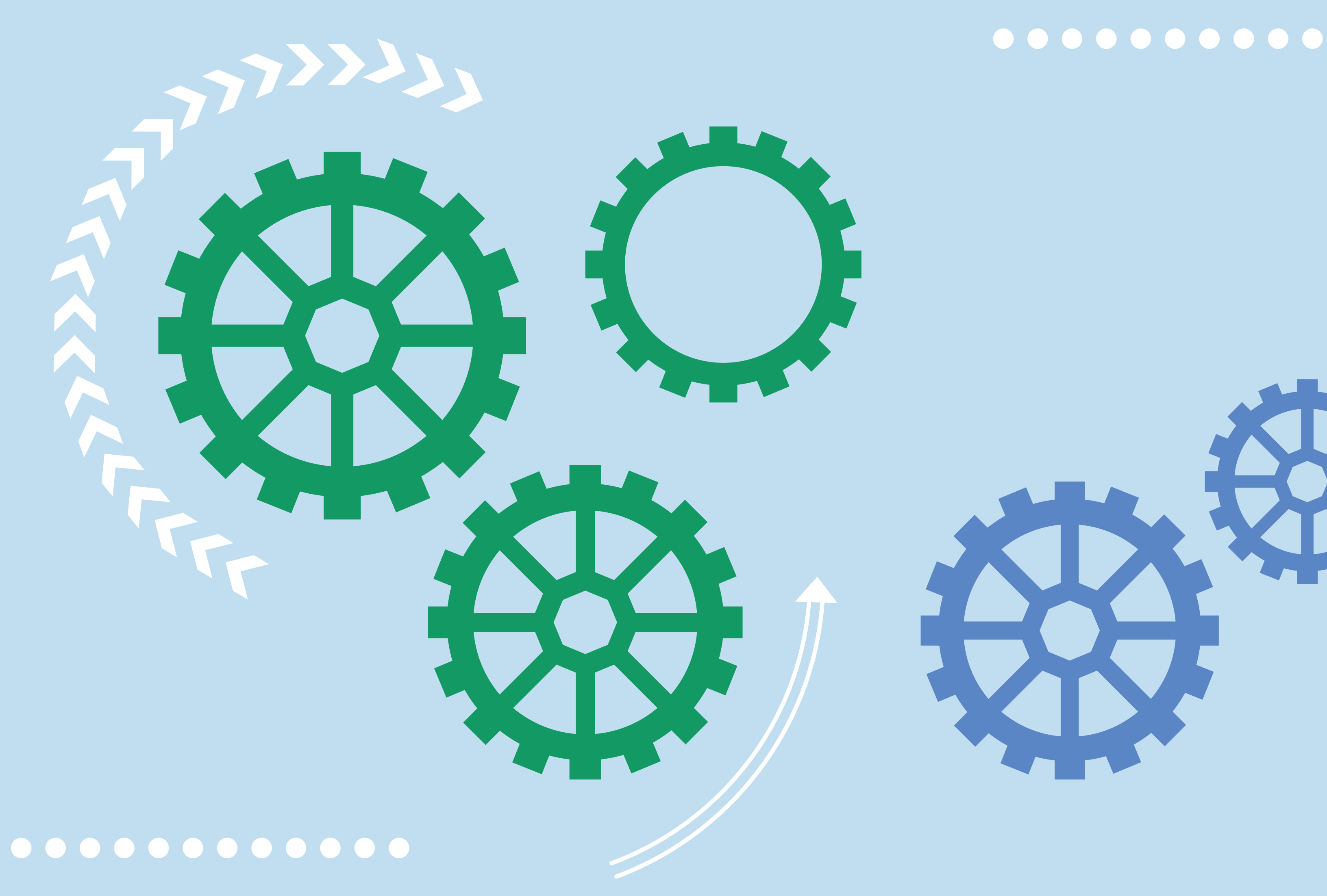

# Powering Change:

## BUILDING HEALTHY, EQUITABLE COMMUNITIES TOGETHER

**January 2021**



CALIFORNIA ACCOUNTABLE COMMUNITIES FOR HEALTH INITIATIVE

CACHI

...The Next Generation of Health System Transformation

POPULATION HEALTH INNOVATION LAB

A Program of the PUBLIC HEALTH INSTITUTE

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# Powering Change:

## BUILDING HEALTHY, EQUITABLE COMMUNITIES TOGETHER

This curriculum was designed with YOU in mind, to provide a concise yet resource-rich learning journey to support you and your community as you work together to build a successful, sustainable multi-sector collaborative. The elements of this curriculum are all interconnected, and are intended for you to engage with in whole or in part, as you need them.

# WHY WE MADE THIS

The work of **multisector collaboratives (MSCs)** is a radical shift away from “business as usual”. These collaboratives take a systems approach to their work, and are driven by a common goal and accountability to the communities they serve. There is no road map for this complex and constantly evolving work.

The Powering Change: Building Healthy, Equitable Communities Together curriculum was created to support the development and operations of health-focused MSCs. We highlight many of the excellent resources available in this space to provide a concise yet resource-rich learning journey to support MSCs and their communities in working together to build a successful, sustainable collaborative. Powering Change was developed in response to the need by California Accountable Communities for Health Initiative (CACHI) to enhance the ongoing operations of current **Accountable Communities of Health (ACHs)** as well as to assist new collaboratives in becoming ACHs. The curriculum also has broader applicability to MSCs in general. The development of this curriculum was funded by CACHI.

Upon the successful completion of the Powering Change curriculum, you will have learned skills to build a sustainable culture, nurture relationships, navigate complex challenges and co-create solutions with your partners. You will have created a number of products to support the continued operations of your collaborative.

At the Population Health Innovation Lab (PHIL) we seek to design, catalyze and accelerate innovative approaches that advance health outcomes and well-being. We hope that our Powering Change curriculum helps you to build these capacities within your own organization.

For a fee, the Population Health Innovation Lab offers consulting services related to this work, including implementation support, facilitation, and strategic advising. To learn more about consulting options, contact Sue Grinnell of the Public Health Institute’s Population Health Innovation Lab at sue.grinnell@phi.org

We would love to hear from you! Please email questions or comments to Emily Christopher at emily.christopher@phi.org.

# HOW WE MADE THIS

The Powering Change curriculum is the product of an in-depth (and ongoing) process. The development of this resource took place in three phases:

## 1) LITERATURE REVIEW

The PHIL team performed an extensive review of community and population health, collaborative governance, innovation, and other resources. We also used and compared our findings with the CACHI Five Year Milestones and identified competencies needed to complete these milestones.

## 2) COMPETENCY FRAMEWORK

From this review, key competencies were developed and used to create a Competency Framework. Competency sets were based on a systematic review of relevant competencies found in publications, reports, and resources including recommendations from key experts and partners. To be included in the Competency Framework, a measure had to meet all of the following requirements:

- The measure must address a key aspect of developing an ACH that can be classified in one of the domains described in the Competency Framework.
- The measure had been developed, adapted, or endorsed by an organization that promotes rigorous development and use of measurement in public health. The organization may be at an international, national, regional, state or local level (criteria adopted from the Agency for Health Research and Quality.)[1]

We then surveyed and conducted in-depth interviews with representatives from ACHs, as well as external support and technical assistance providers, from California, Minnesota, Vermont, and Washington.[2] These participants were asked to review and comment on a first draft of competencies. The findings from these interviews were incorporated into a final draft of the Competency Framework. The Competency Framework, along with numerous conversations with expert advisors, formed the basis for the learning objectives you see in this curriculum.

## 3) CURRICULUM DEVELOPMENT

An initial set of learning objectives were created, based on the Competency Framework. These were organized into modules and lessons, and existing resources were inserted into the relevant areas.

The organization, content, and resources were continually refined. This process involved soliciting feedback from a number of experts, listed in the Acknowledgements section, as well as in-depth review and input provided by CACHI technical assistance (TA) providers on sections relevant to their areas of expertise.

Powering Change is a compilation of existing resources primarily from the libraries of CACHI and PHIL. In line with the limited scope of this contract, a small selection of materials from outside sources were also incorporated.

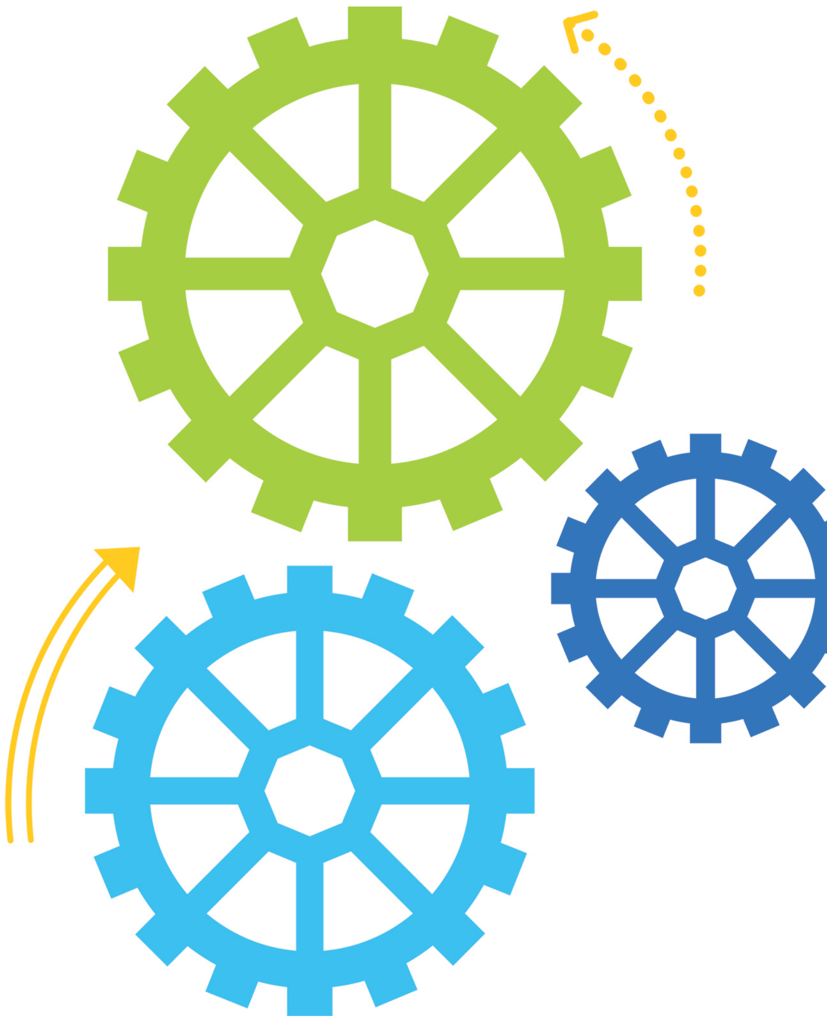
This curriculum is intended to be a living document. As with the nature of multisectoral collaborative work, it will evolve over time. In the future we hope to add content from a broader range of sources and make the curriculum experience more interactive, among other goals.

# HOW TO USE THE CURRICULUM

The Powering Change curriculum may be used by anyone involved in multisectoral collaborative work, but is specifically targeted toward **backbone** staff of both new and existing MSCs, including ACHs, in public and population health disciplines.

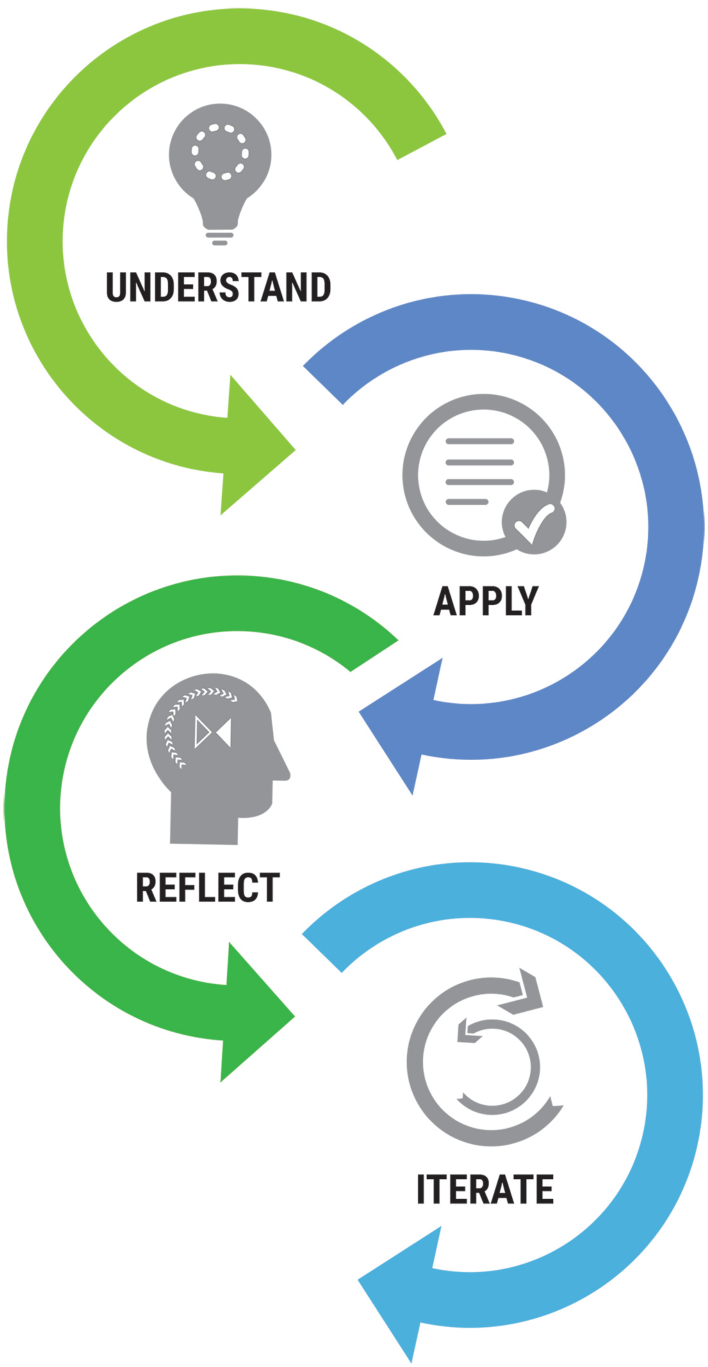
Whether you are just starting out and need to know everything about standing up your collaborative, or have been doing this work for a number of years and just need support in a few key areas, Powering Change is for you.

The curriculum is broken down into eleven modules, which are laid out in an infographic on page 4. There is not a specific order in which you must work through the modules. All of the modules are interconnected, and are designed for you to engage with in whole or in part, as you need them.



# HOW TO USE THE CURRICULUM

Each of the eleven modules contain two to three lessons on different topics. Lessons are divided into four sections: Understand, Apply, Reflect and Iterate.




UNDERSTAND
contains background and explanatory information about the concepts within the lesson.

APPLY
involves putting into practice learnings from new resources or those within the Understand section.

REFLECT AND ITERATE
should be considered together, and contain some prompting questions to ensure that what you are learning is ingrained into the ongoing work of your MSC. The content for both the Reflect and Iterate sections is largely the same for each lesson. This is intentional. Active reflection and evolution of your approach is key to building an effective and sustainable collaborative.

# HOW TO USE THE CURRICULUM

Often there are several resources listed on a given topic. You are not expected to use each and every resource, but to assess which might be most useful for your situation. We offer suggestions, not assignments.

Each lesson's Reflect section lists three "additional practices you can use to support this reflection." Those are described here in detail, and linked on each reflection page.

ADDITIONAL PRACTICES YOU CAN USE TO SUPPORT THIS REFLECTION.

- The Collaborative Reflection Form is a simple template that can be used efficiently in every network meeting to gather data on current perspectives and needs related to the work, the group, and mindset development.
- The What, So What, Now What learning cycle is useful for partners to reflect on a shared experience in a way that builds understanding and spurs coordinated action while avoiding unproductive conflict. This reflection practice should be hosted in a way that all voices can be heard while simultaneously sifting for insights and shaping new direction. Progressing in stages makes this practical—from collecting facts about What Happened to making sense of these facts with So What and finally to what actions logically follow with Now What. The shared progression eliminates most of the misunderstandings that otherwise fuel disagreements about what to do.
- Pair Reflection Post-Journaling and Solo Presencing Walk This practice begins with time for individual reflection through journaling. Journaling is a practice where one writes or draws one's stream of thought and feelings. A focused question is helpful for the journaling exercise. After the journaling, pair up in groups of two to practice sharing their reflections and listening to one another (see "Four Levels of Listening and Talking"). One person shares what is emerging for them after their solo reflection time and the other silently listens, with their full presence and attention, at level three (3) listening to the reflections of the other person. They then switch roles.

# HOW TO USE THE CURRICULUM

Many lessons have a section entitled Dig Deeper, which contains additional resources you may find helpful in your exploration of that lesson.

Often there are "callbacks" to other modules with related content. These are clearly denoted when they arise. This is inherent in the multisector collaborative structure; with each action you take impacting a number of other areas of your work.

AS YOU USE THE CURRICULUM, YOU WILL SEE FIVE DIFFERENT TYPES OF RESOURCES:

Read
Resources such as journal articles, reports, newspaper articles, blog posts, and the like.

Watch
Resources such as videos and webinars.

Do
Interactive resources, such as frameworks to be applied, discussion guides, worksheets and materials of similar nature.

Community Example
Examples of how existing collaboratives have applied certain concepts.

Callback
References to concepts mentioned elsewhere in the curriculum.

You may notice that some of these resource types seem to overlap, for example a "do" resource may be a webinar. They are categorized by the primary intent to simplify the user experience.

All resources link out to external sites. If a link is broken, please send an email to emily.christopher@phi.org and we will correct the issue.

# HOW TO USE THE CURRICULUM

## A FEW NOTES

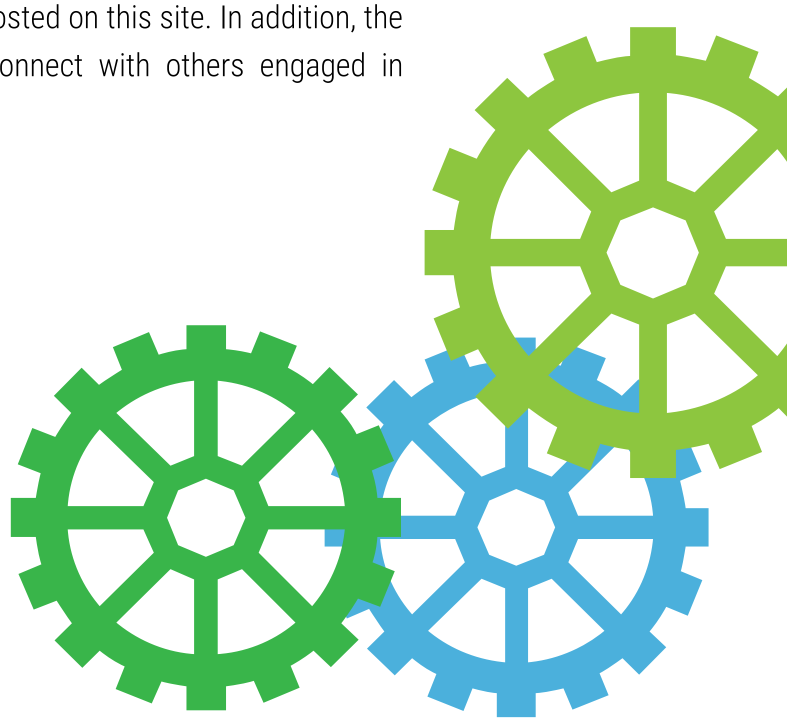
- This curriculum is a compilation of existing resources. Many of these resources are focused on the ACH experience, and often were created for CACHI, a public-private partnership supporting a group of California ACHs. While these learnings are broadly applicable to MSCs generally, keep this context in mind as you explore some of the resources provided.

- While designed with the backbone in mind, this curriculum contains a wealth of resources that are perfect for sharing with your collaborators.

- Because this is a compilation of existing resources, there are areas where some information may be missing. We hope to find or create resources to fill these gaps in the future.

- Much of the framing around the content was adapted from the ACH Start-Up Guide, a helpful resource created to guide ACH development.

- We encourage you to join our online collaboration site, Networks for Purpose. Many of the resources linked here are also hosted on this site. In addition, the site provides the opportunity for you to connect with others engaged in this work.



# GLOSSARY

ACCOUNTABLE COMMUNITY OF/FOR HEALTH

A structured and enduring platform for bringing together the health care delivery system, public health, social services and community based programs, other related sectors and institutions, and residents in order to collectively improve the health of the community.[3]

BACKBONE (SUPPORT) ORGANIZATION

The backbone organization is the identified entity that functions as the collaborative's facilitator and convener. The backbone serves as the key facilitator to convene and connect broad community stakeholders and the formal MSC structures.[3]

COLLABORATIVE GOVERNANCE

The processes and structures of [...] decision making and management that engage people constructively across the boundaries of public agencies, levels of government, and/or the public, private and civic spheres in order to carry out a public purpose that could not otherwise be accomplished.[4] ** Modified from original definition*

DISTRIBUTED LEADERSHIP

Distributed leadership is shared leadership amongst the collaborative members and partners. The success of the collaborative should not depend on one organization and/or person but rather, it is the collective that shares in the workload and leadership and contributes to ongoing success.[3]

DOSE

Dose is a simple term that practitioners and community members can easily understand. In this case, the active ingredient is the community strategy being implemented that is applied to an entire population rather than one person.[5]

# GLOSSARY

### EQUITY

Equity is defined as "the state, quality or ideal of being just, impartial and fair." The concept of equity is synonymous with fairness and justice. It is helpful to think of equity as not simply a desired state of affairs or a lofty value. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept.[6]

### EQUITY VS. EQUALITY

Equity involves trying to understand and give people what they need to enjoy full, healthy lives. Equality, in contrast, aims to ensure that everyone gets the same things in order to enjoy full, healthy lives. Like equity, equality aims to promote fairness and justice, but it can only work if everyone starts from the same place and needs the same things.[6]

### HEALTH AND HEALTH CARE DISPARITIES

Health disparity refers to a higher burden of illness, injury, disability, or mortality experienced by one group relative to another. A 'health care disparity' typically refers to differences between groups in health insurance coverage, access to and use of care, and quality of care.[7]

### HEALTH EQUITY

Health equity means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care.

The following should be added when the definition is used to guide measurement; without measurement, there is no accountability: For the purposes of measurement, health equity means reducing and ultimately eliminating disparities in health and its determinants that adversely affect excluded or marginalized groups.[8]

### INCLUSION

The practice of inclusion refers to inviting in and making a space for all people, regardless of their abilities, ethnicity, disabilities, or healthcare needs.[3]

# GLOSSARY

### INDIVIDUAL LEADERSHIP

Individual leadership is about creating the conditions within yourself to enable you to lead effectively. It means honing your personal leadership style in order to lead by example. This can mean focusing on self-care, or personal development and reflection, or a host of other strategies specific to your personal experience as a leader. A good leader must be flexible, humble, empathetic and able to establish trust to bring together a diverse group of partners. [3]

### INTERSECTIONALITY

Per Kimberlé Williams Crenshaw: Intersectionality is simply a prism to see the interactive effects of various forms of discrimination and disempowerment. It looks at the way that racism, many times, interacts with patriarchy, heterosexism, classism, xenophobia — seeing that the overlapping vulnerabilities created by these systems actually create specific kinds of challenges. "Intersectionality 102," then, is to say that these distinct problems create challenges for movements that are only organized around these problems as separate and individual. So when racial justice doesn't have a critique of patriarchy and homophobia, the particular way that racism is experienced and exacerbated by heterosexism, classism etc., falls outside of our political organizing. It means that significant numbers of people in our communities aren't being served by social justice frames because they don't address the particular ways that they're experiencing discrimination.[9]

### MENTAL MODEL

How someone thinks about the world around them.[3]

### MINDSET

A way of thinking, disposition or a frame of mind. Your mindset is your collection of thoughts and beliefs that shape your thought habits.[3]

### MULTISECTOR COLLABORATIVE (MSC OR "COLLABORATIVE")

The partnership that results when government, non-profit, private, and public organizations, community groups, and individual community members come together to solve problems that affect the whole community.[10]

# GLOSSARY

### ORGANIZATIONAL CULTURE

Shared beliefs and values established by leaders and then communicated and reinforced through various methods, ultimately shaping employee perceptions, behaviors and understanding.[11]

### PARTNER

Any person or organization who has an interest or concern in something, such as your project, organization, community, or business, and can contribute to the creating and supporting of your multisector collaborative's activities

### PORTFOLIO OF INTERVENTIONS (POI)

The ACH identifies and aligns a set of coherent mutually-reinforcing interventions across five key domains: clinical services, community and social service programs, community-clinical linkages, environment and policy and systems change. By aligning, connecting, and, where appropriate, integrating the interventions, they reinforce each other and drive toward a common set of goals and outcomes at the individual, population and systems levels. The portfolio should describe existing and planned services, programs, and policy initiatives at sufficient capacity and scope and include realistic measures and metrics to monitor its performance toward those outcomes.[3]

*Note: The POI is one of the seven core ACH model elements in the CACHI model. Though the POI is central to the CACHI model, this concept and the POI Toolkit are applicable to any MSC needing to define a mutually agreed-upon set of goals and actions which reflect the community's needs and priorities.*

### QUALITATIVE DATA

Usually descriptive and conceptual information,  may be categorized by properties, themes, and other identifiers. For example, feedback from community health workers about their training experiences.[12]

### QUANTITATIVE DATA

Usually numeric data or information that can be converted into numbers. For example, the number of community health workers trained, or the prevalence of cardiovascular disease in a county.[12]

# GLOSSARY

### RACIAL EQUITY

Racial equity is the condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares. When we use the term, we are thinking about racial equity as one part of racial justice, and thus we also include work to address root causes of inequities not just their manifestation. This includes elimination of policies, practices, attitudes and cultural messages that reinforce differential outcomes by race or fail to eliminate them.[9]

### RACISM

The concept of racism is widely thought of as simply personal prejudice, but in fact, it is a complex system of racial hierarchies and inequities. At the micro level of racism, or individual level, are internalized and interpersonal racism. At the macro level of racism, we look beyond the individuals to the broader dynamics, including institutional and structural racism.[6]

### SOCIAL DETERMINANTS OF HEALTH (SDOH)

Conditions found in the environments in which people live, learn, work, and play that impact a wide range of health outcomes and risks.[13]

### SOCIAL ENTERPRISE

Organizations that address a basic unmet need or solve a social or environmental problem through a market-driven approach.[14]

### SOCIAL IMPACT INVESTING

A type of investment that [often] produces a financial return for private investors and positive community outcomes, such as social or environmental impacts. Social impact investing is also referred to as impact investing or impact investment.[15]

** Modified from original definition*

### STEWARDS

Leaders (people and organizations) who take responsibility for forming working relationships with others to drive transformative change in regions.[16]

# GLOSSARY

## STRUCTURAL RACISM

The normalization and legitimization of an array of dynamics – historical, cultural, institutional and interpersonal – that routinely advantage Whites while producing cumulative and chronic adverse outcomes for people of color. Structural racism encompasses the entire system of White domination, diffused and infused in all aspects of society including its history, culture, politics, economics and entire social fabric. Structural racism is more difficult to locate in a particular institution because it involves the reinforcing effects of multiple institutions and cultural norms, past and present, continually reproducing old and producing new forms of racism. Structural racism is the most profound and pervasive form of racism – all other forms of racism emerge from structural racism.

For example, we can see structural racism in the many institutional, cultural, and structural factors that contribute to lower life expectancy for African American and Native American men, compared to white men. These include higher exposure to environmental toxins, dangerous jobs and unhealthy housing stock, higher exposure to and more lethal consequences for reacting to violence, stress, and racism, lower rates of health care coverage, access, and quality of care, and systematic refusal by the nation to fix these things[9].

## SUSTAINABILITY

Sustainability is…about creating and building momentum to maintain community-wide change by organizing and maximizing community assets and resources, [including partnerships and engagement]. It means institutionalizing policies and practices within communities and organizations. From the outset, sustainability requires an approach that emphasizes the development of a network of community practitioners who understand and can lead a movement. It also means involving a multiplicity of stakeholders who can develop long-term buy in and support throughout the community for a coalition's efforts. These factors are crucial to ensuring lasting change and making a difference in people's lives.[17]

** Modified from original definition*

## SYSTEMS CHANGE

Systems change involves change in the policies, processes, relationships, knowledge, power structures, values, or norms that guide how organizations function internally and in relationship to other organizations.[3]

# GLOSSARY

### SYSTEMS LEADERSHIP

Leadership intended to bring about systems change, but may also refer to leadership of a particular system.[18]

### SYSTEMS PERSPECTIVE

Gaining a broader perspective of the current system. This includes seeking out the impacts, challenges, opportunities, leverage points, and gaps while simultaneously identifying blind spots. The systems perspective lens reveals the story behind the data.[3]

### SYSTEMS THINKING

The process of finding and exploring the interrelated parts to a larger context for the sake of creating holistic understanding and solutions.[3]

### WELLNESS FUND

The wellness fund is one of seven model elements that California Accountable Communities for Health Initiative has posited as fundamental to the success of an Accountable Community of/for Health (ACH). It is a locally governed vehicle for supporting the backbone, unfunded interventions, and other activities of the ACH.[3]

# MODULE 1
# REWIRING YOUR BRAIN

## MINDSETS & SYSTEMS THINKING

Module 1

# REWIRING YOUR BRAIN

## Mindsets & Systems Thinking

### OBJECTIVE

Learn new ways of thinking to approach complex problems and strategies for applying these practices.

### LESSONS IN THIS MODULE INCLUDE

1) Introducing Mindsets & Mental Models
2) Systems Thinking

### AT THE END OF THIS MODULE YOU WILL HAVE

- A suite of mental models and mindsets to inform your approach to your work, and strategies to apply them.
- An understanding of systems thinking and the tools to incorporate this practice in to your collaborative.
- An understanding of change management and its application.

***“Everything you need to accomplish your goals is already in you.” ~ Martin Luther King Jr.***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1:
# Introducing Mindsets & Mental Models

## OPENING QUESTIONS

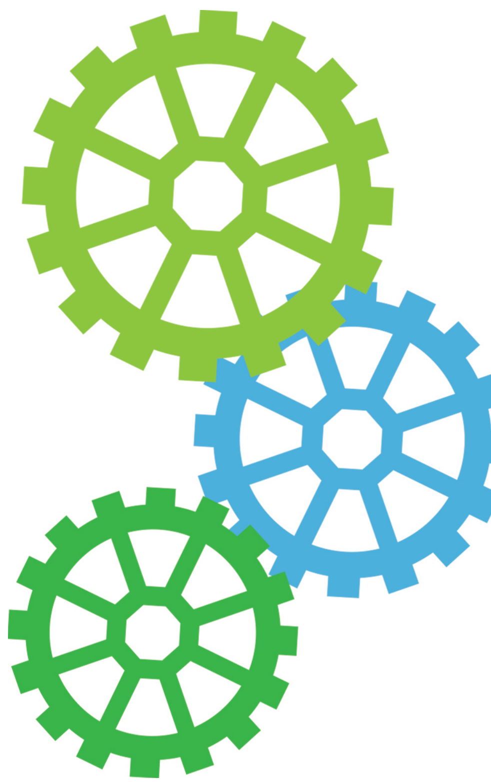
**Discuss these questions with your team members before beginning this lesson.**

- When you have the opportunity to learn something new, what is your approach?
- How do your worldviews shape decisions and perspectives?
- When you engage in dialogue with others who have different perspectives, thoughts or opinions from you, how do you typically respond?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Describe different mindsets and how they can be applied to your work as an individual and with partners.
2) Learn strategies for using mental models and mindsets, integrating them into your decision-making processes and daily activities.



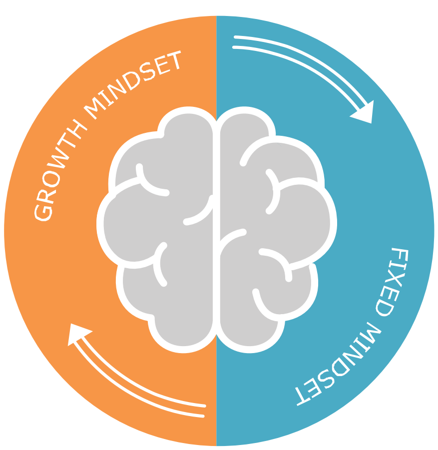
# UNDERSTAND

## MENTAL MODELS

All individuals have an existing set of mental models. A **mental model** explains "how someone thinks about the world around them."[3] These are typically set patterns of thinking derived from one's background, environment and other experiences. The way we consider and respond is determined by our thoughts and as a result influences how we behave and or react to the world, our work, our families, and so on.

## MINDSETS

"**Mindsets** are a way of thinking, disposition or frame of mind. Your mindset is a collection of thoughts and beliefs that shape your thought habits."[3] These thought habits affect how you think, what you feel, and what you do. Your mindset impacts how you make sense of the world, and how you make sense of you. These habits can be either positive and or negative.




Adopting a new mindset can become a powerful choice. The mindsets you and your partners bring to the table can create an influential impact on the outcomes and progress of your multisector collaborative's (MSC's) work. In MSC development, awareness of current mindsets and dedication to being open to exploring new approaches is a path that has proven effective. Choosing to explore, be flexible and include a variety of mindsets throughout the evolution of your efforts can open paths to deeper possibility and innovation.

Adopting a growth mindset, in which you believe that a person's most basic abilities can be developed through dedication and hard work - brains and talent are just the starting point - is the first step on the path toward a love of learning and a resilience that is essential for great accomplishment.

The alternative to a growth mindset is a fixed mindset. In a fixed mindset people believe their basic qualities, like their intelligence or talent, are simply fixed traits. They spend their time documenting their intelligence or talent instead of developing them. They also believe that talent alone creates success—without effort. This mindset is not helpful in shifting your mindset and driving progress.

## LESSON 1: INTRODUCING MINDSETS & MENTAL MODELS

Review the information and the videos on mindsets as a starting point for understanding how we think about things and how you might approach them.

- ACH Start- Up Guide: Flexible Mindsets
- IDEO Design Kit: Mindset Videos
- Carol Dweck: A Summary of Growth and Fixed Mindsets
- Feel Like You're Going Out of Your Mind? Consider Your Mind-set.

## SPECIFIC MINDSETS

One mindset that is particularly important at the outset of the formation of your collaborative is the ability to pivot. It is not uncommon for groups to come together around one issue and as they learn more about the issue and surrounding factors, realize that the root cause may be different than originally thought. There may be tension on the group when some recognize the original path is not what is emerging. Being able to name this issue and creating a safe space to discuss what is emerging will be important.

- Learning to Pivot
- How and When to Pivot

Equity, diversity and inclusion mindsets must be a key part of your personal approach, as well as the work of your collaborative and partners. Equity is covered in Module 2. The below are two short videos to introduce these important concepts.

- Defining Diversity and Inclusion
- Racial Equity Mindset
- Module 2: Righting Injustices: Operationalizing Equity

The decisions and choices we make can often get clouded by emotional, irrational, and confusing factors. This short article highlights some of the mental lapses that show up most frequently in our lives.

- 5 Common Mental Errors that Sway You from Making Good Decisions

Intentional and effective listening is an important component to effectuate the impact of your mental models and mindsets. Review the Four Levels of Listening framework discussed in Module 5 (and linked again below) to learn about how listening helps people to create deep and lasting change.

- Framework: Four Levels of Listening
- Module 5: Pieces of the Puzzle: Communicating for Impact
    - *Lesson 2: Internal Communication Strategies*

# APPLY

*"Successful leadership depends on the quality of attention and intention that the leader brings to any situation."*
*~ Otto Scharmer*

## BLINDSPOTS

The notion of blindspots comes from the idea that leaders know what and how they do what they do, but they may not know why they do it. Often leaders do not understand and/or are blind to what is needed to support deep leadership and change. Understanding the origin and intention of your actions as a leader can be equally important to the actions themselves.

Review the following information to better understand the blind spots of leadership.

Otto Scharmer's The Blind Spot of Leadership: Prescensing as a Social Technology of Freedom

Watch this short video of Otto Scharmer discussing Uncovering the Leadership Blind Spot with a team of your partners. As a group, explore the discussion prompts on the Discovering Blind Spots Discussion Guide.

Uncovering the Leadership Blindspot

Discovering Blind Spots Discussion Guide

## LADDER OF INFERENCE

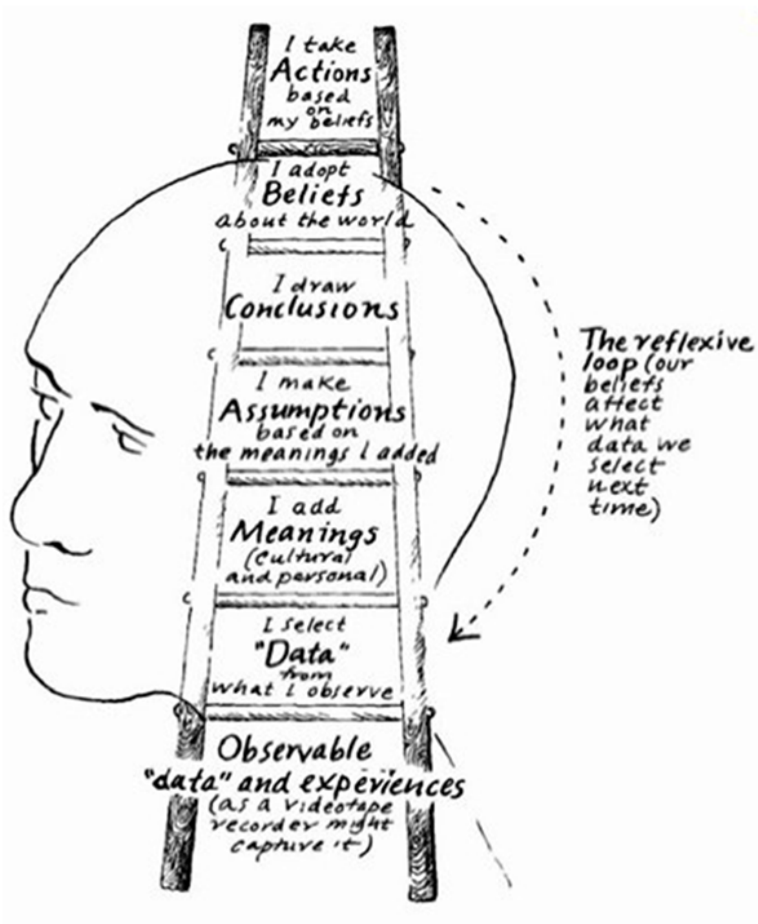
Most people do not realize that they have come to a conclusion about the world around them as it happens fairly quickly. The Ladder of Inference describes the automatic thinking process that we all go through, usually without even realizing it, to get from a fact to a decision or action. The ladder of inference is a tool, first developed by Chris Argyris, that provides a structured way for us to reason as to why we don't usually remember where our deepest attitudes or deep-seated behaviours came from. The data is long lost to memory, after years of inferential leap. Before long, we come to think of our longstanding assumptions as data, but we are several steps removed from data. Becoming aware of our own mental models and ways of thinking begins with self awareness and cultivating the ability to have conversations that balance inquiry and advocacy, where people expose their own thinking effectively and creating a space for open dialogue and learning. Explore the following resource to learn guidance on how to reframe your mindset for meaningful dialogue.

Can We Talk?

## LESSON 1: INTRODUCING MINDSETS & MENTAL MODELS

The thinking stages can be seen as rungs on a ladder with examples are shown below. Also visit the linked resource for a more in-depth explanation.

Mental Models – Understanding The Self




**ACTIONS**
I will not invite David to the next meeting

**ASSUMPTIONS**
If people don't care they shouldn't be invited to the future meetings.

**ADD MEANING**
When someone doesn't contribute it means they don't care.

**OBSERVABLE DATA**
One committee member is looking at his phone and not contributing to the meeting.

> The Ladder of Inference tool, developed by Chris Argyris; provides a structured way for us to reason as to why we don't usually remember where our deepest attitudes or deep-seated behaviors came from.

## LIMITING BELIEFS

Limiting beliefs are thoughts that get in the way of what you think is possible for yourself and can prevent you from being the best that you can be. Thoughts turn into beliefs and are often based on assumptions which may not be real or true. Watch this video and webinar and complete the worksheets individually and/or with your partners.

- Caitlin Frost: Transforming Limiting Beliefs
- Caitlin Frost on Limiting Beliefs

Accompanying Worksheets

- Instructions for Doing The Work
- Self Facilitation Guide
- The Work Limiting Beliefs Diagram
- The Work Partner Facilitation Guide
- UnStuck Fear The Work 2019

## REDUCING BIAS

In your collaborative's work, you will work for and with people of a variety of backgrounds, races and lived experiences. Critical to success in building these relationships and doing this work is an open, unbiased approach. This involves an understanding and compassion for the experiences of others and yourself.

First, learn about what bias is and how it can manifest.

- Psychology Today: Bias
- 12 Examples of Unconscious Bias

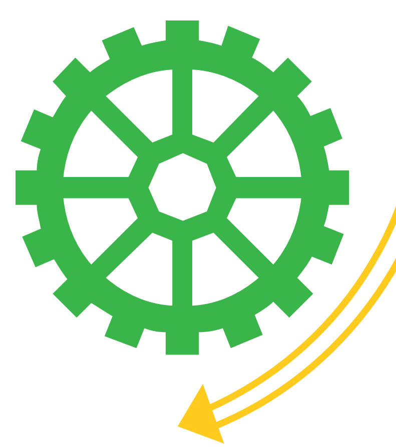
Explore the tools and strategies to reduce bias worksheet below.

- Strategies to Reduce Bias Worksheet
- Project Implicit

## ADDITIONAL SUGGESTIONS FOR APPLYING THESE LEARNINGS

Host a discussion with your partners on mindsets using what you learned from the readings, videos and tools to lay a foundation from which to approach changing your mindsets and practices.

Incorporate a mindset review into your team meeting agendas on a regular basis. Consider which mindsets are working for you/your team, and which are not. Assess how the application of these mindsets impacts other areas of your work.



Identify one or more "disruptors" on your team who regularly checks the team on whether they are employing mindsets and sticking to "business as usual."

Start-Up Guide: Approaches to Support ACH Work (Disruptors, p. 5)

As you move forward with your work, remember that you can pivot if needed!

Ask yourself:

- What does it mean to shift or pivot our efforts?
- How might we identify when the chosen path needs to be adjusted?
- How might we clarify our next move?
- How might we gracefully pivot our focus to be of greater service?

## DIG DEEPER

- Paradigm-Creating Loops: How Perceptions Shape Reality
- Simon Sinek: Empathy
- Human-Centered Design for Innovations in Public Health

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about your own mindsets?
- As a result of any of the reflections, where do you need to pivot or approach the work differently?
- How can you incorporate new ways of thinking?
- What mindsets or mental models are getting in your way?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Systems Thinking

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What systems are your team a part of and how do they intersect/overlap?
- What does systems thinking mean to you?
- How can you move beyond your understanding of a problem or challenge and broaden your view with the help of others in your system?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand what systems thinking is and why it is particularly important for work in a multisector collaborative.
2) Learn about different approaches to systems thinking and strategies to apply them to your work.
3) Define change management and how it relates to the application of mindsets discussed in the previous lesson.

# UNDERSTAND

When bringing together partners it is important to keep in mind that each partner represents a key piece of the system. It's important to consider that in complexity, neither one person, nor a group of experts have all the answers. All-inclusive solutions can only be found when diverse stakeholders convene to brainstorm and co-create together. This strategy requires deep listening, intentional process, receptivity to perspectives, willingness to be challenged on one's point of view, reflection, and ability to collaboratively envision solutions that nobody could have seen on their own.

In order to understand the nature of a system, and how to move to systems thinking and systems change, consider the below definitions.

