meetings for both the EBPP Planning Team and any work groups or subcommittees the member joins
- Taking on the responsibility of tasks that are well suited to the Member's role, skills, and access to resources and completing those tasks within the assigned timeframe whenever possible
- Arriving to each meeting on-time and prepared to participate fully by reading the agenda and any other requested materials prior to arrival.

## Facilitator

The facilitator's role is to understand the EBPP process and to guide the Planning Team through the process. The Facilitator's role includes:

- Guiding the Planning Team through the EBPP process
- Creating space for all voices at the table to be fully heard during every meeting and throughout the process, especially voices that are often silenced
- Ensuring every Member is aware of and in full agreement of their roles as Members
- Maintaining a positive working relationship with every Member
- Coordinating with the Convener, the Recorder, and the Accountability Tracker to synchronize all activities
- Setting agendas for each meeting and submitting to the Convener to be distributed
- Preparing all materials and documents necessary for each meeting
- Facilitating the conversations and activities during each meeting.

### **Notes for the Facilitator:**

*As the Facilitator, it is your role to remain as neutral as possible and facilitate the group in coming to decisions without influencing the outcome. Remaining neutral and being responsible for facilitating activities makes it challenging for someone in this role to participate in the process in the same ways others in the group can participate.*

## Convener

The Convener's role is to ensure the logistics for each meeting are taken care of and is the primary communicator with the group. The Convener's role includes:

- Arranging meeting times and dates that work for everyone in the group (as best as possible)
- Reserving meeting venues and ensuring the venue is accessible and meets the needs of everyone in the group
- Arranging for food/beverage, translation, childcare, accommodations, or other needs to ensure everyone can fully participate in the meeting
- Sending out calendar invites, agendas, meeting notes, accountability reminders, additional materials, etc. to all attendees prior to the meeting
- Maintaining an updated list of all planning team members and current contact information

## Recorder

The Recorder's role is to document the important pieces of the process for the EBPP Planning team. This role includes:

- Making meeting notes, especially in regards to decisions made at each meeting
- Managing the creation and sharing of documents and files on the platform selected by the group (DropBox, Google Drive, etc.) related to the EBPP process
- Maintaining an organized file of all EBPP documents, including agendas, meeting notes, spreadsheets, historical and current membership lists, accountability trackers, etc.

## Accountability Tracker

The Accountability Tracker's role is to track who has agreed to do what by when. The Accountability Tracker's role includes:

- Maintaining up-to-date documentation of tasks to be accomplished, who has agreed to accomplish the task, and a due date for completion
- Composing Action Item reminders to be sent with meeting invitations and submitting to the Convener in a timely manner (the Convener will include these with the meeting reminders, agenda, etc. prior to each meeting)
- During each meeting, reviewing the accountability tracker and celebrating who has accomplished their tasks, reminding members of up-coming tasks, and rescheduling uncompleted tasks

### **Notes for the Accountability Tracker**

*If someone has run into a barrier when attempting to complete a task, the Accountability Tracker or the Facilitator can facilitate a conversation with the individual or for the group to help problem solve ways around the barrier or decide if the task is absolutely necessary to be completed before the group can move on.*

*The Accountability Tracker is NOT the accountability "enforcer". This role is NOT to embarrass, shame, punish, or otherwise call out a missed deadline or an incomplete task in a negative or punitive fashion, especially during a group meeting. If need be, the Accountability Tracker may privately reach out to a team member who is having difficulty following-through with tasks and offer to help problem solve any barriers they have run into or seek to find another team member who can take on the task. This communication should be done in a supportive and nonjudgmental manner.*

# Sample Meeting Agenda for Initial EBPP Team Meeting

Agenda Items	Facilitator Notes
<b>Introductions</b>	<p>Members introduce themselves, their role in the community, and why they have joined the group</p> <p>You may want to create a meaningful icebreaker or activity to get the group interacting and getting to know one another</p>
<b>Overview Meeting Objectives</b>	<p>The primary objective of this meeting is to lay the foundations for success for your group, including a shared goal, group agreements, commitments, role, and logistics</p> <p>Review meeting agenda and speak briefly to the goal for each agenda item</p>
<b>Purpose &amp; Process Overview and Shared Goal Creation</b>	<p>Overview purpose and the entire EBPP process with the group using the visual provided to give everyone a sense of the shared goal of the group and an understanding of the process you will be going through</p> <p>In this step, be sure to work with your team to come up with a shared, and broad goal for your work together. For example, you may decide you want to identify and eliminate challenges youth face in your community in relation to the juvenile justice system. This should be broad and should focus the group on a common goal. Note that your goal may change or shift through this process.</p>
<b>Stakeholder Identification</b>	<p>Based on your shared goal, identify if there are any additional stakeholders, populations, or individuals who should be included in the group</p> <p>If so, create an Action Plan (using the template provided) for outreach to the identified people</p>
<b>Group Agreements, Expectations and Commitments</b>	<p><b>Norms:</b> Establish group agreements for how the group will interact. You may elect to let the group come up with all the norms, or you might want to bring a short list of suggestions.</p> <p><b>Expectations:</b> In addition to norms, speak about the expectation that everyone in the group will commit resources (time and/or financial or organizational resources) to this process and come to a group agreement.</p> <p><b>Commitments:</b> Ask the group members for commitments to both follow through on tasks assigned within the agreed upon timeframe, or ask for support; and attend all meetings (with the exception of emergencies or illness) in a timely fashion. Ask if there are any additional commitments the group feels they need.</p>

Agenda Items	Facilitator Notes
<b>Role Assignment</b>	<p>Using 'Organizing your EBPP Planning Team' as guidance, work with the group to assign the necessary roles to specific group members based on skills, willingness, and availability. Note that you may wish to identify who in your group will likely be doing most of the data research and organization (based on skills and access) and avoid assigning the group roles to these individuals as they will likely be contributing a significant amount of work throughout the process.</p> <p>Note: If you created an Action Plan in the stakeholder identification agenda item, you will now pass that on to the Accountability Tracker.</p>
<b>Logistics</b>	<p>Determine the following logistics:</p> <ol style="list-style-type: none"> <li>1. On-going meeting schedule</li> <li>2. Communication platform (for messages that are to go to the whole group)</li> <li>3. Preferred shared document platform (i.e. Google Drive, Dropbox, etc.) to ensure everyone has access. [Note: If members of your group are not familiar with the platform, partner them with someone who is for a tutorial)</li> <li>4. Any other logistics that are important for your group.</li> </ol>
<b>Closing</b>	<p>Review next meeting time and brief overview of next meeting process (Module 2: Data identification)</p> <p>Close on a positive note.</p>