

## Appendix M

# The SpecialQuest Action Planning Process and Forms

## Preparing to Write Action Plans

The SpecialQuest Action Planning Process is intended to help community teams to effectively plan and implement high quality inclusive services for infants and toddlers with disabilities and their families.

The SpecialQuest Action Planning Process has several steps. It is important to be familiar with the instructions prior to beginning the process. Action Plan cue cards can be used throughout the process as a reference for each of the action planning steps (the cue cards and action plan forms are available for download at [www.specialquest.org/materials.html](http://www.specialquest.org/materials.html)).

The SpecialQuest Action Planning Process is a team process. All team members should have the opportunity to share their ideas and thoughts, to ensure that their input is understood, and to have their input considered. Plan to have at least two and one-half hours for your team to generate new Action Plans through this process.

## Examining the Vision

Prior to developing action plans, it is vital that each team is clear about their vision for including infants and toddlers with disabilities and their families in their communities. A clear vision guides and focuses the action planning process. If a team has already written a vision for their community, they should review the vision prior to generating ideas for their action plans. If they do not have a written vision for their community, they should develop and agree upon a vision prior to beginning the action planning process.

## Assessing the Status of Inclusion and Generating Ideas to Consider

After the vision has been reviewed or developed, each team should consider the status of inclusion in their community. During this discussion each team member

shares his/her perspective on how infants and toddlers with disabilities and their families are provided high quality inclusive services in their community. This process may generate additional ideas for addressing gaps or needs related to inclusive services.

Team members should create a list of "Ideas to Consider," or ways that they can change what they do in order to move closer to their vision of inclusive services in their community. These ideas might be generated from training experiences or team discussions. Each new idea should be written on one Post-it® (or "sticky") note. (Note: teams that have attended a SpecialQuest may wish to review their vision and previous "Ideas to Consider," in addition to creating new ones.)

## Clustering Issues

Next, teams will group their "Ideas to Consider" stickies on chart paper or a wall and consider how their ideas relate and build on each other. Allow some time for the team members to reflect on their ideas so they can easily describe them to the rest of the team. Each team member should share three or four of their ideas. As the ideas are shared, team members may want to ask the person to clarify what they meant by the idea. Hearing what the author's idea is sometimes makes it easier to see connections between ideas others have had.

After all the ideas have been shared, the team will group those that seem to go together. To do this, the teams will do two things:

- ◆ *Look for categories of ideas that seem to go together.*
- ◆ *Put the issues/ideas that are similar in nature together in groups by moving the Post-it notes onto the chart paper or wall*

Because each team member comes from a unique perspective, some ideas may not seem to group with any of the other ideas. If an item does not seem to easily fit, don't force it. This is one of the benefits of having diverse ideas. Teams should consider these especially unique ideas fully, even if they may be separate from their other groups of ideas.

**Note: This is a very creative process; people are demonstrating relationships among issues and ideas that were previously unseen. In this step, avoid naming the categories or groups during the clustering process, as it may exclude ideas that might go together otherwise. Naming the categories will happen in the next step.**

## Naming or Titling Groups of Ideas

After ideas have been grouped, the next step is to title these groups. Teams will

- ◆ *Create a brief, three-to-five-word name or title for each group. Make sure the title*
  - ◆ *describes the ideas included in that category,*
  - ◆ *includes an action word (“e.g., instead of “parents” write “support families as advocates for their children”), and*
  - ◆ *represents all of the ideas in the group.*
- ◆ *Use larger, brightly colored Post-it® notes to post the title above each group on the wall or chart paper.*

## Building Consensus

If the team has generated many ideas, all of them cannot be addressed at the same time. The team should consider which action areas best support their vision and make the most sense to work on over the next six to twelve months. Areas that will not be developed into action plans right away can be held for future Action Plans.

The team will need to come to consensus, or agreement, on which areas to work on as the team's Action Plans. In general, SpecialQuest teams have been most productive focusing on two to three Action Plans at a time.

As the team discusses the areas and builds consensus, it is important to ensure that the areas are meaningful to all of the team members, even if they are not everyone's favorite. Consensus-building does not use a “majority rules” approach.

Some considerations for building consensus:

- ◆ *Can the plan be completed in the next six to twelve months?*
- ◆ *Can everyone agree to work on this area of focus?*
- ◆ *Are all points of view represented?*
- ◆ *Is this the best, most important, or most “doable” area of focus?*

To begin this process of consensus-building, each team member may wish to share the one area for which they feel their team should write an Action Plan and give their reasons why they feel that the area is important to work on. After each team member has shared their ideas, the team should determine, through a consensus building process, the two to three areas for which they will write Action Plans. Remember each Action Plan should describe what the team wants to see happen to enhance services for infants and toddlers with disabilities and their families in their communities.

## Action Planning

After teams have identified the areas for which they will write Action Plans, it is important for them to hold on to the ideas that they are not using. The teams may want to return to these after they have completed the current Action Plans.

Action Plan forms can be downloaded at [www.specialquest.org/materials.html](http://www.specialquest.org/materials.html)

As part of writing an Action Plan, each team will need to consider and develop discrete Action Steps around each plan to help them move toward their vision. Teams will need to determine the following:

- ◆ *What steps are needed to create the identified change*
- ◆ *Who will complete each step*
- ◆ *When the steps will be completed*
- ◆ *What resources are needed to complete the steps*
- ◆ *How the steps will be determined to be completed and successful—  
how they will be evaluated*

Be sure that teams have ample time to develop their Action Plans. Each team may want to select a timekeeper and a recorder to help them stay on track. Teams should make copies of the final Action Plans for each of the team members and any other individuals who need to be informed about the actions being taken.

# SpecialQuest Action Plan

Program Name: \_\_\_\_\_

Our Action Plan will result in: \_\_\_\_\_

## Action Steps:

What	Who	When	Resources	Evaluation