## SYSTEM

There are many definitions and understandings of what is a system. One definition is:

> "A system is an interconnected and interdependent series of entities, where decisions and actions in one entity are consequential to other neighboring entities."[19]

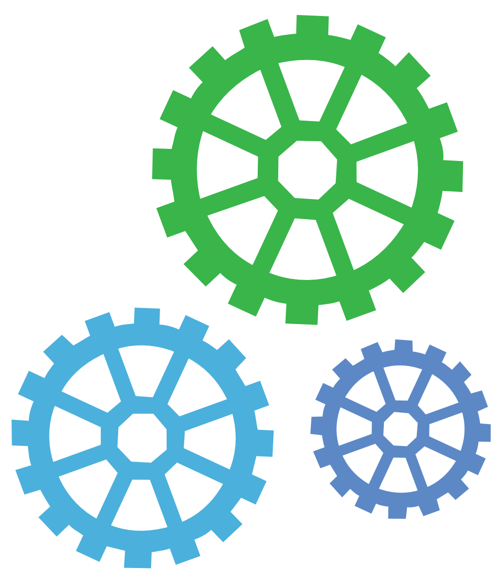
## SYSTEMS CHANGE

"Systems change involves change in the policies, processes, relationships, knowledge, power structures, values, or norms that guide how organizations function internally and in relationship to other organizations."[6]

> "Systems change is shifting the conditions that are holding a problem in place."[20]

## SYSTEMS PERSPECTIVE

"Gaining a broader perspective of the current system. This includes seeking out the impacts, challenges, opportunities, leverage points, and gaps while simultaneously identifying blind spots. The system's perspective lens reveals the story behind the data."[3]



LESSON 2: SYSTEM THINKING

## SYSTEMS THINKING

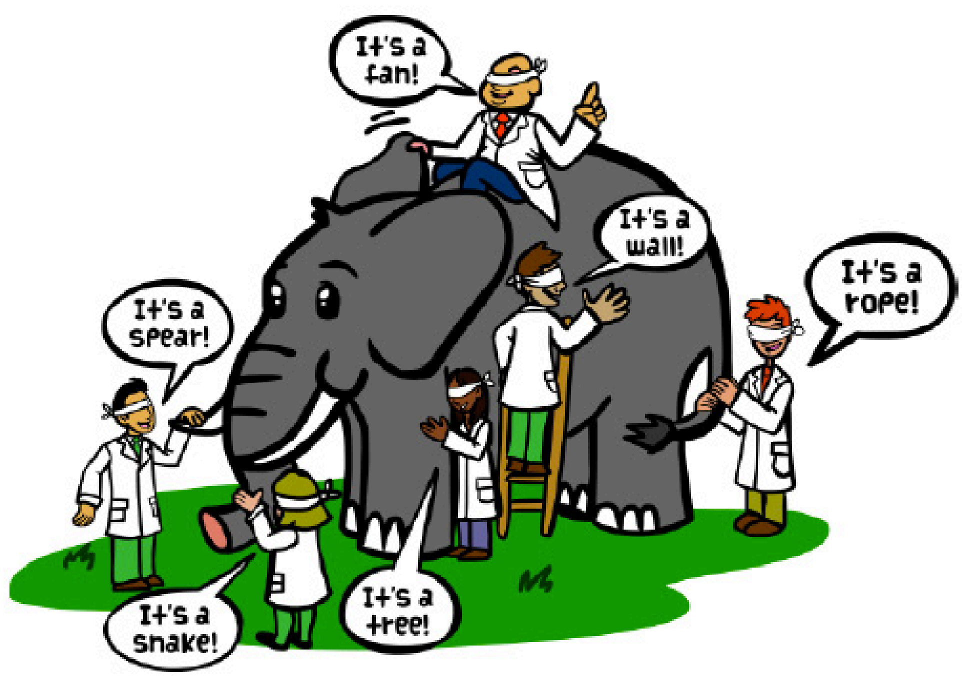
"**Systems thinking** is the process of finding and exploring the interrelated parts to a larger context for the sake of creating holistic understanding and solutions. In systems thinking, the aim is to move away from a 'siloed' approach and consider the entire system as an interconnected whole."[3]

- What is Systems Thinking?
- Start-Up Guide: Welcome to the ACH Start Up Guide! (A Rationale of Thinking and Acting Systemically, p. 3-4)

Visit the below resources to learn more about systems, systems change and systems thinking, and the importance of systems thinking in public health.

- New England Public Health Training Center: Introduction to Systems Thinking*
  - *requires registration*
- Systems Change: A Guide to What It Is and How to Do It
- The Water of Systems Change
- The Water of Systems Change: Action Learning Exercise

Welcome to the ACH Start Up Guide
As the image illustrates, individuals "within a complex system can only see part of the system they are working in. While their individual vantage points are essential to solving a piece of the puzzle, it takes many vantage points while learning together, to see more of the whole system. It becomes imperative to include as many diverse perspectives as possible, and to help stakeholders increase their capacity to see broadly, through each other's eyes."



## SYSTEM APPROACHES AND FRAMEWORKS

There are many frameworks that can be useful for your collaborative when considering a systems approach to address root causes affecting health and well being. Listed below are some examples for your review and consideration. The Portfolio of Interventions (POI), covered in Modules 4 and 9, is another example of a systems approach. Consider how these approaches and others may inform the development of your POI.

### LIFE COURSE MODEL

Lifecourse Health Development: Past, Present and Future

Association of Maternal and Child Health Programs: Life Course

### SOCIO-ECOLOGICAL MODEL

Socio Ecological Model

### TWO GENERATION APPROACH

ASCEND The Aspen Institute: What is 2GEN?

### SPECTRUM OF PREVENTION

The Prevention Institute: Spectrum of Prevention

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 9: It Takes a Village: Creating a Portfolio of Interventions

*Discuss with your team one or more systems thinking approach(es) or frameworks and how they can be applied to your community. Are any of your partners using any of these approaches?*

# APPLY

Systems thinking takes a conscious effort to learn how to think in different ways. We live in a time of much complexity where systems often do not support individuals and families to thrive. These times call for a new consciousness and a new collective leadership capacity to meet these challenges in a more conscious, intentional, and strategic way. The development of such a capacity would allow us to create a future of greater possibilities. Working towards increasing your own self awareness is one way to begin to be more aware and understand the connections.

There are a number of tools and frameworks, some of which are described in the previous section. There is no one right way to select a tool or framework that resonates with your collaborative's experience and works for you. Just remember that you don't need to use them all!  As you move through this section, consider the above options (or others you may know of) and use the tools and frameworks you feel are best applied to your own MSC.

The work you do within this lesson will have direct implications on your POI (covered in Modules 4 and 9.)

Keep this in mind as you move through this work, and revisit these learnings as you work on creating your POI.

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 9: It Takes a Village: Creating a Portfolio of Interventions

In Module 3 you can learn about how to identify and map potential partners.

Module 3: Hand in Hand: Fostering Lasting Relationships

Some questions to consider with a systems thinking approach to a particular issue:

- What patterns and trends are we noticing?
- Are we missing connections between systems?
- Who else do we need at our table to get new perspectives?
- What assumptions are we making?
- Are we considering all perspectives?
- What are the leverage points we might utilize?

## BUILDING YOUR SYSTEMS APPROACH

Read the below BUILD Health Challenge document to learn about the BUILD principles and how this approach impacts community-level systems change.

Community Approaches to Systems Change: A Compendium of Practices, Reflections, and Findings

These *Habits of a System Thinker cards* name different system thinking habits and what you should be incorporating in your work. Review these cards to gain some practical habits of a systems thinker.

Thinking Tools Studio Cards

Complete the handout of your system to better understand what the different elements are and how they are connected.

Waters Center for Systems Thinking: My Organization as a System

## THE ICEBERG MODEL

This model describes both what is in play with systems both seen and unseen as well as various intervention points to better understand what is occurring within a system.

Review the Iceberg model. Select an issue and complete the Iceberg template with your partners/team members. Host a discussion to further explore the factors that are in play and may not be seen. Notice what patterns occur after you complete the worksheet.

Start-Up Guide: Approaches to Support ACH Work (The Iceberg Model, p. 6)

Iceberg Model & Worksheet

The Five Whys practice is another tool that can be useful to begin to explore the root causes of issues that are present in your community.

The Five Whys

## DRAWTOAST WORKSHOP

DrawToast workshops are a great way to get groups to think freshly about systems thinking. In just 3 minutes, each person sketches a diagram of how to make toast. When comparing diagrams, people are shocked at how diverse the diagrams are, revealing a wide range of models of what's important in making toast. It's a great launch pad for drawing out what's really important to the group.

Draw How to Make Toast: A Simple and Fun Introduction to Systems Thinking

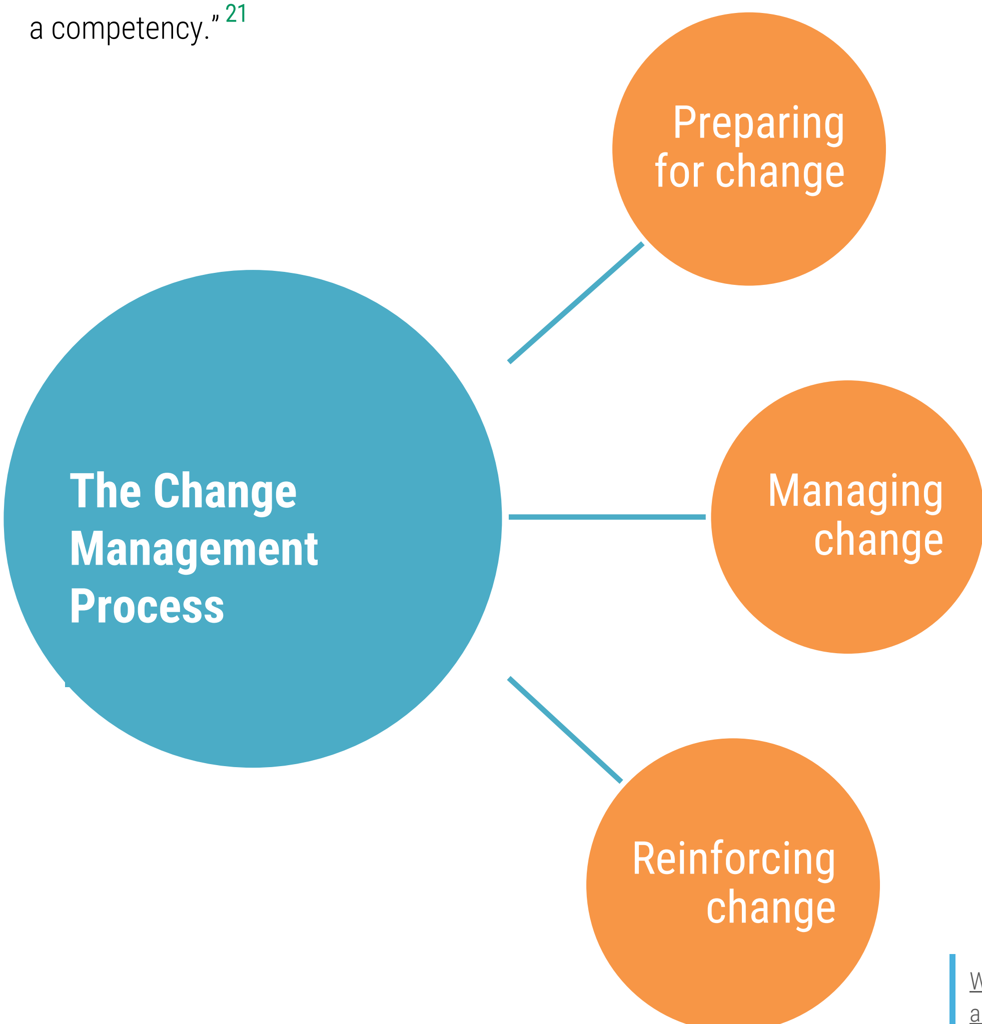
DrawToast Thinking and Discussion Guide

## CHANGE MANAGEMENT

"Change management comprises the processes, tools and techniques used to manage the people side of change and achieve desired business outcomes. Ultimately, change management focuses on how to help employees embrace, adopt and utilize a change in their day-to-day work. Change management is both a process and a competency." [21]

Learn more about change management via the link below.

What is Change Management and How Does It Work?




[21] What is Change Management and How Does It Work? Prosci's research-based three main phase methodology on the Change Management Process.

LESSON 2: SYSTEM THINKING

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about systems, and specifically the systems in which you work?
- What is working well and where are there gaps in the systems?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

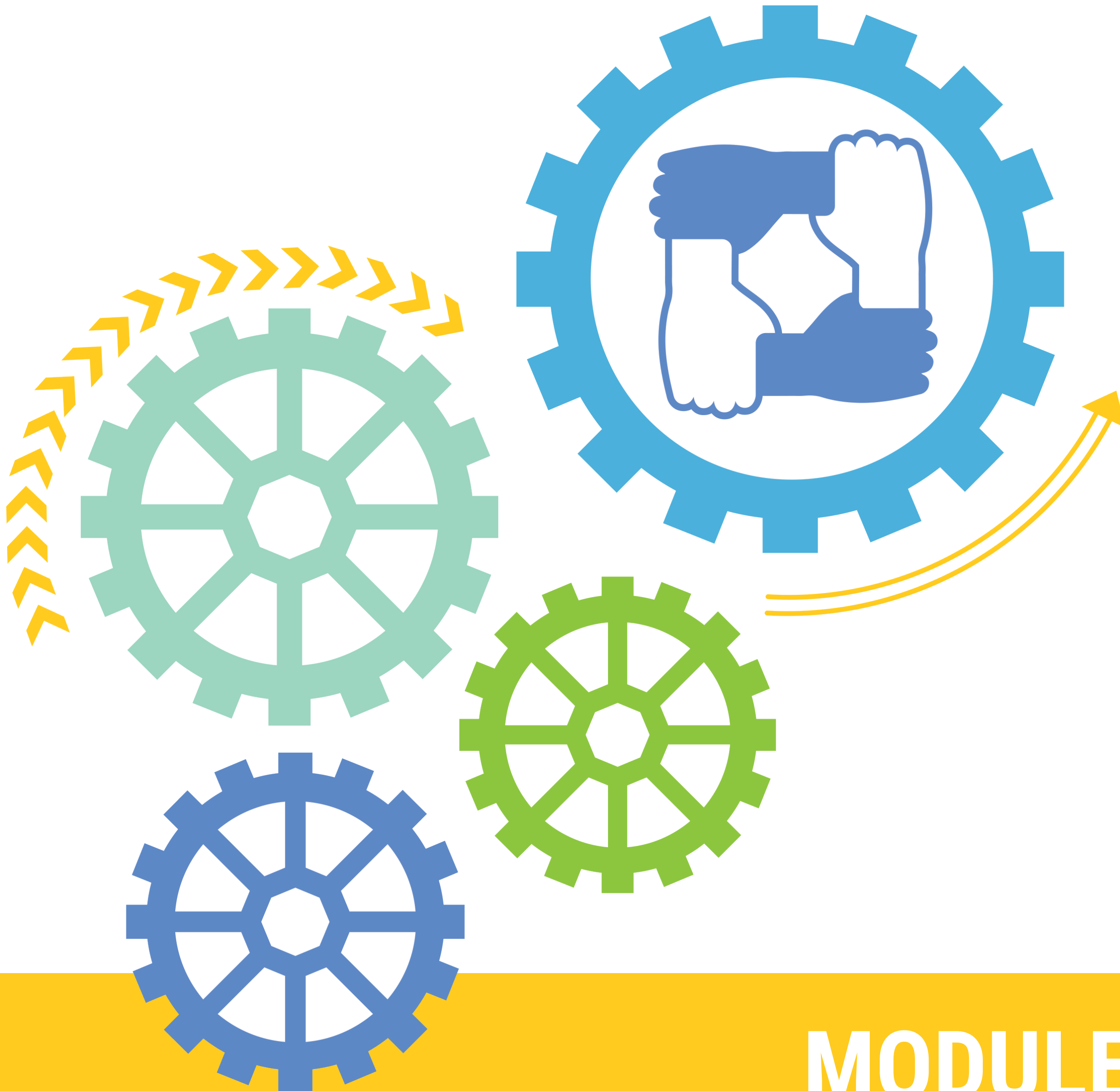
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 2 RIGHTING INJUSTICES

## OPERATIONALIZING EQUITY

*We thank Susan Watson of the Public Health Institute and Kristene Cristobal of Cristobal Consulting, Inc. for their contributions to this module.*

Module 2

# RIGHTING INJUSTICES

## Operationalizing Equity

## OBJECTIVE

Understand how current and historical systems and social structures influence health and well-being, both generally and in the collaborative's own community. Apply these learnings to enhancing racial and health equity in the communities you serve.

## LESSONS IN THIS MODULE INCLUDE

1) What is Equity?
2) Social Determinants of Health & Your Local Context
3) Create an Equity-Driven Culture

## AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of racial and health equity and their impacts on your community.
- An understanding of the social determinants of health and their impacts on your community.
- Conducted an equity assessment.
- Designed a strategy to build a culture of equity in your collaborative's work.

## RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*

- Module 1: Rewiring Your Brain: Mindsets & Systems Thinking
- Module 9: It Takes a Village: Creating a Portfolio of Interventions
- Module 11: Measuring Change: Data Collection, Application & Sharing

***"Tolerance, intercultural dialogue and respect for diversity are more essential than ever in a world where people are becoming more and more connected."***
***~ Kofi Annan***

If you are interested in further coaching on this topic, please contact: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# Lesson 1:
# What is Equity?

## OPENING QUESTIONS

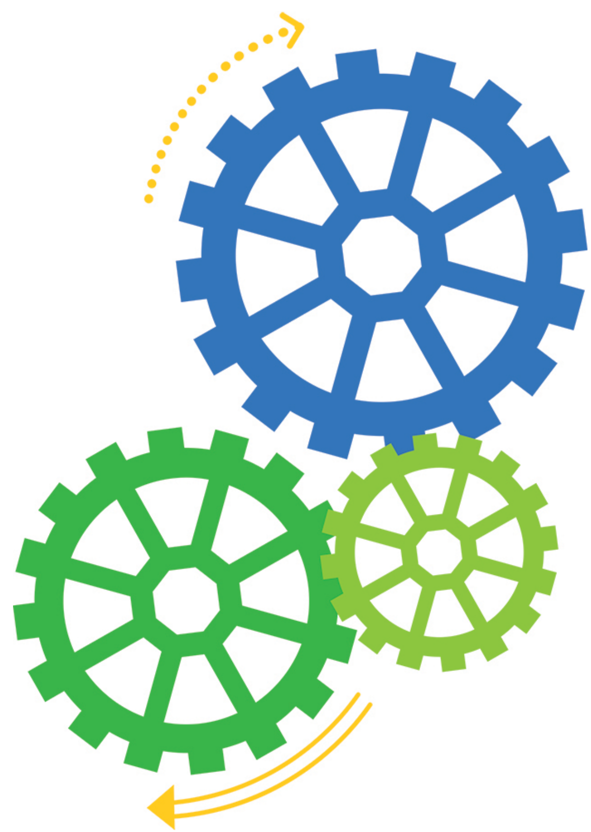
Discuss these questions with your team members before beginning this lesson.

- What is your collaborative's definition of equity?
- Has your collaborative completed an equity, diversity and inclusion assessment? What did you discover if so?
- How does your collaborative work to promote equity across your community? What would you like to do in addition to this?
- What role do you believe systemic racism plays in your community? How does this impact the work of your collaborative?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Define and describe racial and health equity and related terminology.
2) Distinguish between equity and equality and the impact of each perspective.
3) Conduct an equity assessment and incorporate these and other learnings into your collaborative's practices.



LESSON 1: WHAT IS EQUITY?

# UNDERSTAND

A critical first step to working toward equity is to fully understand what equity means. It is also important to come to an agreed upon definition with your partners. Equity is a broad and far-reaching concept. For the purposes of this curriculum, we focus on health and racial equity. These two concepts are inextricably intertwined, and to address one without the other would be to ignore this fundamental relationship.

Many of the following definitions come from the excellent resources listed below. You may find it helpful to reference these resources to ensure that your collaborative is "speaking the same language" and understands the meaning of these terms the same way.

- The Annie E. Casey Foundation Blog: Equity vs. Equality and Other Racial Justice Definitions
- Racial Equity Glossary

## EQUITY

"**Equity** is defined as 'the state, quality or ideal of being just, impartial and fair.' The concept of equity is synonymous with fairness and justice. It is helpful to think of equity as not simply a desired state of affairs or a lofty value. To be achieved and sustained, equity needs to be thought of as a structural and systemic concept."[6]

## EQUITY VERSUS EQUALITY

Equity is not equality. This distinction is an important one, as there are many situations in which treating certain groups "equally" would in fact be unjust.

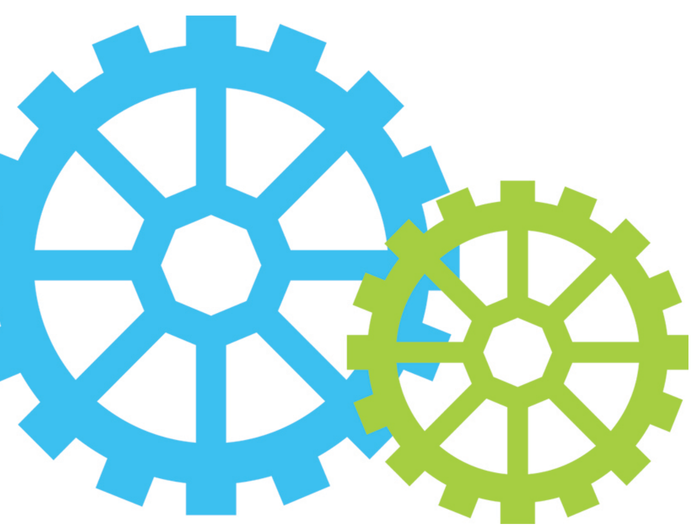
"Equity involves trying to understand and give people what they need to enjoy full, healthy lives. Equality, in contrast, aims to ensure that everyone gets the same things in order to enjoy full, healthy lives. Like equity, equality aims to promote fairness and justice, but it can only work if everyone starts from the same place and needs the same things."[6]

Understanding and communicating about equity can be challenging. For example, consider this article on the issue with a common equity vs. equality graphic you may have come across.

Cultural Organizing: The Problem with that Equity vs Equality Graphic

## HEALTH AND HEALTH CARE DISPARITIES

According to the Kaiser Family Foundation, "health disparity refers to a higher burden of illness, injury, disability, or mortality experienced by one group relative to another. A 'health care disparity' typically refers to differences between groups in health insurance coverage, access to and use of care, and quality of care."[7]



## HEALTH EQUITY

"**Health equity** means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care.

The following should be added when the definition is used to guide measurement; without measurement, there is no accountability: For the purposes of measurement, health equity means reducing and ultimately eliminating disparities in health and its determinants that adversely affect excluded or marginalized groups."[8]

If you are part of a multisector collaborative for health, health equity is likely the cornerstone of all of your work. Defining and measuring the impact you make on health equity is necessary to assess the impact of your work. The below resources provide some information on how to do this.

What Is Health Equity?

Achieving Equity in Health and Safety Through Primary Prevention

## INTERSECTIONALITY

Per Kimberlé Williams Crenshaw: "Intersectionality is simply a prism to see the interactive effects of various forms of discrimination and disempowerment. It looks at the way that racism, many times, interacts with patriarchy, heterosexism, classism, xenophobia — seeing that the overlapping vulnerabilities created by these systems actually create specific kinds of challenges. "Intersectionality 102," then, is to say that these distinct problems create challenges for movements that are only organized around these problems as separate and individual. So when racial justice doesn't have a critique of patriarchy and homophobia, the particular way that racism is experienced and exacerbated by heterosexism, classism etc., falls outside of our political organizing. It means that significant numbers of people in our communities aren't being served by social justice frames because they don't address the particular ways that they're experiencing discrimination."[9]

## RACIAL EQUITY

"**Racial equity** is the condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares. When we use the term, we are thinking about racial equity as one part of racial justice, and thus we also include work to address root causes of inequities not just their manifestation. This includes elimination of policies, practices, attitudes and cultural messages that reinforce differential outcomes by race or fail to eliminate them."[9]

Racial inequities can show up in myriad ways, such as rates of home ownership or high school graduation. For an example of how racial inequity contributes to household net worth, see page 15 of the GARE Communications Guide.

## RACISM

"The concept of **racism** is widely thought of as simply personal prejudice, but in fact, it is a complex system of racial hierarchies and inequities. At the micro level of racism, or individual level, are internalized and interpersonal racism. At the macro level of racism, we look beyond the individuals to the broader dynamics, including institutional and **structural racism**."[6]

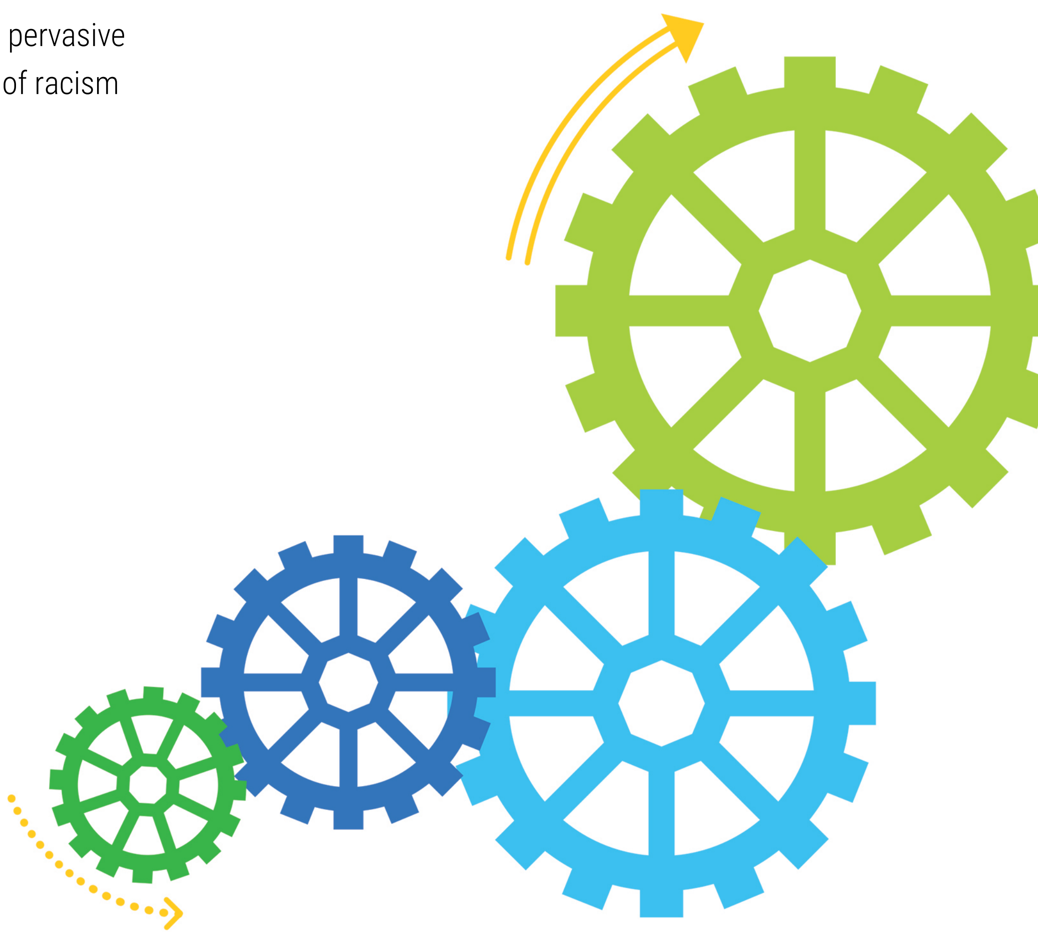
- Aeon: How to See Race
- Levels of Racism: A Theoretic Framework and a Gardener's Tale

> **"By acknowledging the history of racism and discrimination that continues to perpetuate inequities and injustices in our communities and utilizing our lived experiences to help inform others, we can create more equitable systems."**[22]

## STRUCTURAL RACISM

"The normalization and legitimization of an array of dynamics – historical, cultural, institutional and interpersonal – that routinely advantage Whites while producing cumulative and chronic adverse outcomes for people of color. Structural racism encompasses the entire system of White domination, diffused and infused in all aspects of society including its history, culture, politics, economics and entire social fabric. Structural racism is more difficult to locate in a particular institution because it involves the reinforcing effects of multiple institutions and cultural norms, past and present, continually reproducing old and producing new forms of racism. Structural racism is the most profound and pervasive form of racism – all other forms of racism emerge from structural racism.

For example, we can see structural racism in the many institutional, cultural, and structural factors that contribute to lower life expectancy for African American and Native American men, compared to white men. These include higher exposure to environmental toxins, dangerous jobs and unhealthy housing stock, higher exposure to and more lethal consequences for reacting to violence, stress, and racism, lower rates of health care coverage, access, and quality of care, and systematic refusal by the nation to fix these things."[9]



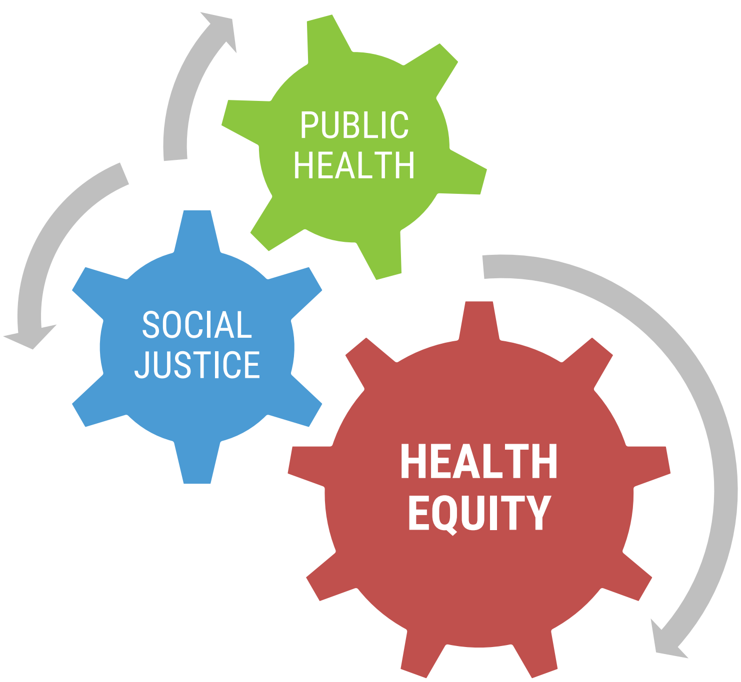
LESSON 1: WHAT IS EQUITY?

# APPLY

In order to create an organization that is truly equitable, you must first conduct an honest self- and organizational assessment. This assessment should be repeated on a regular basis to assess your progress. This important work is a journey, not a check-box.

## HEALTH EQUITY

Use the Human Impact Partners Health Equity Guide as a point of reference as you operationalize equity in your collaborative.




The Health Equity Guide is a comprehensive resource, including strategic practices to:

- mobilize data, research and evaluation;
- build organizational capacity;
- change internal practices and processes;
- prioritize upstream policy change;
- allocate resources;
- build government alliances;
- develop a shared analysis;
- broaden regulatory scope;
- share power with communities;
- build community alliances;
- engage in movements;
- confront the root causes;
- develop leadership and support innovation;
- change the conversation; and
- build a health equity movement.

## LESSON 1: WHAT IS EQUITY?

This guide provides specific actions that can be taken to advance equity, and provides resources to support this work. We encourage you to look carefully at the Health Equity Guide, with a specific focus on areas your collaborative struggles with or needs to address. While you may find any number of the strategic practices presented in this guide useful for your collaborative's ongoing efforts toward advancing equity, we would like to highlight three which we believe would be helpful for all MSCs engaging in this work; share power with communities, confront the root causes, and build a health equity movement. These are linked individually below.

- Health Equity Guide
- Health Equity Guide: Share Power with Communities
- Health Equity Guide: Confront the Root Causes
- Health Equity Guide: Build a Health Equity Movement

For inspiration on new and innovative standards in health equity practice, check out the work of the 2019 Health Equity Awardees.

- Advancing Health Equity: 2019 Health Equity Awardees

## RACIAL EQUITY

Use the following Organizational Self-Assessment tool to capture a holistic picture of the policies and practices of your collaborative as they relate to racial equity and review the Racial Equity Impact Assessment document to help guide organizational decisions and actions moving forward.

Gather your partners to use this (or another) racial equity assessment tool to evaluate your collaborative's strengths and weaknesses. First consider what your goals and areas for improvement are, and discuss your collaborative's current and aspirational practices with your team. Then create an action plan to address any areas of concern. Be sure to include regular reassessment in your plan!

- Tool for Organizational Self-Assessment Related to Racial Equity
- Racial Equity Impact Assessment

## LESSON 1: WHAT IS EQUITY?

"Living Cities used this Staff Racial Equity & Inclusion Competency survey to assess their staff's collective competency around embedding a racial equity lens in their work. This helped them plan staff training, assess the level of racial equity awareness and what staff know about the organization's efforts to promote equity."[23]

Consider replicating the 21-Day Racial Equity and Social Justice Challenge with your collaborative members to "build more effective social justice habits, particularly those dealing with issues of race, power, privilege, and leadership." Scroll to the bottom of the page in the link below for a discussion guide to facilitate conversations among your team on racial equity and social justice learnings.

CA4Health: 21-Day Racial Equity & Social Justice Challenge

- **Requires registration*

Consider hosting a discussion or series of discussions in your community and or with your MSC members. This is one of many ways your collaborative can work toward true community engagement and trust-building, developing allies and partners among the communities you serve. It is also an opportunity to open a dialogue to learn more about how racial equity issues such as systemic racism are impacting the daily lives of your community members, to help inform your collaborative's approach to your work.

Advancing Racial Equity Discussion Guide

Dismantling Racism Workbook


Deepa Iyer, Building Movement Project. SM, © 2018 Deepa Iyer. This is a framework that can help individuals, networks, and organizations align and get in right relationship with social change values, individual roles, and the broader ecosystem.

## LESSON 1: WHAT IS EQUITY?

In one such discussion event, the BSCF Equity and Collaboration Design Day, the following strategies which centered residents were outlined. These are just some examples of many you might draw from and apply to your own community and collaborative, as relevant. These strategies were excerpted from *Operationalizing Equity in Multi-Sector Collaborations: Strategies to Center Equity and Social Justice.*[23]

- Residents had decision making power by having a vote in the multi-sector collaboration's work. As new leaders came in, there were new structures to support more equitable decision making.
- Pooled funding from public, private, and foundation sources into a community trust, where residents were part of a participatory budgeting process to allocate funds.
- Developed a scorecard of powerful stakeholders' progress on the multi-sector collaboration's goals. Accountability meant that repeated low scores resulted in residents having more control of stakeholders' systems until they were on track.
- Fostered forgiveness, healing, and helped residents feel part of the group and not isolated.
- Created adaptable processes for participation so a resident could be involved in different kinds of opportunities, but not be required to be in a leadership role if they have work and family responsibilities.
- Used practices to heal intergenerational trauma. Brought in different types of healing practices from different cultures. Taught mindfulness and how to be together in community that holds heart, spirit, love, and interconnection.
- Practiced deep listening, relationship building, sustaining each others' well being so they can work together for the long haul. They implemented restorative practices and transformative justice practices to bring in healing and forgiveness.
- One community had a $2M gift with no strings attached, so the community decided to use participatory budgeting, which was a huge capacity building opportunity, to develop ideas in a democratic way and decide how to spend the funds.[23]

## LESSON 1: WHAT IS EQUITY?

In relationships where there is an imbalance of power, such as those with community partners, it is important to be aware of your power and how you can use your understanding of recurring power dynamics to support personal growth, team dynamics, and your ability to authentically engage with community leadership. Addressing power dynamics is critical to achieving equity. Consider the information linked below on equity and power in relationships.

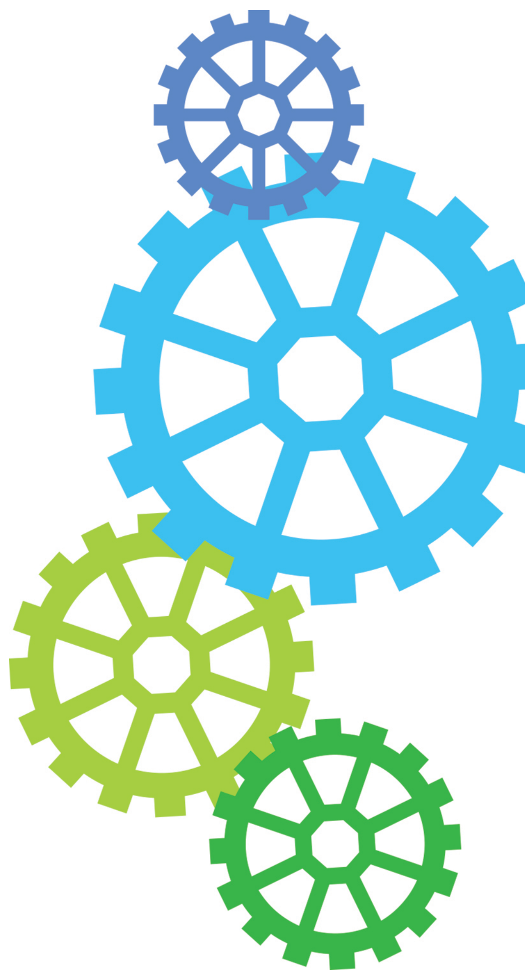
- Start-Up Guide: Getting Started (Equity and Power, p. 19)
- Dynamics of Power, Inclusion and Exclusion
- Leading Locally: Measuring Community Power for Health Equity
- Key Tools to Address Equity, Diversity and Inclusion

Read about how Color of Chicago Beyond addressed power dynamics in their work in the following guidebook.

- Why Am I Always Being Researched? (p. 13 & 14)

You must understand the dynamics of intersectionality in the community you serve, including on the basis of race/ethnicity, indigeneity, class, gender, sexual orientation, age, disability, ability, and so on, designing interventions to reflect and address the many possible intersections of the population. This will help you to avoid reinforcing oppressive systems, even if unintentionally.[23] See the below link for more information on intersectionality.

- Kimberlé Crenshaw's Intersectional Feminism



## LESSON 1: WHAT IS EQUITY?

The following are some practical considerations, excerpted from *Operationalizing Equity in Multi-Sector Collaborations: Strategies to Center Equity and Social Justice,*[23] for how to involve residents in your collaborative's decision-making processes.

- Plan and budget for things that could be barriers to resident involvement, e.g., transportation, child care, translators.
- Develop multi-year/sustainable funding for paid positions for residents within the [backbone] and the collaboration's workgroups.
- Create a plan for how leadership capacity in residents is built, e.g., coaching, mentoring, training, experience. [Backbone] staff can help prepare them for the training, attend the training with them, and debrief the training to discuss learnings.
- Try to have more than one resident or person with lived experience on any improvement team in order to help equalize the balance of power.
- Hire with equity and inclusion, e.g., racial equity, as one of the key competencies for new staff positions.
- Address biases, racism, and/or other marginalizing features of systems and institutions directly through normalizing these conversations, anti-racism trainings, etc.
- Develop facilitation processes to help people so that you're likely to be equitable in both your design process, your implementation process, and in your evaluation process. These facilitation strategies actually help it to be more equitable for everybody, not just for the person with lived experience.

## LESSON 1: WHAT IS EQUITY?

Racial inequities and a long history of racism on both the national and local scale are inextricably linked with disparities in health and their determinants. While this curriculum primarily focuses on the work that your collaborative can do to address these longstanding inequities brought about by racism, this work starts with each of us individually.

We include the below annotated Bibliography on Dismantling Racism and White Supremacy Culture to help guide your personal exploration and learning. See also the linked list What Can White People Do for information on how to begin the work of becoming antiracist.

- Bibliography on Dismantling Racism and White Supremacy Culture
- What Can White People Do?

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# DIG DEEPER

- PBS: Ten Things Everyone Should Know About Race
- Racial Justice Assessment Tool
- NQF Issues Quality Roadmap for Reducing Healthcare Disparities

LESSON 1: WHAT IS EQUITY?

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about racial and health equity?
- Did anything you learned from assessing racial and health equity in your collaborative surprise you?
- Are your collaborators representative of your community? If not, what can you do to build a more representative collaborative?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Social Determinants of Health & Your Local Context

## OPENING QUESTIONS

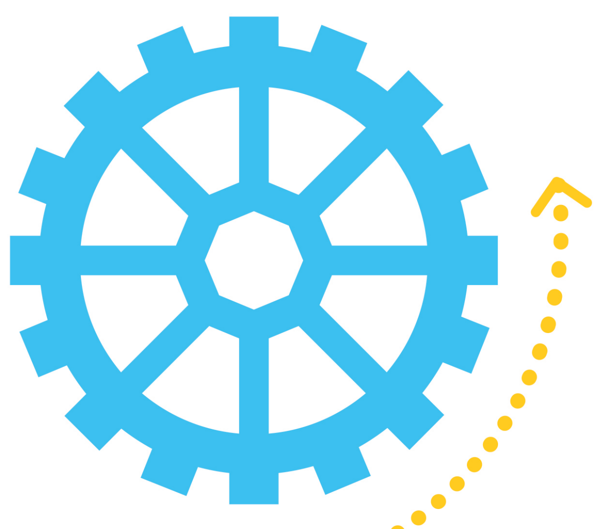
**Discuss these questions with your team members before beginning this lesson.**

- Whose land are you occupying right now? (Google "Native American tribes [your city]" to learn more about the history of the land on which your city rests.)
- In what ways has a history of redlining segregated your communities? (Google "redlining [your city]" to learn about one aspect of institutional racism that shapes your community.)

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand how the social determinants of health influence health and well-being.
2) Explore data on the makeup of your community.
3) Understand some of the historical context of racism and racial injustice in the United States, as well as in your local area.



# UNDERSTAND

"**Social determinants of health (SDOH)**, also referred to as vital conditions, are conditions found in the environments in which people live, learn, work, and play that impact a wide range of health outcomes and risks."[13] Social determinants of health are the underlying conditions that cause health-related social needs. The two concepts are distinct and should not be confused for one another.

- Beyond Health Care: The Role of Social Determinants in Promoting Health and Health Equity
- Meeting Individual Social Needs Falls Short Of Addressing Social Determinants Of Health
- Vital Conditions
- Social Determinants of Health - An Introduction

Discrimination and racism have a long history in the United States, and in each individual community. The historical and current context of these wrongs continue to impact the health of people today. It is important to understand these factors as the context in which you work. The Health Affairs article linked below discusses the relationship between social determinants of health and racism, and is a starting point for understanding this context. The Thriving Together report is a long but worthwhile read which illustrates the impact on vital conditions and wellbeing in the current environment.

- Health Affairs Blog: The Social Determinants of Death
- Thriving Together: A Springboard for Equitable Recovery & Resilience in Communities Across America

Social Determinants of Health

| Economic Stability | Neighborhood and Physical Environment | Education | Food | Community and Social Context | Health Care System |
|---|---|---|---|---|---|
| Employment | Housing | Literacy | Hunger | Social integration | Health coverage |
| Income | Transportation | Language | Access to healthy options | Support systems | Provider availability |
| Expenses | Safety | Early childhood education | | Community engagement | Provider linguistic and cultural competency |
| Debt | Parks | Vocational training | | Discrimination | Quality of care |
| Medical bills | Playgrounds | Higher education | | Stress | |
| Support | Walkability | | | | |
| | Zip code / geography | | | | |

**Health Outcomes**
Mortality, Morbidity, Life Expectancy, Health Care Expenditures, Health Status, Functional Limitations

Beyond Healthcare: The Role of Social Determinants in Promoting Health and Health
Social determinants of health are the conditions in which people are born, grow, live, work and age.

# APPLY

## HISTORICAL CONTEXT

Do some research to learn more about the historical and current context of social determinants of health and racism in your community. This could include segregation and redlining practices, community disinvestment, or any number of structural influences on the community's health and wellbeing. Two good places to start are 1) the opening questions in this lesson and 2) the data sources linked in Module 11, Lesson 1 of this curriculum.

- Find and review in-depth one resource on racial inequities in your community.
- Find and review in-depth one resource on the history of your particular community (defined by place or characteristic make-up, as relevant).

Module 11: Measuring Change: Data Collection, Application & Sharing

- *Lesson 1: Data Collection, Understanding & Application*

| EQUITY IS ABOUT | EQUITY IS NOT ABOUT |
|---|---|
| Meeting people's needs based on their unique circumstance to create success. | Giving everyone the same. This is equality. |
| A process and results that is both fair and just. | Having good intentions with no follow-through. |
| Removing barriers so everyone can thrive. | Helping people survive. |
| What you do and *how* you do it. | Doing something just to get the job done. Checking the box. |

Creating Thriving Communities in Colorado
What is an Equity Approach About? An equity approach often "levels the playing field" based on different starting points and needs in order to remove barriers to opportunity.

For many issues or outcomes that a multi-sector collaboration will address in a community, there are likely inequities that become clear once the data is disaggregated by race, gender, etc. It's important for the collaboration to address the root causes of these inequities, so that real and lasting impacts are possible. An analysis of historical and structural barriers that uphold inequities can better inform targeted program, system, or policy level strategies.[23]

- For example, the collaboration must see how racism operates at multiple levels within a community (internalized, personally mediated, institutional, and structural), so that efforts can be targeted across systems in the community. This includes educating the community and stakeholders about past and current structural racism that impacts residents. E.g., redlining maps in a community can shed light on the unequal distribution of resources across neighborhoods as determined by federal home lending policy from the 1930s; a neighborhood's lack of nutritious and affordable food and food insecurity is linked to historical disinvestment of black neighborhoods, large-scale out-migration from urban centers or "white flight."

- Colorado Department of Public Health and Environment, Office of Health Equity's Equity Action Guide acknowledges structural racism and describes a history of inequitable policies that affect Coloradans from the 1800s. This timeline is then connected to modern-day outcomes of poverty, poor mental health, and diabetes. It provides an example of one CBO that holds planning meetings between residents and public officials in a historically redlined and gentrifying neighborhood.

*Excerpted from Operationalizing Equity in Multi-sector Collaborations: Strategies to Center Equity and Social Justice.*[23]

The below resources provide a wealth of information on specific social determinants of health, as well as national, state and local resources around SDOH and the Healthy People 2020 SDOH Objectives. Explore the areas relevant to your collaborative's mission, and be sure to check out the National, State, and Local Resources section toward the bottom of the page.

- Healthy People 2020: Social Determinants of Health

The Centers for Disease Control and Prevention's SDOH resource center offers ways to "take action" including policy resources and tools to address SDOH. Review the Tools for Putting Social Determinants of Health into Action. Identify three or more areas your collaborative could take action, whether inspired by this list or other resources through this module. Discuss these options with your team, and begin the work.

