Phase 5 User Guide:
Implement and Evaluate the Action Plan
Evidence2Success

THE ANNIE E. CASEY FOUNDATION
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Introduction

Evidence2Success is a framework for improving well-being and healthy development in children and youth. It brings together public systems, schools, neighborhoods and elected officials to invest in programs that are tested and effective for improving outcomes. Local data, system practice changes and strategic financing help communities implementing Evidence2Success to invest more effectively in their young people by increasing the community’s focus on prevention and early intervention.

This user guide is for Evidence2Success coordinators who are leading their community boards through the work of Phase 5, which is to put in place the tested, effective programs your coalition selected to address the priorities identified in Phase 3. Several streams of work come together in Phase 5 to make this possible: the work with data leading to the identification of priorities and the selection of programs, the finance work and the systems capacity building work. These strands of work are illustrated in the diagram below.

Taken together, four plans guide coalitions of public systems and communities in working together to implement their chosen programs with fidelity, to finance the programs and to create an enabling environment in the agencies where they are implemented. Shown on the right side of the diagram, these plans are living documents. Coalitions revisit their planning documents.

Preparing for Phase 5: A Brief Look Back Backward and Forward
regularly at designated points in the process and at other points when it might seem necessary. This flexibility makes the Evidence2Success framework more responsive to changing conditions.

Overview of Phase 5

Phase 5 is called **Implement and Evaluate the Action Plan.** The goals of the phase are to do the following:

- Install and fully implement selected programs and policies in partner neighborhoods
- Measure results and track progress to ensure improvements are achieved by collecting program data and by repeating the Youth Experience Survey every two years
- Develop long-term financing strategies and make plans for maintaining appropriate infrastructure
- Identify and plan for policies and procedures that support broader adoption and quality implementation of tested, effective programs, both at the level of the implementing organization and within relevant city and state systems
- Implement financing strategies
- Through observations and program data, identify lessons and improve quality of program and policy implementation

Unlike other phases, Phase 5 has no defined endpoint. After the selected programs are in place and operating, the Youth Experience Survey (YES) (administered every two years) shows whether progress is being made at the community level in the priority outcomes, risk factors and protective factors. If progress is not sufficient, course corrections can be made. If goals are being met, it may be time to focus on a new set of priorities or to bring new communities into the effort. These changes will be reflected in the planning documents, and a new cycle begins with a return to the work of Phase 3: identifying or affirming priorities in YES data, selecting programs and installing and implementing them. For this reason, the Phase 5 milestones and benchmarks contain a second part, called **Phase 5 Continues: A New Way of Doing Business.** This is reflected in the diagram below by the arrow representing the repeating cycles.
PHASE 5 AT A GLANCE

Overview of Major Work Efforts in Phase 5

<table>
<thead>
<tr>
<th>Oversight and Coordination</th>
<th>Programs</th>
<th>Finance</th>
<th>Who?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconfigure Workgroups</td>
<td>Plan for and Implement Tested, Effective Programs</td>
<td>Implement Strategic Financing Plan</td>
<td>Finance Workgroup</td>
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<tr>
<td>Create Enabling Environment for Programs</td>
<td>Plan to Evaluate and Evaluate Programs</td>
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<td>Community Board</td>
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<td></td>
<td>Prepare System Staff and Supervisors</td>
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<td>Implementation Workgroup, Data Partner</td>
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<td></td>
<td>Train Observers</td>
<td></td>
<td>Participating Systems through Capacity Building</td>
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<tr>
<td>Maintain Community Board</td>
<td>Evaluate Programs</td>
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<td>Evaluation Workgroup, Data Partner</td>
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<td></td>
<td>Evaluate Evidence2Success Effort</td>
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<td>Coordinator, Data Partner Through Monitoring Implementation and Outcomes Workshop</td>
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<td></td>
<td>Celebrate Successes</td>
<td></td>
<td>Coordinator Through Observation Workshop</td>
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Make Course Corrections As Needed and Repeat
USING THIS GUIDE

As you know from prior phases, workshop materials provided on the Evidence2Success website include original material and web presentations and other documents provided by Communities That Care (CTC). Handouts and worksheets are used in the workshop and afterwards to help your community board complete the work begun in the workshop. The purpose of this guide is to help you (the Evidence2Success coordinator and workshop facilitator) find and integrate the materials.

As in previous phases, you will rely heavily on the CTC facilitator guides. The guides, handouts and worksheets can be found under password protection on the Evidence2Success section of the Annie E. Casey Foundation’s website: http://cms.aecf.org/evidence2success/. Be sure to read all materials thoroughly and watch the videos. Walk through each workshop with your coach as part of your preparation.

This user guide alerts you to areas where the Evidence2Success workshop differs from the CTC version. These are called out in the content matrices. As for previous phases, a content matrix is provided for each workshop (with one or two exceptions). Typically these matrices point out differences involving Evidence2Success-specific terminology or handouts. In most cases only minor adjustments are required.

The CTC facilitator guides contain detailed instructions on the community work needed in advance of each session, logistics, room setup and preparation for each module and each workshop as a whole. This user guide does not duplicate those instructions; it only points out instances where deviations occur.

ORIENTING NEW PARTICIPANTS

If your community board does not have enough members with expertise in all aspects of program installation or implementation, this would be a good time to recruit new members to fill those gaps. Some of your community board’s members may not be as interested in program implementation as they were in the planning work beforehand. They may decide to step off the board at this time. Your board maintenance workgroup should continually monitor members’ interest and make plans for recruiting new members when needed. Keep your Evidence2Success coach informed about upcoming changes in board membership.

