

Activity 3.1: Annual Planning Cycle: Components/Tasks, Responsibilities and Timing

TIPS FOR TRAINERS



Suggested Use

Use this activity following your presentation and discussion on the annual planning cycle to reinforce what people have learning about planning tasks, responsibilities and timing.



Time

1 hour and 10 minutes total:

- 10 minutes to explain the activity and break into small groups
- 30 minutes for work in the small groups
- 30 minutes for sharing and discussion in the full group



Materials

- Handout for Participants: Activity Instructions and Annual Planning Cycle Chart
- Handout for Participants: Supporting Information
- Quick Reference Handout 3.1: Annotated Flow Chart of the Annual RWHAP Part A Planning Cycle
- Copies of the PowerPoint slides for reference



Knowledge or Skill Development

Participant understanding of the annual planning cycle and how the various tasks of committees, recipient, and full PC/PB interrelate to enable the PC/PB to carry out its responsibilities each year, including specific knowledge about the roles of particular committees and how they contribute to the ability of the PC/PB to make sound planning decisions.

Activity Steps

Pre-session Preparation

- Add important local dates for your EMA/TGA to the participant handout.
- Create a handout listing your PC/PB's committees with a brief summary of their responsibilities. Include task forces or work groups if they have planning responsibilities.
- Consider the level of experience of your participants. If almost all of them are new to HIV community planning, arrange to have veteran PC/PB members and PC /PB support and recipient staff with appropriate skills attend the session, so you can assign at least one as an expert advisor to each small group.

1. Divide participants into small groups of 4-6 people.
 - **If the participants include only a few people experienced in HIV community planning**, assign these planning veterans to groups so that each group includes at least one experienced person.
 - **If the participants include only people new to the PC/PB and the planning process**, assign one staff member and/or one experienced PC/PB member to serve as a resource person for each small group.
2. Ask each small group to choose a **facilitator**, to coordinate the work of the group and participate, a **recorder**, to fill in the chart based on the group's discussion and a **reporter**, to share the small group's work with the full group. The same person may serve as recorder and reporter if that is the group's preference.
3. Explain the assignment: Using the Annual Planning Cycle Chart, the information provided during the presentation, and the Supporting Information, each group should complete the Annual Planning Cycle Chart.
4. Suggest that participants first think individually for a few minutes about how they would complete the chart, then share and discuss their views within the small group.
5. Give the groups about 25 minutes for discussion, then give them a "5-minute warning" to wrap up their small group work.
6. Have the reporters come to the front. Ask one reporter to address several of the tasks in the chart. Then ask a second reporter if their group assigned these responsibilities differently or had different timing. Give all the reporters a chance to speak so that all tasks on the chart are covered. If one of the reporters says the group was uncertain, discuss that. If there are major differences in how groups assigned responsibilities or timing, ask the full group to give their views, and help decide which approaches are appropriate or if one is better – and if so, why.
7. Briefly summarize the main points from the discussion, including areas of flexibility and uncertainty. Ask participants what they learned from the activity, and what if anything the PC/PB may need to clarify about responsibilities in order to strengthen its annual planning.