CDC Research on SDOH

The National Equity Atlas , a product of PolicyLink and the USC Program for Environmental and Regional Equity (PERE), provides data on demographic change, racial inclusion, and the economic benefits of equity for the 100 largest cities, 150 largest regions, all 50 states, and the United States.[23]

## STRUCTURAL RACISM AND BLACK AMERICAN EXPERIENCE

*"Racism is a public health problem, meaning racism is at the root of the inequities in health that we see, particularly for blacks in this country. So whether it's housing, criminal justice, education, wealth, economic opportunities, healthcare, all of these interlocking systems of racism really are the main fundamental drivers of the racial inequities that we see among black Americans."*[24]
*~ Dr. Sharrelle Barber*

This quote from Dr. Sharrelle Barber illustrates the systemic nature of racism that must be acknowledged and addressed through your collaborative's practices. Is it important to look at all of your policies and programs through the lens of systemic racism and the inequities it has caused, in particular to your black community members.

## ACKNOWLEDGE & NAME INJUSTICES

It is important in this work to acknowledge the lived experiences of those you work with/for, and to regularly reflect on the impact of historical injustices on your collaborative's work today. In doing this, consider the power dynamics at play in the situation.

### *Welcoming Practices*

Including welcoming practices, such as those below, in gatherings hosted by your collaborative are a way of naming injustices and centering equity in these meetings. The below are a few options you might use for this purpose. There are many other options as well.

As you use these and other tools, always be mindful of cultural appropriation and any power dynamics at play. Consider your own position, the history and intent behind the practice, the way in which you are using it, and any unintended consequences that may arise.

Always remember to name the original source, and credit any other cultures from which you are drawing inspiration or practices. To learn more about cultural appropriation, see the below link.

What Is Cultural Appropriation?

### *The Big Welcome*

The Big Welcome is an acknowledgement and level setting tool you can use to open a meeting.

The Big Welcome

### *Recognizing Native Land*

Recognizing native land is a practice you can adopt within your MSC. As the US Department of Arts and Culture states in the below guide, "Acknowledgment is a simple, powerful way of showing respect and a step toward correcting the stories and practices that erase Indigenous people's history and culture and toward inviting and honoring the truth."

The Honor Native Land guide provides context and instructions to initiate the practice of acknowledging and honoring native lands.

Honor Native Land: A Guide and Call to Acknowledgement

### *Equity Moment*

Open your meetings with an "Equity Moment", as the Healthier Here ACH of King County, Washington does. Focus on a particular issue, and have a large or small group discussion on this topic before beginning your meeting.

### *Exercise*

Talk with your partners and community to understand systems in place currently to either facilitate or hinder progress in building an equitable community (race, health and other factors as relevant).

Are there groups within your community that are not represented within your partners, particularly among black and indigenous people of color (BIPOC)? Are there inequities you were not aware of that you should incorporate into your collaborative's work?

Module 3: Hand in Hand: Fostering Lasting Relationships

# REFLECT

**Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.**

- What are you learning about the social determinants of health and how they impact people at a national and local level?
- What have you learned about health and racial inequities present in your own community?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 3:
# Create an Equity-Driven Culture

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What would a culture driven by equity look like?
- Where would you start in building an equity-driven culture?
- What could be measurable goals around equity and inclusion?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand and describe the ways in which equitable operations can impact your work and the communities you serve.
2) Apply these learnings by creating a strategy to build a culture of equity in your collaborative's work.

# UNDERSTAND

No matter the particular health focus of your multisector collaborative's work, it is critical that you understand and apply strategies to build racial and health equity. Understanding how efforts to improve health and racial equity can impact your community is the first step in this journey.

National Equity Project Equity Lens (slides 9-11, 18, 32)

Return on Investment (ROI) Calculator for Partnerships to Address the Social Determinants of Health

In making equity, diversity and inclusion a priority in your collaborative, we highlight two key components identified in *Operationalizing Equity in Multi-Sector Collaborations*:[23]

1) Use direct and explicit language in the mission statement about how racial equity and social and economic justice are core values and core competencies of the [backbone].

2) Establish what values are most important and true for the collaboration, member organization staff, their boards, community partners, and people with lived experience. We can arrive here through a process of deep listening to all stakeholders and learning from other efforts' who have led with a strong set of equity values. Examples of equity values from GARE:

- We Work Towards Justice - We are clear-eyed about the past and rigorously committed to a new way of governing, one that intentionally creates just, equitable outcomes for people of color.
- We Value Lived Experience - (or community) The principle "nothing about us without us" is a core tenet of our approach. We partner with and support the leadership of those most impacted by our history of inequities, communities of color, to guide and shape efforts toward racial equity.
- We Build Momentum - Our work to advance racial equity is urgent, but we know that lasting change can't happen overnight. We balance progress with pragmatism, seeking not perfection but meaningful steps forward every day.

## LESSON 3: CREATE AN EQUITY-DRIVEN CULTURE

As a starting point to building a culture of equity within your collaborative, explore the below resource for case studies, examples and tools to support your work.

[Collaborating for Equity and Justice Toolkit](#)

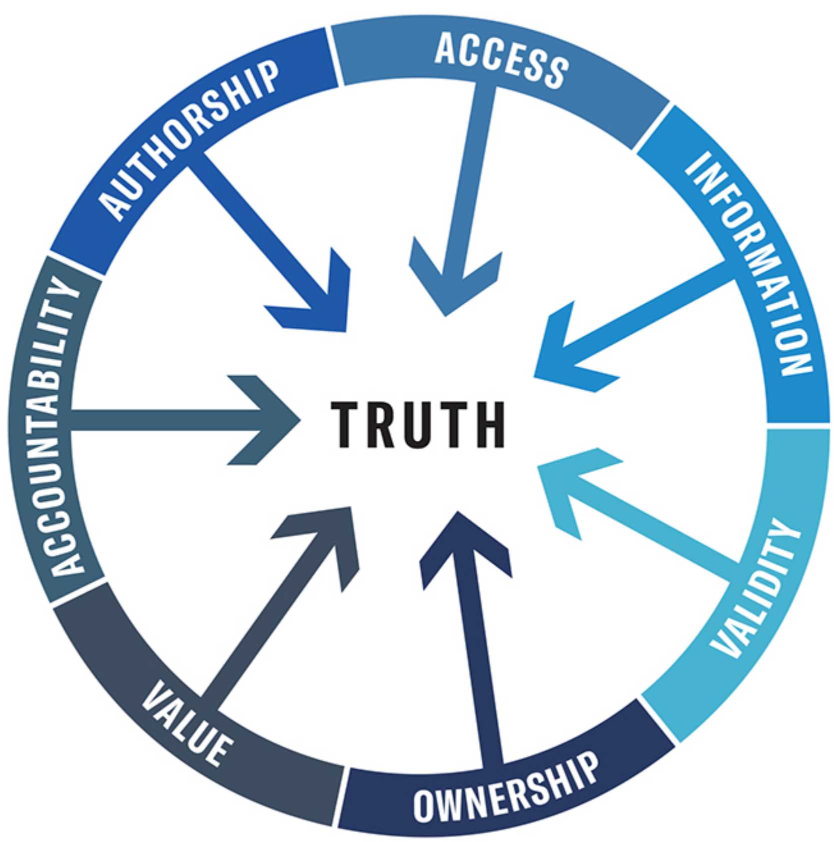
Watch the County Health Rankings and Roadmaps webinar on Building Equity Into Your Network of Partners to learn how to leverage your network of partners and create an equitable partnership experience.

Building Equity Into Your Network of Partners

Read *Seven Inequities Held in Place by Power, Seven Opportunities for Change* in the below guidebook to understand more about power dynamics and how your collaborative's work can work to center power in your communities to drive positive change.

Why Am I Always Being Researched? (p. 18-26)

Why Am I Always Being Researched?
This guide begins by naming seven inequities held in place by power, and calls out how they get in the way of truth and impact.



LESSON 3: CREATE AN EQUITY-DRIVEN CULTURE

# APPLY

To make the desired, sustainable impacts to equity through your work, you must create a culture driven by equity. Explore the below resources, and use what you learn to create a strategy to build a culture of equity, in particular racial and health equity, into your work.

- Promoting Health Equity Through Accountable Communities for Health
- Developing a Framework To Measure the Health Equity Impact of Accountable Communities For Health
- King County ACH Equity Tool
- Equity Resources for Building the SD ACH Equity Tool
- King County's Journey in Institutionalizing Equity and Social Justice

"Implement changes or strategies that can counteract dominant culture practices that uphold inequity. Four ways this can show up in organizations include how you sit in a meeting (who sits at the table), who gets to talk first, how you expect people to identify, how much time is allotted for naming who we are before we get to business."[23]

Below are several tools you can utilize to help in creating an inclusive and equitable planning process:

- How Can We Create An Inclusive And Equitable Planning Process?
- NJJN Western States Rubric
- King County Racial Equity Toolkit to Assess Policies, Initiatives, Programs, and Budget Issues

Below are several specific steps identified in *Operationalizing Equity in Multi-sector Collaboratives: Strategies to Center Equity and Social Justice*[23] to help you to prioritize equity as a core competency in your collaborative.

1) Institutionalize the centering of equity by elevating and **treating equity as a core competency in the [backbone] staff and across the multi-sector collaboration**. This codifies it as an expectation, a continual process of practicing skills and behaviors, and defines it as a norm and value.

2) With equity as a core competency, **develop specific and measurable goals for increasing skills and actions to address equity - for both the individual and the organizational level, including the Board**.

Ensure that there are multiple check-ins on these goals throughout the year to reinforce their priority and especially to support the growth of this capacity for equity.

3) Actions that people can take to advance equity in their everyday work can include **setting equity goals and measures for the workstreams they are a part of**, seeking out and centering the experience and wisdom of the people most affected by inequities, or using a tool to understand the impact of decisions on different groups, e.g., the Racial Equity Impact Assessment (REIA).

As you work to implement equitable and inclusive practices, the below questions can help guide your thinking:

- Who is being impacted by these issues?
- What voices do we need here to learn more about the issues?
- What can we do to ensure the decision-making authority rests with those impacted?
- What systems are in place to ensure resident decisions are followed?
- What are the power dynamics at play in this situation, and how might we address these?

One strategy to institutionalize a commitment to racial justice is to establish Racial Equity Core Teams. "A Racial Equity Core Team is a primary leadership team, including both formal and informal leaders, responsible for designing, coordinating, and organizing racial equity plans and activities across a government jurisdiction or institution that is committed to equitable systems change. The Core Team is often situated within a broader Racial Equity Initiative or framework adopted by a jurisdiction, and is officially authorized to play a leading role in operationalizing the commitment to equity in all dimensions of the institution. The Core Team often serves as the engine for change, leading the way, pulling others along, chugging through sometimes challenging terrain, keeping things on track, moving a diverse community of people in a common direction, and building the movement and momentum to arrive at the destination of equitable outcomes."[25]

Explore the below toolkit to learn more about this strategy. Also linked is GARE's Communication Guide with strategies to communicate around racial equity.

- GARE: Racial Equity Core Teams
- GARE: Communications Guide (p. 41 on)

## LESSON 3: CREATE AN EQUITY-DRIVEN CULTURE

As you work to apply what you have learned in this lesson, do the following with your team:

1) Hold a discussion to develop a series of probes to ask yourselves each time you initiate new activities, or review existing ones. These could include questions such as:
   - What racist systems might this perpetuate?
   - How can you change this to not just avoid racism, but be actively anti-racist?
   - How can you actively promote health and racial equity in this activity?
   - What unintended consequences might this activity have on health and racial equity in your community?
2) Once you have established a list of probing questions, incorporate these into any necessary procedures or documents, so that you will use them regularly in the future.
3) Conduct a "pilot test" of your probing questions, examining one of your collaborative's current activities.
4) If you discover anything about your work that is not actively building health or racial equity, make the necessary changes.

Develop a robust equity action plan for implementing organizational policies and practices that will intentionally address inequities. The following steps excerpted from *Operationalizing Equity in Multi-sector Collaboratives: Strategies to Center Equity and Social Justice* can guide the implementation of the equity action plan:[23]

- [ ] Prepare for leadership support - Determine who at the Board and senior leadership level will be the visible and accountable sponsors of the equity work and how they will endorse, promote, and resource that work.
- [ ] Create an equity planning team and accountability structure - Pull together a multi-racial and multi-identity core team to drive the planning and monitoring processes of the equity action plan.
- [ ] Develop a monitoring and reporting plan.
- [ ] Define the organization's Equity Values.
- [ ] Allocate resources to operationalize the equity action plan, including external partners for training and coaching.
- [ ] Develop a communication plan.

## LESSON 3: CREATE AN EQUITY-DRIVEN CULTURE

For a deeper dive into leading the integration of equity into your collaborative's culture, check out Health Impact Partners' (HIP) Health Equity Awakened: A Leadership Institute. HIP also offers a number of capacity building resources you can use today on their website.

- Health Equity Awakened: A Leadership Institute
- HIP Capacity Building Resources

# DIG DEEPER

- PolicyLink
- State of Colorado: Community Partnerships Principles Guide
- A CEO Blueprint for Racial Equity
- Equity in the Center: Awake to Work to Work: Building a Race Equity Culture
- GARE Racial Equity Toolkit
- Leading and Working Toward Equity
- Race Matters Toolkit: User's Guide
- State of Colorado: Creating a Culture of Belonging: A Guide for Retaining Staff
- State of Colorado: Ensuring a Diverse Workforce: A Guide for Inclusive Hiring Practices

LESSON 3: CREATE AN EQUITY-DRIVEN CULTURE

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about the potential impacts of equity-driven policies and practices?
- What anti-racist and helath equity-driven approaches you can adopt in your organizational approach moving forward?
- How will you incorporate this information into your existing practices, or plan for moving forward with your portfolio of interventions?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# MODULE 3
# HAND IN HAND

## FOSTERING LASTING RELATIONSHIPS

Module 3

# HAND IN HAND

## Fostering Lasting Relationships

## OBJECTIVE

Develop strategies to deeply engage and build trust with community and organizational partners. Learn how to identify, convene and support diverse partners, and approach negotiation and conflict resolution.

### LESSONS IN THIS MODULE INCLUDE

1) Identify & Define Partnerships
2) Build Trust with Partners & the Community at Large

### AT THE END OF THIS MODULE YOU WILL HAVE

- Mapped potential partners, including community members and organizations.
- Created a community engagement plan.
- Assessed existing and/or potential partnerships.
- Developed plans to implement transparent practices and conflict resolution.

### RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*

- Module 1: Rewiring Your Brain: Mindsets & Systems Thinking
- Module 5: Pieces of the Puzzle: Communicating for Impact
- Module 7: Scaffolding for Change: Backbone Organizations
- Module 8: Collective Accountability: Governance & Leadership

***“There is immense power when a group of people with similar interests gets together to work toward the same goals.”***
***~ Idowu Koyenikan***

If you are interested in further coaching on this topic, please contact:


**Sue Grinnell, MPH,**
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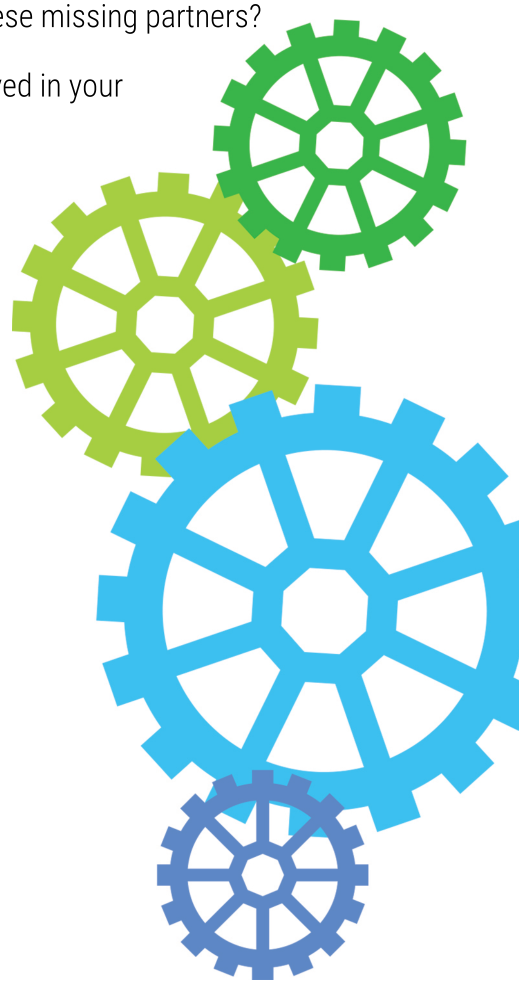
# Lesson 1:
# Identify & Define Partnerships

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- How might you continue to engage with partners?
- What does your team see as the priorities, needs and values of each partner? Discuss and write down your responses.
- Who might be missing from our group?  How might you approach these missing partners?
- How will you identify and approach community members to be involved in your collaborative's operational and decision-making processes?



## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Engage with diverse partners, both community and organizational.
2) Assess existing and potential partnerships.

# UNDERSTAND

For the purposes of this curriculum, we have chosen to use the term **partners** to include both community and organizational representatives - essentially any person or organization who has an interest or concern in something, such as your initiative, organization, community, or business, and can contribute to the creating and supporting of your multisector collaborative's (MSC's) activities.

We have used the term partners in this way intentionally, in order to avoid "othering" and to convey the value of community residents in the collaborative's decision-making process. This approach is not common in the resources we have found. Therefore, the resources listed here tend to separate "community partners" from "organizational partners." There may be differences in the way you engage, amplify and incorporate the voices of these different groups with partners working to find ways to bring the two together as opposed to operating separately.


To move towards a collective it may require separate conversations and understanding of what each needs to effectively partner with an intentional movement towards collective dialogue and shared understanding of what is needed to create a healthy and thriving community.

Start-Up Guide: Getting Started (Partnership, p. 14)

It is important that your MSC's partners are an accurate representation of the community you serve. Ensure that the necessary perspectives are represented, and regularly review your partnership roster.

A targeted universalism approach is particularly salient in the efforts of MSCs to design solutions that are specifically tailored to their own community needs, while serving a larger goal. "Targeted universalism means setting universal goals pursued by targeted processes to achieve those goals. Within a targeted universalism framework, universal goals are established for all groups concerned. The strategies developed to achieve those goals are targeted, based upon how different groups are situated within structures, culture, and across geographies to obtain the universal goal.

## LESSON 1: IDENTIFY & DEFINE PARTNERSHIPS

"Targeted universalism is goal oriented, and the processes are directed in service of the explicit, universal goal."[26] Read more about targeted universalism to learn about how your collaborative might employ this concept in your work.

Targeted Universalism

True community engagement and diversity of partners are key assets of a MSC. To create the greatest impact with these assets, you will need to understand and leverage the expertise of your partners. Explore the Unlocking the Power of Partnership Framework and a chapter from The Practical Playbook below. There is a wealth of information in these resources, and you may want to keep them on file to delve into relevant sections at different times.

Unlocking the Power of Partnership Framework

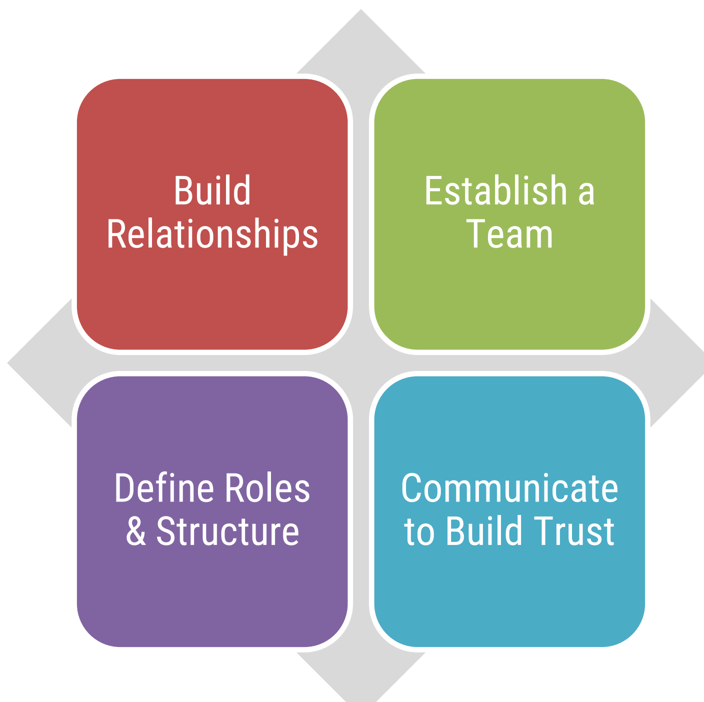
The Practical Playbook: Chapter 11: Engaging Residents for Health Transformation

This spotlight summarizes findings from interviews with seven of the 18 sites that were part of the first cohort of BUILD Health Challenge grantees. This research revealed that collaboration yields many benefits for the partners' work—from sharing resources to driving action and progress.

Keys to Collaboration: BUILD Health Challenge

Module 7: Scaffolding for Change: Backbone Organizations

### 4 STAGES OF COLLABORATION




Keys to Collaboration: BUILD Health Challenge
The BUILD Health Challenge identified four dynamic stages of collaboration that are key to the development and success of partnerships aimed at promoting health equity.

# APPLY

## PARTNER IDENTIFICATION

The work of a MSC, by definition, brings together diverse partners to work toward the same goal. This process will likely necessitate the application of different strategies to identify, convene and support diverse partners, including community resident and organizational, as well as both traditional and non-traditional organizational partners. The backbone organization should work in partnership with a steering committee and or MSC Leadership to identify how best to identify and engage both organizational and community partners.

A partner mapping exercise can be helpful for collaborative members to identify partners who are working on similar issues and or have assets or resources to address the focus area of concern. This topic is covered in more detail in Module 4.

[Start-Up Guide: Identifying Stakeholders]

[Potential Partners Brainstorm Tool]

[Start-Up Guide: Welcome (Concentric Circles tool, p. 5)]

[Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose]

When considering potential partners, remember that it is important to have senior leadership involved in the work of your collaborative. Having decision-makers at the table, who represent the systems you are trying to impact, means that action can be taken quickly, rather than waiting for approval from above.

In order to understand your partners and their perspectives, personas and empathy mapping can be useful tools. Learn more about these strategies in Module 11, and consider doing some of this work as you get to know your partners, particularly those who are community residents.

[Module 11: Measuring Change: Data Collection, Application & Sharing]

- *Lesson 1: Data Collection, Understanding & Application >> Personas and Empathy Mapping*

## SYSTEM AND ACTOR MAPPING

Systems mapping can help guide partners to identify spheres of influence of potential partners, as well as the strength of relationships between actors, organizations, and institutions within a network.

## LESSON 1: IDENTIFY & DEFINE PARTNERSHIPS

Consider the role of your collaborative in the community you serve. List all of the other influences on your community, and how they relate to one another.

Guide to Actor Mapping

Start-Up Guide: Mapping Stakeholders

Some tools you might use to map information and build a visual of a system include:

Kumu is a data visualization platform that helps you organize complex information into interactive relationship maps.

Kumu

Pletica uses a map-building process to help you visualize and connect information. Maps can be constructed individually or you can build them as groups in real-time, with everyone's ideas captured in a shared place.

Pletica

## PARTICIPATORY LEADERSHIP PRACTICES AND CONVENING PARTNERS

You may consider hosting community listening events to bring together partners. This can be useful in creating open, transparent spaces to discuss perspectives, assets, partners and possible solutions.

Explore the Facilitation / Hosting Spaces section of Module 5, Lesson 2 for strategies and tools to facilitate dialogue between partners, as well as the below frameworks and practices.

Consider the below approaches to foster interaction and dialogue among partners, including focus groups, talking circles, formal meetings and interviews. Work with the collaborative partners to get clear on your intentions and then review the information to decide what might be the best method.

The World Cafe Method

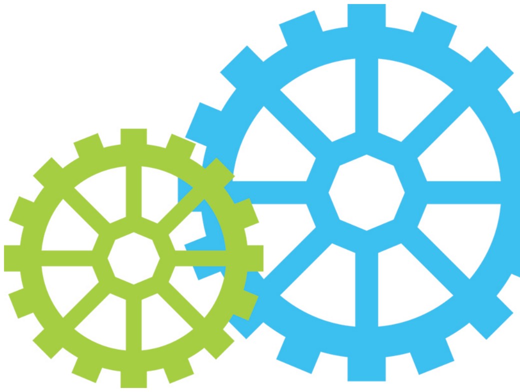
Shaping Powerful Questions

Start-Up Guide: Frameworks and Practices

Start-Up Guide: Stakeholder Interviews

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 2: Internal Communication Strategies*
  *>> Facilitation / Hosting Spaces*



## COMMUNICATION

Communication is an essential component of successful partnerships. The way that you communicate and engage with different types of partners will likely vary. Revisit Module 5: Pieces of the Puzzle: Communicating for Impact for information on how to communicate with internal and external audiences.

Module 5: Pieces of the Puzzle: Communicating for Impact

## PARTNERSHIP ASSESSMENT

Partnership assessments can be useful to better understand the strength of the relationships and level of trust within your partnership and give you some ideas to improve its effectiveness. They can be done anonymously and on a regular basis to use as a baseline with touchpoints throughout the partnership. While strong partnerships are at the core of a successful collaborative, the more partners you have the more difficult it is to coordinate with everyone. Here are some examples of partnership assessment tools you might use to better understand your partners and align your goals.

Remember that though these tools are targeted toward organizational partners, they can also be used to assess partnerships with community partners.

- Assessing Community Engagement
- StriveTogether Development Self-Assessment
- Partnership Assessment Tool for Health
- A Practical Guide to Creating and Maintaining Successful Partnerships

See the "Dig Deeper" section for more templates for partnership assessments

## COMMUNITY RESIDENT ENGAGEMENT

Community resident engagement, inclusion and regular participation is one of the most important building blocks to the success of a MSC. Community residents and organizations with whom you collaborate should be considered partners in the same way that any organization would be. That said, engagement with community partners at times requires a different approach than that of engaging organizational partners. While the tools below are intended for community resident engagement, consider how these lessons may apply to all partners as well.

## LESSON 1: IDENTIFY & DEFINE PARTNERSHIPS

Use these tools to create a community engagement plan for your collaborative.

- Resident Engagement Practices Typology
- Start-Up Guide: Definitional Elements Examples and Resources (Partnership, p. 9- 11 and Resident Engagement, p. 15-21)
- Tool for Developing a Resident Engagement Planning Strategy, ReThink Health 2019
- Companion on Community Member Engagement for Health Action Chapters
- FCHIP Community Engagement Worksheets Template
- Template Community Engagement Plan

When engaging with a community, it is important to consider it's context and history. Considering racial biases and lived experiences is also critical. Explore the below resources to help with this work.

- Lived Experience: The Practice of Engagement in Policy
- Race to Justice: Advancing Racial Equity and Social Justice: Community Engagement Framework

Imperial County ACH in California created a Community Resident Leadership Training, which offers a strong foundation for your community resident engagement practice, and can be a helpful guide as you work to build up community partners.

- Community Resident Leadership Training
- Pathways and Methods to Engagement/Inclusion/ Participation/Leadership
- Module 8: Collective Accountability: Governance & Leadership

In relationships where there is an imbalance of power, such as those with community partners, it is important to be aware of your power and how you can use your understanding of recurring power dynamics to support personal growth, team dynamics, and your ability to authentically engage with community leadership. Addressing power dynamics is critical to achieving equity. Consider the information linked below on equity and power in relationships.

- Start-Up Guide: Getting Started (Equity and Power, p. 19)
- Dynamics of Power, Inclusion and Exclusion
- Leading Locally: A Community Power-Building Approach to Structural Change

# DIG DEEPER

- ACH Community Engagement Milestones Handout
- The Problem of Othering: Towards Inclusiveness and Belonging
- How Multi-Sector Collaborations Can Help Support Community Population Health
- Participatory Leadership for Community Inclusion
- Prevention Institute: Collaborative Assessment Activity
- Resource_ Boston Public Health Commission-s Community Engagement Plan
- Strive Together Partner Alignment Self-Assessment
- The Tamarack Institute: Collective Impact Self-Assessment and Planning
- The Tamarack Institute: Foundations of Community Engagement
- Thinking Tools Studios: Tools Courses #7-9*
  - *Requires registration**

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about how to identify, convene and support partners?
- What are you learning that is important to the community?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?
- Who are some new, perhaps non-traditional partners that you will approach as a result of these learnings?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Build Trust with Partners & the Community at Large

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- Reflect on a time when you were involved in a conflict. How was the situation resolved? Discuss positive and negative aspects of the resolution of this conflict with your team.
- Think about someone you trust. Why do you trust them? What characteristics build trust, and how can you build this capacity within your team?
- What factors affect you ability to build trust with your community and organizational partners?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Employ effective negotiation, communication and conflict resolution skills to build trust with partners and the broader community.
2) Identify strategies for your collaborative to demonstrate accountability and transparency to the community.

# UNDERSTAND

When working in complexity, partners can become stressed and not always able to see a clear path to move forward on action items. Often, it is helpful to have frameworks that collaborative members can collectively learn as constructs they can use to make sense of a wide range of issues. Additionally it helps in breaking out of old ways of thinking and to consider what seems like intractable problems to see in new ways. Once partners understand these frameworks they can use them to name, understand, normalize and navigate what they are experiencing, with a long view in mind. Listed below are some frameworks that can be used to help make sense and be incorporated into agendas of your collaborative meetings. Consider how you might use these resources to shape your engagement with partners.

*Cynefin Framework*

Cynefin Framework

Start-Up Guide: Frameworks and Practices (Cynefin Framework, p. 11)

*Chaordic Path*

Start-Up Guide: Frameworks and Practices (Chaordic Path, p. 5)

Art of Hosting: Online Hosting Manual (Chaordic Path, p. 25-26)

*Divergence/Emergence/Convergence*

Start-Up Guide: Divergence/Convergence Framework

*Forming, Storming, Norming + Performing*

Forming, Storming, Norming + Performing

## TRUST BUILDING

Communication strategies will vary with different partners and situations. Regardless of how you put out information, active and intentional listening is crucial to understanding and building trust with partners.

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 2: Internal Communication Strategies*

In order to build a collaborative that most effectively responds to the needs of the community it serves, you must meaningfully engage partners from many diverse perspectives.

This requires mutual trust between all parties. This work creates the foundation for a sustainable collaborative.

Collaborating at the Speed of Trust

Trust: An Essential Ingredient in Authentic Community Engagement

Module 6: Paying Dividends: Co-Creating Lasting Impacts

- *Lesson 1: Collaborative Sustainability*

## 13 BEHAVIORS TO BUILD TRUST[27]

1) Talk straight
2) Demonstrate respect
3) Create transparency
4) Right wrongs
5) Show loyalty
6) Deliver results
7) Get better
8) Confront reality
9) Clarify expectations
10) Practice accountability
11) Listen first
12) Keep commitments
13) Extend trust

## ACCOUNTABILITY AND TRANSPARENCY

A key aspect of the Accountable Communities of/for Health model is agreeing to being accountable to partners as well as the community to collectively contribute to the health and well being of the community. A primary application of this is in a Portfolio of Interventions (POI) (or other action strategy used by the collaborative.) The POI should be designed through a transparent and accountable process in close collaboration with community and organizational partners and reflect the community needs and priorities.

Practical Playbook: Chapter 18: Sustainability Through Accountability: The Accountable Community for Health Model

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 5: Pieces of the Puzzle: Communicating for Impact

Module 8: Collective Accountability: Governance & Leadership

Module 9: It Takes a Village: Creating a Portfolio of Interventions

## LESSON 2: BUILD TRUST WITH PARTNERS & THE COMMUNITY AT LARGE

Accountability in all partnerships is a key factor for long-term success. Although conversations on this topic are rarely easy, they help to ensure that partners all understand what is agreed and expected to. Below is list of mechanisms to monitor progress, evaluate partner actions, and enable accountability and transparency to help to make sure the partnership is achieving its goals.

> Using the suggestions presented here, or other learnings or ideas, identify at least two specific strategies for your collaborative to demonstrate accountability and transparency to your community. Codify this plan, share it with your partners and include regular check-ins to ensure that you are continuing to implement these accountability practices.

This list is adapted in part from: KPMG's Unlocking the Power of Partnership.

- Regularly assess deliverables, time frames, and allocated resources. This provides a mechanism for partners to continuously evaluate progress against outcomes and the overall mandate of the partnerships
- When planned reality doesn't happen, learn from the opportunity and course-correct
- If there are changes in the work, partners or resources that cause challenges to completing tasks as agreed to, recognize them and adapt and find ways to pivot.
- When sharing information provide the full information and background, telling the whole story - even if it is not good news
- Make information such as meeting minutes, decision making processes and decisions, and budgets available online and at meetings
- Keep in mind that there are many different audiences to communicate with and each may perceive information differently - understanding the partners perceptions is important
- Engage partners in the design of meeting agendas and rotate meeting leads.
- Employ a Design Team within the collaborative to support the creation of meeting agendas as an approach to transparency as well as distributed leadership (This topic is covered in detail in Module 7, Lesson 2.)

# APPLY

Part of building a culture that encourages all partners to meaningfully advance the collaborative's work is intentionally highlighting and encouraging partner participation and contributions. Toward this goal, specific plans should be put into place to ensure that all partners' voices are considered equitably. For example, rotating leaders of different working groups, training each new leader so that they can move to another leadership role after their term expires.

Keys to Collaboration: BUILD Health Challenge

Trust: Foundation of Effective Networks

Network Trust Assessment

It is important to establish mechanisms and practices of transparency to ensure accountability and trust between partners and between the leadership team and the community. Examples of transparent practices include the use of a design team to develop the agenda and process, bringing in diverse perspectives, including community and organizational partners, to the very origins of meeting in which decisions are made. This amplifies the voices less often heard in decision-making processes.

Other examples of transparent practices include making meeting minutes available on your website, engaging committees with strong community resident involvement to drive various aspects of the collaborative's work, and the use of a design team.

Key to building trust and establishing a positive and sustainable culture within your collaborative are the creation of operating principles, a strong core team, and a design team. Visit Module 7: Scaffolding for Change: Backbone Organizations (Lesson 2: Building a Culture for Success) and work through these components of the Lesson 2 before continuing with this lesson.

## FOSTERING OWNERSHIP AND LEADERSHIP IN ALL PARTNERS

Building up your partners, particularly community partners, and elevating them into leadership roles, can offer lasting positive implications for your collaborative, as their perspectives and experiences help to identify the focus of the work and your approach. It is important to identify and employ approaches to foster leadership in partners early on in the process of developing your collaborative and ingrain this culture of distributed leadership.

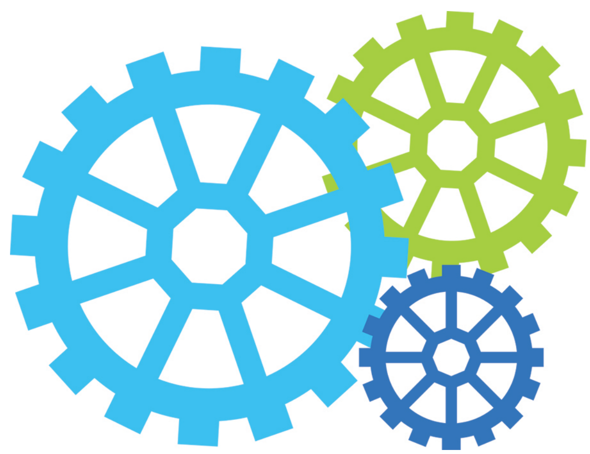
More information on this topic, including distributed leadership and leadership building is covered in Module 8, Lesson 1. Likewise, establishing the mindsets around distributed leadership and an understanding of the systems in which your organization exists must be in place early on in your collaborative's development. Revisit Module 1 for more information on mindsets and systems thinking.

- Module 1: Rewiring Your Brain: Mindsets & Systems Thinking
- Module 8: Collective Accountability: Governance & Leadership
    - *Lesson 1: Leadership Types & Skills*
      *>> Distributed leadership*
      *>> Building leaders*
- Imperial County's Health Leadership and Communications Training

## NEGOTIATION & CONFLICT RESOLUTION

Negotiation and conflict resolution are opportunities to build trust and strengthen the relationships with partners, both community and organizational.

- Sample Dispute Resolution Policy for ACHs
- Conflict of Interest - Example Policy
- Conflict of Interest - Example Disclosure



## DIG DEEPER

- The Tamarack Institute
- Working Together Toward Better Health Outcomes

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about building trust and creating transparency with partners and the community you serve?
- Are you living up to the vision you set forth in your operating principles? Are there areas that should be revisited or revised?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

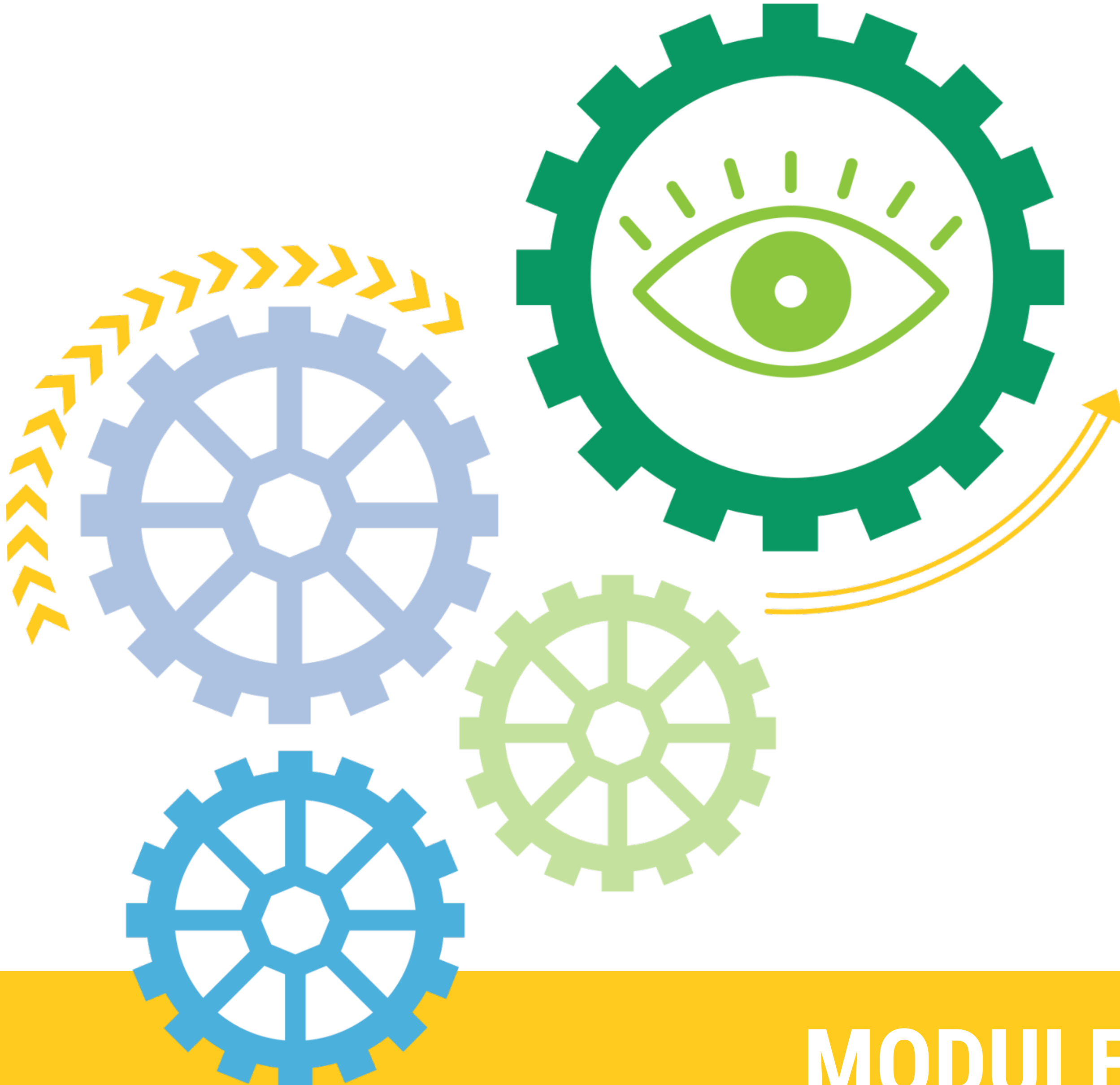
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 4
# SHARPENING THE FOCUS

## SHARED LONG-TERM VISION, GOALS & PURPOSE

*We thank Karen Linkins and Jennifer Brya of Desert Vista Consulting (DVC) for their contributions to this module.*

Module 4

# SHARPENING THE FOCUS

## Shared Long-Term Vision, Goals & Purpose

## OBJECTIVE

Facilitate a shared understanding of partner and community priorities and perspectives. Collaboratively develop a shared vision, goals and purpose. Establish a regular reflection practice to adapt to evolution in community needs.

## LESSONS IN THIS MODULE INCLUDE

1) Shared Intent & Individual Perspectives
2) Align Priorities to Develop Shared Vision, Goals & Purpose

## AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of your community and professional partners' values and goals.
- Created a design challenge.
- Developed and codified a shared vision, goals and purpose.
- Drafted a partnership agreement and memorandum of understanding.
- Established regular reflection practices to continue to evolve your vision, goals and purpose in response to community needs.

***Much of the content of this lesson is derived from DVC's Portfolio of Interventions (POI) Toolkit.***

## RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*

- Module 2: Righting Injustices: Operationalizing Equity
- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 5: Pieces of the Puzzle: Communicating for Impact
- Module 7: Scaffolding for Change: Backbone Organization
- Module 9: It Takes a Village: Creating a Portfolio of Interventions

***"If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I know the proper question, I could solve the problem in less than five minutes."***

***~ Albert Einstein***

If you are interested in further coaching on this topic, please contact: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# Lesson 1: Shared Intent & Individual Perspectives

## OPENING QUESTIONS

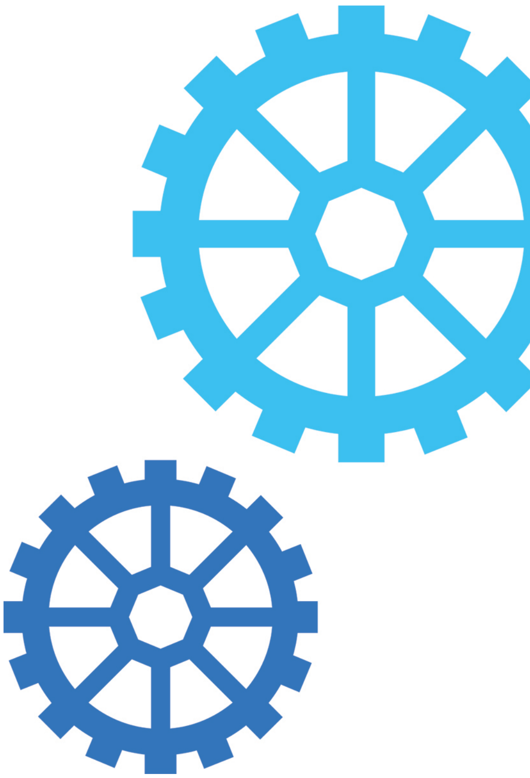
**Discuss these questions with your team members before beginning this lesson.**

- What do you envision your community will look like in ten years?
- What do you want your collaborative to achieve/accomplish?
- What are the greatest assets in your community?
- What are the biggest challenges facing your community?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand partners' priorities and how they align with those of the collaborative.
2) Draft a written agreement describing the purpose and scope of partnerships.



# UNDERSTAND

Once you have identified your partners, you will need to ensure that you each understand each others' priorities, and are able to align behind a shared vision, goals and purpose of the collaborative. The formation and engagement of a sustainable network is driven by the group's shared understanding of the needs, barriers and opportunities in your community.

## CREATING THE CONDITIONS FOR A SHARED UNDERSTANDING

Coming to a shared understanding of what is most needed to improve health and well being in communities requires participants to start by listening to one another, sharing their deepest intent through engaging in dialogue seeking to better understand perspectives and possible solutions to creating health across your communities. As many of your partners may come from various backgrounds, a helpfulful approach is practicing listening in a heartfelt manner. The Four Levels of Listening (see Module 5, Lesson 2) is a useful framework to share and practice with your partners.

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 2: Internal Communication Strategies >> Four Levels of Listening*

Multisolving is one systems thinking approach you might consider as you are planning approaches to address issues of concern in your community. Learn how multisolving is used to solve multiple problems with a single investment of time and money.

The Magic of Multisolving

Spend time to learn about each other's 'big why', or intent for doing this work. Knowing this will support how partners might best support one another in creating health with and for the community.

Simon Sinek - How Great Leaders Inspire Action

It is important that you and your partners all have the same understanding of the terms you use - a shared language. It can be helpful to create your own glossary of sorts, and to regularly review and add to it as necessary. You may want to build off of this ACH and/or the Powering Change glossary.

ACH Glossary

Powering Change Glossary

## LESSON 1: SHARED INTENT & INDIVIDUAL PRESPECTIVES

As partners are coming together, it will be important to provide opportunities for all partners' voices to be heard. Using the practice of a check in question at the start of your meetings is one way for the partners to get centered and an opportunity for sharing perspectives Additionally, if done right the question can help to center partners on their commitment to the intention of the collaborative.

At the close of the meeting, a check out question or reflection can be used which can be useful to gain insight as to what was learned, or other perspectives.