If new members will be joining the effort for this phase, it is appropriate to hold a makeup session before this workshop to fill in new participants’ knowledge of the initiative. This includes members of the finance workgroup or other workgroups. The Phase 3 user guide contains a list of modules from the initial community board orientation in Phase 2 that can be used for this purpose. We also recommend printing the roadmap slide from that guide as a discussion aid for talking through the work of Phase 3 and the work to be covered in Phase 4. You should also provide a link to the

PREPARING FOR THE WORKSHOPS

Be sure to read the Facilitator Guide Introduction as well the appropriate CTC facilitator guide for each workshop. Prepare an agenda for each workshop. Include the objectives on the agenda.

When you see or hear references to “health and behavior problems,” recall that this phrase refers to outcomes. References to the CTC youth survey should be understood as referring to the Evidence2Success Youth Experience Survey (or the SHARP Survey in Utah). For more information on terminology differences between Evidence2Success and CTC, see the previous user guides and page 7 above.

If the workgroup has established ground rules or has adopted the community board’s ground rules, then use them instead of the ones in the facilitator guide and the CTC web-streamed presentation. Write your group’s ground rules on a flipchart to bring to the meeting.

Starting with page 14, the remainder of this guide is divided into sections that provide an overview and content matrix for each workshop. As with previous phases, this information is intended to supplement the facilitator guides available for each workshop online. Contact your coach if you need help accessing the online Evidence2Success materials.

Phase 5 Terminology

As in previous phases, Evidence2Success uses the online operating system Communities That Care PLUS (CTC) as well as a suite of strategic finance materials and system capacity building materials that were created specifically for Evidence2Success. The same terminology differences noted in earlier phases also apply here. The only new difference between CTC and Evidence2Success involves the use of the term program implementation. CTC uses the word implementation to refer to the work of putting programs in place and then maintaining them. Evidence2Success, in contrast, draws a distinction between program installation and implementation.

Program installation begins once a decision is made to adopt a new program. The installation stage involves securing resources necessary to effectively implement the program and preparing staff for new practices. Examples of installation activities include the following:

- Developing communication pathways between participating agencies and feedback loops
• Ensuring financial and human resources are in place
• Developing practitioner competency via training and coaching
• Finding or establishing performance assessment tools
• Locating office space and ensuring access to materials, equipment, and technology

**Implementation**, in contrast, is defined as a specified set of activities designed to deliver a program to the target audience. Implementation continues after installation is complete, and may be divided into initial vs. full implementation as new programs are adopted. These distinctions are based on the work of the National Implementation Research Network (NIRN). A simplified version of the NIRN model of program implementation is shown in the figure below. Full implementation is considered to be achieved when 50 percent or more of the intended team are using the program with fidelity and good results. Full implementation is difficult to achieve without supports, so implementation teams or workgroups are vital during the initial implementation stage.

One other distinction needs to be drawn in Phase 5. Evidence2Success has its own set of outcomes, which are measured (along with risk and protective factors) by the Youth Experience Survey. A similar survey, such as SHARP, can be used. The Evidence2Success outcomes are listed in the handout Evidence2Success Outcomes, Risk Factors and Protective Factors, which you are already familiar with from the Phase 2 materials. (To refresh your memory, see the document index on the Evidence2Success website.) These are the community-level outcomes shown in the Outcome-Focused Planning slide from Phases 3 and 4 (reproduced below).

Please note, however, that each tested, effective program has its own set of outcomes. These are the program-level outcomes in the diagram above. They are defined in the first video in the Evaluation Planning Workshop. In videos and printed materials, be sure you understand which outcomes are being referred to. This will usually be clear from the context. If in doubt, consult your coach.

**Enabling Contexts within Provider Organizations and Public Systems**

NIRN is an influential network in the field of program implementation and implementation. NIRN characterizes implementation as a multiplication problem dependent on an effective environment (“enabling context”) for the tested, effective programs, as well as fidelity to program specifications. The idea is that, if any of these elements is lacking, the desired results will not be achieved—the same result as multiplying by zero. This is shown in the figure above. As you have seen in previous phases, Evidence2Success helps communities and systems maintain fidelity in their programs and build and sustain enabling contexts. These efforts intensify in Phase 5. First, as you work with the community board and workgroups to plan for high-quality delivery of
programs by service providers or schools, you’ll encourage those providers to consider the extent
to which their organizations reflect enabling contexts, or hospitable hosts, for those programs and
more broadly for other programs and services they deliver. Likewise, you’ll want to encourage
reflection among the public systems (education, child welfare, etc.) that fund and support service
providers and schools. To what extent do those public systems reflect enabling contexts to
support tested, effective programs, and what capacities within those systems could be enhanced
to make them more conducive to the use of tested effective programs?

Race Equity in Evidence2Success

In recent years, the United States has experienced a shift in attention to racial equity, from implicit
to explicit consideration. When we refer to race in Evidence2Success, the term should be
understood as referring to race and ethnicity. The term equity should be understood as referring
to equity and inclusion.

Racial and cultural factors undergird many social problems in the United States. Structural racism
(race-based inequalities embedded in public systems, institutions, ideologies and our social
fabric) often works unseen to perpetuate and exacerbate inequities. As a nation, we are in the
early stages of developing an awareness of structural racism and its effects. Before we go into
the specifics of Phase 5, we’d like to invite you to think about how your site’s Evidence2Success
initiative can improve race equity for your community’s children.