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HANDOUT FOR PARTICIPANTS

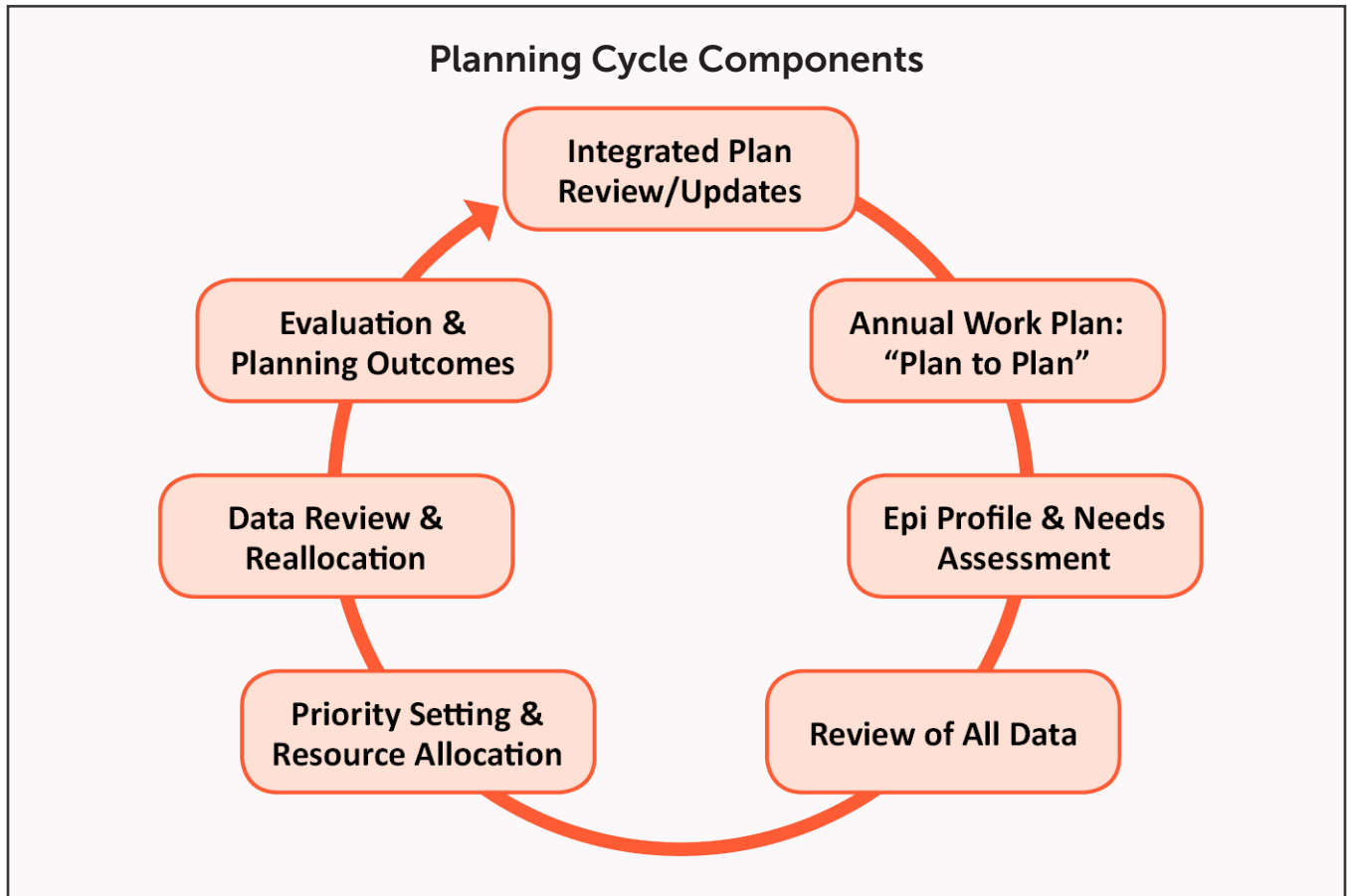
Instructions

1. Work in your small group, choosing a **facilitator**, to coordinate the work of the group and participate, a **recorder**, to fill in the Chart based on the group's discussion, and a **reporter**, to share the small group's work with the full group. The same person may serve as recorder and reporter if that is the group's preference.
2. Take 4-5 minutes individually, to review the Annual Planning Cycle Chart and Supporting Information. Consider how you would complete the Chart.
3. Now work as a group to complete the Chart for your PC/PB, including what entity (often but not always a committee) has primary responsibility, what entity has secondary responsibility (i.e. should provide data, reports, or other assistance), and what should be the timing (starting and ending months) for the activity. You have a total of 30 minutes for work in your small group.
4. Once you have completed the chart, check it against the key dates and identify any areas of uncertainty.
5. Be sure your reporter is prepared to share your small group's work with the full group.

Annual Planning Cycle Chart: Components/Tasks, Responsibilities and Timing (over 12 months)

Planning Cycle Component/Task	Committee or Other Entity with Primary Responsibility	Committee or Other Entity with Secondary Responsibility	Timing: Start-End (Months)
Integrated Plan Review/ Update			
Annual Work Plan: "Plan to Plan"			
Epi Profile			
Needs Assessment			
Review of All Data			
Data Presentation			
Priority Setting			
Resource Allocation			
Directives			
Review Expenditures and Service Utilization Data			
Reallocation			
Evaluation and Planning Outcomes			

Supporting Information



Key Dates for RWHAP Part A Planning

Event	Date
Program year begins	March 1
RWHAP Services Report (RSR) due	late March
Application due to HRSA/HAB	September
Carryover request due to HRSA/HAB	December 31
Program year ends	February 28

Additional Key Dates for Your Jurisdiction

Event	Date

See also the list of your PC/PB committees.