Circle Check In

Shaping Questions for Powerful Check-In and Check-Out Process

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 2: Internal Communication Strategies >>Virtual Gatherings*

# APPLY

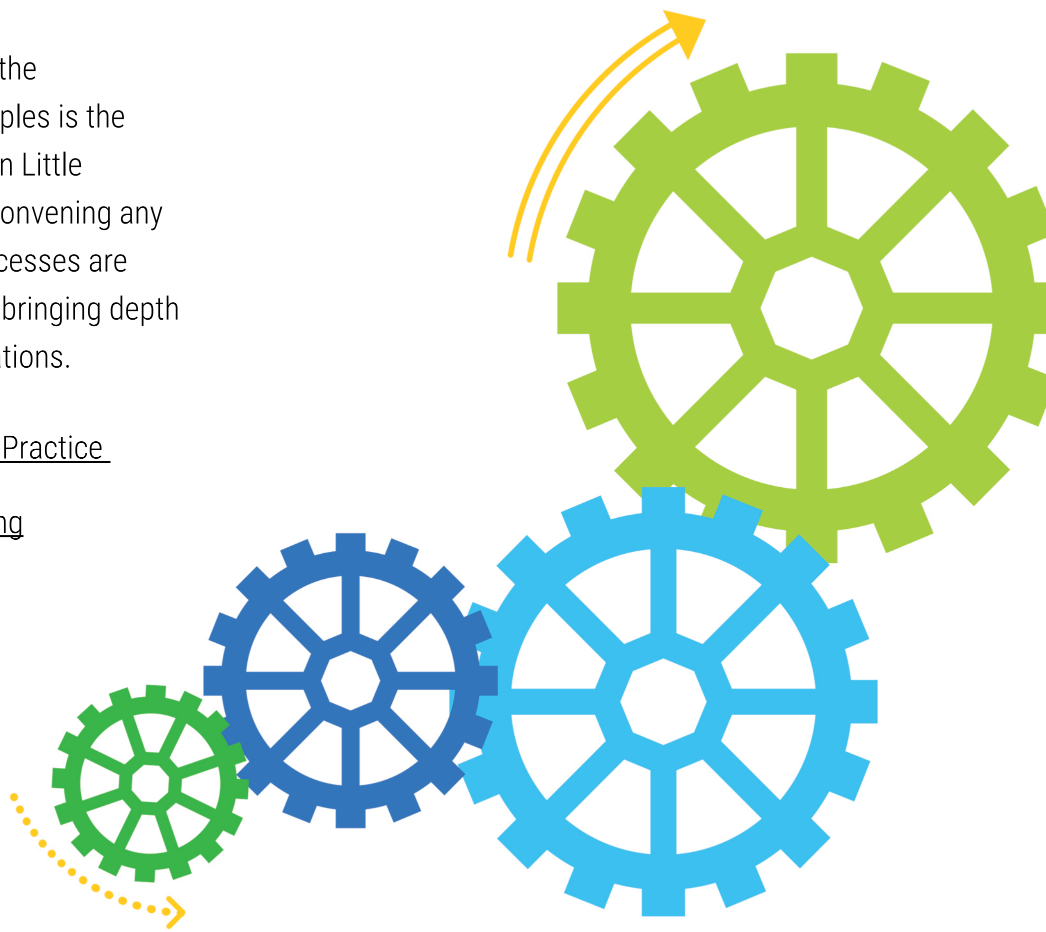
## CREATE A SET OF OPERATING PRINCIPLES

What you are attempting to accomplish will not be done through ordinary working relationships and rules of engagement. It is important to create an enabling environment capable of meeting high expectations from diverse leaders. All conversations are opportunities to connect a little deeper with one another. Creating a set of operating principles is an important tool to support relationship building and authentic engagement.

A helpful framework to support the development of operating principles is the Four Fold Practice and the Seven Little Helpers: the simplest tools for convening any conversation. These simple processes are offered as a quick reference for bringing depth and life to small group conversations.

- Start-Up Guide: Four Fold Practice
- Start-Up Guide: Co-Creating Operating Principles

> Remember to engage all partners included in your collaborative as well as the broader community in a meaningful way, ensuring that the decision-making process is transparent and you are accountable to the community. A good practice is to go out in the field and test your assumptions - talk to community members, partner organizations, and others to ensure what you are discussing and considering is really the issue you want to address.



## IDENTIFY PARTNER PRIORITIES & MOTIVATIONS

This work is designed to lay the foundation for identifying collaborative priorities and aligning on a common mission. To get to this point, partners must openly and honestly share their priorities with one another. Below are some activities which can be helpful to identify individual and organizational priorities. You can choose to do any or all of these exercises, depending on the needs of your collaborative.

### *Why Statement / This I Believe*

A Why Statement and the This I Believe essay are both options to approach identifying individual priorities. These exercises can help to clarify both within yourself and among your partners, what your leadership style and priorities and motivations are, and are a first step to eventually establishing a shared intent.

- This I Believe Essay Guidelines
- Simon Sinek The Science of Why

### *Discussion Series*

In order to identify, or revisit, partner priorities and evaluate their alignment with the collaborative's goals, consider hosting a series of discussions using the information from the lessons and information in this module, as well as other tools and or practices you know of.

These conversations can include questions like *What is your purpose/our purpose for working to improve the health and well being in our region?* Take the time to learn about each other's concerns and motivations and see if there are any patterns emerging amongst you or new ideas/perspectives evolving from listening to each other. The goal is to articulate WHY you each choose to do this work and to learn what matters to each other.

- Collective Impact Forum: Collaborating to Create a Common Agenda
- Start-Up Guide: Theory U (Shared Intent, p. 6)
- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 5: Pieces of the Puzzle: Communicating for Impact
    - *Lesson 2: Internal Communication Strategies*

## FIVE STRATEGIES FOR TEASING OUT SHARED INTENT AMONG PARTNERS[28]

| | |
|---|---|
| 1) Test Your Assumptions | Take a look at your focus area from different perspectives to determine if it is the right place to address the real issues at hand. |
| 2) Assess Your Strategy | Through conversations and stakeholder engagement determine how close to the source of the problem you are willing to work. |
| 3) Follow the Impact | Ask "who benefits?" and assess if the decisions. you are making center around the community you are impacting. |
| 4) Define Key Terms & Themes | Facilitate discussions with the intent to create a collective understanding of your work. Clarify what is meant by specific words and terms like "equity", or even "health". Using simplified language and creating a glossary along with a list of central themes can be quite helpful. |
| 5) Question How Decisions Are Made | Be sure to put in place a shared decision-making process with the intent to engage key stakeholders in informing your efforts. |

## PARTNERSHIP AGREEMENTS

Establishing a written partnership agreement or a memorandum of understanding (MOU) can help define the expectations from each partner and how they will work together, and represent a formal commitment to the work. MOUs and partnership agreements can be a useful tool to facilitate the partnership and working relationship between partners. Prior to finalizing an MOU or partnership agreement, it is advised to seek legal review and approval of the agreement. There are many templates for MOUs and partnership agreements available online and linked below. Depending on the stage of your partnership, you may have a need for different types of agreements.

It can be helpful to put a review date on these agreements, and revisit them on a regular basis to ensure they still fit the needs of your collaborative. Additionally, partnership agreements may need to be revisited after establishing a shared intent and vision among partners, which is one component of creating a Portfolio of Interventions (POI) (Module 4.)

- Start-Up Guide: Getting Started (Partnership, p. 14)
- APA: Partnership Agreements: Memorandum of Understanding
- Draft Partnership Agreement
- Memorandum of Understanding Learning Partner Dashboard
- Anchorage United for Youth Partnership Agreement

## DIG DEEPER

- Generic Partnership Agreement

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about how to align your partner and collaborative priorities toward a shared vision, goals and purpose?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?
- How are the partners' visions similar and or different?
- How might your ACH use the vision as a lens when grant opportunities come along?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Align Priorities to Develop Shared Vision, Goals & Purpose

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- After discussing priorities with partners, what are the strongest values that you share? Where do your values diverge? Write these down so that you can revisit as needed throughout this process.
- How might your collaborative focus on these values to create the most effective offerings?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand how to collaboratively develop and codify a shared vision, goals and purpose.
2) Identify and define a problem or condition to address to improve community health.
3) Develop clear goals and outcomes that will drive the work of your collaborative.
4) Establish regular reflection practices on the impact and appropriateness of these priorities, ensuring evolution of the vision, goals and purpose in response to community needs.

# UNDERSTAND

This module is directly linked with Module 9: It Takes a Village: Creating a Portfolio of Interventions. The first two of six "building blocks" presented in the POI toolkit linked below are addressed here. The following four are in Module 9.

A key element of the Accountable Community of/for Health (ACH) model is holding the partners accountable to each other as well as the community to improve the health and wellbeing of the community. For both ACHs and multisector collaboratives (MSCs) more broadly, the vision, goals and purpose of the collaborative are a broader set of overarching principles that are driven by community priorities and needs, and help to explain the collaborative's purpose.

It is the backbone organization's role to facilitate this process, bringing together a diverse set of partners to work toward identifying a common set of goals and outcomes at both the individual and systems levels. This process requires highly developed facilitation, leadership, coordination and conflict management skills.

Module 3: Hand in Hand: Fostering Lasting Relationships

It may be helpful to have a strategy group, subcommittee or working group such as the Design Team which both supports this effort and maintains responsibility for ensuring all partners' voices are represented in this process. They should also lead regular opportunities to revisit the vision, goals and purpose and lead revisions if changes are needed.

Module 7: Scaffolding for Change: Backbone Organization

- *Lesson 2: Building a Culture for Success >> Design Team*

## PIVOTING

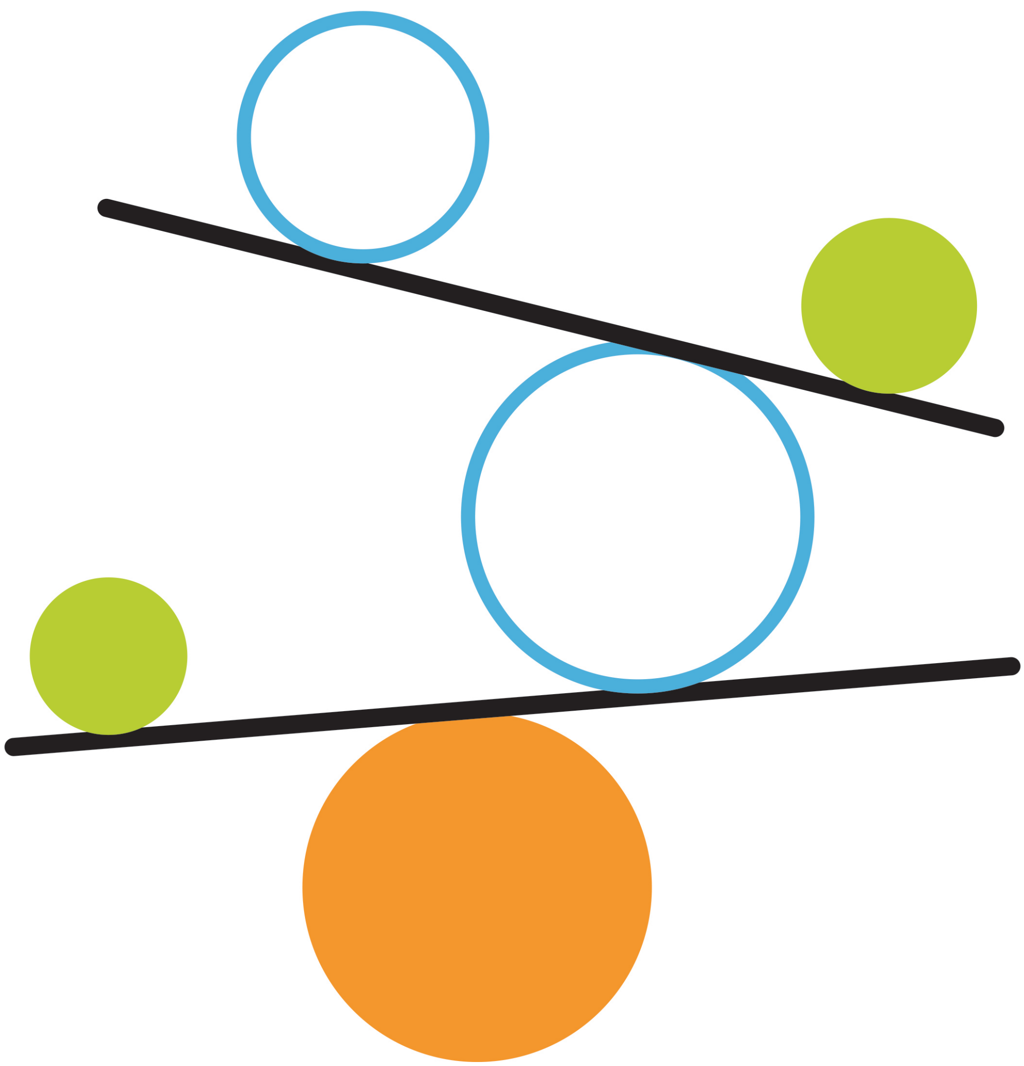
The goals and outcomes you develop as part of Building Block 2 in the POI toolkit (below) will be more narrowly-focused priorities, guided by your collaborative's vision, goals and purpose and directly informed by community needs and priorities. While again these will focus on identified needs in the community, it is important that you have the ability to pivot to respond to new arising priorities or urgent community needs as agreed upon by the collaborative with community guidance.

POI Toolkit

A pivot to expand the collaborative's scope of work does not mean that it discontinues work on previous priorities. It merely acknowledges that there are a variety of needs in the community and that creating a sustainable collaborative allows for partners to balance multiple priorities--possibly with multiple POIs.

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

- *Lesson 1: Introducing Mindsets & Mental Models*



# APPLY

## WORKING TOWARD THE CREATION OF A PORTFOLIO OF INTERVENTIONS

The development, implementation and refinement of a POI is an iterative, community-driven process. The POI will continue to evolve the more it is tested, and you will learn as you go. In fact, it is important to continue your work even as you develop and refine your POI, in order to maintain enthusiasm and interest from your partners and the broader community.

Shaping Questions for Powerful Check-in and Check-out Processes

## POI BUILDING BLOCK 1:

*Identify and define the problem or condition you want to address to improve community health.*

In order to meet the outcome of Building Block 1 of the POI toolkit, "a clear target condition that reflects community priorities," use the toolkit, additional resources and other modules (listed below) to guide your work. The problem or condition identified in Building Block 1 will be a more narrow focus which aligns with your vision, goals and purpose defined in this lesson.

Remember that this building block may look different for your collaborative compared to other collaboratives. Always consider your local context as you proceed with the development of your POI.

- POI Toolkit (p. 4-5)
- The Intersector Toolkit (p. 23-25)
- Module 2: Righting Injustices: Operationalizing Equity
- Module 11: Measuring Change: Data Collection, Application & Sharing

From the very beginning of the POI development process, it is essential that an equity lens is at the forefront of your decision-making processes. Consider how each step of the process may impact health, racial, or other types of equity in the community you serve. One helpful tool you might use to do this is the Racial Equity Planning Guide, linked below. Revisit Module 2: Righting Injustices: Operationalizing Equity for more information and resources.

How Can We Create an Inclusive And Equitable Planning Process?

## LESSON 2: ALIGN PRIORITIES TO DEVELOP SHARED VISION, GOALS & PURPOSE

### ESTABLISH YOUR VISION AND PURPOSE

All partners have different drivers and goals. Once you have initiated, and continue to nurture, relationships across a diverse set of community and professional partners, you can focus on alignment of each partner's goals with those of the collaborative as a whole. The below resources can help guide you in hosting work sessions with your team to co-create your shared vision and purpose.

- Start-Up Guide: Backcasting
- Start-Up Guide: Shared Vision & Mission (Definitions & Samples, p. 3-5)
- Proclaiming Your Dream: Developing Your Vision and Mission Statements
- Sculpting the Current Reality
- Sculpting a Vision of the Future
- A Shared Purpose Drives Collaboration

### GATHERING DATA

The collaborative can play a key role in community data gathering by convening the various organizations who are required by funding, legally or other reasons to complete an assessment of a community's health.

If your collaborative has an existing data and/or performance management subcommittee, they could begin planning to host a coordinated data gathering event that meets the needs of the many partners. Below are some resources to help you organize this process.

- CHNA MOU and Letter of Commitment
- CHNA Collaborative Charter

Types of data, including Community Health Needs Assessments (CHNA) and non-traditional data such as voice data and focus groups, are discussed in Module 11, Lesson 1.

- Module 11: Measuring Change: Data Collection, Application & Sharing

### PRIORITIZE FOCUS AREAS

There are many ways to identify the focus area(s) of your collaborative. Often a prioritization method is useful to narrow in on where you will focus attention.

Asset-Based Community Development (ABCD) is an approach to community-driven change which can guide you in prioritizing focus areas for your POI. Through the process of identifying community assets, you will hear from community members and learn about the needs, assets and priorities of the community.

ABCD is discussed in Module 9, Lesson 1.

Asset-Based Community Development

Asset-Based Community Development Handouts

Module 9: It Takes a Village: Creating a Portfolio of Interventions

- *Lesson 1: Understand & Develop a Portfolio of Interventions*

Convene partners to watch the web discussion on ABCD and review the linked information. Consider how you might use this methodology to learn how to engage community members. Also revisit Module 3, Lesson 1 for information on System and Actor Mapping, including some helpful tools you might use for this exercise.

Module 3: Hand in Hand: Fostering Lasting Relationships

- *Lesson 1: Identify & Define Partnerships*

Here are some other examples of prioritization methods:

Affinity Clusters

Prioritization Grid

Four Category Voting: Choose one or two ideas from the following four categories: (1) the rational, (2) the most likely to delight the user, (3) the long shot, and (4) the darling/most likable to the team.

Sticky Note Voting: Each team member gets three sticky notes to place next to the ideas that are most appealing to them. Using a tool such as Google's Jamboard can be useful if it needs to be done virtually.

## DESIGN CHALLENGE

Creating a unique design challenge can serve as a useful tool for framing solution generation. A design challenge is used as a pathway for solving problems and identifying new opportunities. It is the design team who creates the initial draft design challenge for sharing and refining with your partners and leadership. Before you create a design challenge, visit Module 7, Lesson 2 to work on creating a design team. More information on the design challenge is also available in this lesson.

Start-Up Guide: Design Challenge

Start-Up Guide: Getting Started (Design Challenge, p. 5)

Module 7: Scaffolding for Change: Backbone Organizations

- *Lesson 2: Building a Culture for Success >> Design Team & Design Challenge*

## POI BUILDING BLOCK 2:

*Develop clear goals and outcomes that will drive the work of your ACH.*

> "The most important step in developing the POI is having a clear set of goals and knowing what outcomes you want to achieve." [29]

There are many types of strategic planning tools and frameworks that can serve as a guide to create your vision, goals, purpose, interventions and outcomes. Building off of the work done earlier in this lesson, use the POI toolkit to guide you in the identification of clear, long-term goals that your POI interventions will target. Additional resources and information on strategic planning for the collaborative are covered in Module 8, Lesson 2.

POI Toolkit (p. 6-7)

Start-Up Guide: Chaordic Stepping Stones

How Can We Create an Inclusive and Equitable Planning Process?

Module 8: Collective Accountability: Governance & Leadership

- *Lesson 2: Governance*

Once you have aligned around a set of priorities, it is time to establish a set of clear goals and outcomes you will work to achieve. There are a number of ways you might approach this, discussed below. Remember that you can take the approach that works best for your collaborative; you do not need to do all of these.

### RESULTS-BASED ACCOUNTABILITY

Results-Based Accountability (RBA), also discussed in Module 9, is a decision-making tool that builds collaboration and consensus by following an approach that works backward from the goal to define the means. A number of ACHs have had success using RBA to build their Portfolio of Interventions.

Module 9: It Takes a Village: Creating a Portfolio of Interventions

- *Lesson 2: Implement, Monitor & Evolve Your Portfolio of Interventions*

### FIVE WHYS

The Five Whys tool is a helpful practice to better understand the root causes of issues present in your community. Further explore the organizations, institutions, funders and others that may be working on the root cause issues identified with this practice.

Reach out to them and spend time learning what they are doing to address the issues and how your collaborative could connect, enhance and or support these efforts.

Start-Up Guide: Five Whys Tool

*Some questions you might use to reflect as part of this exercise include:*

- Which of the conditions will contribute most to achieving equity?
- What documents/data provide the evidence that this is a problem to address in our community?
- What are the "root causes" of the problem our collaborative has selected?

## VISUAL METAPHOR: BRIDGING THE GAP AND IDENTIFYING GOALS

A visual metaphor is a tool that you might use to communicate a journey/end goal and can be referenced during the journey of developing and refining your POI. Using visual thinking metaphors is much like building a story and the journey towards the goal. You are effectively taking your thoughts, different scenarios, choices, and options out of your head, and making them concrete and real in front of your eyes.

This helps you to clarify things, to identify patterns, and make better and more effective decisions.

Visual Metaphor: Bridging the Gap and Identifying Goals

## EXAMPLES

Watch the below webinar from Humboldt Community Health Trust ACH and how they approached creating a Portfolio of Interventions.

Creating a Portfolio of Interventions: The Humboldt Story

Below are examples of a logic model and framework for action related to two ACH's vision, goals and purpose.

Imperial County Accountable Community for Health Vision Logic Model

Health Action Sonoma County Framework for Action

As you start to develop your POI, through this module and Module 9: It Takes a Village: Creating a Portfolio of Interventions, make sure that you are regularly and intentionally reflecting on the decisions you make and the things you are learning.

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about how to align your partner and collaborative priorities toward a shared vision, goals and purpose?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?
- How are the partners' visions similar and or different?
- How might your ACH use the vision as a lens when grant opportunities come along?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# MODULE 5
# PIECES OF THE PUZZLE

## COMMUNICATING FOR IMPACT

*We thank Michael Miller of Brown Miller Communications, Inc.
and Andy Krackov of Hillcrest Advisory for their contributions to this module.*

Module 5

# PIECES OF THE PUZZLE

## Communicating for Impact

## OBJECTIVE

Learn strategies to communicate with internal and external audiences, and how to create a communications plan. Describe factors that may influence your communications choices, and discover persuasive communication strategies to clearly explain your collaborative's vision, value and purpose.

### LESSONS IN THIS MODULE INCLUDE

1) External Communication Strategies
2) Internal Communication Strategies
3) Data Communications

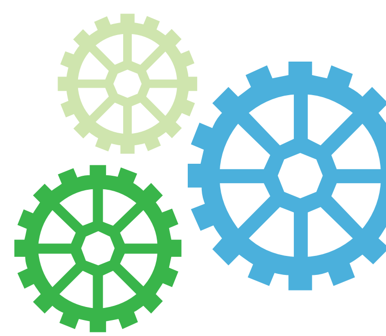
### AT THE END OF THIS MODULE YOU WILL HAVE

- An increased understanding of the essentials of strategic communications.
- Explored persuasive communication strategies to clearly explain the vision, value and purpose of your collaborative.
- Learned how to create a communications plan.
- Explored strategies to facilitate interactions with partners and the broader community.
- Learned the Four Levels of Listening framework.
- Discovered different ways to communicate data to reach diverse audiences.

### RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*

- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 7: Scaffolding for Change: Backbone Organizations
- Module 11: Measuring Change: Data Collection, Application & Sharing



***"When you talk you are already repeating what you already know. But if you listen you may learn something new."***
***~ Dalai Lama***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1:
# External Communication Strategies

## OPENING QUESTIONS

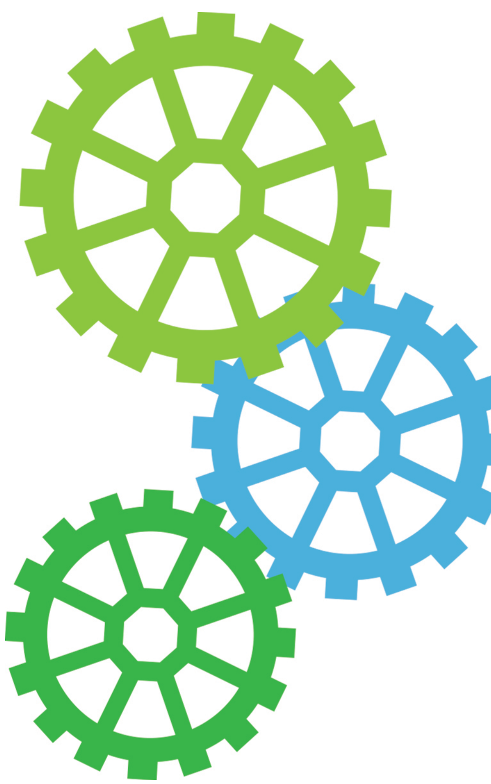
**Discuss these questions with your team members before beginning this lesson.**

- Think about the different external audiences you communicate with on a regular basis. What is similar and different in the way you communicate with each?
- What communications are already used by the collaborative to communicate with external parties? How are these methods working?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand the essentials of strategic communications.
2) Employ persuasive communication strategies to clearly explain the vision, value and purpose of your collaborative.
3) Describe factors that may influence your communication / interactions with partners and the broader community.



LESSON 1: EXTERNAL COMMUNICATION STRATEGIES

# UNDERSTAND

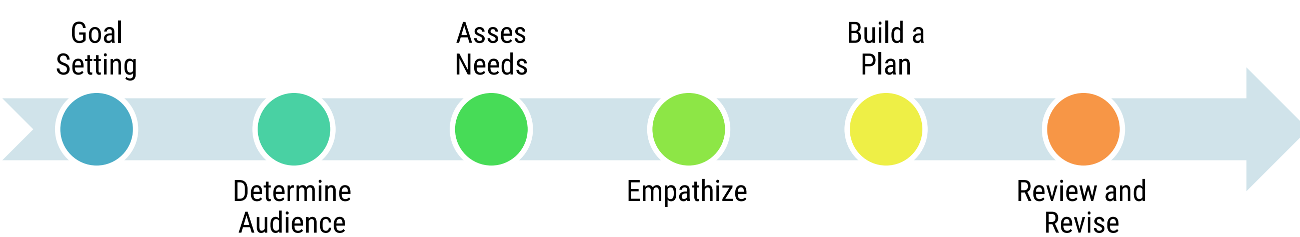
The below webinar serves as an introduction to the essential strategic steps to develop a successful communications outreach program. The lesson uses the framework of this webinar as an outline. We focus here on external communications, and cover internal communications (within your collaborative and partners) in the next lesson. Many of the internal and external communication strategies overlap and inform one another, so these lessons are best considered together. Feel free to apply tools from one group to the other.

- Communications Strategy Webinar
- Strategic Communications for Your ACH Community: 6 Key Elements

**We suggest you keep this worksheet handy, completing the different sections as you move through this lesson.*

One of the initial communications challenges you may face as a multisector collaborative is communicating specifically and clearly around the vision, value and purpose of your collaborative. This could mean explaining the structure, functions, financing, and governance of your organization to partners and funders, or communicating your value to the community you serve. The below resources should get you started to create your own communication resources, particularly when used alongside the learnings and resources throughout the rest of this lesson.

- CACHI Data Story, Fact Sheet and Dashboard Templates Available to All Sites
- ACH Intro Customizable Communications Slide Deck
- Boyle Heights - An Accountable Community for Health



# APPLY

With any type of communications, you will need to identify several key factors before you begin to design your strategy. These include 1) your goal, or the reason you are sharing this information with others, 2) who your audience is, 3) what your message is, and 4) how your audience may react to this communication. Then, when you are ready to create a plan, you must consider four elements; format, channel, frequency and influencer. Before you deploy any communications strategy, you must have a plan to evaluate and adapt your approach quickly with new evidence. The below lesson content explains this process and links to resources. Some general resources you may find helpful in this process include:

Public Health Reaching Across Sectors (PHRASES)

## BIG PICTURE: GOAL SETTING

What are you trying to accomplish with this communications effort? This may seem like an easy question, but it is not always as clear as you may think when you start out.

ACH Vision Map Rainbow

## WHO IS YOUR AUDIENCE?

You must first identify who you would like to communicate with before you can craft a message or strategy. Be specific! This is likely not "the city of Sacramento" but rather an intentionally selected subgroup of people to whom you want to convey a specific message.

*Here is a set of questions adapted from a CACHI storytelling exercise to help you hone in on who your specific audience is.*

1) Who do you need to reach with your [insert specific work here, e.g. sustainability-related work]? Check all that apply…
   - ☐ Foundations
   - ☐ Local Business
   - ☐ Nonprofits (to collaborate on the certain topic area)
   - ☐ Government Agencies
   - ☐ Health Care Providers/Health Plans
   - ☐ Other: ________________________
2) To help make this exercise concrete, now name specific organizations/individuals within the audiences that you checked.
3) Now comes the hard part: Choose just *one* audience from question 1.

In addition, you should consider factors such as the language and culture of your audience to help ensure that you are able to communicate with them effectively.

Language Access Organizational Practices Assessment

Multicultural Guidelines for Communicating Across Differences

## WHAT DO YOU NEED YOUR AUDIENCE TO DO?

What is your message? What do you hope to compel your audience to do or feel?

Your message and identifying your audience go hand in hand. Depending on who your audience is, your message (i.e. what you want them to do) will need to resonate with that particular audience. In addition, the data you select to convey your message have the potential to compel and inspire, or overwhelm and confuse your audience.

Data Communication 2: What Exactly Is Data Storytelling?

Module 11: Measuring Change: Data Collection, Application & Sharing

- *Lesson 1: Data Collection, Understanding & Application*

For an example of an external communication tool describing the work of the CACHI network, see the below PowerPoint.

CACHI Overview 2019

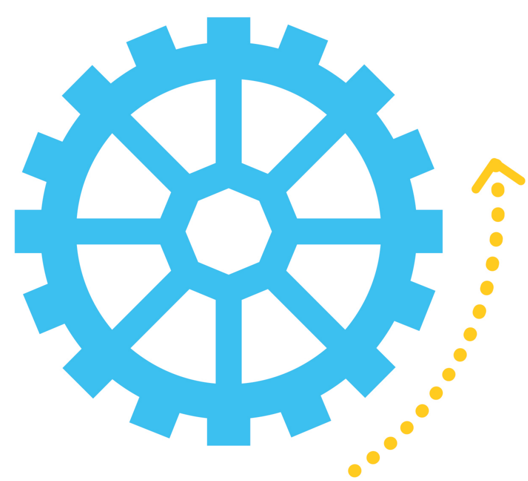
## EMPATHY: PUTTING YOURSELF IN YOUR AUDIENCE'S SHOES

The art of communications is about understanding people. It is important to take a system's approach to understanding your audience; remember that people are part of a broader context, through their lived experiences, their family, their community and beyond. Systems thinking, mindset and equity lenses are critical to crafting an effective communications approach.

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

Module 2: Righting Injustices: Operationalizing Equity

IDEO: Empathy



Creating personas is one tool you can use to understand people. What you learn through this activity can be applied to how you interact with them, including but not exclusive to communication strategies. More information on personas is available in Module 9, Lesson 1.

[Start-Up Guide: Creating Personas](#)

[Module 9: It Takes a Village: Creating a Portfolio of Interventions](#)

- *Lesson 1: Understand & Develop a Portfolio of Interventions*

In order to fully understand a person and their perspecitves, you must know how to listen. As explained in Lesson 2, the Four Levels of Listening framework can help you understand how to deeply listen.

[Start-Up Guide: Four Levels of Listening](#)

## BUILDING A PLAN: FORMAT, CHANNEL, FREQUENCY, INFLUENCER

Your communications plan should be dynamic and responsive to new information. As you build your plan, you will need to carefully consider the format, channel, frequency and influencers used to deliver your message to your intended audience.

### *Format*

You will need to understand different modes of communication and how and when to use them. The Communications Network has a number of quick explainers you may find useful.

[The Communications Network](#)

[Lumen: Principles of Management](#)

### *Channel*

The channel is the platform through which you communicate information to reach and engage your audience. There are many possible communications channels you may utilize, and you will need to familiarize yourself with the options available to you. For example, emails, letters and or social media are all channels to communicate depending on your intent and audience.

[Start-Up Guide: Operations & Communications Tools (Communicating, p. 8-10)](#)

[Start-Up Guide: Communications Ecosystem](#)

### *Frequency*

No matter who your audience is, they are likely bombarded constantly with information. This may be newsletters or direct communications at work, or even just the news and advertisements at home. It is important to carefully consider the frequency and utility of the information you choose to share, keeping in mind that yours are certainly not the only communications that your audience will receive.

Data Communication 5: More Data Isn't Always Better

Data Communication 6: Make Your Data Relatable to Audiences

This worksheet, while focused on persuasive narratives around ACH sustainability, can be used as a guide to creating a communications plan around any approach if lightly adapted.

Persuasive Narrative Tool

### *Influencer*

Consider who your audience trusts; who they will listen to. Depending on who you need to reach, you may not be the best messenger; other organizations or individuals may serve as more effective information ambassadors to help ensure your messages take hold among those you need to reach.

## ADJUSTING YOUR PLAN BASED ON ONGOING ASSESSMENT

Before you implement your communications plan, it is important to craft an evaluation strategy, including how you will respond to new information quickly and decisively. This could mean responding to the way people are reacting to your message, or pivoting based on policy changes or community events. We have likely all experienced this need to pivot sharply and quickly with the recent COVID-19 situation.

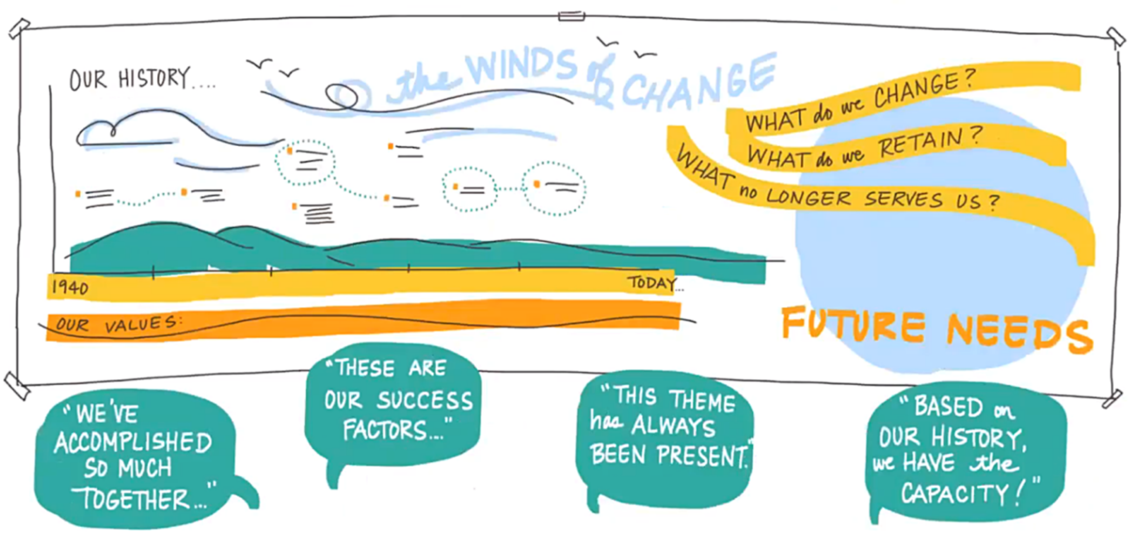
## A FINAL NOTE

Sometimes it is best to outsource this work to a communications professional, especially if your organization has a Public Information Officer or similar role. You may also hire a consultant for areas in need of specific knowledge or guidance. There are some lower cost resources as well, such as approaching a university student majoring in communications to see if they may be able to develop materials or a communications strategy for your collaborative as part of their coursework or a thesis project.

Start-Up Guide: Getting Started (Working with Consultants, p. 22)

# DIG DEEPER

- Start-Up Guide; Frameworks and Practices (Human-Centered Design Thinking, p. 10)
- Hillcrest Advisory YouTube Channel
- Graphic Facilitation: Using Live Drawing, Graphic Formats to See Patterns & Connections




Graphic Facilitation: Using Live Drawing, Graphic Formats to See Patterns & Connections
Big-Picture Thinking: Graphic displays support seeing relationships and big patterns.
It's an accessible support for systems thinking and making sense out of complex data.

LESSON 1: EXTERNAL COMMUNICATION STRATEGIES

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about communicating with external audiences?
- Who are the main external audiences with whom you communicate?
- How would your communication strategy differ between the different audiences?
- How do you ensure an equity lens is present in your communications?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Internal Communication Strategies

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What do you think are the most important elements to consider in hosting collaborative interactions with your community and professional partners?
- Describe a collaborative experience that was particularly meaningful, and why.

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand and describe strategies to facilitate interactions with partners and the broader community.
2) Understand and employ the Four Levels of Listening framework.

# UNDERSTAND

This lesson focuses on internal communications (within your organization as well as with community and professional partners). External communications, with the public and members of the community outside of your partners, are covered in the previous lesson. Many of the internal and external communication strategies overlap and inform one another, so these lessons are best considered together. Feel free to apply tools from one group to the other.

Creating an effective communication strategy within your organization, as well as with community and professional partners, is key to successful collaboration. This communication strategy includes effective facilitation and collaboration settings, as well as intentional listening and meaning making practices. You can use the below Communication Ecosystem tool to identify different channels or tools through which you might share information with specific groups.

Tool: Communications Ecosystem

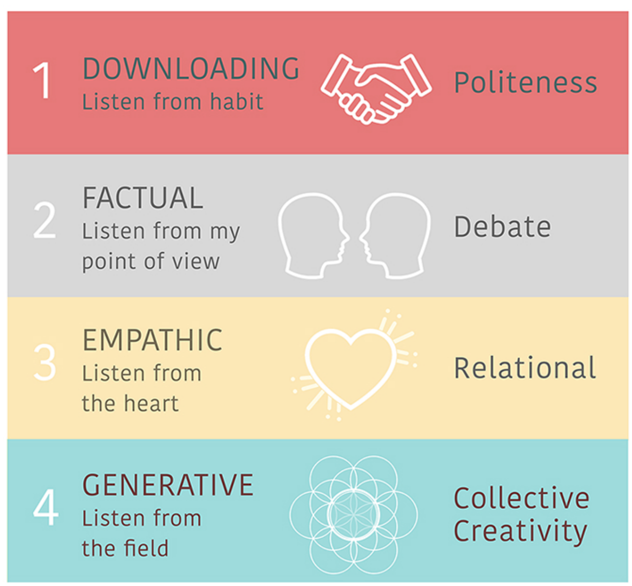
## LISTENING

Change work requires participants' capacity to deeply listen and fully share their perspectives, even when they have seemingly opposing viewpoints.

Theory U has a framework that highlights Four Levels of Listening to help people identify and shift their level of listening and talking that is taking place in order to create deep and lasting change.

All levels of listening are important. One is not better than the other. However, when co-creating and innovating in a complex environment, it is essential that we get to levels three and four. This is a framework that can support the group in reflecting on the type of listening the team is engaged in and decide the level they want to engage in levels 3 and 4 if we are co-creating.

Start-Up Guide: Four Levels of Listening



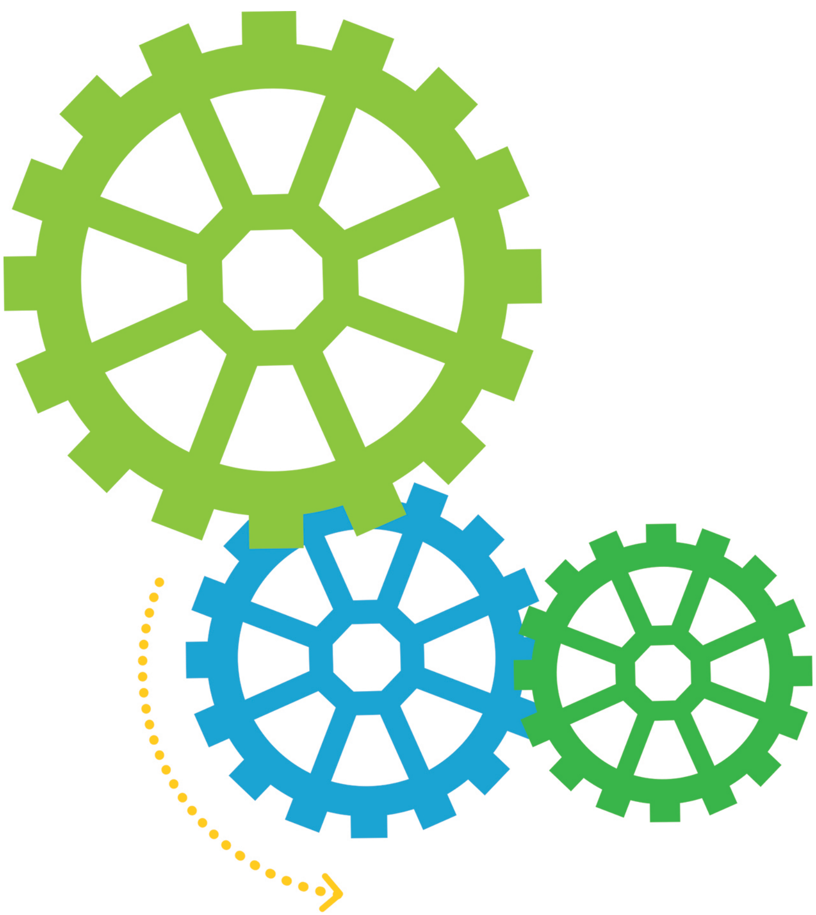

Start-Up Guide: Four Levels of Listening
Theory U framework highlighting 4 Levels of Listening.

## COLLABORATION

The way that you communicate and engage with different types of partners, including those within your collaborative and community and professional partners, will likely vary.

These communication tools can be useful in identifying the different communication channels for different partners and messages:

- Strategies to Support Networks – Communication and Collaboration
- Cultural Humility



There are myriad tools which can be used to communicate across partners. The below document includes operations and communications tools including web conferencing, project management software, social networking and more. Explore these and other tools you may know of to see what might work for your collaborative.

- Start-Up Guide: Operations & Communications Tools

The below slide deck is an example of cultural considerations to keep in mind when working with First Nations. For example, tip #4 is to avoid the use of the term "stakeholders." As Bob Joseph points out in this presentation, "First Nations people are not merely stakeholders they have constitutionally protected rights and are used to dealing with Canada, provinces and territories on a Nation-to-Nation basis." [30]

- 23 Tips on What Not to Say or Do When Working Effectively with Aboriginal Peoples

# APPLY

## FACILITATION / HOSTING SPACES

When partners come together, it is important to acknowledge that there will be many different perspectives and beliefs. Facilitating these conversations can be challenging with many different perspectives and creating the space to allow these perspectives emerge and be heard is important to build common understanding and trust amongst the partners. The Art of Hosting practice highly recommends that facilitators never host meetings and / or convenings alone.

Consider working with a Design Team to plan and co host meetings to facilitate trust and transparency.

- Start-Up Guide: ACH Launch Meeting Email Samples
- Start-Up Guide: ACH Meeting Blank Agenda
- Start-Up Guide: Getting Started (Agenda Planning & Impact, p. 23-24)
- Module 7: Scaffolding for Change: Backbone Organizations
    - *Lesson 2: Building a Culture for Success >> Design Team & Design Challenge*

Hosting an intentionally designed, in-person meeting can be immensely valuable to the relationships you are developing with partners.

- Start-Up Guide: Hosting Dialogues
- Start-Up Guide: Hosting an Effective Meeting Checklist

The Art of Hosting is a collaborative tool used by many ACHs and other collaboratives around the world. This practice is “a highly effective way of harnessing the collective wisdom and self-organizing capacity of groups of any size.”[31]

- Art of Hosting
- Art of Hosting CACHI Workbook

*Virtual Gatherings*

With the majority of our interactions being virtual these days, it is important to also learn how to effectively host online gatherings, from small meetings to conferences.

- Online Hosting Manual (p. 25)
- Online AoH Manual Co-Creation: Practices for Meaningful Participatory Virtual Engagement
- Start-Up Guide: Operations & Communications Tools (Video Calling & Web Conferencing, p. 10)
- Module 3: Hand in Hand: Fostering Lasting Relationships

## MEANING MAKING THROUGH SHARED LANGUAGE AND UNDERSTANDING

At the start of each meeting, before getting to work, begin by using the Circle Check-In to set the context and connect the whole group to the larger purpose of why we were doing this work.

- Start-Up Guide: Circle Check-In
- Graphic Facilitation: Using Live Drawing, Graphic Formats to See Patterns and Connections
- Start-Up Guide: Getting Started (Shared Language, p. 25)

## ASKING THE RIGHT QUESTIONS

- Shaping Powerful Questions
- FSG's Appreciative Inquiry Tool

## FACLITATING DIFFICULT CONVERSATIONS AND CONFLICT RESOLUTION

- Sample Dispute Resolution Policy for ACHs

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about facilitating meaningful communication among your collaborative and your community and professional partners?
- Who are the main internal audiences with whom you communicate?
- How would your communication strategy differ between the different audiences?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 3: Data Communications

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- How have you used data to communicate in the past?
- What do you think worked well? What didn't go as planned?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand and describe several different ways to communicate data to reach diverse audiences.
2) Explore about other collaborative's use of fact sheets, dashboards, persuasive narratives, and other vehicles of data dissemination.

# UNDERSTAND

We're awash in data. So why aren't we seeing results? This video series from Hillcrest Advisory explores ways in which we can communicate data more effectively, in order to achieve the results we're after.

Introduction: Data Communication Lessons Learned

The power of story brings understanding and context - two qualities that will serve your collaborative well over time. Storytelling is one way to build trust and deepen understanding of partners' perspectives and experiences. In one California ACH the chair encouraged storytelling. To kick off the use of this practice they told a story of what called them to service. The chair then invited other partners to share their stories at subsequent meetings.