As you know, the Evidence2Success framework (including Communities That Care) was built to
improve outcomes for all the children in a community. Even when community-wide outcomes
improve, however, it is also important to examine whether disparities widen or remain constant.
Racial equity requires the following:

- Applying system resources differently, taking into account differences in the level of need (a
  hallmark of the Evidence2Success framework)
- Removing barriers for individuals, families and communities that face higher obstacles than
  others
- Treating individuals who are in similar situations, families or communities in similar ways

Racial equity is mission based and results focused. Evidence2Success was designed with this
lens. The Annie E. Casey Foundation has made equity a major focus of all its efforts. Having a
local focus on equity is one of the criteria for selection as an Evidence2Success site. The
framework contains built-in opportunities to further these efforts through community engagement
and data analysis. The Foundation hopes the sites will continue to deepen their dedication to this
work. To that end, we are providing tools to foster analysis and dialogue.
First, the Foundation provides a training through the Race Matters Institute. If you would like to learn more, contact your Evidence2Success project manager or senior associate. This training provides three helpful tools. The first is a vocabulary and a set of communications tips to keep stakeholders at the table for frank and productive discussions. The second is a framework for conducting deeper data analyses and identifying effective ways to intervene.

The third tool from this training can be applied immediately, and we encourage you to start using it. It is called the Racial Equity Impact Analysis. Its five questions can be applied to any policy, practice or decision. Here they are, phrased for use in decision making about the programs being implemented:

- Are all racial/ethnic groups who are affected by the decision at the table?
- How will the proposed decision affect each group?
- How will the proposed decision be perceived by each group?
- Does the decision worsen or ignore existing racial or ethnic disparities?
- Based on responses to these questions, what revisions are needed to the program decision under discussion?

Careful use of the questions in this tool provides an extra level of insurance that the interventions will be implemented in a manner likely to close gaps in race equity. Specific suggestions for areas to consider are included in the workshop sections starting on page 14. Work with your coach to ensure the equity lens is incorporated throughout your work.

The Foundation’s website provides a wealth of resources for improving equity. We hope you will take advantage of them. Go to http://www.aecf.org/work/equity-and-inclusion/ and scroll down to Our Work in Equity and Inclusion. At the bottom of the page, you can also subscribe to the Foundation’s Race Equity and Inclusion Mailing List. Use the site’s search functionality for more specific searches.

The Finance Work of Phase 5

The finance work of Phase 4 concludes with a set of meetings leading to the development of a strategic financing plan for supporting your community’s tested, effective programs. Next, the finance workgroup turns its attention to the ongoing work of implementing, monitoring and updating their finance plan. The Phase 5 finance work is guided by two technical assistance manuals. The first is the Guide to Monitoring, Implementing and Updating Your Finance Plan. This guide helps the finance coordinator to keep the workgroup membership engaged in
the ongoing finance work, which includes reviewing key fiscal reports, developing collaborative funding proposals and updating the finance plan.

The second manual is the **Guide to Developing and Sustaining Your Infrastructure**. This guide covers the funding of operational and programmatic infrastructure. It should be noted that the identification of infrastructure needs requires substantial involvement from the program implementation workgroup and possibly the community board.

Finance technical assistance continues as your community enters Phase 5, although this phase does not include finance workshops. Instead, the finance coach helps the finance lead organize workgroup meetings and proceedings using the guides’ recommendations and procedures. As always, Evidence2Success coordinators work closely with finance leads and their respective coaches to ensure that both strands of work proceed in synch. Frequent, regular exchanges of information are necessary. The program implementation workshop in particular yields crucial information needed for finance planning, such as enrollment projections that are needed for creating budgets.

**The Role of the Data Partner**

During the initial implementation of Evidence2Success, the Foundation provides partial funding and support for one or more data partners to act as a consultant on relevant administrative data and other data sources, to spearhead data collection for the programs being implemented and to participate on the evaluation workgroup. The data partner might also assist with facilitating several of the workshops in Phase 5:

- The Implementation Planning Workshop
- The Monitoring Program Implementation and Outcomes Workshop

For an overview of this role, see the fact sheet **The Role of the Data Partner**. This handout is intended to help you introduce the data partner’s role to the community board and the evaluation workgroup. For a detailed explanation of the role, see the document **Evidence2Success Data Partner Role and Responsibilities**. This document can be adapted to aid in selecting one or more entities for the role. Communities have some flexibility in how to deploy their data partner. Consider data-related needs and the participating systems’ existing capacities when apportioning responsibilities.

Data-related capacities are crucial to the success of Evidence2Success. The initial data partner funding should be considered seed money for integrating the data partner’s functions into the local Evidence2Success infrastructure. The finance group and the community board will lead
efforts to secure stable funding for the data partner functions (which are considered part of the necessary infrastructure for Evidence2Success).

The data belong, of course, to the community as a whole, since all workgroups and participating agencies need to know data highlights in order to act on them. The data partner needs to remain sensitive to issues of access and capacity.

A Look at the Workgroups and Workshops of Phase 5

Many different constituencies participate in the Evidence2Success effort. In a typical community, these include leaders and staff from the school district and child- or family-serving systems, service providers and community members. All have a stake in the success of the programs. The Phase 5 workshops prepare members of each constituency for involvement in program installation, implementation or financing — or evaluation of programs or the overall effort.

Phase 5 contains more workshops or meetings than the previous phases. Some of these workshops may sound similar, but the focus differs depending on the audience. The workshops are listed sequentially in the table below (although the sequence may be adapted to meet local needs), along with each workshop’s audience and purpose.

