

Checklist for Pre-Planning for Effective Family Leadership & Engagement

Purpose

This tool is intended to provide a quick reference checklist of items to consider in pre-planning and budgeting efforts.

How to Use This Tool

This checklist highlights important considerations that can shape planning and budgeting decisions. This checklist is not intended to be used with family leaders, but to provide organizations with suggestions for internal discussion and action.

Organizational Support and Staff Capacity

- Have you met with staff and board to build organization-wide shared understanding of and commitment to the value of family leadership and engagement?
 - Have you discussed how your organization's work will be different with meaningful family leadership?
 - Have you budgeted staff time for family leadership recruitment, coaching, and support and have you designated a staff person to fill that role?
 - Have you budgeted for administrative, technology, and other program support and discussed how those staffing needs will be met?
 - Have you ensured that your staff have a shared understanding of and commitment to equity and dismantling white supremacy culture?
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Policies

- Have you developed a partnership agreement that lays out what is expected of the family leader and what they can expect from the organization?
- Have you established a policy and process for how you will provide stipends and ensured the policies meet IRS guidelines and follow best practices in terms of amounts and distribution methods?



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- Have you addressed whether the stipend will also address child care and transportation needs or if those will be handled separately?
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Resources

- Stipends:** Have you developed a policy and process for stipends with clear guidelines that are the least burdensome possible? Have you included funding for stipends in your budget?
 - Transportation:** Have you decided how transportation needs will be met and developed any needed policies and procedures? Included this in your budget and made plans to assess the needs of your family leaders?
 - Child care:** Have you decided how child care needs will be met and developed any needed policies and procedures? Have you included this in your budget and made plans to assess the needs of your family leaders?
 - Printing and mailing:** Have you budgeted for printing and mailing? Have you made plans to assess the needs of your family leaders?
 - Communication:** Have you identified communication tools/resources and developed policies to support regular effective family communication? Have you reviewed your materials to ensure that they are appropriate in terms of literacy levels?
 - Translation:** Have you included both simultaneous and materials translation in your budget and made plans to assess the needs of your family leaders? Have you explored translation options in your community to ensure translation is available at the beginning of the program if needed?
 - Technology:** Have you considered what technology needs your families might face and budgeted for potential needs and staff support? Have you made plans to assess the needs of your family leaders?
 - Equity training:** Have you budgeted and built in time for equity training? Have you explored who might be best suited to provide this training?
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