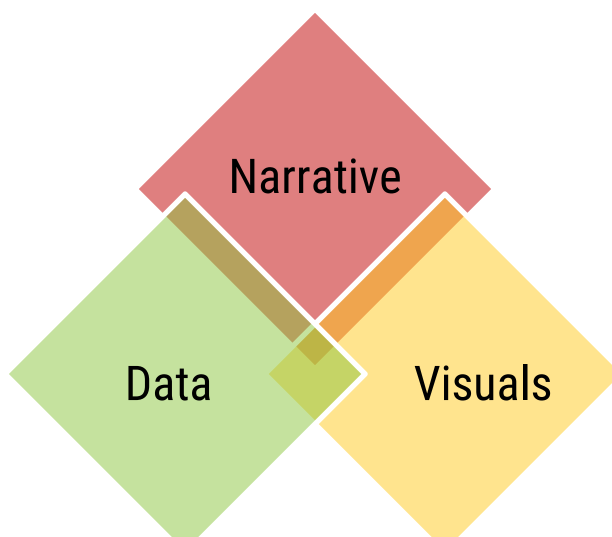
Art of Hosting Storytelling Exercise

> "Data storytelling is a structured approach for communicating data insights, and it involves a combination of three key elements: data, visuals, and narrative."[32]

But what exactly is data storytelling? This video begins by describing what a data story is (hint: it's not just one thing), then shares some lessons learned on how to make a data story that's engaging.

Data Communication 2: What Exactly is Data Storytelling?

Data Storytelling: the Essential Data Science Skill Everyone Needs



# APPLY

Communicating using data can be tricky. What specific information do you want to share with your audience? What do you want them to do with it? How much data should you share? How can you make your data communications relatable and compelling? The below video series, continued from the Understand section, explains the key components to good data communications.

- Tips on Visualizing Data
- Don't Visualize on Your Own
- Design for Face-to-Face Interaction
- More Data isn't Always Better
- Make Your Data Relatable to Audiences

There are many ways to use data to communicate a message. Some of these formats and examples are linked below. Building off of what you learned in Lesson 1, explore these tools to learn more about these two communications formats and whether they may be useful for your collaborative's needs.

### *Persuasive Narratives*

- Examples of Persuasive Narratives
- Persuasive Narrative Template
- CACHI: Developing Your ACH's Persuasive Narrative to Support Your Sustainability Work

### *Data Stories and Dashboards*

- CACHI Data Stories and Dashboards
- Sonoma County COVID Data Story Advancing Health Equity: 2019 Health Equity Awardees

### *Photovoice*

- PhotoVoice 1
- PhotoVoice 2
- PhotoVoice Manual

> **Data Communications Spotlight:**[33]
>
> **Photovoice**
>
> Photovoice is a community based participatory process where people represent their community through a specific photographic technique. The method has three main goals: (1) to enable people to record and reflect their community's strengths and concerns, (2) to promote critical dialogue and knowledge about important issues through large and small group discussion of photographs, and (3) to reach policymakers.

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about data communications?
- How could you use the data you have to bring more meaning to your external communications?
- Has what you learned in this lesson caused you to rethink any of your previous approaches to communicating with data? In what way?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

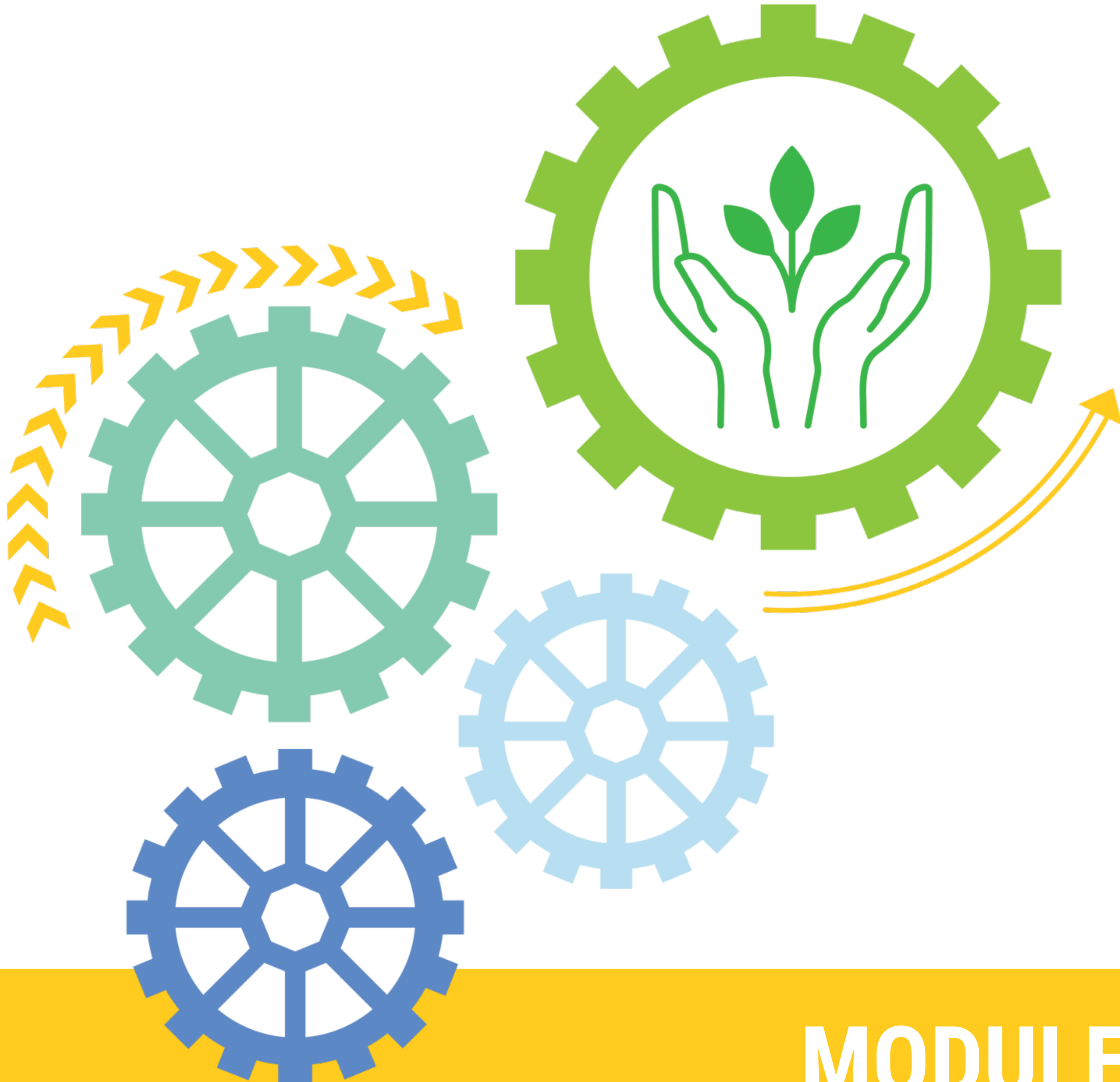
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 6
# PAYING DIVIDENDS

## CO-CREATING LASTING IMPACTS

*We thank Jeremy Cantor of John Snow, Inc.
for his contributions to this module.*

Module 6

# PAYING DIVIDENDS

## Co-Creating Lasting Impacts

## OBJECTIVE

Discover approaches to sustaining the financial and collaborative aspects of a multisector collaborative. Create a sustainability plan with the potential to evolve, reflecting on your collaborative's community. Learn about wellness funds as an approach to financial sustainability.

### LESSONS IN THIS MODULE INCLUDE

1) Collaborative Sustainability
2) Financial Sustainability: Right-Sizing Resources to Achieve Your Goals
3) Wellness Funds

### AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of the necessary components of your collaborative's sustainability.
- Learned strategies to institutionalize change initiatives and sustain an organizational culture.
- Learned to articulate a clear value proposition.
- Begun to create a sustainability plan with concrete actions for ensuring long-term funding for your collaborative.
- An understanding of the concept of a wellness fund and how it can be a tool for financial sustainability of a multisector collaborative.

### RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*


- Module 2: Righting Injustices: Operationalizing Equity
- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose
- Module 8: Collective Accountability: Governance & Leadership
- Module 9: It Takes a Village: Creating a Portfolio of Interventions
- Module 10: Keeping the Lights On: Financial Management Strategies

***"Every time you spend money you are casting a vote for the kind of world you want."***
***~ Anna Lappe***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1: Collaborative Sustainability

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- What does sustainability mean to you?
- What should you consider as you plan for the sustainability of your collaborative?
- If your entire collaborative staff were to turn over today, would a new cohort have the resources they need to continue your work? What else might they need?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand the necessary components of your collaborative's sustainability.
2) Build and nurture strategic collaborations and work to institutionalize change initiatives.

LESSON 1: COLLABORATIVE SUSTAINABILITY

# UNDERSTAND

In this module we focus on collaborative sustainability (Lesson 1) and financial sustainability (Lessons 2 and 3). Through these lessons you will learn how to determine and implement the important elements of sustainability for your collaborative by focusing on your vision, partnerships, and trust. The true value of your collaborative lies in it's sustainability, and the relationships built and nurtured through a culture of openness and learning. By definition, the work of creating a sustainable multisector collaborative (MSC) overlaps with many aspects of your collaborative's operations (and therefore the other modules in this curriculum.)

Because the meaning of **sustainability** changes and grows along with the conditions of our world, it can be difficult to point to one definition of the term. The CDC's Healthy Communities Program defines sustainability this way.

** modified from the original definition*

For some collaboratives, the meaning of sustainability, or what is required to be sustainable, may not be entirely clear. What is required and what is actually to be sustained? It will be important to foster a shared understanding of sustainability within your collaborative, and plan for how to approach it. Work toward achieving sustainability is an ongoing journey, through which you will grow and learn alongside your partners. The understanding of sustainability will be an ongoing journey to better capture the value of the work being done together with your partners.

> "Sustainability is…about creating and building momentum to maintain community-wide change by organizing and maximizing community assets and resources [including partnerships and engagement]*. It means institutionalizing policies and practices within communities and organizations. From the outset, sustainability requires an approach that emphasizes the development of a network of community practitioners who understand and can lead a movement. It also means involving a multiplicity of stakeholders who can develop long-term buy in and support throughout the community for a coalition's efforts. These factors are crucial to ensuring lasting change and making a difference in people's lives." [17]

## VISION, PARTNERSHIPS, AND TRUST

However your collaborative approaches sustainability, some proven factors that contribute to the ongoing organizational sustainability are: "**clarity of vision and shared purpose, having clearly identified partner roles, active partner involvement, and a strong sense of trust**." For more on the necessary elements of sustaining collective impacts review the below planning guide.

A Sustainable Planning Guide for Healthy Communities

At a meeting with CACHI Backbone Organization leads on June 4, 2020, several site representatives called out the value of the relationships their ACH has built:

"The long-term relationships built between the ACH and other local orgs and community members is the best sustainability asset for the ACH. Including value as a convener and facilitator in the community around social determinants of health."

"We see the strong partnerships that we have built as important tools to effect change. Sustainability is not just about money; it is about connections that sustain change and provide opportunities to move the work forward."

When you hear the term sustainability, you may think of the environment. While we do not address environmental sustainability in this lesson, it is an important consideration to the operations of all organizations. Some organizations use the "triple bottom line" framework to guide their approach to sustainability. To learn more about the "triple bottom line" - people, planet, profit - and how environmental sustainability might be incorporated into your collaborative's operations, explore this report.

Triple Bottom Line

LESSON 1: COLLABORATIVE SUSTAINABILITY

# APPLY

A number of factors influence organizational sustainability. As you work to create a sustainable collaborative, revisit the modules listed below to ensure that your sustainability goals are in line with current practices and plans.

Module 2: Righting Injustices: Operationalizing Equity

*Equitable Inclusion & Participation*

Module 3: Hand in Hand: Fostering Lasting Relationships

*Building Strong, Healthy Relationships with Partners & Broader Community from the Beginning*

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

- *Lesson 1: Shared Vision, Goals & Purpose*

Module 7: Scaffolding for Change: Backbone Organization

- *Lesson 2: Building a Culture for Success*

Module 8: Collective Accountability: Governance & Leadership

*Continue to Nurture & Support a Strong Team with Agreed to Operating Principles & Values*

*Development of the Collaborative Governance & Decision Making Models Use*

Module 9: It Takes a Village: Creating a Portfolio of Interventions

*Identify Shared Measurement Outcomes & Tracking Mechanisms*

## REFRAME YOUR THINKING

As you approach sustainability planning for your collaborative, it is helpful to refresh or reframe your thinking. This process can illuminate innovative solutions you may not have thought of before. One way to change your perspective to approach this work is Analogous Inspiration.

> "When you've spent countless hours, months, or years deep inside a particular field or system, a radically fresh perspective can help unlock sticky problems or inspire new directions of exploration." [34]

The Design Kit activity by IDEO can help you to refresh and reframe your thinking.

IDEO Design Kit: Analogous Inspiration

*Some questions to consider alongside this activity include:*

- Can you tell us the history or the origin of your collaborative?
- What are the key drivers and motivations of your collaborative?
- Are there key champions who have been instrumental in the support of your collaborative?
- How do you define sustainability and do you have key performance indicators for the collaborative's leadership?
- What do you see as key factors in the sustainability of your collaborative?
- Do you have any advice to share with others on this topic?

## INSTITUTIONALIZE CHANGE INITIATIVES

The institutionalization of change initiatives is critical to your collaborative's sustainability. This is a process, and part of a sustainable culture is built over time through trust and mutual understanding. The tools and strategies below aim to help you to build this culture within your own organization. We discuss culture building in Module 7, Lesson 2.

Module 7: Scaffolding for Change: Backbone Organizations

- *Lesson 2: Building a Culture for Success*

Start-Up Guide: Building Strong Teams

The Blueprint of We

Art of Hosting CACHI Workbook (Working Together Using Art of Participatory Leadership, p. 50-52)

Tamarack Institute: Sustaining Collective Impact Efforts

Succession planning is important to ensure that the culture and values of the collaborative outlast any individual members. This topic is discussed in Module 8, Lesson 1.

Module 8: Collective Accountability: Governance & Leadership

- *Lesson 1: Leadership Types & Skills*

## TRUST AND PARTNERSHIP ASSESSMENT

In Module 3 we offer a number of tools you can use to regularly assess the strength of your partnerships, linked again below. Revisiting partnerships and common goals is important for sustaining relationships in an evolving world, as priorities may have shifted and partnerships may need to change over time. Open and honest dialogue is the foundation of a strong, trusting relationship, and these assessments can also provide a measurement of the level of trust among partners.

Assessing Community Engagement

Strive Together Development Self-Assessment

Partnership Assessment Tool for Health

A Practical Guide to Creating and Maintaining Successful Partnerships

Module 3: Hand in Hand: Fostering Lasting Relationships

- *Lesson 1: Identify & Define Partnerships >> Partnership Assessment*
- *Lesson 2: Build Trust with Partners & the Community at Large*

## VALUE PROPOSITION

In Lesson 2, we discuss the creation of a value proposition to highlight and communicate about the value of your collaborative. This can be helpful also around the social value of your MSC's work. Please see Lesson 2 for more information on creating a value proposition.

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## DIG DEEPER

Sustainability – What Is It? Definition, Principles and Examples

Sustainability Through Partnerships

Sustaining Community-Based Programs: Relationships Between Sustainability Factors and Program Results

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about organizational sustainability?
- What practices will you put into place to better set your collaborative up for sustainability?
- What factors are currently impacting your collaborative's sustainability prospects?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2:
# Financial Sustainability: Right-Sizing Resources to Achieve Your Goals

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What is your financial goal (maintain current level of funding, expand funds available to support backbone activity, have funds available to re-grant to partner organizations, etc.)?
- In general, who do you imagine will support your efforts moving forward?

## LEARNING OUTCOMES

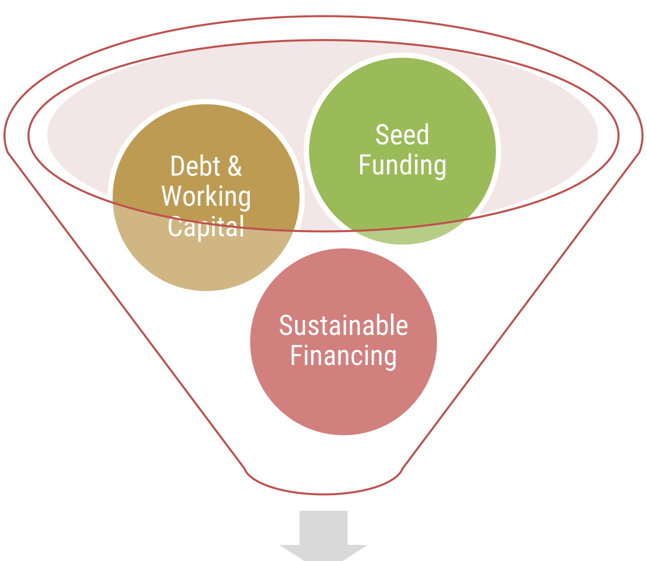
After completing this lesson, you will be able to:

1) Understand what your collaborative needs to be financially sustainable.
2) Identify the infrastructure and funding needed to be financially sustainable.
3) Articulate a clear business case and value proposition.

# UNDERSTAND

There are many different approaches to sustaining funding. Explore the below resources to better understand what some options are, and factors impacting financial sustainability in MSCs. In Module 10, we cover fundraising approaches and blending, braiding and aligning funds.

- Module 10: Keeping the Lights On: Financial Management Strategies
- Funding Models and Sources
- Accountable Communities for Health Strategies for Financial Sustainability, JSI, May 2015




Funding Structures

One novel approach to creating a financially sustainable collaborative is the development of a wellness fund. This is covered in detail in the next lesson.

As you work toward a sustainable future for your organization, remember that there is no one-size-fits-all strategy. It depends on the context in which you are operating. Avoid chasing "shiny objects" - the latest funding idea may not be the best one for your collaborative's present situation.

Being successful requires a mix of entrepreneurial spirit (business planning) and community organizing (trust-building).

- Module 1: Rewiring Your Brain: Mindsets & Systems Thinking
- Module 3: Hand in Hand: Fostering Lasting Relationships

# APPLY

Building a financially sustainable MSC is no small task; it can be hard to know where to start. This lesson follows the structure of the Financial Sustainability Toolkit, linked below, guiding you through key considerations to build a financially sustainable organization. Additional resources and suggestions are listed with each question to support your inquiry.

Financial Sustainability Mini-Toolkit: Domestic Violence Collaboratives and Others

There are a variety of ways in which your MSC can approach discussing, agreeing and documenting the key aspects of financial sustainability. Some collaboratives form subcommittees, hire a consultant, or create and steward a group process. Prior to beginning the process, the backbone organization lead may want to bring the Design Team or a sustainability subcommittee to review the Financial Sustainability Mini-Toolkit and co-create a process to design the sustainability action plan.

Module 3: Hand in Hand: Fostering Lasting Relationships

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 2: Internal Communication Strategies*

Module 7: Scaffolding for Change: Backbone Organization

- *Lesson 2: Building a Culture for Success >> Design Team*

## VALUE PROPOSITION: WHAT IS THE VALUE OF YOUR COLLABORATIVE?

Toolkit for Developing a Value Proposition Narrative

JSI: Value Proposition Worksheet

CACHI Value Proposition Worksheet Merced

Sonoma Health Action Wellness Fund Value Proposition Example

## WHO DO YOU THINK WILL CONTRIBUTE TO THE FUND/CONTRACT WITH YOUR COLLABORATIVE MOVING FORWARD?

Typical funding streams may be the easiest to approach, but perhaps not to sustain. Consider thinking outside of the box and work to identify novel funders. Hold a brainstorming session with your collaborative partners and make a list of potential funders who might have interest in working or contracting with you. For example, you might approach healthcare facilities in your community who are working toward improving HEDIS measures, which are tied to incentives. You may be able to develop a mutually beneficial relationship if your collaborative's work improves key metrics for a partner healthcare facility. More information about HEDIS measures is below.

- Funding Hypothesis Exercise
- ReThink Health Typology of Potential Funding Sources
- HEDIS Measures

## WHAT RESOURCES DO YOU NEED?

- Budget Template
- ReThink Beyond the Grant, Module 4, Worksheet
- Sustainable Financing Analysis for Sonoma County Health Action

## WHAT INFRASTRUCTURE DO YOU NEED TO MANAGE RESOURCES?

A committee to assist with overall planning, resource development, and other activities may be helpful. One such committee example comes from the East San Jose CACHI ACH. Find the roles and responsibilities of this ACH's sustainability workgroup outlined below.

*PEACE Finance & Sustainability Workgroup:*

- Provide critical resources for the PEACE Partnership, including the Backbone Organization
- Cultivate a collaborative fundraising ecosystem to ensure shared accountability among all ESJ PEACE partners and stakeholders.
- Support upstream strategies, activities and interventions to prevent all forms of violence

*PEACE Finance & Sustainability (cont.)*

- Gather and share quality information about the ESJ PEACE Partnership to build understanding and enhance community ownership
- Reaffirm values, vision, and direction of the ESJ PEACE Partnership
- Create effective and fair processes
- Create a fundraising strategy structured to ensure that all workgroups have a clear understanding that the Finance & Sustainability workgroup actively seeks funding for PEACE, hence no competition.

Consider other governance structures as they are relevant to your collaborative's sustainability needs. This topic is covered in detail in Module 8.

Module 8: Collective Accountability: Governance & Leadership

It may also be appropriate to engage a committee in order to put structures in place to allocate and disburse grant funds to support upstream interventions and prevention, and advance health equity. Building in an equity focus to your financial sustainability efforts is crucial from the very earliest stages. They should include formalized processes to equitably share power over resources.

Community Tool Box: Section 3. Developing a Committee to Help with Financial Sustainability

## ARTICULATE A SUSTAINABILITY PLAN

The design and use of a sustainability plan can be helpful to guide the development of your business case and collaborative activities. Using the below resources, in combination with your organization's established definition of sustainability (Lesson 1), work with your partners to create a sustainability action plan and self-assessment.

Sustaining Healthy Communities: Healthy Neighborhoods Learning Collaborative Convening

Georgia Health Policy Center Sustainability Framework

Georgia Health Policy Center Sustainability Framework Fact Sheet

## LESSON 2: FINANCIAL SUSTAINABILITY

A clear and concise "pitch deck" is an invaluable tool in convincing potential funders of your organization's value.

- CACHI Pitch Outline 2020
- Crowdfunder Pitch Deck
- Sonoma Financial Sustainability Pitch Outline
- Sonoma Financial Sustainability Pitch
- West Sacramento Financial Sustainability Pitch

An important factor that contributes to sustaining entities such as a backbone organization is the tracking of key performance indicators that demonstrate their value and operational effectiveness. For partners that wish to track the backbone organization performance, they may set certain targets and the indicators that demonstrate operational objectives.

Additionally, setting a regular frequency to review, track and update these indicators can demonstrate value of the organization and provides an opportunity for partners to contribute to the leadership effectiveness of the collaborative. Effective backbone support is critical to make impact on the health and well being in communities. The value demonstrated through tracking effectiveness can be used in the value proposition and other financial or economic sustainability efforts. Examples of backbone indicators are linked below.

- Backbone Effectiveness Indicators

Host a discussion with partners on sustainability and review the backbone indicators of success. Identify key metrics that are important to partners, and begin to track and set a frequency for partner review.

## DIG DEEPER

- Beyond the Grant, ReThink Health
- FCHIP Founding Member One-Pager
- How Multi-Sector Collaborations Can Help Can Support Community Population Health

LESSON 2: FINANCIAL SUSTAINABILITY

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about financial sustainability?
- What would financial sustainability look like for your collaborative?
- Who are the key partners you want to engage in a dialogue about sustainability?
- How can you bring a focus on equity to your sustainability work?
- Are there changes in your local community, or in the broader state and national economic and policy environment, that create opportunities for your collaborative?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 3: Wellness Funds

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What do you know about wellness funds?
- What has your experience been (if any) working with or developing a wellness fund?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand the concept of a wellness fund and how it could be used to create a sustainable funding structure.
2) Understand more about how to establish a wellness fund.

# UNDERSTAND

> "Multisector health collaboratives require careful strategy development and trust building to bring public health and health care together, along with other partners and residents, to determine where there are leverage points for innovation and true system changes."[35]

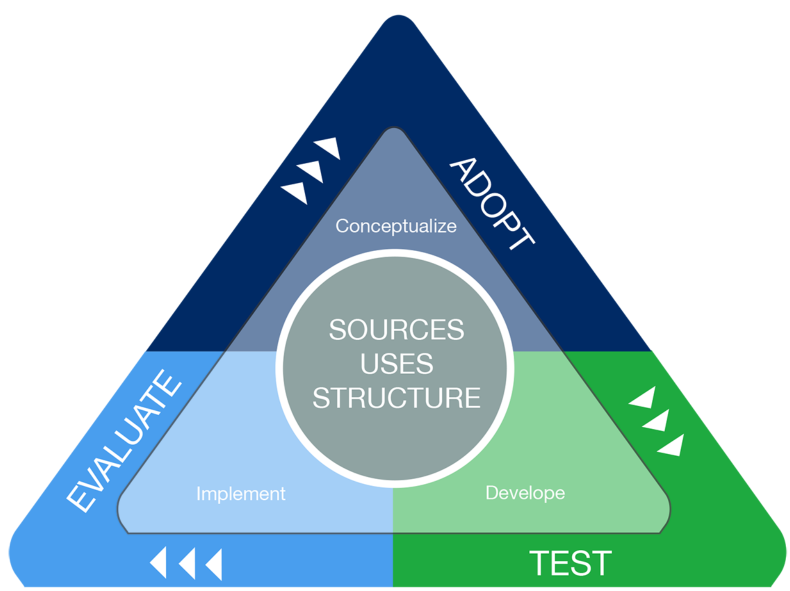
The creation of a Wellness Fund is one way to approach building the financial sustainability of a MSC. The following lesson structure and content is primarily derived from an issue brief created for CACHI ACHs.

- Establishing a Local Wellness Fund Issue Brief

For a primer on wellness funds in the ACH context and some helpful resources, visit the below resources.

- Start-Up Guide: Definitional Elements Examples and Resources (Wellness Fund, p. 29-31)
- Wellness Funds: Flexible Funding to Advance the Health of Communities (Funders Forum Issue Brief) (p. 2)
- Local Wellness Funds Brief

Local Wellness Funds Brief
Critical Steps/Pathways in the Development of Wellness Funds



# APPLY

A Wellness Fund is intended to extend the MSC principles of shared accountability and collective action into the management of resources. Regardless of the administrative model, the Wellness Fund should be accountable to the MSC as a whole.

Decisions about Wellness Fund resource allocation should sit with the MSC leadership and governance (not with the board of a Wellness Fund administrator, a local elected official, etc.). These decisions are driven by considerations about governance, the Portfolio of Interventions, and a commitment to enhance equity. Creating any sort of parallel decision-making process, or perceived aggregated power or control over funds, can serve to undermine trust built up through inclusive MSC processes. If, for instance, community partners participate fully in prioritizing the activities that the MSC will pursue, but a separate process is established for deciding where to allocate Wellness Fund resources, community participation in the initiative is likely to wane.

Wellness Fund Governance Examples

## KEY ADMINISTRATIVE CAPABILITIES

Generally, it makes sense to start Wellness Fund design by defining what a Fund will need to do versus identifying the most feasible administrative model (though it can be a bit of a chicken-and-egg question). Regardless of the model selected, the Wellness Fund should possess key capabilities to successfully manage funds with oversight from a collaborative, such as:

- A sophisticated nonprofit or government financial management system
- Direct service billing
- Cost accounting
- Grantmaking
- Budgeting, analysis and financial reporting
- Fundraising
- Fiscal management, including blending, braiding and aligning funds

Learn about each of these capabilities here:

- Establishing a Local Wellness Fund Issue Brief (Fiscal Management by Braiging, Blending and/or Aligning Funds, p. 6-9)
- Module 10: Keeping the Lights On: Financial Management Strategies,
    - *Lesson 1: Financial Management >> Blending, Braiding & Aligning Funds*
- ACH Wellness Fund Pilot: Considerations for Funding Decisions
- Humboldt Financing Committee Policies
- Sample Wellness Fund Budget

## SELECTING A WELLNESS FUND ADMINISTRATIVE MODEL

"After an ACH determines the required capabilities to administer its Fund, several internal and external factors should be weighed to select an appropriate administrative model. The Wellness Fund may evolve over time as the ACH matures, tackles additional health issues and has more resources from multiple funders to manage; any future needs that can be anticipated should be factored into the selection process."[35]

For questions the leadership should consider when investigating potential Wellness Fund models, see the below resource.

- Establishing a Local Wellness Fund Issue Brief (Options for Selecting a Wellness Fund Administrative Module, p. 11-13)

**ASSESSMENT OF ADMINISTRATIVE MODELS**

Likely ● Possible ◖ Unlikely ○

| | A. Select an existing non-government entity (foundation, fiscal sponsor, NGO, other nonprofit) to operate the Wellness Fund | B. Establish a new independent organization (NGO, foundation) | C. Establish a governmental or quasi-governmental task force, public service corporation or local health authority |
|---|---|---|---|
| Quick to establish | ● | ○ | ○ |
| Relatively low-cost setup | ● | ○ | ◖ |
| Low ongoing overhead costs | ◖ | ○ | ◖ |
| Flexible design | ◖ | ● | ○ |
| Overseen exclusively by ACH governance | ● | ● | ◖ |
| Able to leverage existing networks & funders | ● | ◖ | ◖ |
| Alignment with ACH vision & identity | ◖ | ● | ◖ |
| Responsive/limited bureaucracy | ◖ | ● | ○ |
| Enhanced reputation & buy-in from key stakeholders | ◖ | ○ | ◖ |
| Able to receive and manage funds from a wide range of sources | ◖ | ● | ○ |
| Less susceptible to shifting external organizational or political priorities | ◖ | ● | ◖ |

Establishing a Local Wellness Fund Brief
Options for selecting a wellness fund administrative module. p.13

## EVALUATING A WELLNESS FUND

Wellness Funds present new challenges for evaluation. Not only are funds investing in upstream, cross-sector initiatives implemented by multiple collaborating partners and addressing the needs and wants of often diverse groups of stakeholders, but they are also unique financial structures whose goals and performance require monitoring and evaluation. A proposed evaluation framework for a Wellness Fund must be designed to capture all of these elements.

The framework below suggests a three-prong evaluation: (1) evaluation of the Fund's startup performance, (2) ongoing evaluation of the Fund's financial and overall performance, and (3) evaluation of the individual investments of the Fund.

Sonoma Health Action Wellness Fund Evaluation Framework

## DIG DEEPER

Wellness Funds: Flexible Funding to Advance the Health of Communities, Funders Forum Issue Brief

Wellness Fund Capabilities Featuring Anne de Biasi from Trust for America's Health

- *requires registration*

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about wellness funds as a tool for financial sustainability?
- What assets do you have to support the development of a wellness fund for your collaborative?
- What do you expect will be the primary challenges to overcome in developing your wellness fund?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

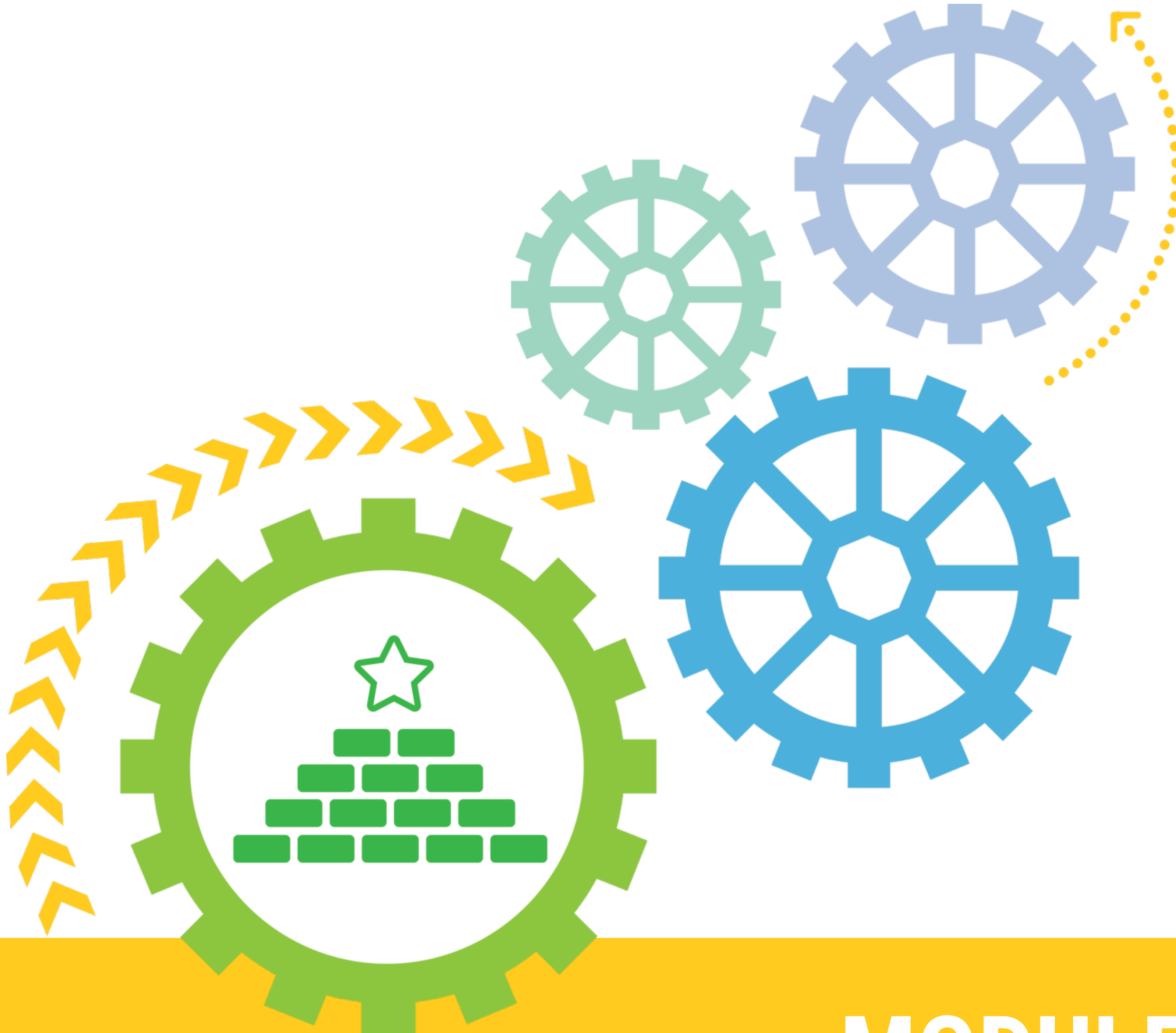
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 7
# SCAFFOLDING FOR CHANGE

## BACKBONE ORGANIZATIONS

Module 7

# SCAFFOLDING FOR CHANGE

## Backbone Organizations

## OBJECTIVE

Understand the role of backbone organizations in multisector collaboratives (MSCs). Acting as a steward for your organization, put these learnings into practice as you create a culture for success.

### LESSONS IN THIS MODULE INCLUDE

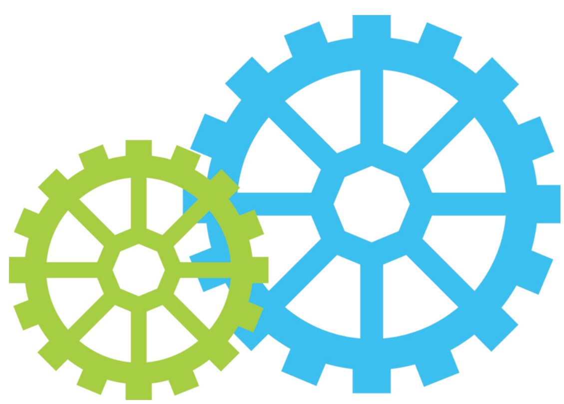
1) Backbone Roles & Responsibilities
2) Building a Culture for Success

### AT THE END OF THIS MODULE YOU WILL HAVE

- Learned about the history and value of the backbone organization.
- An understanding of the backbone's roles and responsibilities in collaborative operations.
- Assessed your backbone support organization's level of readiness to engage in your responsibilities.
- Learned about stewardship and how it applies to backbone support staff.
- Learned how to apply principles of distributed leadership and stewardship in order to build a culture for success.
- Begun to establish a design team and create a design challenge.
- Drafted a culture statement.

### RELATED CONTENT

*As you progress through this module, you will find that it relates back to most every other module within this curriculum. This is because this curriculum was designed as a resource primarily for the backbone support organization in a multisector collaborative. The links back to other modules will be called out within to direct further exploration of the topics.*



***"You need the right people with you, not the best people."***

***~ Jack Ma***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1: Backbone Roles & Responsibilities

## OPENING QUESTIONS

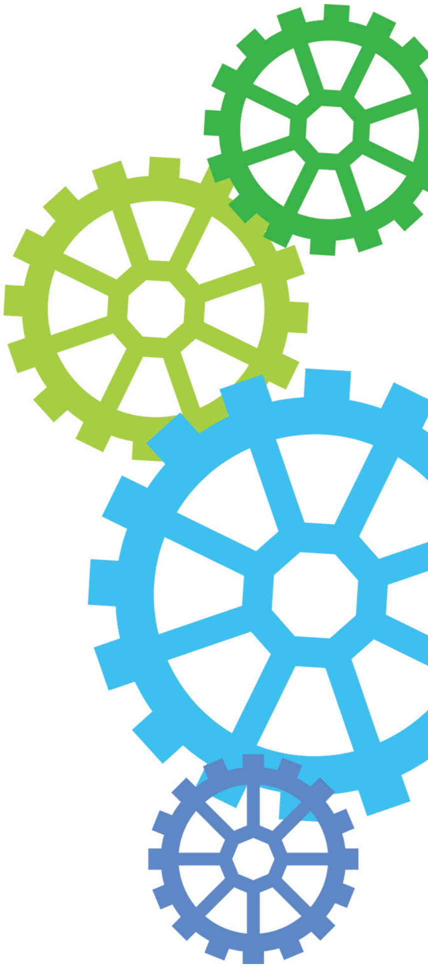
Discuss these questions with your team members before beginning this lesson.

- How might a backbone role be different from being a lead for a collaborative?
- What characteristics define an effective backbone organization?
- What is the role of the backbone in a multisector collaborative?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Explore the history and value of the backbone organization.
2) Understand the backbone's roles and responsibilities in collaborative operations.
3) Assess your backbone support organization's level of readiness to engage in your responsibilities.
4) Understand the concept of stewardship and how it applies to backbone support staff.



# UNDERSTAND

## HISTORY

The concept of a backbone support organization originated from the shift to a new type of collaborative structure. There are various types of collaborations that employ the backbone support model, including Accountable Communities of/for Health (ACHs) and the Collective Impact model. The work of the backbone organization is different from traditional collaborative models and relies on the staff adaptive and emergent skills to support its success. While the names of the collaboratives may be similar, the roles of the backbone organization may be different and require different roles and responsibilities.

The below resources provide information on the history of the ACH model, and are helpful to contextualize the origin and provide some different examples of how the backbone organization might function.

- Advancing State Innovation Model Goals through Accountable Communities for Health
- An Accountable Care Community in Akron, Ohio: Collaborating to Create a Healthier Future
- Healthier by Design: Creating Accountable Care Communities: A Framework for Engagement and Sustainability

## ROLE

The backbone organization is the agency that facilitates and stewards the collaboration across the collaborative members and partners. Their role is complex and requires the ability to maintain overall strategic coherence and coordinate and manage the day-to-day operations and implementation of work including: stakeholder engagement, communications, data collection and analysis, and other responsibilities. Backbone organizations have often been referred to as the quarterback or integrator because their role is about facilitation, not the control of an initiative. The backbone supports the partnership collaboratively in service of greater systems change in the community.

Utilizing a backbone agency in collaborative work provides a great service to the development and success of the multisector collaborative (MSC). A differentiator in the ACH model is that the backbone remains neutral to individual agendas and sectors; therefore the backbone is able to facilitate the establishment of collective ownership. They co-create, not lead, the collaborative spirit that allows multiple organizations to come together, have conversations and collectively move forward in areas of opportunity.

The below resources describe the purpose and functions of the backbone support organization.

- ACH Start-Up Guide Backbone Organization
- CACHI September 2019 Webinar: Identifying Backbone Integrative Activities and Options for Supporting Them
- Backbone Organizations: Diving Deeper in the Role of the Backbone Organization

## IDENTIFYING THE BACKBONE

The identification of a backbone agency may come about in several different ways. Sometimes the backbone originates from the initial organizers and serves as the "caller" to the community asking them to operate in this new way.

In other cases, the backbone is a community organization that has been selected through an open transparent process. Another version might be a model where functions are jointly run by two organizations pairing together; one serving as the backbone and one serving as the fiscal sponsor. Whatever the means of establishment, it's important to clearly understand and explore the roles, responsibilities, and expectations of being a backbone agency in the ACH model, which can also be applied to other MSCs.

- Start-Up Guide: Backbone Organization

## VALUE

The roles played in accelerating change can be challenging to articulate as, by design, their work is largely behind the scenes. As a result, demonstrating the value of the backbone organization has become all the more important. The four-part series by *Stanford Social Innovation Review: Understanding the Value of Backbone Organizations in Collective Impact* provides an in-depth discussion of the value of the backbone organization in collective impact.

- SSIR: Part 1
- SSIR: Part 2
- SSIR: Part 3
- SSIR: Part 4

## LEADING THE CHARGE FOR STEWARDSHIP

ReThink Health defines stewards as "leaders (people and organizations) who take responsibility for forming working relationships with others to drive transformative change in regions."[16]
As network leader, the backbone is the chief steward of the collaborative, responsible for supporting and facilitating productive collaboration within the collaborative's network. This also means that the backbone should work to cultivate stewardship among community and organizational partners. Through the links below, learn about The Steward's Pathway and discover strategies to support networks through leading, learning and sharing.

- Steward's Pathway (ReThink Health)
- ReThink Health: Community Activation for System Stewardship
- Strategies to Support Networks: Leading, Learning and Sharing
- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 2: Righting Injustices: Operationalizing Equity

## KEY FUNCTIONS

Several key functions of a backbone organization are discussed briefly below. You will notice that each function is linked with at least one other module in this curriculum. The activities of the backbone organization are wide-ranging and involve every aspect of the collaborative.

Before reading through these key backbone functions, read the two links below from Nemours which aim to "advance the field's knowledge of the ways that health care can and should contribute to multi-sector networks that advance population level health goals,"[36] and discuss the challenges and proposed solutions to the backbone/integrator organization model. Keep these findings in mind as you move forward with this module.

- Preliminary Findings on the Role of Health Care in Multi-Sector Networks for Population Health: Notes from the Field
- Announcing Networks Selected for Nemours' 2020 Integrator Learning Lab

## LESSON 1: BACKBONE ROLES & RESPONSIBILITIES

*Support Vision and Strategy:*

The backbone ensures that the collaborative's vision and strategy are continuously present and at the forefront of everyone's work.

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 8: Collective Accountability: Governance & Leadership

- *Lesson 1: Leadership Types and Skills*

*Support Learning across the Partnership:*

Due to the novelty and complexity of the MSC model, it is useful for the backbone to incorporate regular and intentional reflection time to review what is being learned, what mindsets are needed to move forward and what progress has been made.

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

Module 3: Hand in Hand: Fostering Lasting Relationships

*Support Aligned Activities:*

The backbone facilitates a process to identify and develop an aligned set of interventions that address identified health issues. This includes survey development and analysis, convening, meaning making, developing prototypes and tests, and identifying and recruiting new partners.

Module 9: It Takes a Village: Creating a Portfolio of Interventions

*Establish Shared Measurement Practices:*

The backbone is responsible for assuring the identification, development and ongoing maintenance and analysis of data included in a shared measurement system.

Module 9: It Takes a Village: Creating a Portfolio of Interventions

Module 11: Measuring Change: Data Collection, Application & Sharing

*Advance Policy:*

The backbone identifies opportunities and advocates for policy and system change related to interventions at a local, regional, state and national levels.

Module 8: Collective Accountability: Governance & Leadership

### *Build Public Will:*

"Building public will" means raising awareness and support for the initiative, as well as getting community members to feel empowered to enact change and take action themselves. Backbones do this by working directly in the community on behalf of partners or working through partners to build public will indirectly. This work involves building awareness of the collaborative initiatives, as well as support training and other opportunities for partners to enact and lead change and take action themselves.

Module 3: Hand in Hand: Fostering Lasting Relationships

Module 5: Pieces of the Puzzle: Communicating for Impact

### *Mobilize Funding and Resources:*

This work involves bringing in new resources as well facilitating the alignment of existing funding and resources to maximize the collaborative's impact.

Module 10: Keeping the Lights On: Financial Management Strategies

- *Lesson 2: Fundraising*

When designing and managing ongoing operations of the backbone organization, consider modeling your work after the "Root Body," coined by Kristene Cristobal in her report, *Operationalizing Equity in Multi-Sector Collaborations: Strategies to Center Equity and Social Justice.* Cristobal defines the Root Body as "the foundational and interconnected networks of people that are within and/or across organizations, that come together to support the work of a community and their multi-sector collaboration. The Root Body nourishes and feeds the collaboration, with varying levels of formal and informal structures and processes. The Root Body can change, grow, and mature and its existence supports the community, its organizations, and collaborations to bloom and flourish." This term imbues the traditional backbone organization structure with a more organic evolution, forming a base of trust and shared community power.[23]

Module 2: Righting Injustices: Operationalizing Equity

# APPLY

## HOST A VIEWING AND DISCUSSION SESSION WITH YOUR PARTNERS

Use a flip the classroom approach with partners by asking them to watch the Backbone Organizations webinar linked below (either as a group or independently) prior to the discussion. Schedule a separate discussion time with your partners.