<table>
<thead>
<tr>
<th>Workshop</th>
<th>Audience</th>
<th>Purpose</th>
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</thead>
<tbody>
<tr>
<td>Organizing for Phase 5</td>
<td>Full community board</td>
<td>• Review Phase 5 goals; Determine if any reorganization of workgroups is required in Phase 5 for effective coalition functioning and implementation of the Community Action Plan</td>
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<tr>
<td></td>
<td>Time: Two hours</td>
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</table>
| Implementation Planning Workshop       | Workgroup overseeing program implementation (probably including the data partner); relevant agency directors and supervisors, depending on programs being implemented. | • Create plans for high quality, high fidelity implementation of Action Plan programs  
• Assign follow up, if needed, to finalize budgets and develop Memoranda of Understanding |
<p>|                                       | Time: Seven hours                                                        |                                                                         |</p>
<table>
<thead>
<tr>
<th>Workshop</th>
<th>Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Planning Workshop</td>
<td>Workgroup overseeing monitoring and evaluation of Action Plan and programs (the workgroup includes the local data partner, who can be co-facilitator of this workshop)</td>
<td>• Decide on information to send to the Evaluation Planning Workshop&lt;br&gt;• Create a plan to monitor Action Plan programs&lt;br&gt;• Summarize evaluation plan and associated costs for group(s) working to finalize Action Plan budget and develop MOUs (if needed)&lt;br&gt;• Provide evaluation plans to appropriate workgroup(s)</td>
</tr>
<tr>
<td>Monitoring Program Implementation and Outcomes Workshop</td>
<td>Staff and supervisors of Action Plan programs; workgroup overseeing implementation (the workgroup probably includes the local data partner, who can be a co-facilitator of this workshop)</td>
<td>• Train frontline staff to effectively monitor program delivery&lt;br&gt;• Emphasize importance of high-fidelity implementation&lt;br&gt;• Emphasize importance of monitoring quality, fidelity and participant outcomes</td>
</tr>
<tr>
<td>Observation Workshop</td>
<td>Individuals who will observe program delivery</td>
<td>• Train volunteers how to observe program sessions, including observation protocol and forms</td>
</tr>
<tr>
<td>Milestones and Benchmarks Review Workshop</td>
<td>Full community board</td>
<td>• Review the Milestones and Benchmarks as a coalition&lt;br&gt;• Determine if the coalition has benchmarks needing attention and plan to address them</td>
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Notice that the community board and workgroups are not the only audiences for these workshops. Other participants include agency directors and program supervisors; service
provider staff and supervisors; and community members and staff who agree to monitor program implementation. While the trainings in Phase 5, like prior phases, primarily serve the purpose of preparing particular workgroups of individuals to carry out specific tasks, they also provide knowledge, skills and experience. This increases local capacity to support the new way of doing business. In considering who should participate in each training, the coordinator will have to balance the immediate and practical needs of accomplishing the task at hand with the longer-term goals of building community capacity in each aspect of the Evidence2Success process. Questions about striking an appropriate balance can be discussed with your coach.

Also note the audiences for the Implementation Planning Workshop and the Evaluation Planning Workshop: “the workgroup overseeing program implementation” and “the workgroup overseeing monitoring and evaluation of the Action Plan and programs,” respectively. These probably refer to the program implementation workgroup and the evaluation workgroup, but remember that community boards can structure and rename the workgroups as they see fit, depending on current needs and available resources. Some communities form one workgroup to take on both functions; others keep them separate. Some communities decide to form several implementation teams within their workgroup, with a separate team to oversee installation, planning and evaluation for each program. One of the tasks of the Organizing for Phase 5 Workshop is to decide on the structure best suited to your community.

Now that we have introduced the workshops of Phase 5, this guide will cover each one in turn. As in the previous phases, the primary reference for each workshop is the CTC facilitator guide for that workshop. This user guide shows where to deviate from the CTC facilitator guides. You will find fewer deviations in this phase than in previous phases.
The Organizing for Phase 5 Workshop in Brief

Because the work of Phase 5 differs substantially from the planning work of previous phases, the community board should consider its workgroup structure before undertaking the work in Phase 5. One goal of the Organizing for Phase 5 Workshop is to help the board determine whether any reorganizing is necessary to implement the community action plan and to continue functioning effectively. This workshop is attended by the full community board (including new members, if any). The workshop requires a near-final draft of the community action plan.

One race equity question to ask here is whether all the groups affected by programming decisions are still represented on the community board or workgroups. Care was taken during Phases 1 and 2 to make sure the community board reflected the larger community, but some of the earlier members may have left the effort or may feel they no longer have role to play so a review at this point in the process can be helpful to ensuring full community representation and participation. All members, including the board maintenance workgroup, should work to ensure broad representation is maintained.

OBJECTIVES AND TIMING

This workshop is delivered in one two-hour session. As a result of this workshop, participants will:

- agree on the organizational structure for Phase 5 (creating new workgroups as needed and developing membership rosters); and
- create work plans and a timeline for Phase 5

The workshop contains two modules:

Module 1: Overview

Module 2: Workgroup Roles

MILESTONES AND BENCHMARKS ADDRESSED IN THIS WORKSHOP

Milestone 4.9. The community is ready to move to Phase 5: Implement and Evaluate the Action Plan.

Benchmark 4.9.2 Identify and secure the resources needed for Phase 5.
Content Matrix: Organizing for Phase 5 Workshop

The table below shows the materials for the Organizing for Phase 5 Workshop. All CTC materials are marked. The fourth column ("To Note") shows adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. As the facilitator of this workshop, you will need to integrate the materials as seamlessly as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach. Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

<table>
<thead>
<tr>
<th>Module</th>
<th>Time</th>
<th>Materials</th>
<th>To Note</th>
<th>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1: Overview (CTC)</td>
<td>20 min</td>
<td>Use the agenda you created. CTC Module 1 Use the Evidence2Success handout Phase 5 Workshops rather than the CTC version.</td>
<td>Remind the group that we’re combining materials from both Evidence2Success and CTC in this workshop. References to the funding workgroup should be understood as referring to the finance workgroup. During the updates, point out the key leaders in the room if any are present.</td>
<td>If community board leaders, such as the chair, are attending the workshop, they may be invited to speak and give an update on progress. Invite them far enough ahead so that they have time to prepare and provide suggested talking points. In the first video, for the five action steps, emphasize programs over policies, but tell the group that the systems capacity building effort is going to consider how to improve...</td>
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<tr>
<td>Module</td>
<td>Time</td>
<td>Materials</td>
<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<td>policies to better support tested, effective programs. Point out that the finance workgroup is handling the funding but will need to work closely with the implementation workgroup to do so.</td>
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<tr>
<td>2. Workgroup Roles (CTC)</td>
<td>100 min</td>
<td>CTC Module 2</td>
<td>The CTC materials provide examples of the flexible ways the workgroups can be configured. One additional option is to create implementation teams. An implementation team is similar to the implementation workgroup, but a different implementation team is formed for each program, whereas the implementation workgroup oversees the entire portfolio of programs. This approach has been used successfully in Evidence2Success and CTC communities. An implementation team can also take on the evaluation for its program, but not</td>
<td>The data partner selection process should be underway by Phase 5. If possible, the data partner should be represented at this meeting in order to participate in workgroup formation. The community board should already be familiar with the data partner’s role and the functions to be filled. If the data partner has not been selected yet, be sure the functions are enumerated in the appropriate workgroup plans.</td>
</tr>
<tr>
<td>Module</td>
<td>Time</td>
<td>Materials</td>
<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<td>the overall evaluation of the initiative. Talk to your coach about how this might look in your community and, if needed, how to incorporate this discussion into the workshop. Slide 2 shows the typical organizational structure. Point out differences if applicable in your community. In the Workgroup Roles video, workgroups may change their names or reconfigure to ensure all the tasks are covered. This is made clear in the subsequent video, but you might want to mention this if participants have questions.</td>
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The Implementation Planning Workshop in Brief

This workshop is about planning for the installation and initial implementation of programs. This workshop is for the workgroup overseeing program implementation and school or agency directors and supervisors who will oversee the programs. The goal is to develop plans that enable the programs to be implemented with fidelity to their specifications. The “workgroup” may actually be a set of program implementation teams, each for a different program. See pages 14–15 for a discussion of implementation teams.

Because much of the planning depends on the program, this workshop treats the subject rather broadly, with attention to themes and principles. The approach is methodical and adaptable. In the content matrix below, the Evidence2Success materials include a handout on vital information to request from program developers. After the workshop, coaching helps in developing a detailed program implementation plan.

You will need the Implementation Goal Worksheets that were created for the Community Action Plan in Phase 4. You will also need a draft of the strategic finance plan if it is available.

Consider the decisions made in this workshop through the prism of the Race Equity Impact Analysis questions from page 10:

- Are all racial and ethnic groups who are affected by the decision at the table?
- How will the proposed decision affect each group?
- How will the proposed decision be perceived by each group?
- Does the decision worsen or ignore existing racial or ethnic disparities?
- Based on responses to these questions, what revisions are needed to the program decision under discussion?

OBJECTIVES AND TIMING

This workshop is delivered in one 4.5-hour session, including breaks. As a result of this workshop, participants will be able to develop implementation plans for action plan programs and policies that:

- address the five fidelity factors;
- use keys for successful implementation; and
- provide adequate information or budgets for the finance workgroup to use in planning.
The workshop contains three modules:

Module 1: Overview

Module 2: Achieving Fidelity

Module 3: Keys to Successful Implementation

MILESTONES AND BENCHMARKS ADDRESSED IN THIS WORKSHOP

Milestone 5.1 Develop Implementation Plans for Each Program Selected. (This training could take place before the end of Phase 4.)

   Benchmarks

   5.1.1 Hold the Implementation Planning Workshop.

   5.1.2. Identify training and/or technical assistance needed for each new program.

   5.1.3 Refine implementation plans from the Community Planning Workshop to ensure fidelity factors and keys to successful implementation are addressed.

   5.1.4 Involve youth in implementation planning as appropriate.
The table below shows the materials for each session of the Implementation Planning Workshop. The fourth column ("To Note") shows adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. As the facilitator of this workshop, you will need to integrate the materials in as seamless a manner as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach.

Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

<table>
<thead>
<tr>
<th>Session 1 Module</th>
<th>Time</th>
<th>Materials</th>
<th>To Note</th>
<th>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</th>
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</thead>
<tbody>
<tr>
<td>1: Overview (CTC)</td>
<td>40 min</td>
<td>Use the agenda you created. CTC Module 1</td>
<td>Remind the group that we’re combining materials from both Evidence2Success and CTC in this workshop. The video <em>Tested and Effective Programs</em> has been used in several modules in previous trainings. We recommend using it for review, especially if the workgroup has new members.</td>
<td>If community board members are attending the workshop, they may be invited to speak and give an update on progress. Invite them far enough ahead so that they have time to prepare and provide suggested talking points.</td>
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</tbody>
</table>
### 2. Achieving Fidelity (CTC)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Module</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Systems Capacity Building: Fidelity in an Enabling Environment</strong> (slide to be printed as a handout)</td>
<td>60 min</td>
<td>CTC Module 2</td>
<td>Right before the break, after the last slide (Summary: Adaptation and Fidelity), point out that fidelity is not the only consideration. The community board has already been introduced to the system capacity-building effort and the importance of an enabling environment for the tested, effective programs. As a reminder, this is shown on the last handout listed, which shows the context in which fidelity is most effective in program implementation. You might want to use a slide corresponding to the handout Systems Capacity Building: Fidelity in an Enabling Environment. If so, have it cued and ready for use.</td>
</tr>
</tbody>
</table>