- Backbone Organizations: Diving Deeper in the Role of the Backbone Organization
- University of Washington: Flipping the Classroom

***Some discussion questions could include:***

- What support does a network need to be effective?
- What roles must be fulfilled in a network? What role can my organization play?
- What is my role in creating fertile ground for collaboration and innovation?
- How can I get to know my network – No, seriously, get way deeper than you are! Who is missing?

## ASSESSING READINESS AND MILESTONES

When launching an ACH or collaborative it can be useful to spend time diving into the collaborative model you are using, and identifying what leadership it calls for. Ascertaining levels of readiness and milestones prepares leaders for managing the complexity and challenges of the work ahead. Strategies for assessing readiness will vary on your context and approach. The California Accountable Communities for Health (CACHI) program developed a set of milestones specific to their ACH communities to assist with charting the progress of implementation and articulating key steps and accomplishments at various intervals. This example is linked below to help inform your thinking on this activity.

- 2017 CACHI Assessment Tool
- Start-Up Guide: Readiness
- CACHI Five Year Milestones

## BACKBONE EFFECTIVENESS

In order to demonstrate value and make informed decisions regarding backbone organization operations, it is important to assess backbone effectiveness.

This topic is covered in Module 6, Lesson 2 in more detail as it relates to the sustainability of the MSC. Consider the below list of 27 backbone effectiveness indicators by FSG as you determine what indicators of success might be for your own backbone organization.

- Backbone Effectiveness Indicators
- Module 6: Paying Dividends: Co-Creating Lasting Impacts

## COMMUNITY EXAMPLES OF BACKBONE STRUCTURE AND ACTIVITIES

- Start-Up Guide: Definitional Elements Examples and Resources (p. 22-23)
- Project Vision - Working Together to Address Substance Abuse and Build Great Neighborhoods

## PERSONNEL

In this work, there are many roles and skills necessary to support the backbone and related efforts.

Here are some examples of job descriptions you may see, or use to hire for positions within your collaborative.

- ACH Executive Director Job Description
- ACH Program Manager Job Description
- Outreach & Communications Specialist Job Description
- Senior Program Manager Job Description

## DIG DEEPER

- Collective Impact v Network Chart SHORT
- Patient Protection and Affordable Care Act (PPACA)
- To Launch and Sustain Local Health Outcome Trusts, Focus On Backbone Resources, Health Affairs Blog, February 10, 2016
- Backbone Organization Webinar Series
- Collective Impact Forum: Backbone Starter Guide
- SSIR: Backbone Organization Field Guide

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about the role of the backbone support organization?
- If you are a member of a backbone, how does what you learned in this lesson fit in with your personal experience?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Building a Culture for Success

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- What type of culture do you want to foster within the collaborative?
- What mindsets are necessary for the collaborative to be successful?
- How will you ingrain your culture into day to day operations and practices?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Apply mindsets to support culture-building and collaboration.
2) Learn how to apply principles of distributed leadership and stewardship in order to build a culture for success.
3) Establish a design team and create a design challenge.

# UNDERSTAND

An organizational culture consists of:

*"Shared beliefs and values established by leaders and then communicated and reinforced through various methods, ultimately shaping employee perceptions, behaviors and understanding."* [11]
~ shrm.org

Culture change is one of the hardest things to do within an existing organization. "As Edgar Schein's [a professor in the field of organizational culture] model points out, culture doesn't magically appear; it's built up over time by process of rehearsal, negotiation, and practice. Eventually, it becomes part of the fabric of our organization and gets reinforced by artifacts like structures, policies, and procedures."[47] It is often referred to as the "way we do things around here." Resources to catalyze building the desired culture within your collaborative are listed below.

Start-Up Guide: Forming Teams

Start-Up Guide: Setting the Culture

Dave Snowden - How Leaders Change Culture Through Small Actions

As a starting point when exploring culture change it is helpful to explore the following concepts as a team. A review of Module 1 will be useful in this process, particularly when considering blindspots and shifts in thinking.

- Blindspots, both individual and collective.
- What shifts might need to be made in the way you think and approach the work.
- How the original ideas and intentions may be changing as your membership begins to better understand the systems in play in the community.
- How the accountability of the collaborative will be put into action; calling out and clarifying that the backbone role is not to take on all the work but to facilitate and steward collaborative activities.

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

# APPLY

This lesson will take you through creating a design team and subsequently a design challenge in order to begin building a culture for success within your collaborative. Essential preliminary work includes the establishment of operating principles and building a strong core team.

## OPERATING PRINCIPLES AND BUILDING A STRONG CORE TEAM

As partners come together, it will be important to work towards achieving shared clarity of purpose and understanding. Some may thrive in certain conditions and struggle in other conditions. Consider creating conditions for team members to share what is needed to thrive on your team and how to survive the slumps. This can be done through establishing operating principles, or exploring tools such as the Blueprint of We.

Blueprint of We

Team Blueprint: A Tool for Building a Strong Partnership Foundation

Start-Up Guide: Co-Creating Operating Principles

In order to sustain these operating principles, take any necessary steps to codify the agreed on principles. The creation of organizational charters and bylaws is covered in Module 8, Lesson 2.

Module 8: Collective Accountability: Governance & Leadership

- *Lesson 2: Governance*

## DESIGN TEAM

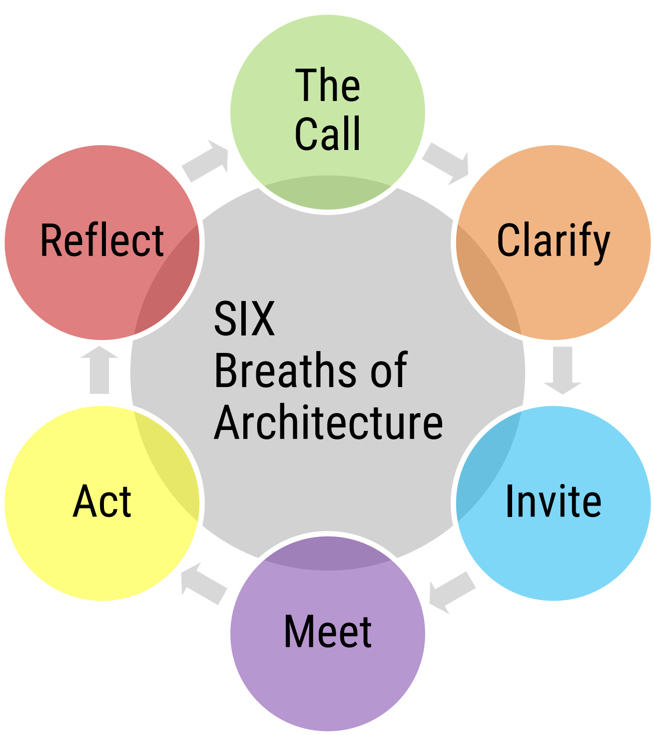
A Design Team is a crucial structure that has the power to shape and catalyze your collaborative's progress and builds a culture of transparency and inclusion right from the beginning.  The role of the Design Team is to work with backbone staff to steward the development of the MSC, meetings and related efforts tied to the MSC through designing items such as the leadership team meeting agendas and creating feedback loops between organizations and their stakeholders. The design team is also responsible for planning relevant learning experiences for the participating network partners as well as building local design and facilitation capacity to support project sustainability.

Consisting of a small, core-working group of members, the team should reflect a diverse group of participants who can provide context, perspective and experiences that the backbone staff may not necessarily have. It's important to create your design team from the beginning as their participation in designing the initial design challenge exploration may offer a strong start to your network. Although they are separate from the leadership team, the two groups work hand in hand in service to MSC formation and expansion.

Start-Up Guide: Getting Started (Design Team, p.12-13)

Start-Up Guide: Design Team Launch Meeting: Sample Agenda

The 6 Breaths of Process Architecture




## DESIGN CHALLENGE QUESTION

From a foundational alignment, the creation of a design challenge question articulates the problem you are trying to solve and is created through review of the opportunities, barriers and challenges. The design challenge question method is framed as a "How Might We" and requires partners to craft a question that drives the process towards impact and allows for many possible solutions.

Start-Up Guide: Getting Started (Design Challenge Question, p. 5)

Start-Up Guide: Framing a Design Challenge

Start-Up Guide: Design Challenge Brief

The creation of a design challenge question is also covered in Module 4, Lesson 2, as it relates to the development of the Portfolio of Interventions (POI).

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

- *Lesson 2: Align Priorities to Develop Shared Vision, Goals & Purpose*

## COMMUNITY LEARNING SPOTLIGHT: EVOLVING DESIGN CHALLENGE QUESTIONS

Here is one example of how the design challenge question for the Fresno Community Health Improvement Partnership changed over time as they began to more deeply understand what was needed:

*Version One*

> "How might we engage the community to define focus areas for a Fresno Accountable Community of Health that are achievable and sustainable?"

*Version Two*

> "How might we actively engage residents to deepen our understanding of population health improvement with an equity lens?"

*Version Three*

> "How might we deepen our understanding to effectively act as a trusted collaborative partnership network for health - generating value, accountability, and equitable community health and well-being? "

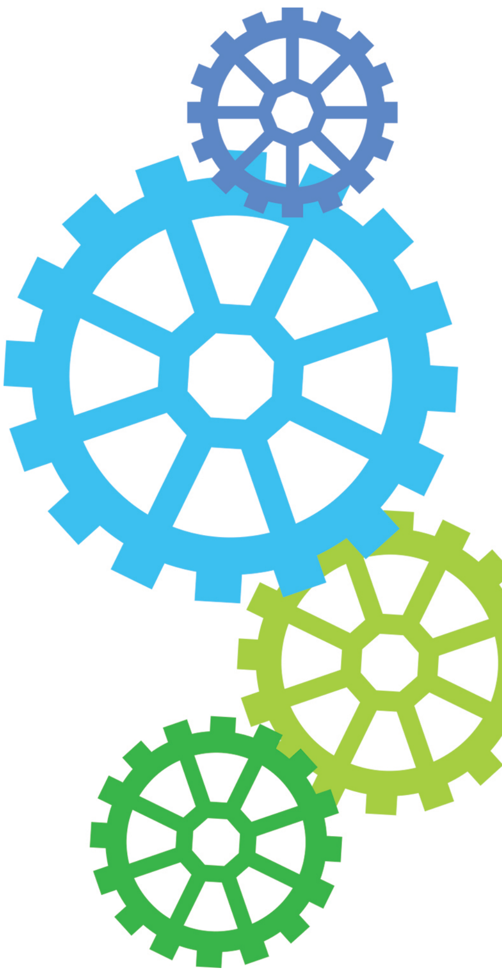
## CULTURE STATEMENT

You may want to create a culture statement to codify your organization's values. Below is an example of this from a Vermont ACH. Remember that your organizational culture should be driven by a goal to enhance equity in all practices.

Vermont ACH Culture Statement

Module 2: Righting Injustices: Operationalizing Equity

- *Lesson 3: Create an Equity-Driven Culture*



# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about the backbone's role in creating a culture for success within your collaborative?
- What is your design challenge? How will you use the design challenge to guide your work?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?
- What elements are central to your collaborative's culture?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

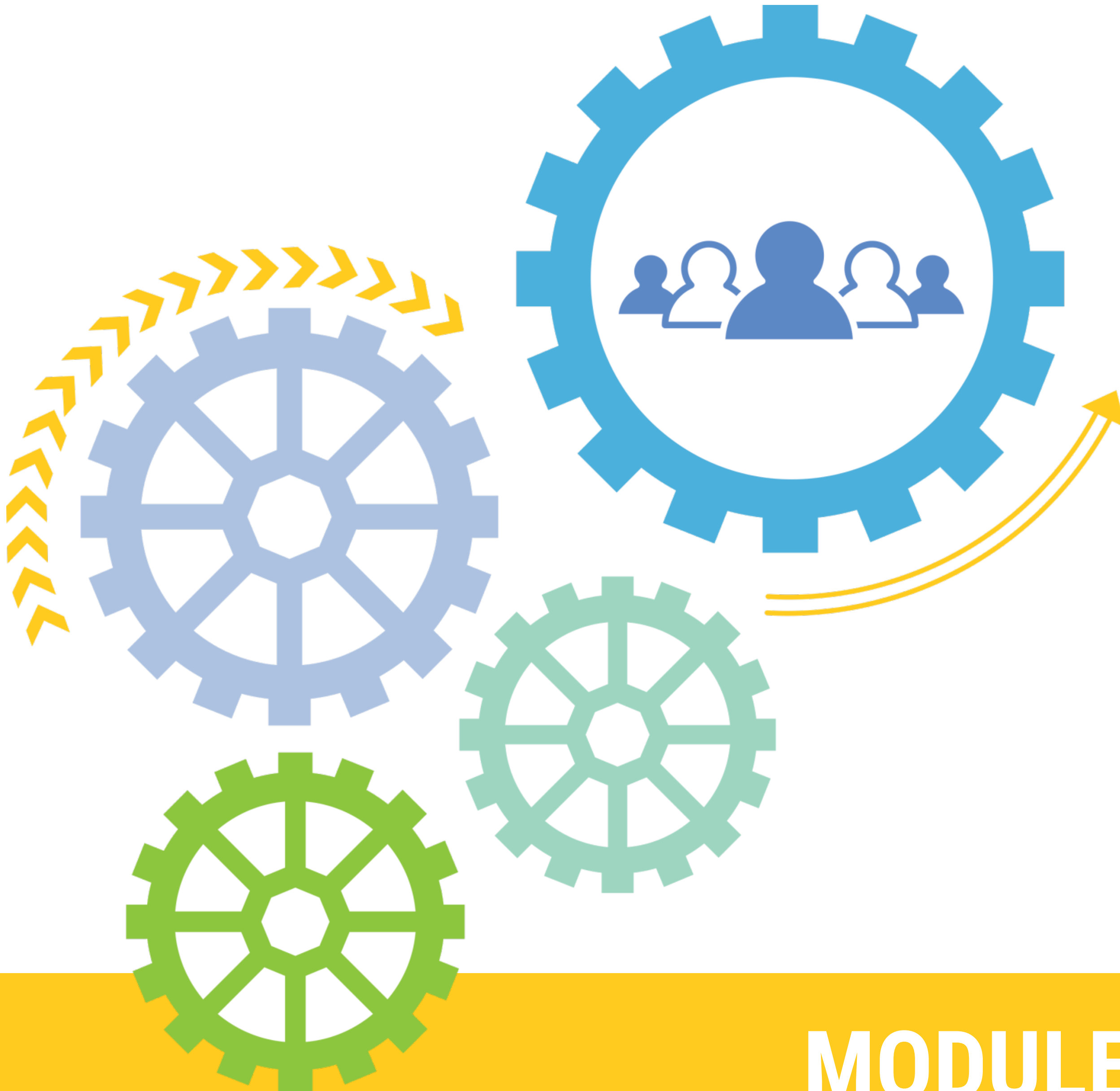
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 8
# COLLECTIVE ACCOUNTABILITY

## GOVERNANCE & LEADERSHIP

Module 8

# COLLECTIVE ACCOUNTABILITY

## Governance & Leadership

## OBJECTIVE

Learn various leadership approaches and how to apply these skills to the decision-making and operations of a multisector collaborative (MSC). Gain a deeper understanding of the operational aspects of collaborative management and governance. Apply these learnings to creating an organizational structure accountable to the community.

## LESSONS IN THIS MODULE INCLUDE

1) Leadership Types & Skills
2) Governance

## AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of the different leadership practices and styles.
- Learned how to apply approaches to build new leaders with intentional and inclusive leadership and facilitation tactics.
- An understanding of the collaborative governance model.
- Learned ways to establish a governance structure, along with project and program management aspects of collaborative operations.
- Developed a collaborative organizational strategic plan.
- Begun drafting a succession plan to ensure collaborative culture and values outlast individual members.

## RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*


- Module 2: Righting Injustices: Operationalizing Equity
- Module 3: Hand in Hand: Fostering Lasting Relationships
- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose
- Module 7: Scaffolding for Change: Backbone Organization
- Module 10: Keeping the Lights On: Financial Management Strategies

***"It is not only what we do,***
***but also what we do not do,***
***for which we are accountable."***
***~ Molière***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1: Leadership Types & Skills

## OPENING QUESTIONS

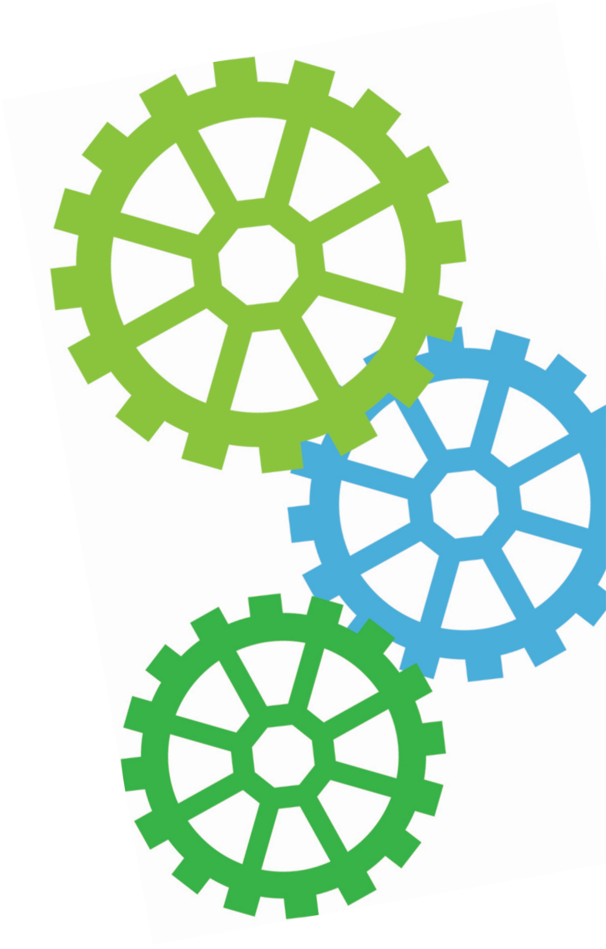
Discuss these questions with your team members before beginning this lesson.

- What qualities must a good leader possess?
- How does your collaborative want to approach decision-making?
- What structures do you need to support your collaborative?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand different types of leadership, including individual and distributed leadership.
2) Apply approaches to build new leaders with intentional and inclusive leadership and facilitation tactics.
3) Develop a succession plan to ensure collaborative culture and values outlast individual members.



# UNDERSTAND

There are many types of leadership practices and styles, including individual, distributed, stewardship, network, and servant leadership, among others. In this lesson we focus primarily on individual, distributed and network leadership, and in Module 7, Lesson 2 on the concept of stewardship. However, leadership is a topic that has been extensively studied and there are many interesting resources to investigate if you are interested. We list some of these in the Dig Deeper section.

Module 7: Scaffolding for Change: Backbone Organizations

- *Lesson 2: Building a Culture for Success*

## INDIVIDUAL LEADERSHIP

"Individual leadership is about creating the conditions within yourself to enable you to lead effectively. It means honing your personal leadership style in order to lead by example. This can mean focusing on self-care, or personal development and reflection, or a host of other strategies specific to your personal experience as a leader."[3]

A good leader must be flexible, humble, empathetic and able to establish trust to bring together a diverse group of partners.

Forbes: Self-Leadership Is The New Self-Care

How to Cultivate Humble Leadership

Leadership Foundry: Personal Leadership Development Plan

*Here are some ways to begin to practice self awareness:*

- Try to look at yourself objectively
- Keep a regular journal reflecting on events in your personal and professional life
- Write down your goals, plans, and priorities and track their progress
- Perform daily self-reflection
- Practice meditation and other mindfulness habits.
- Ask a trusted colleague for feedback

## DISTRIBUTED LEADERSHIP

"Distributed leadership is shared leadership amongst the collaborative members and partners. The success of the collaborative should not depend on one organization and/or person but rather, it is the collective that shares and contributes to ongoing success."[3]

A distributed leadership model explores the question, "What does it mean to be accountable?" For each collaborative this may look different. How accountability is achieved and nurtured should be guided by the backbone organization.

Another definition of leadership that lends itself well to the model of distributed leadership is one given by the Co-Active Training Institute. They recognize that everyone is a leader and that leadership means being responsible for and able to respond to their world.

- Start-Up Guide: Distributed Leadership
- Co-Active Training Institute
- Fostering Accountability within Our Community

Multisector collaboratives should work toward vertical leadership development in their efforts to create meaningful relationships and leadership opportunities.

Explore the below report to learn more about how to implement this model.

- Vertical Leadership Development, Part 1: Developing Leaders for a Complex World

### *The Snowflake Model*

"The snowflake model is an organizational structure that embodies leadership as that which enables others to achieve shared purpose in the face of uncertainty. In the snowflake model, leadership is distributed. No one person or group of people holds all the power; responsibility is shared in a sustainable way, and structure aims to create mutual accountability. The snowflake is made up of interconnected teams working together to further common goals. Second, the snowflake model is based above all on enabling others. A movement's strength stems from its capacity and commitment to develop leadership and in the snowflake model, everyone is responsible for identifying, recruiting, and developing leaders. Leaders develop other leaders who, in turn, develop other leaders, and so on."[37]

- Organizing: People, Power, Change (Snowflake Model, p. 7)
- The Snowflake Model: Marshall Ganz on How Technology Has Changed Organizing Revolutions

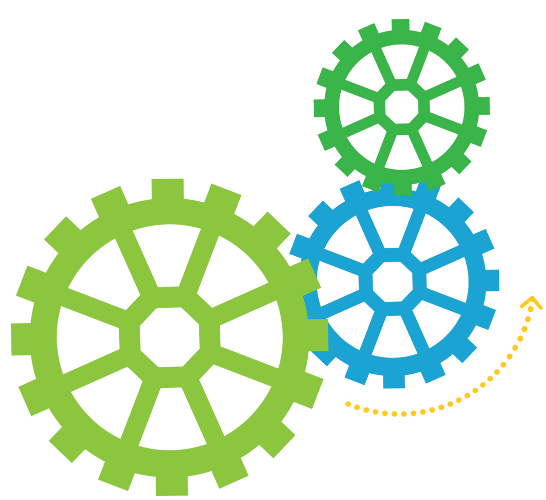
## NETWORK LEADERSHIP

In a network leadership model, "every network leader spends much of their time providing mentoring, listening, and support until everyone in the network sees themselves as responsible for creating a healthy, effective network. Leadership development in networks is all about increasing the flows of leadership capacity."[38] NetworkWeaver offers free slide decks on seven basic network leadership principles to guide your work, as well as on the "basic skills and processes necessary to weave a network or create a collaborative project." These are both linked below, along with a comparison chart between network leadership and collective impact.

- Network Leadership vs. Collective Impact Chart
- Network Basics Presentation Slide Deck
- Network Skills Presentation Slide Deck

*According to NetworkWeaver, the four key roles in network leadership are:*[38]

1. CONNECTING
   - Help people bring innovation and new perspectives into their network by adding new people to their network.
   - Encourage people with skills and resources to connect to people with needs.
2. COORDINATING & COACHING COLLABORATIVE PROJECTS
   - Initiate cross-organizational collaborations and activities with others.
   - Show people how to build trust through small, low-risk collaborations with others.
3. FACILITATING, CONVENING & ALIGNING
   - Convene people with common interests to form a network.
   - Continually find new people with needed skills, resources, and perspectives and link them into the network.
4. CO-CREATING SUPPORT STRUCTURES
   - Support, encourage, and mentor network weavers.
   - Encourage others to become network weavers and to take responsibility for increasing the health of their networks.



# APPLY

The work of a MSC is often complex and difficult. Establish mindsets that allow for flexibility and help you to take ambiguity in stride.

Before beginning work on individual or distributed leadership development, it is important to understand what type of leader you are. This will help to determine the best path forward toward improving your personal approach and contribution to the broader collaborative. Do some research outside of the resources provided here to help determine what type of leader you are. Consider this as you work through this lesson.

## BUILDING LEADERS

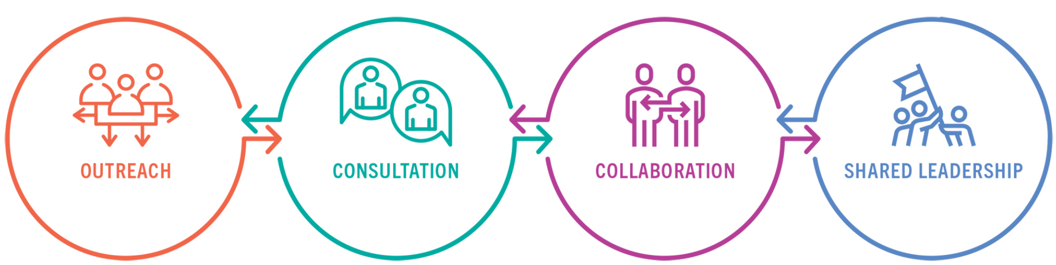
Building up other leaders, particularly with community and non-traditional partners, is key to the sustainability and meaningful contribution of your collaborative. It is important to make personal/professional development resources available to all interested partners, and encourage all partners to bring creative solutions to the table.

Focus on creating opportunities for others to lead, including them in decision-making processes and looking to them for thought leadership.

- Lived Experience: The Practice of Policy Engagement
- Power Analysis of the Decision Making Process
- Module 3: Hand in Hand: Fostering Lasting Relationships

Equity in leadership is of paramount importance. As a leader in your MSC it is your responsibility to develop innovative strategies to build leaders from diverse backgrounds, particularly those who may not have had as many leadership opportunities.

Nemours Children's Health System
Nemours National Office of Policy & Prevention.
Lived Experience: The Practice of Engagement in Policy.
Published April, 2020.



## DISTRIBUTED LEADERSHIP APPROACHES

Distributed leadership is central to the MSC model. Explore this report for approaches and examples of systems leadership. A related concept is that of systems leadership. The below Issue Brief, Cultivating Systems Leadership in Cross-Sector Partnerships, defines **systems leadership** as "leadership intended to bring about systems change, but may also refer to leadership of a particular system."[18] Systems leadership research and practice overlaps with areas including network leadership and others.

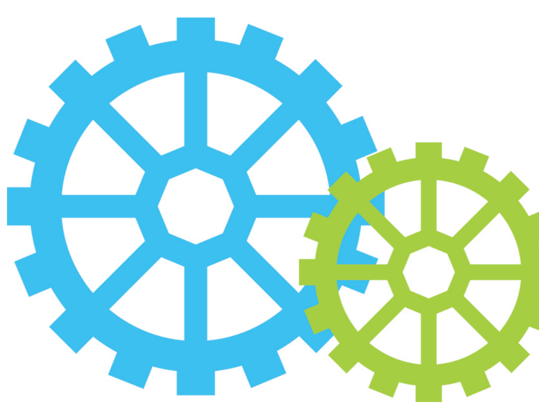
- Cultivating Systems Leadership in Cross-Sector Partnerships
- Start-Up Guide: Definitional Elements Examples and Resources (Distributed Leadership, p. 12)
- Network Weaver Checklist

Consider how your collaborative's governance structure is built upon and creates the conditions for transparency and accountability to your community. In particular, ensure that the appropriate community and organizational partners are actively involved in the governance process.

One method to implement a distributed leadership approach is through the formation of a design team. This team is one crucial structure that shapes and ignites a culture of success and drives progress. Visit Module 7, Lesson 2 to learn more about how to create a design team.

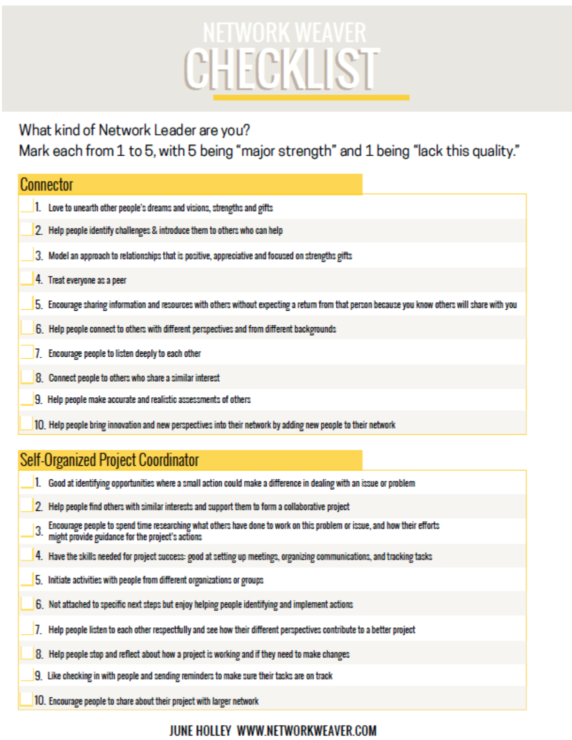
A multisector collaborative is an innovative way of working across sectors to create meaningful change. This model offers many opportunities to employ unconventional and action-oriented meeting strategies, including:[28]

- Rotating leadership and facilitation.
- Experiential learning.
- Integrating opportunities for cross-collaboration.
- Assigning a disruptor in meetings to identify Business As Usual operations.
- Reflection and feedback.



## NETWORK LEADERSHIP

One way to help people understand which type of network leader they are is to ask the members of the collaborative to take the Network Weaver Checklist.



NETWORK WEAVER
CHECKLIST

What kind of Network Leader are you?
Mark each from 1 to 5, with 5 being "major strength" and 1 being "lack this quality."

**Connector**

1. Love to unearth other people's dreams and visions, strengths and gifts
2. Help people identify challenges & introduce them to others who can help
3. Model an approach to relationships that is positive, appreciative and focused on strengths gifts
4. Treat everyone as a peer
5. Encourage sharing information and resources with others without expecting a return from that person because you know others will share with you
6. Help people connect to others with different perspectives and from different backgrounds
7. Encourage people to listen deeply to each other
8. Connect people to others who share a similar interest
9. Help people make accurate and realistic assessments of others
10. Help people bring innovation and new perspectives into their network by adding new people to their network

**Self-Organized Project Coordinator**

1. Good at identifying opportunities where a small action could make a difference in dealing with an issue or problem
2. Help people find others with similar interests and support them to form a collaborative project
3. Encourage people to spend time researching what others have done to work on this problem or issue, and how their efforts might provide guidance for the project's actions
4. Have the skills needed for project success: good at setting up meetings, organizing communications, and tracking tasks
5. Initiate activities with people from different organizations or groups
6. Not attached to specific next steps but enjoy helping people identifying and implement actions
7. Help people listen to each other respectfully and see how their different perspectives contribute to a better project
8. Help people stop and reflect about how a project is working and if they need to make changes
9. Like checking in with people and sending reminders to make sure their tasks are on track
10. Encourage people to share about their project with larger network

JUNE HOLLEY WWW.NETWORKWEAVER.COM

Network Weaver Checklist

For more information on how to use the Network Weaver Checklist, check out this slide deck:

Network Leadership and Learning

"This Network Weaver checklist is great to give to people in your network at a face-to-face or virtual gathering. Have them spend 5 or so minutes taking the survey. Then have a chart paper (or 2-3 if the group is large). Using a marker, make a line down the center of the paper and then one horizontally across from side to side. Mark the upper left quadrant with Connector, the upper right quadrant with Facilitator, the lower left quadrant with Project Coordinator, and the final quadrant with Guardian. Then have people put a red dot in the quadrant where they got the most 4s and 5s, and a green dot in the quadrant they would like to learn more about or do more.

Have them pair up with another person and talk about what they learned about themselves as a network weaver and what they would like to learn.

Then have the whole group notice the quadrant(s) where it is strong, and the quadrant(s) where there aren't many people currently working. Notice which quadrant has lots of green dots – the network may want to do some explicit organizing of training in this area." [39]

*(excerpt from Network Weaver Checklist)*

## SUCCESSION PLANNING

Leadership turnover will always occur in MSCs. Some roles are more crucial than others for sustaining the organizational culture and relationships, however to keep the operations moving forward you should ensure that all vacancies are filled quickly and new staff are trained appropriately.

In order to provide the necessary training on the values and operations of the position, it is important to be intentional about documenting your policies and procedures, and updating these documents with any changes along the way.

We advise creating a formal succession plan to have at the ready for whenever leadership turnover occurs. This plan should include the history and work of the collaborative, and should be used to continually train potential successive leaders and partners. Below are some succession planning toolkits to assist you in this exercise.

- Nonprofit Executive Succession Planning Toolkit
- Building Leaderful Organizations: Succession Planning for Nonprofits

## DIG DEEPER

- Mindful.org

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about individual and distributed leadership?
- What is your collaborative's current leadership structure? Is it working?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Governance

## OPENING QUESTIONS

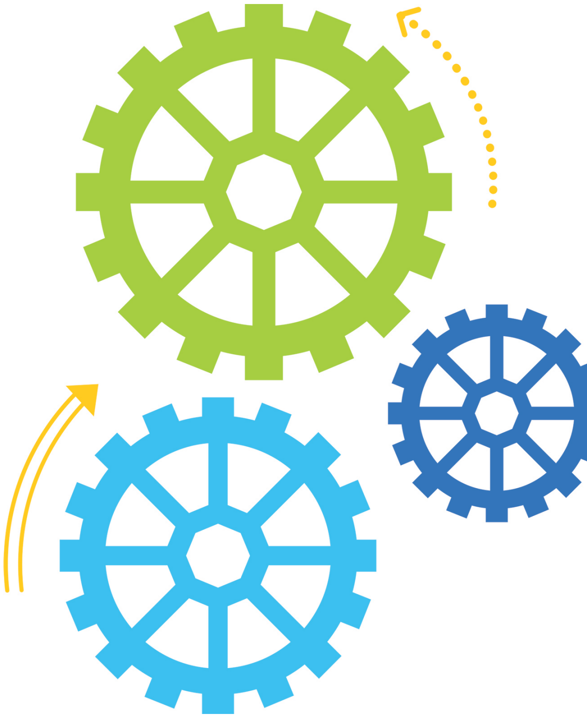
Discuss these questions with your team members before beginning this lesson.

- How might you incorporate the voices of community and organizational partners into your governance practices?
- What sort of governance structures do you have so far? How do they impact your collaborative's ongoing operations?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand what collaborative governance is and how to apply these principles in your collaborative's work.
2) Understand different ways to establish a governance structure, along with project and program management aspects of collaborative operations.
3) Develop a strategic plan.



LESSON 2: GOVERNANCE

# UNDERSTAND

One differentiator of the ACH model from other MSCs is the strong governance and leadership structures and practice.

Under the ACH model, a clear governance structure must be in place. The ACH partners and leaders should work together to create the right model, structure and decision making methods for membership including how they will hold each other accountable to themselves and the community. Explore the links below to learn about several different governance structures you could apply to MSCs.

- Principles of Sound Governance – Change Lab Solutions
- Start-Up Guide: Getting Started (Governance, p. 20)
- Start-Up Guide: Definitional Elements Examples and Resources (Governance A Structure, p. 13-15)

To operate a successful MSC, you will need to have established shared intent among partners. Creating shared intent is covered in Module 4.

The next step is translating talk and understanding into action by establishing governance structures to formalize the operations and culture of your collaborative.

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

## SUBCOMMITTEES AND SUSTAINABILITY

There are many types of structures to support governance and decision making for your MSC. When determining the structure of your collaborative, you must consider, among other aspects, the impact of your decisions on long-term sustainability. There are also numerous factors which influence the relationship between governance and the sustainability of your MSC, including how a distributed leadership approach is implemented, the creation of a shared language and culture, diversity and appropriate representation, and the quality of working relationships among partners. If implemented correctly, these factors can help build trust among the broader community and your partners. More information on the relationship between governance and sustainability is available in Module 6.

Module 6: Paying Dividends: Co-Creating Lasting Impacts

Sub-committees are a useful tool in taking a distributed leadership approach to your organization's governance structure. Which sub-committees or working groups are necessary for your organization depends on myriad factors. For example, you might choose to establish an executive committee to steward the process discussed in the above paragraph, of guiding the implementation of a distributed leadership approach and engaging the appropriate partners.

***Here are a few examples of other potential sub-committees below.***

- Financial Committee
- Steering Committee
- Design Teams
- Performance Management Committee
- Strategy/Planning Committee
- Communications Committee
- Executive Committee
- Stewardship Council
- Data Committees

Data Metrics Workgroup Charter, San Diego Accountable Community for Health

## COLLABORATIVE GOVERNANCE

"**Collaborative governance** can be defined as the processes and structures of public policy decision making and management that engage people constructively across the boundaries of public agencies, levels of government, and/or the public, private and civic spheres in order to carry out a public purpose that could not otherwise be accomplished."

**Definition lightly adapted from An Integrative Framework for Collaborative Governance.*[4]

A key component of collaborative governance is principled engagement. Principled engagement, though perhaps referred to in other ways, is a hallmark of the MSC and ACH models. It evolves over time to include varying partners and interactions depending on the circumstances. Through this work, partners with different goals work together toward a common cause.

Read the full article here to gain an understanding of the collaborative governance approach and how it relates to the governance of MSCs.

An Integrative Framework for Collaborative Governance

# APPLY

## STRATEGIC PLAN

There are a number of other modules which relate to strategic planning within your collaborative. As needed, review the material in each of the below modules to support these efforts.

Module 2: Righting Injustices: Operationalizing Equity

- *Lesson 3: Creating an Equity-Driven Culture*
  *>> Resources on creating an inclusive and equitable planning process.*

Module 3: Hand in Hand: Fostering Lasting Relationships

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

- *Lesson 2: Align Priorities to Develop Shared Vision, Goals & Purpose*
  *>> Strategic Planning Tools*

Module 7: Scaffolding for Change: Backbone Organizations

Module 10: Keeping the Lights On: Financial Management Strategies

- *Lesson 3: Creating a Business Plan*

For example, see the Framework for Action used by Sonoma Health Action ACH in California.

Sonoma Health Action | Framework for Action

## ESTABLISHING A GOVERNANCE STRUCTURE

A MSC should operate under a structure guided by a distributed leadership approach which is driven by accountability and transparency to the community it serves. A clear governance structure "provides direction while ensuring equity and inclusivity to resolve actual or perceived power imbalances that can arise during collaboration."[40] You may use the below resources to help guide you through the process of developing this plan.

The Intersector Toolkit (Establish a Governance Structure, p. 14)

Start-Up Guide: Chaordic Stepping Stones

ChangeLab Solutions California ACH Report (Sound Governance, p. 17-21, Nonprofit vs. Government vs. For-profit, p. 27-29)

Long-Range Planning for Health, Equity and Prosperity Primer

BHT Governance and Organizational Structure Attachment

You must assess your policies through an equity lens as you are in the process of structuring your organization. This will ensure that you play your part in breaking a very long history of institutional racism and discrimination. See Module 2 for more equity resources.

Module 2: Righting Injustices: Operationalizing Equity

## ORGANIZATIONAL CHARTERS AND BYLAWS

In Module 7, Lesson 2 we discuss the creation of operating principles to optimize the working conditions and relationships among the backbone organization and partners. To codify your operating principles toward putting your plan into action, consider the resources on organizational charters, articles of incorporation and bylaws. Assess how your priorities, as well as those of your partners, influence the establishment of these operating principles and resulting documents.

Some templates to use for establishing articles of incorporation and bylaws are below.

Articles of Incorporation Template

Bylaws Template

Module 7: Scaffolding for Change: Backbone Organizations

- *Lesson 2: Building a Culture for Success*

Below are several examples of organizational charters from Accountable Communities for Health.

Cascade Pacific Action Alliance (CPAA) Council Charter

SDACH Stewardship Group Charter

Humboldt ACH Community Charter

## PROJECT AND PROGRAM MANAGEMENT

Project and program management are an integral function of the backbone organization. This work is a large undertaking and many resources exist to support your project management. A good place to start is the Project Management Institute, linked here.

- Project Management Institute

Using the tools linked below, explore project management tools you might use in your collaborative.

- Start-Up Guide: Operations & Communications Tools (Operating, p. 3-7)
- ACH Meeting Topics & Considerations

## DIG DEEPER

- Cross-sector Innovations to Improve Population Health and Equity
- Project Charter - Hope Rising, Lake County ACH
- Sonoma Health Action Leadership Team Charter

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about governance structures?
- What new policies or practices will you put into place after completing this lesson?
- What do these learnings mean for the broader context of your work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# MODULE 9
# IT TAKES A VILLAGE

## CREATING A PORTFOLIO OF INTERVENSIONS

*We thank Karen Linkins and Jennifer Brya of Desert Vista Consulting (DVC) for their contributions to this module.*

Module 9

# IT TAKES A VILLAGE

## Creating a Portfolio of Interventions

## OBJECTIVE

Create an inventory of existing programs, activities and interventions. Use this and other work done in Module 4 to create your Portfolio of Interventions. Learn how to implement and monitor your Portfolio of Interventions.

## LESSONS IN THIS MODULE INCLUDE

1) Understand & Develop a Portfolio of Interventions
2) Implement, Monitor & Evolve Your Portfolio of Interventions

## AT THE END OF THIS MODULE YOU WILL HAVE

- Conducted an inventory of existing programs, activities, and interventions.
- Begun to develop your POI.
- An understanding of the basics of monitoring and evaluation.
- Drafted an implementation plan.
- A plan for monitoring and reporting progress on POI activities to the community.

***Much of the content of this lesson is derived from DVC's Portfolio of Interventions (POI) Toolkit.***

## RELATED CONTENT

In order to get the most out of this module, we advise that you explore the following related curriculum content:

- Module 1: Rewiring Your Brain: Mindsets & Systems Thinking
- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose
- Module 11: Measuring Change: Data Collection, Application & Sharing

***"We need to create the institutions that will support the type of society we want to live in. The only answer is collective action." ~ Nick Harkaway***

If you are interested in further coaching on this topic, please contact: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# Lesson 1: Understand & Develop a Portfolio of Interventions

## OPENING QUESTIONS

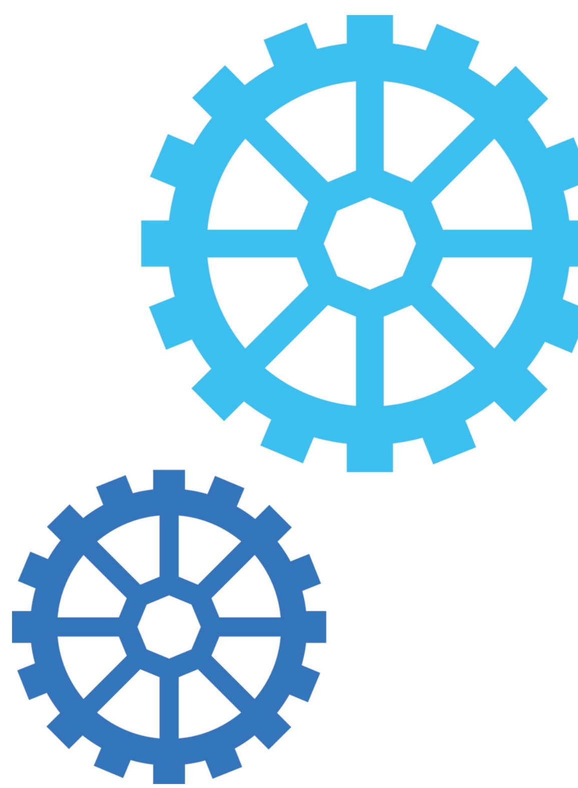
**Discuss these questions with your team members before beginning this lesson.**

- What do you see as key assets and gaps in the existing programs, activities, or interventions in your community?
- Thinking about your collaborative's vision, goals, and purpose, what do you see as the root causes of the areas you have chosen to target with interventions?

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand what a Portfolio of Interventions is and why it is important to the collaborative's operations.
2) Review the work from Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose.
3) Create an inventory of existing programs, activities, and interventions that can be leveraged for the Portfolio of Interventions.
4) Create a Portfolio of Interventions.



LESSON 1: UNDERSTAND & DEVELOP A PORTFOLIO OF INTERVENTIONS

# UNDERSTAND

The **Portfolio of Interventions (POI)** is a concept based on the idea that in any given community, there are organizations that are working on addressing the same problem or targeting similar goals, but this often happens in silos without the sufficient coordination to significantly improve population health. The POI is one of the seven core Accountable Community of/for Health (ACH) model elements in the California Accountable Communities for Health Initiative (CACHI) model. Though the POI is central to the CACHI model, this concept and the POI Toolkit are applicable to any multisector collaborative (MSC) needing to define a mutually agreed-upon set of goals and actions which reflect the community's needs and priorities.

CACHI POI Webinar Recording

CACHI POI Webinar Slides

Multisector collaboratives should consider taking a systems approach to identifying goals to improve the communities health and wellbeing.

As noted in the Vermont ACH Peer Learning Lab Report (linked below),

> "An ACH is guided by an overarching strategic framework and implementation plan that reflects a cross-sector approach to health improvement and the commitment by its partners to support implementation."

Vermont ACH Peer Learning Lab Report

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

- *Lesson 2: Systems Thinking*

This lesson follows a toolkit created to support CACHI ACHs in developing their POIs. The toolkit refers to the action steps as building blocks. While these building blocks are listed consecutively in this toolkit and module, your collaborative may have begun some of these actions in a different order and or time frame.

POI Toolkit

## BUILDING BLOCKS

1: Identify and define the problem or condition you want to address to improve community health and 2: Develop clear goals and outcomes that will drive the work of your ACH are addressed in Module 4. Make sure to complete Module 4 (and review if necessary) prior to moving through this module. This module focuses on the remaining four building blocks.