### 3. Keys to Successful Implementation (CTC)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Module</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scoring Rubric for Implementer Selection</strong> (Introduce this with the Implementer Selection Worksheet at slide 8. This rubric might help you narrow down your choices before you use the worksheet.)</td>
<td>180 min</td>
<td>CTC Module 3</td>
<td>For the activity Plan Ahead for Sustainability, the considerations mentioned in the video need to be built into the implementation plan as well as into the financing plan. It is helpful to share information with the finance workgroup or work together on these plans. Finance workgroup members who serve on Check on the status of the strategic financing plan ahead of time to see if building these two plans together can streamline research into the programs or generate other synergies. Check with the participating agencies to see if the existing procurement process allows for independent observation and</td>
</tr>
<tr>
<td>Sample Evidence2Success PowerPoint presentation template: Implementation Progress Update</td>
<td>the community board can act as a liaison between the two groups. The budgeting activity is another opportunity to share information with the finance workgroup. At the end of the workshop, provide the workgroup with the sample PowerPoint presentation for reporting implementation progress to the community board, or send the link to the document on the Evidence2Success website afterwards.</td>
<td>monitoring of the programs. If it is, you will not need to use the sample CTC Agreement to Monitor from the Facilitator Documents.</td>
<td></td>
</tr>
</tbody>
</table>
The Evaluation Planning Workshop in Brief

The goal of the Evaluation Planning Workshop is to develop program monitoring and evaluation plans for each of the tested, effective programs being implemented, and to make plans for tracking changes in community-level outcomes. As in the Implementation Planning Workshop, the emphasis is on maintaining fidelity to program specifications. This workshop is for the workgroup overseeing the monitoring and evaluation of the Action Plan and the programs. We will generally refer to this workgroup as the evaluation workgroup for short, although your community's workgroup configuration might differ.

This workshop requires the following:

- The Implementation Goal Worksheets that were created for during development of the Action Plan
- The Participant Outcomes Worksheets from the Implementation Planning Workshop

Disaggregation of data is one way to factor race equity into the evaluation plan. If the evaluation plan can answer questions of particular concern to racial or ethnic groups in the community, the workgroup should make a strong effort to include them in the evaluation plan.

OBJECTIVES AND TIMING

This workshop is delivered in one session of approximately five hours, including breaks. As a result of this workshop, participants will be able to do the following:

- Develop monitoring plans
- Finalize collaborative agreements
- Agree on tasks and timeline
- Plan to finalize tools

This workshop is completed in one session of 4.5 to five hours. It has four modules:

- Overview
- Monitoring Program Implementation
- Monitoring Participant Outcomes
- Community-Level Outcomes

MILESTONES AND BENCHMARKS ADDRESSED IN THIS WORKSHOP

Milestone 5.3 Develop an evaluation plan to assess progress community-wide and for each tested, effective program.
Benchmarks

5.3.1 Hold the Evaluation Planning Workshop to develop a work plan and timeline for collecting implementation and participant outcome data for each new program.

5.3.2 Identify the resources needed to monitor each program, including nonfinancial resources.

5.3.3 Develop a work plan and timelines for collecting outcome, risk-factor and protective-factor data community-wide, at least every two years, to measure progress toward desired outcomes. The Youth Experience Survey is recommended to measure progress.

5.3.4 Develop a work plan and timeline for collection of public data determined to be necessary to measure progress toward the desired outcomes.

5.3.5 Establish partnerships with outside evaluators as needed.

5.3.6 Share data-sharing plans and results quarterly and adjust as needed.
Content Matrix: Evaluation Planning Workshop

The table below shows the materials for each session of the Community Planning Workshop. The fourth column (“To Note”) shows any adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. The data partner can be engaged as a co-facilitator of this workshop, along with the Evidence2Success coordinator. Both should be thoroughly prepared and familiar with the materials in order to integrate the materials in as seamless a manner as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach. Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