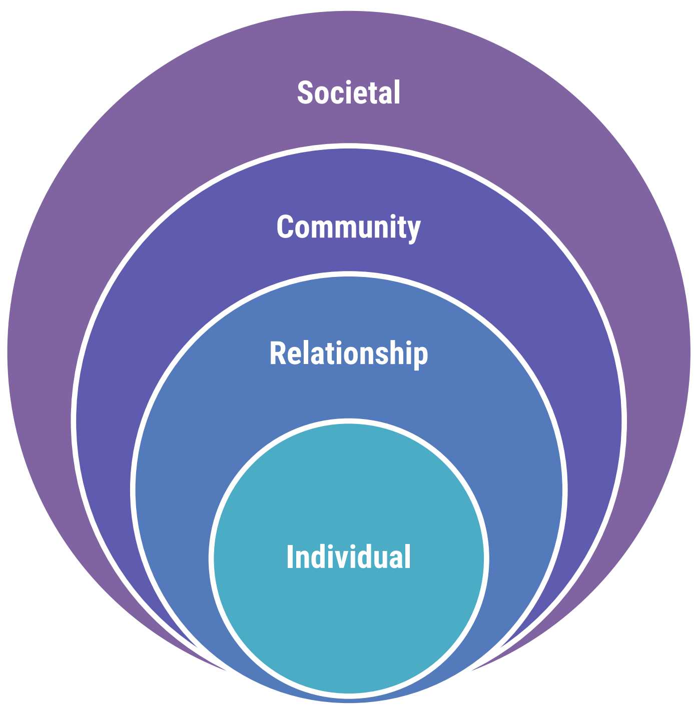
- POI Outcomes (from 22:00 mins)
- Aligning POI Activities and Outcomes
- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

## THE POI BUILDING BLOCKS

1) Identify and define the problem or condition you want to address to improve community health
2) Develop clear goals and outcomes that will drive the work of your ACH
3) Create an inventory of existing programs, activities and interventions that can be leveraged for the POI
4) Create your Portfolio of Interventions
5) Implement the POI
6) Monitor progress and refine your POI

While the five domains used in the CACHI model and this toolkit are one approach, some communities may use other frameworks such as the Social-Ecological Model and or the Spectrum of Prevention to guide the development of their organizing principles.

- Portfolio of Interventions
- CDC: The Social-Ecological Model
- Prevention Institute: Spectrum of Prevention
- Portfolio Planning - Moving from Theory to Implementation




The Social-Ecological Model: A Framework for Prevention

## GUIDING PRINCIPLES TO KEEP IN MIND (SOURCE: POI TOOLKIT)

| | |
|---|---|
| Clear Vision and Understanding of Community Health and Equity Priorities | What are the community's long-term goals and problems that need to be addressed? What needs to be changed to achieve greater equity? |
| Move from "Business as Usual" | Identify and consider a range of interventions to address community priorities and clarify how current practices and workflows need to change. |
| Interventions & activities of the POI already exist | Keep in mind that the makings of your POI already exist in the community, among your partners and others who need to be identified. Consider leveraging and scaling up what already exists (partners, programs, and resources). |
| Leverage existing motivation, passion, and will | Start where there is motivation, passion, and will among residents and partners. Who is at the table? Who is in a position to contribute and catalyze the work to move forward? |
| Include a balanced mix of interventions and activities | Evidence-based practices and activities within the POI are important, but not at the exclusion of field-generated practices that are effective and have value in the community. Similarly, include a mix of interventions with short-term early wins and long term impacts. |
| POI structure and interventions/activities provide the basis for collaborative action and change | Keep in mind that if successful, the ACH will be a lasting platform for collaborative action and driver of change in the community. The target condition or problem being solved may change, but the POI structure and development approach will be consistent as the ACH evolves. |

# APPLY

The backbone organization facilitates a co-creation process with the MSC and it's partners to identify strategies to address the issues of concern in their community.

While this module lists the building blocks to develop the interventions, the process is not always sequential and or linear. It can be very messy! As new discoveries, challenges and opportunities emerge, the group thinking may evolve as to what the issues really are and the possible solutions to address.

## PRE-WORK:

Before diving into the processes in this module, schedule a time with your partners to review and discuss the POI toolkit. Discuss which building blocks you have already addressed and or may need updating.

Schedule a time to review and discuss the POI toolkit with your collaboratives data or performance management committee (if one exists).

## BUILDING BLOCK 3:

*Create an inventory of existing programs, activities and interventions that can be leveraged for the POI*

Gaining a broader perspective of the current system is an important focus. Learning what other parts of the system are doing and identifying impacts, challenges, opportunities, gaps, leverage points, and blind spots is an additional consideration you may want to employ. Engagement in these strategies provides a perspective that you can't get from just data. The systems perspective lens reveals the story behind the data, and potential root causes or the deeper challenges at play.

- POI Toolkit (p. 7-9)
- Start-Up Guide: Getting Started (Portfolio of Interventions, p. 30)
- Long Beach Portfolio of Interventions Partner Offerings Survey
- FCHIP Draft Portfolio of Interventions

## LESSON 1: UNDERSTAND & DEVELOP A PORTFOLIO OF INTERVENTIONS

Information on data collection, understanding and sharing is covered in Module 11 and should be reviewed as you engage in the work for this section. The section on Personas and Empathy Mapping may be especially helpful as you seek to understand the priorities of your community members in the process of developing your POI.

Module 11: Measuring Change: Data Collection, Application & Sharing

- *Lesson 1: Data Collection, Understanding & Application*

### *Asset-Based Community Development*

In addition to gathering data on the needs in the community, another approach is identifying community assets. Asset-Based Community Development (ABCD) is an approach to community-driven change. The approach challenges traditional thought that assumes communities need to be fixed by outsiders. Instead, it considers local assets to be the primary building blocks for developing strong, sustainable communities. Communities have the ability and power to drive change themselves by identifying and mobilizing existing, but often unrecognized assets. This approach requires intentional, collaborative identification of local resident skills, local association power, and local institutions support functions.

This information may have been gathered during your community health needs assessment. Check in with the organization(s) conducting this assessment to see what data are available. Remember too that your current and potential partners, both organizational and community-based, are some of your most important assets.

Asset-Based Community Development

Asset-Based Community Development Handouts

Module 3: Hand in Hand: Fostering Lasting Relationships

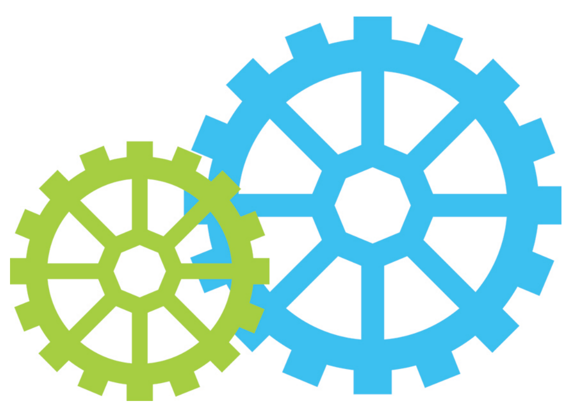
- *Lesson 1: Identify & Define Partnerships*

For several examples of ACHs which have applied the ABCD model to their work, check out the below links.

Community Spotlight: Napa

Community Spotlight: Long Beach

Community Spotlight: West Sacramento



### *Journey Mapping*

A Journey Map allows you to identify and strategize for key moments in the product, experience, or service you're designing. Once you have a better understanding of the needs and characteristics of the audience for the interventions through persona development, this framework can help think through key moments for those that will experience the interventions being proposed. "Consider how [they] become aware of your solution, how they make a decision to try it, what their first interaction and engagement is like, how they might become a repeat user, and how the solution might ultimately impact their life." [41]

IDEO Design Kit: Journey Mapping

Always consider including the people who will use services, policies and or programs in the design of these interventions. Those most impacted by the system barriers often know best what is most needed. They identified solutions from their perspective as to what would be most helpful. The solutions identified become possible prototypes to test with your community and organizational partners.

## BUILDING BLOCK 4:

### *Create your Portfolio of Interventions*

Having completed building blocks 1 - 3, you are ready to begin designing your POI. Each of the previous steps informs this process, so make sure they are complete!

There are many strategies you can utilize to identify and agree to interventions in your community. Here are some resources to draw on:

- POI Toolkit (p. 9-11)
- Start-Up Guide: Definitional Elements Examples and Resources (Portfolio of Interventions & Resources by Portfolio of Interventions Area, p. 34-42)
- Module 7: Scaffolding for Change: Backbone Organizations

Below are some community examples to give you a sense of how some ACHs have approached this work.

- Creating a Portfolio of Interventions: The Humboldt Story
- Humboldt Portfolio of Interventions
- Hearts of Sonoma County: Approved Portfolio of Interventions, May 2018

# DIG DEEPER

- JSI-PI ACH Portfolio Approach
- Cardiovascular Disease Portfolio of Interventions Logic Model
- Portfolio of Interventions Graphic


Portfolio of Interventions[29]
Health Action Sonoma County

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about the assets in your community, and how they can be used to help create your POI?
- What, if any, existing programs/initiatives align or contribute to the priority outcomes that are currently under purview of the backbone?
- Does the overall set of interventions seem sufficient to achieve a measurable change? Is it so broad that the partners cannot launch and sustain the POI?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*As you start to develop your POI, through this module and Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose, make sure that you are regularly and intentionally reflecting on the decisions you make and the things you are learning.*

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Implement, Monitor & Evolve Your Portfolio of Interventions

## OPENING QUESTIONS

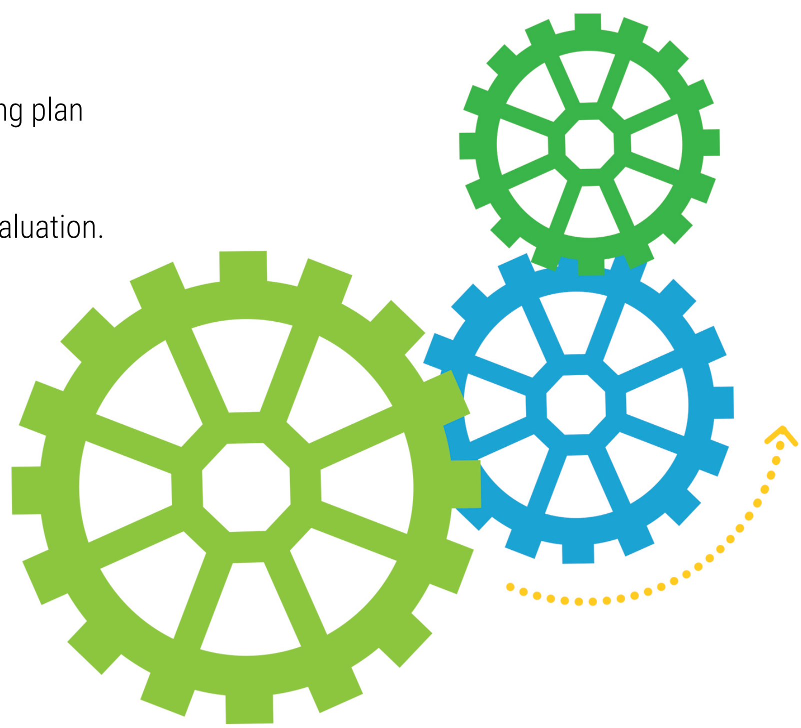
Discuss these questions with your team members before beginning this lesson.

- What is the timeline for seeing impact from the interventions in your POI? Are there relatively short-term impacts that you can expect?
- How does the POI reflect community priorities?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Implement the POI with a mutually reinforcing plan of action.
2) Understand the basics of monitoring and evaluation.
3) Monitor progress and refine your POI.



# UNDERSTAND

## MUTUALLY REINFORCING

*BUILDING BLOCK 5 REFERS TO A "MUTUALLY REINFORCING PLAN OF ACTION."*

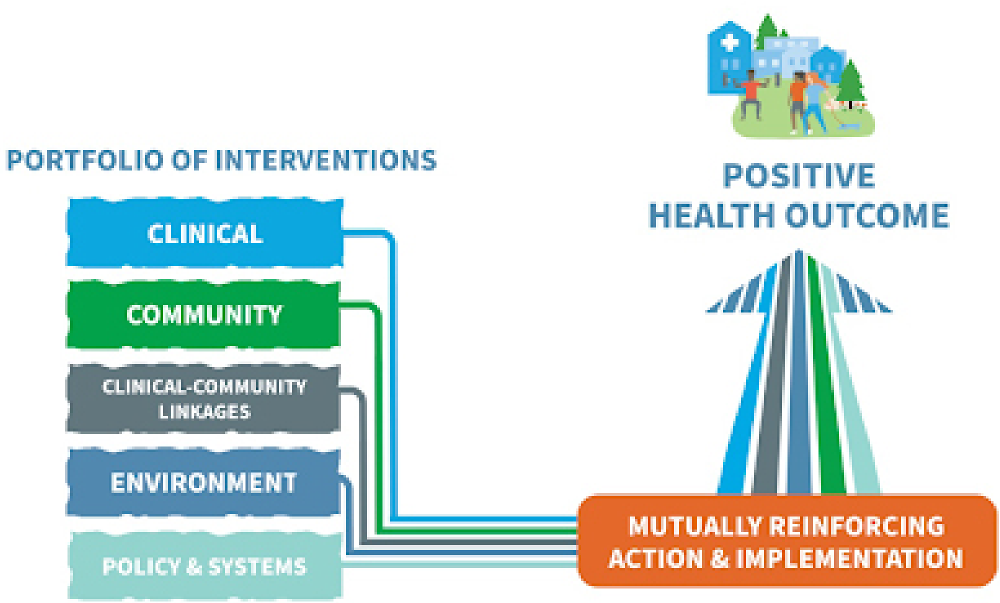
The work of a MSC requires alignment across partners with varying priorities, and a strong systems approach in order to be successful. Iteration, through continuous reflection and responsiveness to the needs of the community, helps the collaborative to be responsive and accountable to the community you serve. In particular, as you progress through this work, regularly revisit your partner roster and assess if you should add new partners.

*"POI alignment happens through implementation, not just aligning the list of interventions in the POI. Alignment comes with action, coordination and accountability across partners. Alignment is essential to success – creating a 'better way to do business' and work together."*
*~ Karen Linkins*

POI toolkit (p. 15-17)

Module 1: Rewiring Your Brain: Mindsets & Systems Thinking

- *Lesson 2: Systems Thinking*




POI Toolkit
As they are implemented, the different interventions included in each of these five domains work together and reinforce each other to strengthen the impact of each activity included in the overall portfolio.

## DOSE

The "dose" of your interventions should be considered, and perhaps adjusted, as you continue to implement and refine your POI. This concept relates to the mutually-reinforcing plan of action above by providing the collaborative with a strategy to measure and compare interventions and assess impacts.

> "Dose is a simple term that practitioners and community members can easily understand. In this case, the active ingredient is the community strategy being implemented that is applied to an entire population rather than one person."[5]
> *-Healthy Dose Toolkit*

- Portfolio of Interventions: Dose, Reach, and Strength
- Measuring and Increasing Dose
- Healthy Dose Toolkit

## PROTOTYPE AND PILOT TESTING

Developing a POI can be overwhelming to identify strategies in each of the five domain areas all at one time. One strategy to consider after the identification of root causes of poor health in your community is to work with partners to develop a prototype in one or two of the POI domain areas.

The ideas to address the root causes that have come forward can be considered to try experimentations (prototyping) of services, products, and potential actions that will bring This is an opportunity to be experimental, playful, and iterative with potential ideas and solutions. It will be important during this process to include partners as well as those directly affected by the challenge.

Your initial prototype of a given intervention should identify leverage points - where a shift in the system can make an impact. This process should be approached with a strategic group of community and professional partners who have expertise on the potential solutions and barriers within the system you hope to address.

Your POI will continue to evolve over time. Don't be afraid to try things out to see how they work. Throughout the process, regularly check in with your partners and community to evaluate the success of your approach, iterating and evolving as necessary.

- Start-Up Guide: Determine What to Prototype
- Start-Up Guide: Piloting vs Prototyping
- Start-Up Guide: Rapid Prototyping
- Start-Up Guide: Pilot Test

# APPLY

## BUILDING BLOCK 5:

*Implement the POI with a mutually reinforcing plan of action*

- POI Toolkit (p. 11-13)
- Start-Up Guide: Create an Implementation Plan

*Pro Action Cafe*

Once you begin to implement your POI, a useful practice to check in with partners on how the work is going, and to identify challenges and or opportunities is the Pro Action Cafe. The Pro Action Cafe is a tool to guide you in hosting conversations about questions and projects, working toward a collective informed action.

- Pro Action Cafe

## BUILDING BLOCK 6:

*Monitor progress and refine your POI*

The ACH – through the backbone organization, leadership team, and POI workgroup -- should continuously monitor progress of the POI and refine the composition of interventions over time. Utilize accepted tools and measures to establish and assess process and outcome measures in order to ensure continual process improvement and alignment with your collaborative's mission. Regularly communicate these findings with partners and the broader community to help build accountability and trust, as well as to gain this important perspective on the impact of your work.

- POI Toolkit (p. 13-15)
- CACHI: Identifying and Measuring Outcomes
- ACH Evaluation Framework
- Ripple Effects Mapping
- Asthma Community Linkages Project Final Report – Year One and Year Two, Imperial County ACH
- Introduction to Core Metrics
- CACHI: Data Related Milestones

> It is the backbone's responsibility to establish and organize relevant committees for the conduct of the collaborative's business. One committee that would be helpful in the conduct and/or management of monitoring and evaluation is a performance management committee, or a strategy committee.

To learn more about committees in the MSC context see Module 8, linked below.

Module 8: Collective Accountability: Governance & Leadership

### *Results-Based Accountability*

Results-Based Accountability (RBA), also discussed in Module 4, is a decision-making tool that builds collaboration and consensus by following an approach that works backward from the goal to define the means. In addition to the identification of the desired outcomes of your MSC's work, the RBA framework can also be used to measure outcomes. This framework offers a process to continually assess how you are progressing on outcomes, as defined in Module 4.

Visit the link below for more information.

- Results-Based Accountability
- Implementation Guide: Results-Based Accountability
- Results-Based Accountability Tools for Implementation
- RBA Workshop Materials
- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose
    - *Lesson 2: Align Priorities to Develop Shared Vision, Goals & Purpose*

The Model for Improvement is another improvement model used in health care and community organizations to identify your aim (What are we trying to accomplish), measures (How will we know that a change is an improvement?), and PDSAs (plan, do, study, act cycles or What change can we make that will result in improvement?). Testing PDSAs allow for understanding change on a small scale before implementing or spreading the change on a large scale.[23]

As you start to develop your POI, through this module and Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose, make sure that you are regularly and intentionally reflecting on the decisions you make and the things you are learning.

## DIG DEEPER

- Portfolio of Interventions: Community Clinical Linkages - Highlighting the Pathways Community Hub Model
- Start-Up Guide: Getting Started (Iterative Process, p. 31)

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about implementing and evaluating a POI?
- What is the "reach" of your POI interventions? How many people in your community are being touched by the interventions you have selected? Are there sub-populations that are being missed?
- How is the POI evolving over time? What interventions do you need to add or expand?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*As you start to develop your POI, through this module and Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose, make sure that you are regularly and intentionally reflecting on the decisions you make and the things you are learning.*

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

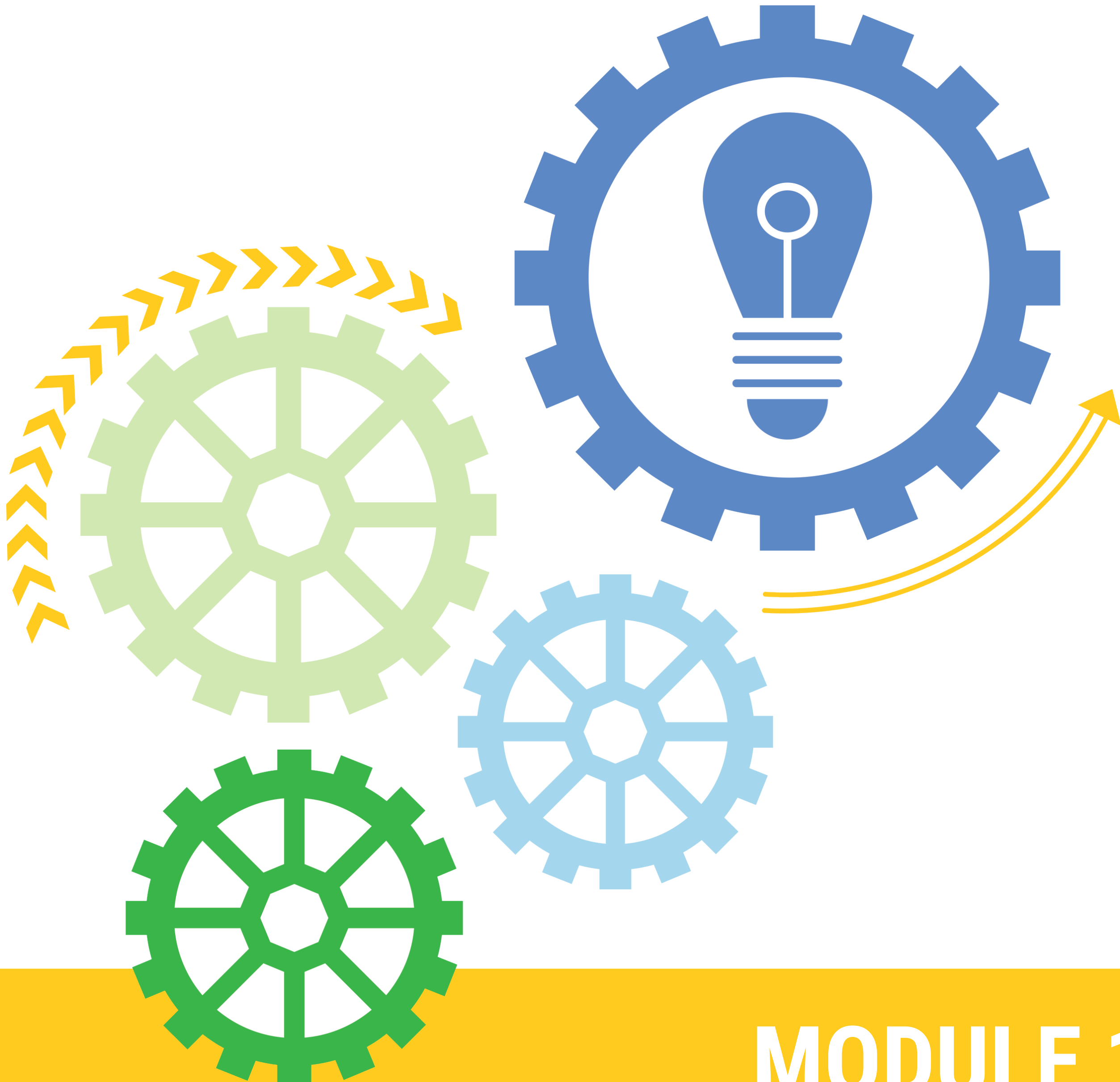
- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.



# MODULE 10
# KEEPING THE LIGHTS ON

## FINANCIAL MANAGEMENT STRATEGIES

Module 10

# KEEPING THE LIGHTS ON

## Financial Management Strategies

## OBJECTIVE

Understand the financial structures involved in a multisector collaborative and how to apply financial management strategies in your organization. Learn how to fundraise and create a business plan.

## LESSONS IN THIS MODULE INCLUDE

1) Financial Management
2) Fundraising
3) Creating a Business Plan

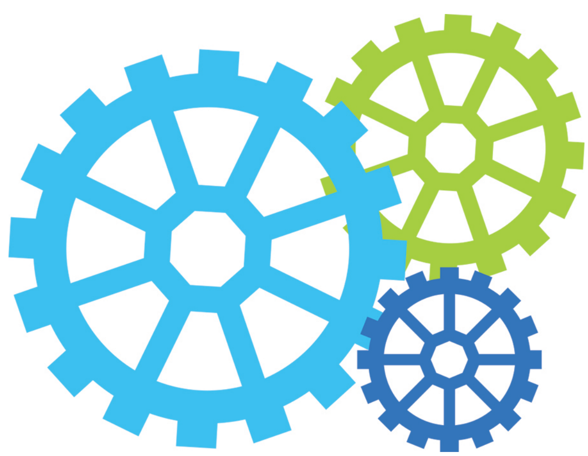
## AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of the backbone's financial management responsibilities.
- Learned different financial analysis methods and how they apply to multisector collaboratives.
- Learned how to develop and manage a program budget.
- An understanding of the basics of nonprofit fundraising.
- Explored ways to identify and implement revenue streams outside of typical grant funding structures.
- Learned how to create a business plan and a business case for your collaborative.

## RELATED CONTENT

*In order to get the most out of this module, we advise that you explore the following related curriculum content:*

- Module 6: Paying Dividends: Co-Creating Lasting Impacts



***"The secret to change is to focus all of your energy not on fighting the old, but on building the new."***
***~ Socrates***

If you are interested in further coaching on this topic, please contact: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# Lesson 1:
# Financial Management

## OPENING QUESTIONS

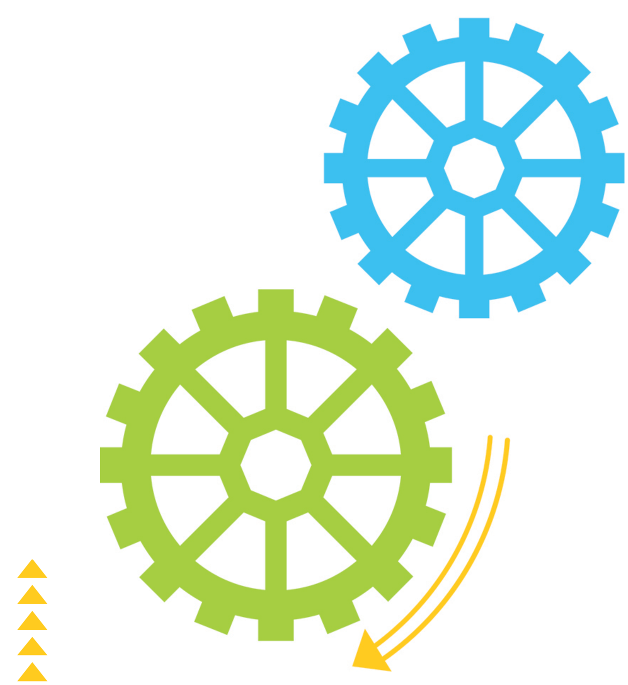
**Discuss these questions with your team members before beginning this lesson.**

- What aspects of financial management do you feel confident in? What areas do you think you need support? Where might you find the support you need on this topic?
- What do you think you need to know about financial management that you do not know right now?
- Discuss your current and potential funding sources, and how they may complement one another.

## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand the backbone's financial management responsibilities.
2) Describe different financial analysis methods and how they apply to multisector collaboratives specifically.
3) Develop a program budget.
4) Understand various methods for managing funds, including concerns such as braiding, blending and aligning funds, as well as cash flow and staffing levels.
5) Develop healthy financial policies.



# UNDERSTAND

The world of finance is often thought of as quite separate from public health work on the ground. However, the structure of multisector collaboratives (MSCs) brings the work of financial management to the forefront as there are often multiple funding streams and partners to navigate. It is therefore helpful to have a broad understanding of terms used in financial management before you begin the work of managing your collaborative's finances.

- Glossary of Financial Terms Used in Capital Training, California Convergence
- A Typology of Potential Structures for Population Health, ReThink Health 2018

It is important to note before you proceed with this lesson that the tools and information presented here are for you to use as relevant to your MSC's experience. Depending on the nature of the backbone organization and the type of work your MSC is doing, which financial management strategies you might use can vary. Keep this and your individual MSC's context in mind as you proceed with this lesson.

Additionally, this lesson does not include financial sustainability or wellness fund resources. For this information please visit Module 6.

Module 6: Paying Dividends: Co-Creating Lasting Impacts

## FINANCING MODELS

There are myriad financing models available to MSCs, and you may find that you will use multiple different methods depending on your funding and needs. The two resources from ReThink Health linked below are an excellent starting point for you to understand the options available to you in financing your MSC.

- A Typology of Potential Structures for Population Health, ReThink Health 2018
- ReThink Health Financing Workbook

The Definitional Elements Examples and Resources document contains a number of links to different financing models and other helpful information.

- Start-Up Guide: Definitional Elements Examples and Resources
    - *(Financing Models, p. 32-33)*

## LESSON 1: FINANCIAL MANAGEMENT

Below are several examples of financing models used by existing Accountable Communities of/for Health (ACHs). Review as you see fit to help you shape your understanding of what is possible, and what might be a good fit for your collaborative's needs.

- Financial Sustainability: Membership Model and Government Funding
- San Diego ACH Neighborhood Networks Model
- Financing The Infrastructure Of Accountable Communities For Health Is Key To Long-Term Sustainability
- Imperial County CACHI Catalyst Case Study

You may find you need further support to supplement your collaborative's expertise in financial management strategies. You should therefore identify partners who have financial management expertise. Are they engaged in this work for your collaborative? Could they be? In which areas might they be able to provide support?

- JSI Budgeting Template

There may be processes your collaborative would prefer to outsource rather than to do in-house, for myriad reasons. See the below link to one ACH's request for proposals you may use to help you get started.

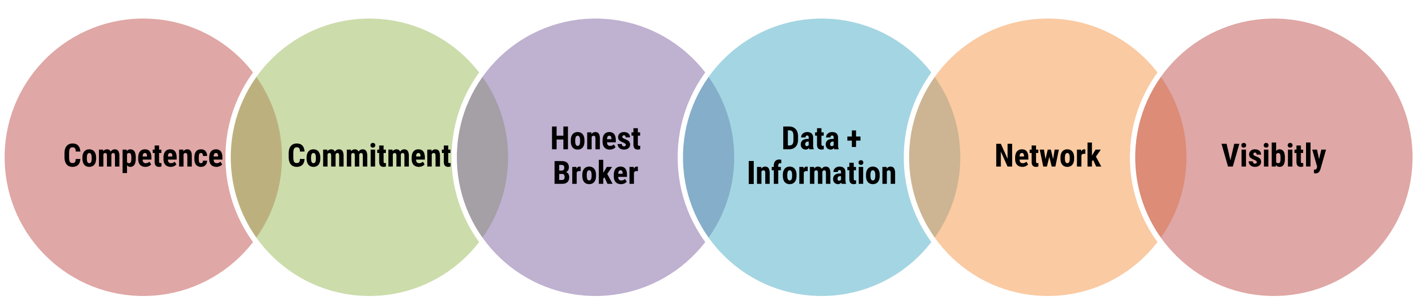
- Request for Proposals for FCHIP Priorities

## BACKBONE FINANCIAL MANAGEMENT RESPONSIBILITIES

The backbone organization also plays a key role in mobilizing resources to support the goals of the ACH. Resources can include materials, money, staff, and other assets necessary for effective operation.

- Start-Up Guide: Backbone Organization (Mobilizing Resources, p. 7)

Start-Up Guide: Backbone Organization
Six Sources of Influence: that enable backbones to shape and guide without formal authority.



# APPLY

## DEVELOPMENT: OF A PROGRAM BUDGET

The development of a program budget is one of the most important components in fiscal management for a MSC. It will help you identify what resources are necessary to fully implement your work moving forward. Budgets involving multiple partners and funding streams can be complex, but getting it right from the start will help support, and potentially sustain, the work of your collaborative.

- Developing an ACH budget
- Community Tool Box: Planning and Writing an Annual Budget

## MANAGEMENT: OF A PROGRAM BUDGET

There are myriad budgeting concerns you must address in the day-to-day operations of your MSC. These vary from how to create a financial and audit committee to handling cash flow to development of budget management tools. The Community Tool Box chapter on this topic is linked below to guide you in managing your collaborative's finances.

- Community Tool Box: Managing Finances (Sections 2-5)

## BLENDING, BRAIDING AND ALIGNING FUNDS

Blending, braiding and aligning funds involves leveraging existing community or collaborative funds to manage and increase resources, reduce fragmentation and duplication of activities and services, increase efficiencies for contributors/investors who seek to leverage their dollars with other financial partners, and provide long-term stability compared to single grants/ investments. Activities related to this topic include grant management, soliciting funding to support backbone staff, writing grant proposals, working with community development financial institutions, and identifying existing community assets.

- Combined Regional Investments Could Substantially Enhance Health System Performance and Be Financially Affordable
- Blend or Braid - Spark Insight Partners
- Blending and Braiding Early Childhood Program Funding Streams Toolkit
- Establishing a Local Wellness Fund Issue Brief (Fiscal Management. p. 6-8)

## DEVELOPING HEALTHY FINANCIAL POLICIES

Understanding the ethics and best practices of nonprofit financial policies and management can be challenging. This section will walk you through some of the strategies you can use to assess potential financial relationships and financial management practices from an ethical perspective.

The Council of Nonprofits offers a number of excellent resources to support nonprofit financial management and the development of healthy financial policies. See the below links by topic area to tools you might use in your MSC financial management practices.

- Tools for Ethics & Accountability
- Tools for Leadership
- Tools for Fundraising
- Tools for Financial Management

## FINANCING MODELS

As introduced above, there are a variety of financing models that can be used to support the work of your collaborative. Understanding what each of these might look like in the context of your collaborative's structure and function will be important in deciding which one, or few, would work best.

Use the exercise below to discuss with your partners how each might work for your collaborative.

Funding Hypothesis Exercise

### *Grant writing and management*

Fundraising is covered in the next lesson, read on!

### *Working with community development financial institutions*

A Community Development Financing Institution (CDFI) is a financial institution that "has a primary mission of community development, serves a target market, is a financing entity, provides development services, remains accountable to its community, and is a non-governmental entity. CDFIs are certified by the Community Development Financial Institutions Fund (CDFI Fund) at the US Department of Treasury."[42]

You might consider working with a CDFI to partner with or fund some of your collaborative's work. See below for several links to inform your understanding of this topic.

What is a CDFI

CDFIs in California

CDFI Locator

## HEALTHCARE EFFECTIVENESS DATA AND INFORMATION SET (HEDIS)

The Healthcare Effectiveness Data and Information Set (HEDIS) is a performance improvement tool for health plans. The measures that are used to determine the HEDIS quality score comes from outcomes at the hospital/provider level, which may be some of the areas your collaborative's interventions target.

The providers who contract with health plans are required to create a performance improvement plan stating how they will meet the HEDIS measures.

It may therefore be a valuable activity for your collaborative to review HEDIS measures and identify any activities or interventions your MSC is implementing that could contribute to an improved outcome of any clinical partners. A conversation with your clinical partners may uncover potential opportunities to create an improvement plan proposal that could provide funding for some of your work that impacts these measures and help them meet their goals.

- HEDIS Quality Scores Explained
- NCQA: HEDIS.

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## DIG DEEPER

- King County WA Investment Prioritization
- All In Conference Sustainable Financing Deep Dive Worksheets

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about financial management?
- On which aspects of your collaborative's finances and financial management do you need support?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

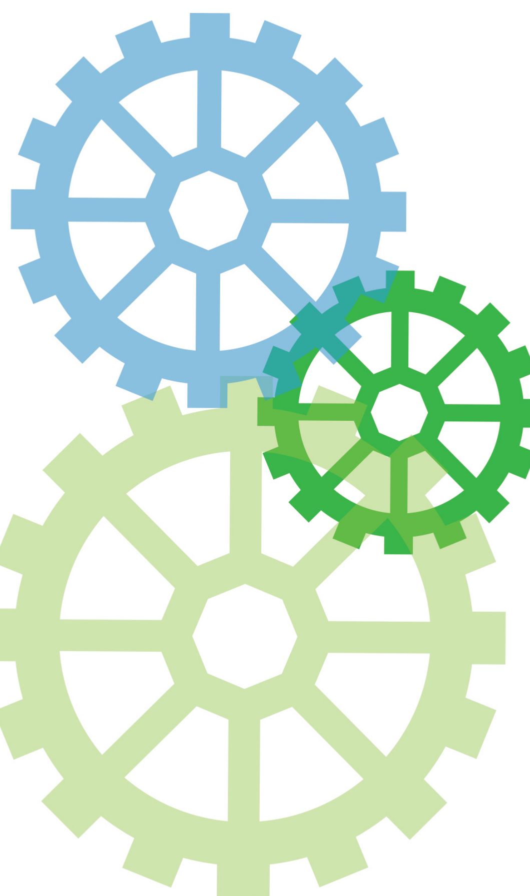
Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Fundraising

## OPENING QUESTIONS

**Discuss these questions with your team members before beginning this lesson.**

- What types of funding sources do you have at your collaborative now, or have you had in the past?
- What creative fundraising methods have you used previously, or want to pursue in the future?



## LEARNING OUTCOMES

**After completing this lesson, you will be able to:**

1) Understand and apply the basics of nonprofit fundraising.
2) Effectively apply for grants and loans and recruit non-monetary, or in-kind, support.
3) Identify and implement revenue streams outside of typical grant funding structures.

# UNDERSTAND

Working in public health, you are likely familiar with applying for grant funding. For an in-depth look at nonprofit fundraising, check out this free course:

Nonprofit Fundraising Essentials*

- **Requires registration*

## FUNDING SOURCES

Identifying traditional and innovative funding sources is essential for the sustainability of your collaborative. The below information can help get you started in this process.

- Identifying Funding Sources
- Financing the Infrastructure of Accountable Communities for Health is Key to Long-Term Sustainability
- Short Term Funding Strategies for Health Action's Wellness Fund
- Engaging Private Capital to Scale Community Health & Wellness
- Potential Structures and Funding Sources for the Health Action Wellness Fund

Two innovative investment approaches are social impact investing and social enterprise.

> "**Social impact investing**, also known as impact investing or impact investment, is a term used to describe a type of investment that [often] produces a financial return for private investors and positive community outcomes, such as social or environmental impacts."[43]
>
> - Opportunities for Social Impact Investing for Accountable Communities for Health
> - CACHI Roundtable: The ABCs of Social Impact Investing

> The Social Enterprise Alliance defines **social enterprise** as "Organizations that address a basic unmet need or solve a social or environmental problem through a market-driven approach."[14]
>
> Two examples of social enterprises include FareStart and The Town Kitchen. To learn more about this innovative investment approach, visit the resources linked here.
>
> - Social Enterprise Alliance
> - What is a Social Enterprise?
> - Social Enterprise Guidebook

# APPLY

## APPLYING FOR GRANTS AND LOANS

The fundraising topics covered in this section are all influenced by the topics discussed in Module 6, Lesson 2 on financial sustainability. Revisit this lesson before proceeding with applying for grants and loans.

Module 6: Paying Dividends: Co-Creating Lasting Impacts

- *Lesson 2: Financial Sustainability: Right-Sizing Resources to Achieve Your Goals*

Two examples of innovative nonprofit funding organizations include Giveffect and ioby. Giveffect is an online platform designed for nonprofits and includes fundraising features such as peer to peer fundraising campaigns, crowdfunding, volunteer tracking and reporting, and donor management tools. ioby, which stands for in our back yards, is a crowdfunding organization for nonprofits which aims to "mobilize neighbors who have good ideas to become powerful civic leaders who plan, fund, and make positive change in their own neighborhoods."[44] ioby offers free resource guides on crowdfunding, and a webinar linked here.

Another resource on crowdfunding is Global Giving, also linked below.

- Giveffect
- Crowdfunding for Healthy Communities
- Ioby Free Guides
- Beginner's Guide to Crowdfunding Success

### IDENTIFY FUNDING OPPORTUNITIES

Below is a list of resources to check regularly for funding opportunities, as well as funding trends for the general landscape.

- Chronicle of Philanthropy
- Inside Philanthropy
- Philanthropy News Digest/Candid
- Philanthropy Roundtable
- Foundation Directory Online
  *This is a site where you can find competitor organizations and view their funder history to create a targeted research list.*
- Innovative Funding Partners Newsletter
- EGC Consulting
- GrantStation
- Grants.gov

## LESSON 2: FUNDRAISING

When possible, sign up for email listservs regarding grant opportunities. This can generate a lot of emails, so you may want to create a designated funding newsletter email inbox. In addition, Twitter is a valuable resource to find funding opportunities. Follow the funders you are interested in, as well as their leadership, to be notified of any funding opportunities that may be posted on Twitter.

You may want to create a financing committee to support your efforts in this space. Particularly if you have connected committee members to champion your cause, this can open doors for collaborative funding.

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## DIG DEEPER

- The Massachusetts Prevention and Wellness Trust Fund Grantee Program, Final Evaluation Report, January 13, 2017
- Investing in Community Health: A Toolkit for Hospitals

LESSON 2: FUNDRAISING

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about nonprofit fundraising?
- Are there new types of funding you would like to pursue? What do you need to do to begin applying for funding through these sources?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 3: Creating a Business Plan

## OPENING QUESTIONS

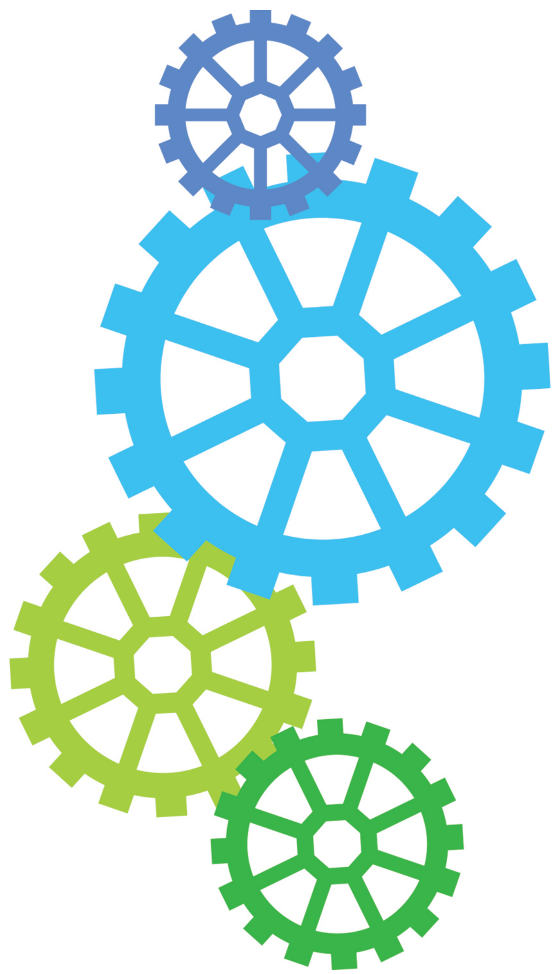
Discuss these questions with your team members before beginning this lesson.

- What do you know about creating a business plan? What experience have you had in this area?
- What do you think having a business plan can do for your collaborative?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand the elements of a business plan, and how they apply to the nonprofit context.
2) Create a business plan, completing all of the component parts step by step.



# UNDERSTAND

Often nonprofit organizations may not necessarily think of their work as a business. Your organization, or collaborative, is likely driven not by profit, but by a commitment to the community you serve. However, especially in the MSC model, the need for long-term financial sustainability brings the importance of understanding nonprofit business planning and operations to the fore. At any time, you should know how much money your collaborative needs and how it would be spent.

Creating a business plan is an important aspect of financial management in a MSC. But a business plan does not exist in a vacuum; it is intertwined with all other elements of your collaborative, including your vision, goals and purpose, strategic plan, Portfolio of Interventions (POI), partnerships, governance and leadership, sustainability, and more. As you engage with the resources throughout this lesson, remember to take a systems approach, being aware of the impact of all aspects of your collaborative's work and the broader system in which this work is done.

Business Planning for Nonprofits: What It Is and Why It Matters

As a first step in the process of developing a business plan, explore the resource below, sharing and engaging with your partners throughout the process.

SCORE: Business Planning Tools for Nonprofits

Learn about the components that go into making a business plan and two traditional formats for business plans. Discuss with your partners what format would make the most sense to your work. There are many helpful resources out there as you go through this process. If you have any specific questions or areas of concern, try searching their Tools and Resources section from the National Council of Nonprofits or the Free Management Library. We also suggest you become a member of the National Council for Nonprofits. They have even more helpful resources for members.

Write Your Business Plan

National Council of Nonprofits: Tools & Resources

All About Business Planning: Complete Manual With Updated Extensive Resources

# APPLY

## "HOW TO"

The U.S. Small Business Administration is a great resource for tools and guidance to support the start-up and ongoing operations of your collaborative. As a group, take this short 30-minute course on How to Write a Business Plan. If you identify items or sections you are not able to complete, take a look through the tools and resources listed in the Understand section of this lesson and the tool linked below.

SBA: How to Write a Business Plan

Additional business planning resources you may find helpful include the following:

How to Start a Non-profit

All About Business Planning

## STRATEGIC CLARITY

Clarity of purpose and mission is a key element when working together to develop your business plan. Taking time to revisit your shared vision, goals and purpose is a practice that should be incorporated regularly in your work. Once you have reflected on this, refer back to the Business Planning for Nonprofits article and discuss the highlighted questions regarding strategic clarity and priorities with your team.

Business Planning for Nonprofits: What It Is and Why It Matters (Gaining Strategic Clarify and Determining Strategic Priorities, p. 5-13)

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

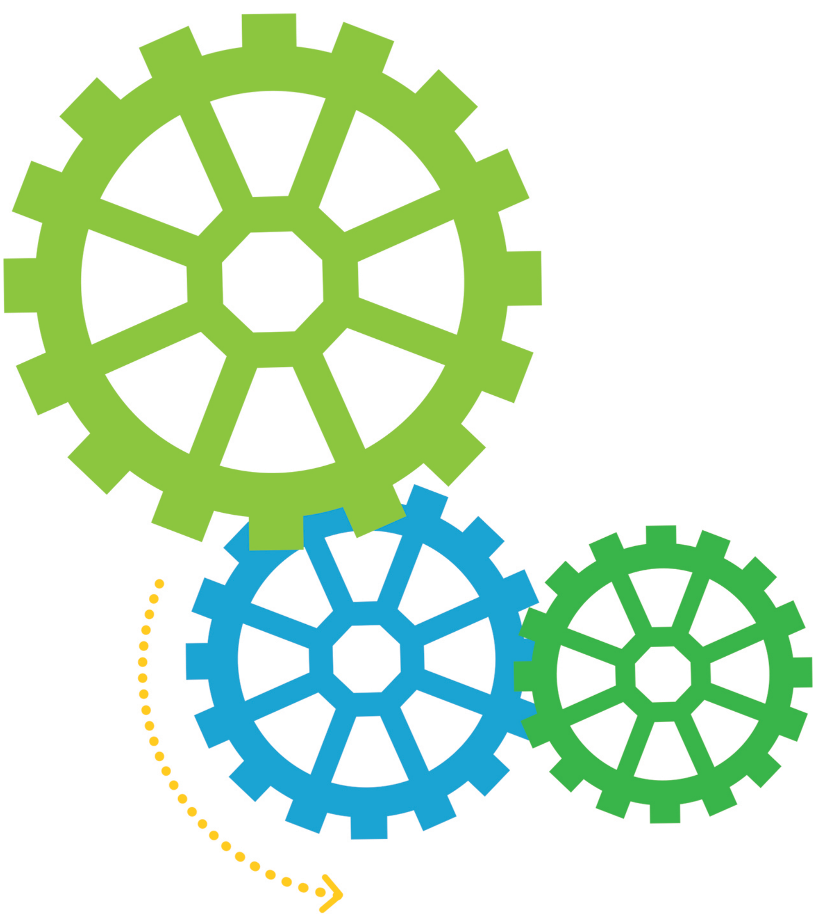
LESSON 3: CREATING A BUSINESS PLAN

## SUSTAINABILITY

Having a solidly developed business plan can be a huge asset in fundraising and planning for financial sustainability by providing a strong case for what your collaborative is working for and a clear picture of the human and capital resources needed to achieve your goals.

Module 6: Paying Dividends: Co-Creating Lasting Impacts

- *Lesson 2: Financial Sustainability: Right-Sizing Resources to Achieve Your Goals*



## VALUATION

According to Investopedia, "Valuation is the analytical process of determining the current (or projected) worth of an asset or a company."[45] The site has a helpful explainer on valuation, linked below.

Investopedia: Valuation

To learn more about the valuation of outcomes from a POI, and the community infrastructure that supports them, explore the below resource. This was created for CACHI, but has applications across many other contexts.

CACHI Intro to Outcomes Valuation Discussion Paper Feb 2018

For information on creating a *value proposition*, see Module 6, Lesson 2.

Module 6: Paying Dividends: Co-Creating Lasting Impacts

- *Lesson 2: Financial Sustainability: Right-Sizing Resources to Achieve Your Goals*

LESSON 3: CREATING A BUSINESS PLAN

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about creating a business plan?
- What are the next steps to develop and implement your collaborative's business plan?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# MODULE 11
# MEASURING CHANGE

## DATA COLLECTION, APPLICATION & SHARING

*We thank Andy Krackov of Hillcrest Advisory for his contributions to this module.*

Module 11

# MEASURING CHANGE

## Data Collection, Application & Sharing

## OBJECTIVE

Explore different types of data and how and when they should be used. Learn strategies for collecting, understanding and applying data to inform decision-making and continuous evaluation of your collaborative's impact. Identify outcome measures and metrics of success for your multisector collaborative. Understand different approaches to data sharing and the legal aspects of sharing data.

## LESSONS IN THIS MODULE INCLUDE

1) Data Collection, Understanding & Application
2) Data Sharing

## AT THE END OF THIS MODULE YOU WILL HAVE

- An understanding of different types of data and when to use them.
- Begun to identify outcome measures and metrics of success for your multisector collaborative.
- Revisited earlier lessons and learned more about how to evaluate and communicate your collaborative's progress.
- An understanding of different approaches to data sharing.
- Begun to develop a data sharing plan.
- Learned about some of the legal aspects of sharing data.

## RELATED CONTENT

In order to get the most out of this module, we advise that you explore the following related curriculum content:

- Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose
- Module 5: Pieces of the Puzzle: Communicating for Impact
- Module 9: It Takes a Village: Creating a Portfolio of Interventions

***"Numbers have an important story to tell. They rely on you to give them a voice." ~ Stephen Few***

If you are interested in further coaching on this topic, please contact:

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# Lesson 1:
# Data Collection, Understanding & Application

## OPENING QUESTIONS

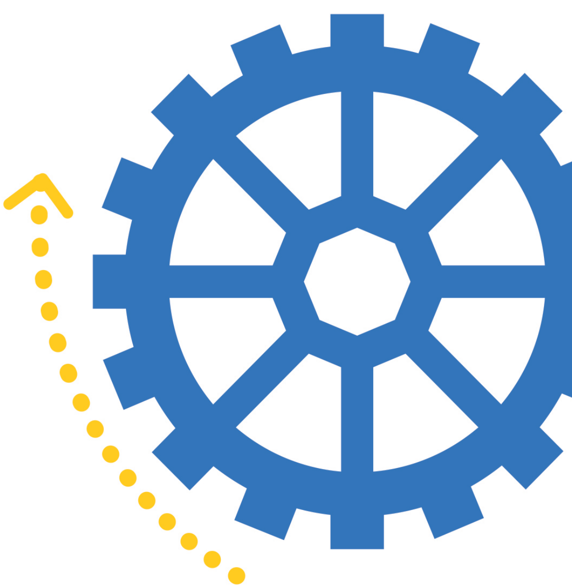
Discuss these questions with your team members before beginning this lesson.

- For what purpose(s) does your collaborative need data?
- Is there an existing committee in your area that tracks cross-agency data?
- What data sources are you currently using to assess your community's needs? Do they provide sufficient information, including about health and racial equity?
- How is your collaborative's progress measured currently? What metrics do you (or should you) use?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand different types of data and when to use them.
2) Identify outcome measures and metrics of success for their multisector collaborative.
3) Evaluate and communicate the collaborative's progress.



# UNDERSTAND

Types of data and when to use them

There are many different types of data you might use to measure your collaborative's impact or progress.

> QUANTITATIVE DATA
>
> "Usually numeric data or information that can be converted into numbers. For example, the number of community health workers trained, or the prevalence of cardiovascular disease in a county."[12]
>
> QUALITATIVE DATA
>
> "Usually descriptive and conceptual information, may be categorized by properties, themes, and other identifiers. For example, feedback from community health workers about their training experiences."[12]

The community voice should be central to your evaluation of community needs. Implement practices to engage partners to obtain quality data representing the community voice, such as voice data.

## DATA COLLECTION

Some data sources you will likely consider as a part of the development of your Portfolio of Interventions (POI) are available data sources such as county health rankings, health plan HEDIS indicators, Community Health Needs Assessments (CHNA) and others, as well as non-traditional data, such as voice data and focus groups. Here we focus on Community Health Needs Assessments because many collaboratives have experience using or collecting these data. Your MSC may play a role in collecting data from some of these sources, which can be an opportunity to bring in revenue.

Gathering data as it relates to the POI is discussed in Module 4, Lesson 2. Also discussed briefly in Module 4 is the use of a data and/or performance management subcommittee. This group can be helpful to assess what data each partner is collecting. This helps to inform shared measurement.

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

- *Lesson 2: Align Priorities to Develop Shared Vision, Goals & Purpose*

### (1) COMMUNITY HEALTH NEEDS ASSESSMENTS

The Community Health Needs Assessment (CHNA) is done every three years and must include input from the community in the determination of health needs. Engaging with the process of conducting these assessments can be a valuable opportunity to collect the data you need to define your collaborative's goals. Learn when the CHNA is set to be redone or has been completed in your community.

- CDC: Community Health Assessments & Health Improvement Plans
- Community Health Needs Assessment (CHNA)
- Assessing Alignment

The Community Benefit Insight Tool is a great resource to learn more about your local non profit hospital CHNA. If the local non profit hospital is not part of your ACH set up a time to meet with the Community Benefit Coordinator to review the CHNA and how investments are being directed.

- Community Benefit Insight Tool
- Find Hospital Community Benefit Plans

### (2) NON-TRADITIONAL DATA

In addition to the above community health needs assessment data and other large quantitative data sources, non-traditional data sources, particularly qualitative data sources, should also be considered. These include voice data, smaller survey data, focus groups, public deliberation, and others. Much of the non-traditional data you could collect will require community engagement. Learn more about this in Module 3.

- Module 3: Hand in Hand: Fostering Lasting Relationships

*Personas and empathy mapping*

A persona represents a community member, partners or some other type of user your collaborative will interface with. The persona is created based on the information gathered from conversations, listening sessions and other types of data, and is themed into common characteristics.  This approach is research-based and designed to help you better understand your community and organization partner needs, behaviors, experiences, and goals.

A helpful tool is to collect the information from your data and place into person cards and or empathy maps.

These can be shared with your partners and kept at the center of the portfolio of intervention or other types of planning efforts of your collaborative.

- Interaction Design Foundation: Personas
- UC Davis Center for Healthcare Policy and Research
- Start-Up Guide: Creating Personas

An example of a persona from a person experiencing domestic violence:

> *For all service providers that I come into contact with to treat me with respect and have compassion/empathy (I have felt judged too many times and then it is harder for me to develop a relationship with that person, which creates even more barriers). I want to know that I am safe with each person that is trying to help me and that I will not be judged for my mistakes.*

An empathy map is another way to capture the learnings from those you have interviewed. These help your team articulate perspective from those that you interviewed. Below is one example of a type of empathy map.

- Start-Up Guide: Empathy Mapping

## EQUITY CONSIDERATIONS

Equity-driven policies and practices should be at the center of all collaborative activities. This includes data collection and application. Consider how the data you use were collected and how representative the data is of all communities, particularly those which are underserved. Data should be disaggregated by relevant indicators to identify inequities and to help direct resources and interventions to where they are most needed.

One way to use data to enhance equity is to build data literacy in your community. Enhancing data literacy allows for deeper engagement with the work of your collaborative or other community initiatives, and is an ever-important skill in today's professional world.

Explore the tools linked below regarding health and racial equity data.

- Center to Advance Community Health & Equity Website
- Overview of Community Benefit Data and Center to Advance
- More Than Numbers: A Guide Toward Diversity, Equity, and Inclusion (DEI) in Data Collection
- National Equity Atlas

## USING DATA TO DEMONSTRATE VALUE

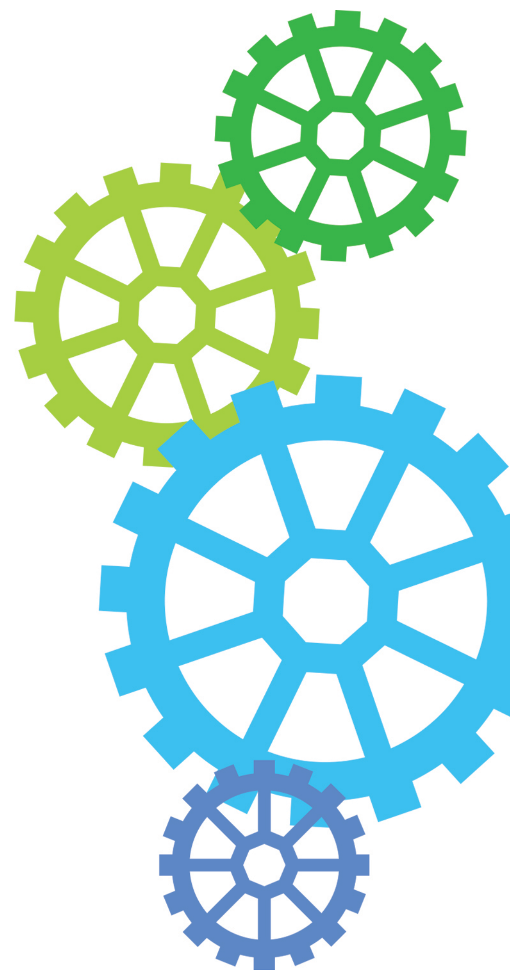
As an introduction to using data demonstrate the value of your collaborative, review the below slide deck. Additional information about creating a value proposition, along with some examples, can be found in Module 6, Lesson 2.

- What's In It for You… and Your Community?
- Module 6: Paying Dividends: Co-Creating Lasting Impacts
  - *Lesson 2: Financial Sustainability: Right-Sizing Resources to Achieve Your Goals >> Value Proposition: What is the value of your collaborative?*

## DATA SOURCES

Depending on what you would like to learn, measure or target through your interventions, you will need to understand and select data sources to use (or collect your own data if what you need is not available.) Some examples of resources are listed below.

- California Data Sources
- The California Healthy Places Index
- Start-Up Guide: Definitional Elements Examples and Resources (Publically Available Data Sets, p. 25-28)



# APPLY

Using both the links in the Data Sources section above and other relevant sources, identify two data sources that inform your collaborative's work. Explore each of these in detail and discuss with your team how you might use them.

## OUTCOME MEASURES AND INDICATORS OF SUCCESS

Intentional identification of data needs and uses and selection of outcome measures and indicators of success should be done before implementing any of your collaborative's initiatives. These measures, which may be derived from your POI outcomes, must be agreed upon by your partners in order to design effective interventions.

Module 4: Sharpening the Focus: Shared Long-Term Vision, Goals & Purpose

Module 9: It Takes a Village: Creating a Portfolio of Interventions

Before diving in, review the definitions of three key terms; measures, indicators and metrics.

CACHI: Data-Related Milestones (Outcome Measures & Indicators of Success, p. 6-7)

*CACHI: Data-Related Milestones*

Selecting the correct metrics is as important as conducting the evaluation. The measures you select should;

- Reflect interventions & infrastructure (p. 9)
- Reflect process and outcome (p. 12)
- Be relevant and understandable (p. 17)
- Be measurable and timely (p.19)
- Be operational and rigorous (p. 22)

ACHs [and other MSCs] can consider using data for four key purposes:[12]

1) Measuring outcomes to provide an overview and understanding of ACH progress
2) Measuring interventions and activities to support continuous quality improvement
3) Promoting health equity
4) Communicating key data to drive action and share progress that demonstrates accountability to partners and the community at large

## LESSON 1: DATA COLLECTION, UNDERSTANDING & APPLICATION

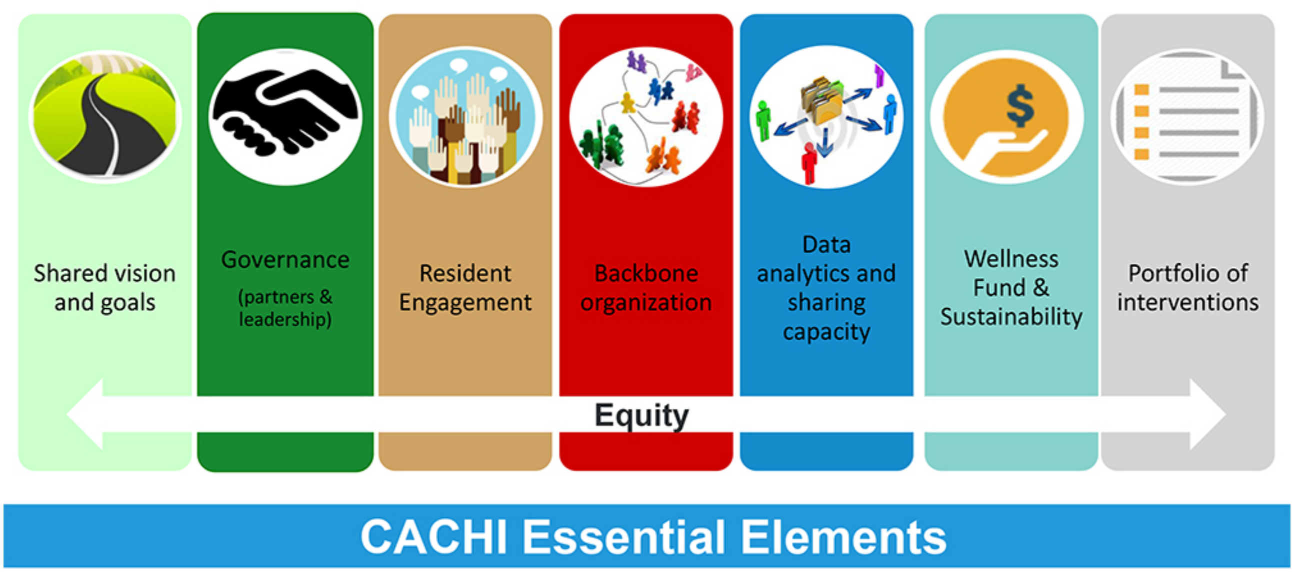
Explore the below resources to learn more about the metrics you might use to measure your collaborative's impact.

- What's In It For You… and Your Community?
- CACHI Data Webinar 1-28-19
- CACHI: Data-Related Milestones (Outcome Measures & Indicators of Success, p. 7-23)
- Introduction to Core Metrics
- List of Measures CACHI Sites Are Using
- How to Choose Your ACH's Measures

## QUALITY IMPROVEMENT

You should regularly track updates to data collected and used across the collaborative. Data dashboards can be a helpful tool to conduct this tracking. These findings should also be confirmed with the community, to hear perspectives from the end user about whether your interventions are working as intended.

What's In It For You… and Your Community?
Different, But the Same



## EVALUATION

Now that you have selected the measures you will use to assess your collaborative's performance, you will need to design an evaluation framework. This is discussed in detail in Module 9: It Takes a Village: Creating a Portfolio of Interventions.

ACH Evaluation Framework

Asthma Community Linkages Project Final Report – Year One and Year Two, Imperial County ACH

Module 9: It Takes a Village: Creating a Portfolio of Interventions

- *Lesson 2: Implement, Monitor & Evolve Your Portfolio of Interventions*

One interesting and novel tool you might use for participatory evaluation is Ripple Effects Mapping (REM). "The intent of REM is to collect the untold stories and behind-the-scenes activities that can ripple out from a specific program or activity."[46]

Ripple Effects Mapping

## COMMUNICATING PROGRESS

Having evaluated your collaborative's progress, you will want to communicate this information with several different audiences, including your funders, partners and the community. Revisit Module 5 to create a communications strategy for each of the audiences to which you wish to communicate progress.

Module 5: Pieces of the Puzzle: Communicating for Impact

- *Lesson 3: Data Communications*

# REFLECT

Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.

- What are you learning about data collection and application?
- What are some ways in which the data you collect and how you use it can impact racial and/or health equity?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

HOW TO USE GUIDE

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

# Lesson 2: Data Sharing

## OPENING QUESTIONS

Discuss these questions with your team members before beginning this lesson.

- Does your collaborative have a data sharing plan in place? With which organizations?
- What is working or not working with your current data sharing practices?

## LEARNING OUTCOMES

After completing this lesson, you will be able to:

1) Understand different approaches to data sharing and work to develop a data sharing plan.
2) Understand some of the legal considerations around sharing data.

LESSON 2: DATA SHARING

# UNDERSTAND

> "Data sharing, particularly at the local level, is an essential component to identify community-wide needs, inform ACH activities, and monitor the impact of population based health efforts. Collecting, aggregating, and sharing health, social services, and financial data from disparate clinical and non-clinical services and programs, as well as community and population-level data, across a variety of providers and organizations is thus an important goal for ACHs."[12]
> *- Advancing State Innovation Model Goals through Accountable Communities of Health Center for Health Care Strategies*

Data sharing can be an intensive undertaking, and can range from sharing data with a small group of partners, to setting up a community-wide information exchange. This lesson aims to provide information primarily on the small group data exchange process, but some resources presented are applicable to the larger alternative. It is important to consider what your collaborative needs are and seek out resources specific to these needs.

To be able to report on selected outcome measures and indicators of success, as well as enable certain interventions, MSCs may need to pursue data sharing arrangements with data owners or aggregators. See some resources on this topic from CACHI below.

- CACHI: Data-Related Milestones (Data Sharing, p. 34)
- Start-Up Guide: Definitional Elements Examples & Resources (Data Analytics & Sharing Capacity, p. 24)

Some helpful resources with a wealth of information on data sharing are linked below. Explore these sites to see what you can learn about different approaches to data sharing in general, and for your collaborative's needs.

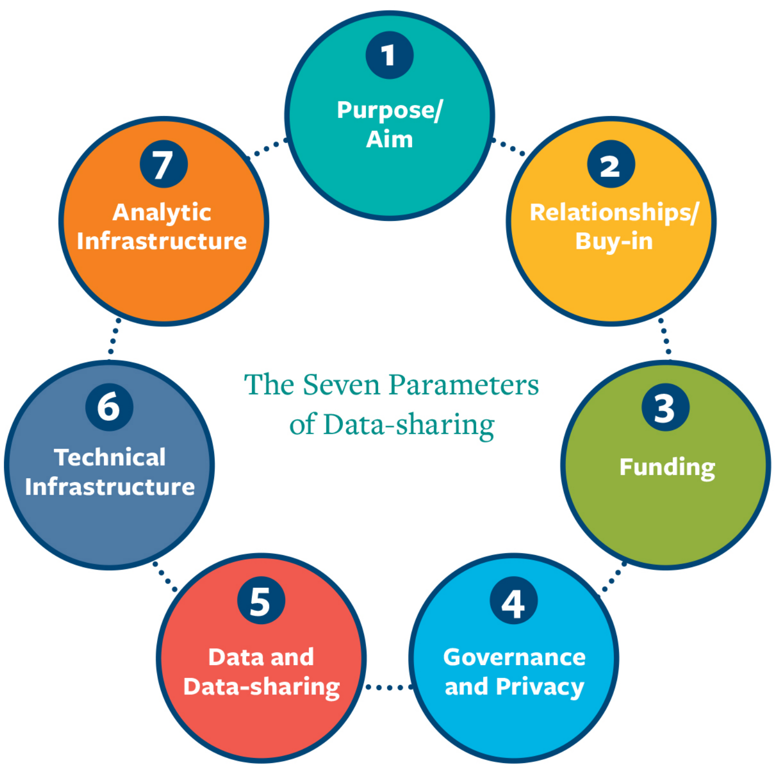
- All In: Data for Community Health Network
- DASH-NPHL Legal Resource Bibliography
- Data Across Sectors for Health (DASH)
- Network for Public Health Law
- National Interoperability Collaborative: Collaboration Hub

## LESSON 2: DATA SHARING

Many aspects of data sharing, legal and otherwise, can be complex and vary by jurisdiction. This is an area where having decision-makers at the table can be helpful. These leaders will be able to make decisions and take action on data sharing initiatives, rather than waiting on approval from above. You may want to work with outside partners or contractors to manage these activities for your collaborative.

The resources linked below offer some resources on the legal aspects of data sharing, and on working with a consultant if you decide to go that route.

- Communications Toolkit: Legal Bibliography
- Start-Up Guide: Getting Started (Working with Consultants, p. 22)




CHOIR ACH Data-Sharing Toolkit
ACH Data-sharing: Maturity Along Seven Parameters
CACHI: Data-Related Milestones (Data Sharing, p. 34)

LESSON 2: DATA SHARING

# APPLY

One of your tasks as a health-focused multisector collaborative (MSC) is to facilitate the creation of a collective, data-informed understanding of the impacts of the health of a community.

- ACH for Health Data Sharing Toolkit, CHOIR, Berkeley School of Public Health, December 2016
- Learning Series: Data Sharing Within Cross Sector Collaborations, Build Health Challenge

Some resources around various considerations for data-sharing are linked below.

- De-Identification Toolkit, Network for Public Health Law
- Communications Toolkit - Legal Bibliography
- Data Governance Communications Planning

This issue brief explores how purposeful data sharing and cross-sector linkages can focus action and policy development and enable more effective use of what will likely be increasingly scarce resources.

- Actionable Data Sharing (Association of State and Territorial Health Officials)

You will need to establish data sharing agreements as you begin to share data with external organizations. For information on this, including toolkits and informational resources, see the resources below.

- Data Sharing to Coordinate Care
- Data and Analytics
- Using HHS Data to Improve the Health and Wellbeing of All Californians
- Data And Public Space

## DIG DEEPER

- Start-Up Guide: Definitional Elements Examples and Resources (p. 24, 28-29)

# REFLECT

**Discuss the following questions with your team. We encourage you to regularly revisit these questions, continually refining your approach as your collaborative grows.**

- What are you learning about data sharing?
- Have you learned anything through this lesson that might lead you to make changes to your data sharing practices?
- Are there other possible data sharing partners or strategies you might explore?
- What does that mean for the broader context of your personal work, and the work of your collaborative?

*Additional practices you can use to support this reflection. For more detail on these resources, visit the 'How to Use' section of our introductory guide.*

- Collaborative Reflection Form
- What, So What, Now What
- Pair Reflection Post-Journaling and Solo Presencing Walk

**HOW TO USE GUIDE**

# ITERATE

Schedule a time within the next several weeks to reflect with your team on the practices learned in this lesson you will ingrain in your organizational approach moving forward.

Implement any necessary changes discovered through this process, continually revisiting these questions.

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# COMPETENCY FRAMEWORK

## POWERING CHANGE CURRICULUM COMPETENCY FRAMEWORK

*This Competency Framework was the initial step in developing the Powering Change: Building Healthy, Equitable Communities Together curriculum. The primary target audience is backbone organizations supporting multisector collabroatives. The backbone facilitates dialogue between partners, provides direct support for the Steering Committee and working group meetings as needed, and generally helps to coordinate the actions across the effort.*

| **Competency Domain** | **Competencies** ***(Knowledge, Skills and Abilities)*** | **Notes** ***Source/Citation*** |
|---|---|---|
| Communication<br><br>Communicates strategically and transparently to actively engage and invite continued participation of the community and diverse stakeholders. | Understanding how and when to use different modes of communication.<br>▪ Translating complex topics<br>▪ Persuasive communication | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Facilitates communication among individuals, groups, and organizations through shared language and understanding.<br>▪ Meaning making through synthesis of interactions with community and PH partners<br>▪ Brokering arrangements/interactions between partners<br>▪ Glossary<br>▪ Ability to re-frame, pivot conversations/approaches<br>▪ Communication to support shared decision-making<br>▪ Include Steering Committee and other activities. | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Communicate with diverse populations and non-traditional partners in a culturally-appropriate manner.<br>▪ Cultural humility<br>▪ Language /disability access | |

| Competency Domain | Competencies<br>*(Knowledge, Skills and Abilities)* | Notes<br>*Source/Citation* |
|---|---|---|
| Communication (cont.)<br><br>Communicates strategically and transparently to actively engage and invite continued participation of the community and diverse stakeholders. | Evaluation and selection of key data points and approaches for targeted communications to convey diverse data to professionals and the public using a variety of approaches (e.g., reports, presentations, email, letters, press releases) to drive action and share progress.<br>- Identification of data to share<br>- How to share that data (e.g., social media, newspapers, newsletters, journals, town hall meetings, libraries, neighborhood gatherings). | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Ability to maintain ongoing relations with local and statewide media including the ability to write a press release, conduct a press conference, and use electronic communication tools to interact with the media.<br>- Earned Media | The Public Health National Center for Innovations, Foundational Public Health Services in Action, November 2018 |
| | The capacity to communicate progress, celebrate success and partner contribution, encourage patience when needed, and allow for flexibility as the collaboration progresses. | The Intersector Toolkit: Tools for Cross-Sector Collaboration |
| | Communicating specifically and clearly around the vision, value and purpose of the ACH | |
| | Listening skills; intake of information not just output. Listen for understanding.<br>- Lived experiences | |

| Competency Domain | Competencies (Knowledge, Skills and Abilities) | Notes Source/Citation |
|---|---|---|
| **Partnership**<br>Actively engages in and facilitates collaborations between and among ACH partners and other key stakeholders, to advance the ACH's shared vision and portfolio of interventions.<br><br>**Pre-work/background info.**<br>Equal Partnership<br>Commitment to equal partnership /representation/voice/participation among all members. Equity.<br><br>Fostering the equal participation of all ACH partners, including public health and other professional stakeholders, community residents and organizations. | Ensures that partner input is considered equally and is used for developing and maintaining ACH infrastructure and operations. | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Backbone stewards the equity of participation among partners throughout all ACH activities. Facilitates the establishment of partner contributions, moving toward formalization of roles in partnership agreements. | |
| | Ability to establish and maintain trust to [do the work of the ACH - rephrase] sustain ongoing relationships with partners (e.g., schools, businesses, local governments, faith groups, sovereign entities (tribes), non-governmental organizations, etc.). | The Public Health National Center for Innovations, Foundational Public Health Services in Action, November 2018 |
| | Facilitate a deep understanding of partner values and assets, leading to shared intent and vision.<br>- Operating principles - rules of engagement | |
| | Facilitate a process to develop the portfolio of interventions, that leverages assets and identifies gaps, ensuring this is mutually reinforcing with partner priorities.<br>- Learning conversations<br>- POI is part of the community health improvement plan | |
| | Cultivates broad relationships throughout the community in coordination with the Steering Committee and working group members, seeking to build an inclusive effort that authentically engages and fosters ownership within the community over the long term. | Backbone Starter Guide, FSG |
| | Utilize leadership, team building, negotiation and conflict resolution skills to build community partnerships. | |

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| **Competency Domain** | **Competencies** ***(Knowledge, Skills and Abilities)*** | **Notes** ***Source/Citation*** |
|---|---|---|
| Partnership<br>Actively engages in and facilitates collaborations between and among ACH partners and other key stakeholders, to advance the ACH's shared vision and portfolio of interventions.<br><br>Pre-work/background info.<br>Equal Partnership<br>Commitment to equal partnership /representation/voice/participatio n among all members. Equity.<br><br>Fostering the equal participation of all ACH partners, including public health and other professional stakeholders, community residents and organizations. | Build and support coalitions to stimulate intersectoral collaboration on health issues. | |
| | Ability to create, convene, and support strategic partnerships, including those with non-traditional partners, leveraging the expertise of stakeholders. | The Public Health National Center for Innovations, Foundational Public Health Services in Action, November 2018<br><br>NLACHI Community Benefit Leadership Competency Sets, April 2015 |
| | Utilize a design team to develop and implement agendas and activities to ensure that the context of the membership team is being represented.<br><br>ACH is held accountable to the team and the community. | |
| | Utilize intentional and strategic leadership, establishment of trust, inclusion, team building, negotiation and conflict resolution to support partnerships and partner engagement in the ACH's activities. | |
| Data Sharing and Analytics<br><br>Stewards the collection, sharing and analysis of diverse data to identify community assets, needs and opportunities, to inform ACH decision-making. | Synthesizes information from various data sources in collaboration with community members for assessing community health needs to inform ACH priorities and promote health equity | Population Health Competencies, PHF, March 2019 |
| | Understand the types and uses of diverse data sources, including qualitative and quantitative data. | |
| | Engages partners to obtain qualitative and quantitative data (e.g., focus groups, talking circles, formal meetings, key informant interviews) to support improving health in a community. | Council on Linkages Between Academia and Public Health Practice, June 2014 |

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Data Sharing and Analytics (cont.)<br><br>Stewards the collection, sharing and analysis of diverse data to identify community assets, needs and opportunities, to inform ACH decision-making. | Uses/Interprets/Integrates findings from diverse data sources into organizational plans and operations (e.g. strategic plans, quality improvement plan, professional development).<br>- Develop a performance management plan (e.g. results-based accountability) | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Describes how evidence (e.g. data findings reported in peer-reviewed literature) is used in decision making. | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Advocates for the use of evidence in decision-making that affects the health of a community (e.g. helping elected officials understand community health needs, demonstrating the impact of programs.) | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | The use of data in meaning-making and a collective understanding of the impacts on the health of a community. | |
| | Utilize accepted tools and measures to establish and assess process and outcome measures in order to ensure continual process improvement and alignment with ACH mission. Regularly communicate these findings with key partners. | |
| | Inventory existing programs, activities and assets.<br>- Asset-Based Community Development [one tool]<br>- Community asset mapping<br>- Community Health Needs Assessments<br>- Professional service offerings | |
| | Understand how and when to use diverse data sources to support ACH goals and activities.<br>- Utilize selected data to persuade stakeholders to action. | |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Data Sharing and Analytics (cont.)<br><br>Stewards the collection, sharing and analysis of diverse data to identify community assets, needs and opportunities, to inform ACH decision-making. | Determine data sharing guidelines and make agreements with external partners, including health departments. | |
| | Describes the vital conditions that are affecting health in a community (e.g., racism, historical trauma, power dynamics, natural disasters, poverty, housing). Recognize how these conditions impact the health and well-being of specific population groups. | Population Health Competencies, PHF, March 2019<br><br>Council on Linkages Between Academia and Public Health Practice, June 2014 |
| Equity<br><br>Advance equity, particularly health and racial equity, through a robust collective understanding of vital conditions and their impacts. Embed a commitment to advancing equity at the core of all ACH policies. | Describes the concept of diversity as it applies to individuals and populations (e.g., language, culture, values, socioeconomic status, geography, education, race, gender, age, ethnicity, sexual orientation, profession, religious affiliation, mental and physical abilities, historical experiences). | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Recognizes/Supports/Incorporates diverse perspectives in developing, implementing, and evaluating policies, programs, and services that affect the health of a community. | |
| | Ensure that ACH decision-making reflects the knowledge of historical conditions and lived experiences in the community. | |
| | ACH members should carefully examine their own individual practices, those of the leadership team and a network, and be aware of their personal biases | |
| | Apply a lens of systems thinking to fully understand equity. | |
| | Ensure representation within the ACH reflects the diversity of the community. | |
| | Advocate for equity in all practices, including internal (ACH staff and partners) and external (policies and other external actors.) | |
| | The ACH adopts and incorporates equity, diversity and inclusion principles throughout the activities of the ACH. | CACHI Milestones and Competencies |

# COMPETENCY FRAMEWORK

| **Competency Domain** | **Competencies** *(Knowledge, Skills and Abilities)* | **Notes** ***Source/Citation*** |
|---|---|---|
| Financial Sustainability<br><br>Develop and manage program budgets, facilitating informed financial decision-making. Continually work toward the ACH's financial sustainability through the development and implementation of a sustainability plan, including securing funding and establishing a wellness fund. | Develop and manage ACH and backbone budgets<br>▪ Development of budget<br>▪ Day-to-day financial management<br>▪ Understand financial planning and management tools and strategies needed in the ACH | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Manages ACH activities within current and projected budgets and staffing levels (e.g., sustaining a program when funding and staff are cut, recruiting and retaining staff, engaging volunteers). | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Uses financial analysis methods in making decisions about ACH activities (e.g., cost-effectiveness, cost-benefit, cost-utility analysis, return on investment). | Population Health Competencies, PHF, March 2019 |
| | The backbone plays a key role in developing resources for the initiative's sustainability, including fundraising for the backbone itself and recruiting volunteers or other non-monetary support for the initiative. Backbone staff can also coordinate or support the fundraising efforts of members of the collective impact initiative. Identify and implement revenue streams outside of typical grant funding structures. | Backbone Starter Guide, FSG |
| | Blend, braid and align public and private resources for programs to support the ACH's goals toward improving the health of a community (e.g., supporting backbone staff, writing grant proposals, working with community development financial institutions, identifying existing community assets). | Population Health Competencies, PHF, March 2019<br><br>Backbone Starter Guide, FSG<br><br>Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Calculate projected savings and social benefit anticipated by interventions and measure actual savings accrued. | Sustainable Financing Analysis for Sonoma County Health Action, Third Sector Capital Partners, July 2017 |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Financial Sustainability (cont.)<br><br>Develop and manage program budgets, facilitating informed financial decision-making. Continually work toward the ACH's financial sustainability through the development and implementation of a sustainability plan, including securing funding and establishing a wellness fund. | Articulate a clear value proposition for investing in and achieving the ACH's objectives that resonates with diverse stakeholders. | Sustainable Financing Analysis for Sonoma County Health Action, Third Sector Capital Partners, July 2017 |
| | Align payers, providers, and community-based organizations to a sustainable funding system that leverages value-based payments for improving Human Development Index (HDI) - a composite statistic of health, education, and income indicated widely accepted as a measure of overall development. | Sustainable Financing Analysis for Sonoma County Health Action, Third Sector Capital Partners, July 2017 |
| | Constructs and utilizes a portfolio of current activities in the community to leverage existing funding structures within the community and make decisions around funding and utilization of existing resources. Understand which partners to bring in to support financial planning and management. | |
| | Position and plan for the ACH's financial sustainability<br>▪ Create an outreach plan for wellness fund<br>▪ Create and use a sustainability plan to guide ACH activities<br>▪ Skills around grantmaking<br>>> ID and apply for grants<br>▪ Engage a committee in order to put structures in place to allocate and disburse grant funds to support upstream interventions and prevention, and advances health equity.<br>▪ Implement partnerships as appropriate across the ACH and with external partners, potentially including other ACHs. | Georgia Health Policy Center Sustainability Framework, 2011<br><br>CACHI Milestones and Competencies |
| | Communicate transparently with internal and external stakeholders about financial decision-making within the ACH. | |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Financial Sustainability (cont.)<br><br>Develop and manage program budgets, facilitating informed financial decision-making. Continually work toward the ACH's financial sustainability through the development and implementation of a sustainability plan, including securing funding and establishing a wellness fund. | Establish and maintain the structures necessary to maintain an ACH wellness fund. | |
| | Evaluation of policy at the state level, identification of opportunities for leveraging funding and relationships to impact the ACH's efforts. Stay on top of policy developments that impact the effort. | Backbone Starter Guide, FSG |
| | Articulate a clear business case | Seven Definitional Elements |
| Innovation & Mindsets<br><br>Utilizing creative approaches to problem-solving and ACH design, driven by community perspectives, needs and opportunities; drawing inspiration from a wide range of models, tools and techniques. | Employ non-traditional approaches to problem solving, seeking ideas, or suggestions from diverse perspectives. | Inside The Box - Innovation Competency Model |
| | Thinks imaginatively, or "outside of the box" in order to identify and/or develop creative solutions for which there are few or no precedents. | Inside The Box - Innovation Competency Model |
| | Develop prototypes adapted from relevant resources into the ACH's vision (e.g. concepts, models, data and information). | Inside The Box - Innovation Competency Model |
| | Continue to evaluate, refine and iterate on processes throughout the life of the ACH. | |
| | Comes up with fundamental new ways to support ACH's ability to execute its strategy. | Inside The Box - Innovation Competency Model |
| | Creates new insights from a wide range of information, tools and techniques. | Inside The Box - Innovation Competency Model |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Innovation & Mindsets (cont.)<br><br>Utilizing creative approaches to problem-solving and ACH design, driven by community perspectives, needs and opportunities; drawing inspiration from a wide range of models, tools and techniques. | Fostering an entrepreneurial mindset to adapt to and take advantage of the current circumstances surrounding the ACH. Encourages and promotes exploration of new ideas and creative thinking in self and others. | Inside The Box - Innovation Competency  Model |
| Leadership<br><br>Foster a culture of individual and distributed leadership and accountability, building capacity for joint action grounded in shared intent and mutual trust. | Personal Leadership | |
| | Self awareness | |
| | Self care | |
| | Reflection and continued learning and self-improvement. | |
| | The ability to facilitate difficult conversations and resolve conflicts | ACH Competency Domains: Survey and Interview Report |
| | A good leader must be flexible, humble, empathetic and able to establish trust to bring together a diverse group of stakeholders, including non-traditional partners. | ACH Competency Domains: Survey and Interview Report |
| | Flexibility; the ability to deal with ambiguity | The Lotus: A Practice Guide for Authentic Leadership Toward Sustainability |
| | Distributed Leadership | |
| | Collaborative reflection | |

# COMPETENCY FRAMEWORK

| **Competency Domain** | **Competencies** ***(Knowledge, Skills and Abilities)*** | **Notes** ***Source/Citation*** |
|---|---|---|
| Leadership (cont.)<br><br>Foster a culture of individual and distributed leadership and accountability, building capacity for joint action grounded in shared intent and mutual trust. | Act as a steward of the ACH's mission:<br><br>Stewards acknowledged the importance of varied perspectives and the voices and experiences of local residents. They made representatives from their organization's local chapters part of their overall leadership structure, and provided support to build capacity for resident leadership.<br><br>Stewards are leaders (people and organizations) who take responsibility for forming working relationships with others to drive transformative change in regions. Stewards have (or are interested in developing) an equity organization in regard to purpose, power and wealth. | ReThink Health, A Rippel Initiative |
| | The ACH establishes mechanisms and practices of transparency to ensure accountability between partners and between the leadership team and the community. | CACHI Milestones and Competencies |
| | Create a succession plan to ensure that the ACH is prepared for leadership turnover by continually training successive leaders and partner-leaders and establishing a sustainable culture. | ACH Competency Domains: Survey and Interview Report |
| | Create leaders by intentionally building agency among partners. | |
| | Facilitating the process of exploring power dynamics and identifying interests across partners and through smoothing the edges | ACH Competency Domains: Survey and Interview Report |
| | Facilitate regular team reflection and learning opportunities. | |
| | Understand the systems at work and key policymakers which influence the ACH's work. This includes the identification of a diverse group of partners who understand budgetary decisions involved in public funding. | ACH Competency Domains: Survey and Interview Report |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes ***Source/Citation*** |
|---|---|---|
| Stewardship<br><br>Further the ACH's shared vision and goals, driving transformative change and advance equity using a collaborative governance approach to the development and management of ACH infrastructure. | Explains the structure, functions, financing, and governance of the organization. | Population Health Competencies, PHF, March 2019 |
| | Governance : having clear roles and responsibilities of leadership and community partners and those involved in the transformation work | Collective Impact Model |
| | Contributes to the development of a collaborative organizational strategic plan (e.g., incorporates community health improvement plan, contains measurable objectives and targets). | Population Health Competencies, PHF, March 2019 |
| | Ensure adequate staffing and expertise for ACH operations. | |
| | Manages ACH activities within current and projected budgets and staffing levels (e.g., sustaining a program when funding and staff are cut, recruiting and retaining staff, engaging volunteers). | Population Health Competencies, PHF, March 2019 |
| | Establishes written partnership agreements (e.g. MOUs, contracts, letters of endorsement) that describe the purpose and scope of partnerships. | Council on Linkages Between Academia and Public Health Practice, June 2014 |
| | Engages stakeholders in decisions around organizational priorities and changes. Support the establishment of relevant committees (e.g. design teams, performance management / data, strategy, communications, executive, and steering committees.) Activate and disband committees as ACH needs indicate. | |
| | Alignment of ACH priorities with a focus on community voice, sustainability and continuous improvement and reflection. | |
| | Convene diverse stakeholders to develop a governance structure that includes agreement on vision, goals, core values, and a process for identifying priorities & a POI. | |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Stewardship (cont.)<br><br>Further the ACH's shared vision and goals, driving transformative change and advance equity using a collaborative governance approach to the development and management of ACH infrastructure. | Implementation of ACH activities should be driven by the readiness of the leadership team, partners and the broader community when making decisions. | |
| | The backbone is responsible for guiding/facilitating/managing the systems in place to keep the ACH running. | |
| | Facilitate a process to identify the ACH's structures and priorities to guide operations.<br>▪ Toward developing POI (as lesson)<br>▪ Inputs include areas of expertise, community asset mapping, partner input, data | |
| | Develop clear goals and outcomes to drive ACH work | POI Toolkit |
| | Advocate for an aligned and equitable policy agenda that supports the ACH's overall goal at different levels of government (e.g. local, state and federal levels.) Advocate for an aligned policy agenda at both state and federal level. | Backbone Starter Guide, FSG<br><br>The Public Health National Center for Innovations, Foundational Public Health Services in Action, November 2018 |
| Sustained Operations and Impact<br><br>Establish and support mechanisms and systems for the continued operations of the ACH through shared motivation, strong partner relationships, transparency and capacity for joint action. Continually respond to changing conditions for maximum impact. | Build and nurture relationships based on trust and mutual respect between community and other partners. | |
| | Engage in ongoing capacity building and leadership development, building public will by empowering partners' contributions to furthering the ACH's mission. | |
| | Establish shared intent and the capacity for joint action across partners, leading to agreement on a set of values and goals driving the ACH work. | ReThink Health Community Activation |
| | Reflecting on previous work and learnings, continue to refine and innovate the ACH's operations. (The ACH becomes more sustainable as time goes on.) | An Integrative Framework for Collaborative Governance |

# COMPETENCY FRAMEWORK

| Competency Domain | Competencies *(Knowledge, Skills and Abilities)* | Notes *Source/Citation* |
|---|---|---|
| Systems Thinking & Approaches<br><br>Understand the relationships between the structures, patterns, and trends impacting the health of the community, and the root causes contributing to inequities. Identify and employ high-impact leverage points to create broad and lasting systems change. | Describes the interrelationships of factors and root causes affecting the health and wellbeing of a community at local, national and global levels (e.g., inequity, income, education, environment, demographic trends, legislation). | Population Health Competencies, PHF, March 2019 |
| | Explains ways organizations (e.g., hospitals, health departments, schools, businesses, libraries, faith-based organizations) can work together or individually to impact the health of a community. | Population Health Competencies, PHF, March 2019 |
| | Actively work toward moving to shared thinking and action through engagement with traditional and non-traditional partners. | ACH Competency Domains: Survey and Interview Report |
| | The ACH adopts a systems-change orientation to its work. Its practices reflect transformed norms, mindsets, and ways of working together. | CACHI Milestones and Competencies |
| | Regularly scan the policy landscape, maintaining an up-to-date understanding of policy priorities and current trends. | |
| | Understand and incorporate learnings from previous and existing collaboration structures within the community into current ACH work. | |
| | Identify the root causes contributing to inequities in your community. | |