<table>
<thead>
<tr>
<th>Session 1 Module</th>
<th>Time</th>
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<th>To Note</th>
<th>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</th>
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</thead>
<tbody>
<tr>
<td>1: Overview (CTC)</td>
<td>20-30 min</td>
<td>Use the agenda you created. CTC Module 1</td>
<td>Remind the group that we’re combining materials from both Evidence2Success and CTC in this workshop.</td>
<td>If community board leaders, such as the chair, are attending the workshop, they may be invited to speak and give an update on progress. Invite them far enough ahead so that they have time to prepare and provide suggested talking points.</td>
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<tr>
<td>2. Monitoring Program</td>
<td>150 min</td>
<td>CTC Module 2</td>
<td>After the video <em>Why Do Observations?</em>, make sure the</td>
<td>Review the list of Data Partner Roles and Responsibilities (or a</td>
</tr>
<tr>
<td>Session 1 Module</td>
<td>Time</td>
<td>Materials</td>
<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<tr>
<td>Implementation (CTC)</td>
<td></td>
<td>After the video <em>Monitoring with Checklists</em>, distribute the handout <em>Recommended Information to Obtain from Program Developers</em> to illustrate that much of what they'll be evaluating is program specific.</td>
<td>participating agencies allow for program observations in their procurement boilerplate. If the agencies do not, refer them to CTC’s sample Agreement to Monitor.</td>
<td>shorter version of it). If your community’s data partner has been selected, ask the data partner ahead of time to comment on areas where he/she/they can help. If they have not been identified yet, point out where they will be involved. Ask participating service provider agency(ies) to check their procurement boilerplate ahead of the meeting to see if they allow for program observations.</td>
</tr>
<tr>
<td>3. Monitoring Participant Outcomes (CTC)</td>
<td>60 min</td>
<td>CTC Module 3</td>
<td>At the end of this module, use the Evidence2Success handout <em>Achieving Fidelity and Outcomes</em> instead of the CTC sample Evaluation Plan. This handout shows how to use the checklist method to monitor continuous</td>
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<tr>
<td>Session 1 Module</td>
<td>Time</td>
<td>Materials</td>
<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<td>quality improvement data indicators in addition to fidelity.</td>
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</tbody>
</table>
| 4. Community-Level Outcomes (CTC) | 45 min | CTC Module 4  
Sample Evidence2Success  
PowerPoint presentation template: Evaluation Progress Update | At the end of the workshop, provide  
the workgroup with the sample  
PowerPoint presentation for  
reporting evaluation progress to the  
community board, or send the link  
to the document on the  
Evidence2Success website afterwards. | For the video Why You Need Written Agreements, check for  
collaboration agreements with the  
participating agencies. These can  
replace the CTC samples.  
Reiterate the data partner’s role as  
you wrap up the session. |
The Monitoring Program Implementation and Outcomes Workshop in Brief

The goal of the Monitoring Program Implementation and Outcomes Workshop is to train program providers in implementation fidelity and in the use of the implementation and participation outcome measurement instruments and procedures for each program. This workshop is structured for providers who will be implementing the same program. If necessary, the audience can include providers of more than one program as long as the number of participants is reasonable.

This workshop requires:

- Program-specific tools identified in the evaluation plan, such as the fidelity checklist
- Program-specific implementation plan
- Program-specific evaluation plan

We recommend considering the program-specific information to look for the potential for affecting racial groups or other groups differently.

OBJECTIVES AND TIMING

This workshop is delivered in one session of approximately five hours, including breaks. As a result of this workshop, participants will be able to do the following:

- Ensure high-fidelity implementation of tested, effective programs
- Monitor implementation fidelity
- Monitor participant outcomes

This workshop is completed in one 5-hour session. It has three modules:

- Overview
- Monitoring Program Implementation
- Measuring Participant Outcomes

MILESTONES AND BENCHMARKS ADDRESSED IN THIS WORKSHOP

Milestone 5.4 Implementers of new programs have the necessary skills, expertise and resources to implement with fidelity.

Benchmarks

5.4.1 Hold the Monitoring Program Implementation and Outcomes Workshop to ensure that implementers have received needed training and technical assistance.
5.4.2 Ensure that implementers have the necessary skills and tools to measure implementation fidelity.
Content Matrix: Monitoring Program Implementation and Outcomes Workshop

The table below shows the materials for each session of the Community Planning Workshop. The fourth column ("To Note") shows any adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. As the facilitator of this workshop, you will need to integrate the materials as seamlessly as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach. Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

<table>
<thead>
<tr>
<th>Session 1 Module</th>
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<th>To Note</th>
<th>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</th>
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</thead>
<tbody>
<tr>
<td>1: Overview (CTC)</td>
<td>30 min</td>
<td>Use the agenda you created. CTC Module 1 Note the use of the pre-workshop survey as a sponge activity, with the data to be used later.</td>
<td>Remind the group that we’re combining materials from both Evidence2Success and CTC in this workshop. When you see or hear references to “health and behavior problems,” point out that this phrase refers to outcomes. References to the CTC youth survey should be understood as referring to the Evidence2Success Youth</td>
<td>If community board leaders, such as the chair, are attending the workshop, they may be invited to speak and give an update on progress. Invite them far enough ahead so that they have time to prepare and provide suggested talking points. If the group has established ground rules, then bring the rules written on a flipchart to use instead of the suggested ground rules in CTC.</td>
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<tr>
<td>Session 1 Module</td>
<td>Time</td>
<td>Materials</td>
<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<td></td>
<td>Experience Survey (or the SHARP Survey in Utah).</td>
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<tr>
<td>2. Monitoring Program Implementation (CTC)</td>
<td>180 min</td>
<td>CTC Module 2</td>
<td>All the videos in this module (and the next module) have been used before but probably not with this audience, since they probably have not been heavily involved in the Evidence2Success effort before now. Keep the emphasis on programs. The systems capacity-building effort puts more emphasis on policies.</td>
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<tr>
<td></td>
<td></td>
<td>Evidence2Success Handouts:</td>
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<tr>
<td></td>
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<td>Recommended Information to Obtain from Program Developers</td>
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<td></td>
<td></td>
<td>Achieving Fidelity and Outcomes</td>
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<td></td>
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<td>(Use these the same way you used them in the Evaluation Planning Workshop.)</td>
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<tr>
<td>F3. Measuring Participant Outcomes (CTC)</td>
<td>90 min</td>
<td>CTC Module 3</td>
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</table>
The Observation Workshop in Brief

Objective observation of program sessions is important for maintaining fidelity. A rule of thumb is to observe 10 percent of program sessions. Observations must be performed according to protocol, which includes documenting what was observed. This workshop is attended by community board members and community members who have volunteered to conduct program observations. Observations are a good way of involving community members in program implementation.

OBJECTIVES AND TIMING

This workshop is delivered in one session of approximately two hours. As a result of this workshop, participants will be able to do the following:

- Explain why program observations are important for program success
- Outline and follow the protocol for conducting an observation

This workshop has two modules:

- Overview
- Observation Protocol

MILESTONES AND BENCHMARKS

Milestone 5.5 Implement new programs with fidelity.

Benchmark

5.5.1 Hold the Observation Workshop to ensure that the program is reaching the targeted population.

Milestone 5.10 The community board remains active.

Benchmark

5.10.3 Board members have participated in and/or observed program sessions.
Content Matrix: Observation Workshop

The tables below show the materials for each session of the Community Planning Workshop. The fourth column (“To Note”) shows any adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. As the facilitator of this workshop, you will need to integrate the materials as seamlessly as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach. Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

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<tbody>
<tr>
<td>1: Overview (CTC)</td>
<td>30 min</td>
<td>Use the agenda you created. CTC Module 1</td>
<td>Remind the group that we’re combining materials from both Evidence2Success and CTC in this workshop. When you see or hear references to “health and behavior problems,” point out that this phrase refers to outcomes. References to the CTC youth survey should be understood as referring to the Evidence2Success Youth</td>
<td>If community board leaders, such as the chair, are attending the workshop, they may be invited to speak and give an update on progress. Invite them far enough ahead so that they have time to prepare and provide suggested talking points. If the group has established ground rules, then bring the rules written on</td>
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<td></td>
<td>Experience Survey (or the SHARP Survey in Utah). The Prevention Science video has been used frequently in previous workshops but is probably new to this group.</td>
<td>a flipchart to use instead of the suggested ground rules in CTC.</td>
<td></td>
</tr>
<tr>
<td>2. Observation Protocol (CTC)</td>
<td>60 min</td>
<td>CTC Module 2</td>
<td>The Value of Fidelity video has been used frequently in previous workshops but is probably new to this group.</td>
<td></td>
</tr>
</tbody>
</table>
The Milestones and Benchmarks Review Workshop in Brief

The milestones and benchmarks guide the work of Evidence2Success and provide a check to make sure the necessary steps have been completed. They were reviewed at the end of each of the first four phases, but since Phase 5 does not have a clear end point, they should be reviewed at least annually after the initial part of Phase 5 is complete (see page 4). This module is usually given as part of a regularly scheduled community board meeting. The participants are the members of the board.

It may be helpful to bring implementation updates from each workgroup and program for this workshop. In this workshop, the community board will complete the following documents:

- Milestones and benchmark document for all phases
- List of benchmarks that need attention and a plan to address them
- Plan for use of the milestones and benchmarks going forward

OBJECTIVES AND TIMING

This workshop is delivered in one session of about two hours. During this workshop, participants will:

- check progress made in the Evidence2Success process using the milestones and benchmarks;
- decide on follow-up actions; and
- agree on a schedule for milestone and benchmark reviews.

This workshop contains three modules:

Overview

Review of Phase 5 milestones and benchmarks

Review of milestones and benchmarks from Phases 1-4

A celebration of progress can be included. See the CTC facilitator guide for timing suggestions.

MILESTONES AND BENCHMARKS

Milestone 5.10 The community board remains active.

Benchmarks

5.10.1 Hold the Milestones and Benchmarks Review Workshop.

5.10.2 The community board confirms Evidence2Success progress by reviewing the milestones and benchmarks at least annually.
Content Matrix: Milestones and Benchmarks Review Workshop

The table below shows the materials for each session of the Community Planning Workshop. The fourth column (“To Note”) shows any adjustments that need to be made to CTC modules. Most of these adjustments have to do with language or terminology. As the facilitator of this workshop, you will need to integrate the materials in as seamless a manner as possible. All materials can be accessed through the Annie E. Casey Foundation’s site for Evidence2Success: [http://cms.aecf.org/evidence2success/](http://cms.aecf.org/evidence2success/).

Create an agenda that includes the objectives for the session. Prepare using the Facilitator Guide for this workshop and the instructions in the right-hand column below. Be sure to read the Facilitator Guide Introduction as well. If you have any questions, discuss them with your coach. Use the web-streamed presentation, the CTC Participant Handout packet and the Facilitator Documents for each module.

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<td>Use the agenda you created. CTC Module 1</td>
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<tr>
<td>Session 1 Module</td>
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<td>To Note</td>
<td>Advance Preparation (in Addition to the Steps in the CTC Facilitator Guide)</td>
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<td></td>
<td>Experience Survey (or the SHARP Survey in Utah).</td>
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<tr>
<td>2. Review Phase 5 Milestones and Benchmarks (CTC)</td>
<td>45 min</td>
<td>CTC Module 2</td>
<td>Remind everyone that continuing with Evidence2Success means in some ways returning to repeat Phases 3-5 over again with each administration of the Youth Experience Survey.</td>
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<td>For modules 2 and 3, see the tool that you are accustomed to using, either the original Evidence2Success <strong>Milestone and Benchmark Rating Tool</strong> or the newer Evidence2Success <strong>Planning and Rating Tool</strong>. Your coach can supply these tools.</td>
<td></td>
</tr>
<tr>
<td>3. Review Phase 5 Milestones and Benchmarks for Phases 1–4 (CTC)</td>
<td>45 min</td>
<td>CTC Module 3</td>
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