ABLe Change Backbone Organization (BBO) Field Guide

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Introduction

This Backbone Organization (BBO) Field Guide is designed to help lead organizations and backbone staff facilitate and support the 8 step ABLe Change process for problem solving and systems change within their community.

ABLe Process		
Define	1	Define a Targeted Problem
	2	Determine System Boundaries
	3	Understand the Community System
	4	Adopt a Shared Agenda
Design	5	Design Powerful Strategies
Do	6	Promote Quick Wins
	7	Build a Climate for Effective Implementation
Learn	8	Learn for Continuous Improvement

Collaboratives can use the ABLe Change Process to pursue a series of collective impact outcomes in their community, including:

- Effective convening
- Shared vision & goals
- Engaged diverse perspectives
- Aligned systems
- Adaptive learning and improvement
- Equity pursuits

The guide provides in depth instructions, tools, tips, and case examples BBOs can use support their collaborative in using the ABLe Change process to pursue the collective impact outcomes. Make sure to have your ABLe Change Participant Manual available, as the guide references materials throughout the manual.

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Step 1: Define a Shared Vision or Targeted Problem

ABLe Process Road Map

The first step in in the ABLe Process is to define a **Shared Vision** of the changes the community wants to bring about for itself OR a **Targeted Problem** the community wants to solve.

The Shared Vision/Targeted Problem will inform all other steps in the ABLe process and will ultimately guide strategy design and action.

Step 1 in a Nutshell

WHAT: Stakeholders engage in a process to define a Shared Vision/Targeted Problem describing the population-level outcomes (e.g., obesity rates, homelessness), community conditions (e.g., access to high-quality and affordable food, housing, transit, etc.), and related inequities they want to change within the community. The collaborative uses the Shared Vision/Targeted Problem to guide all its activities, encourages local partner organizations to do the same, and builds public will to support sustainability.

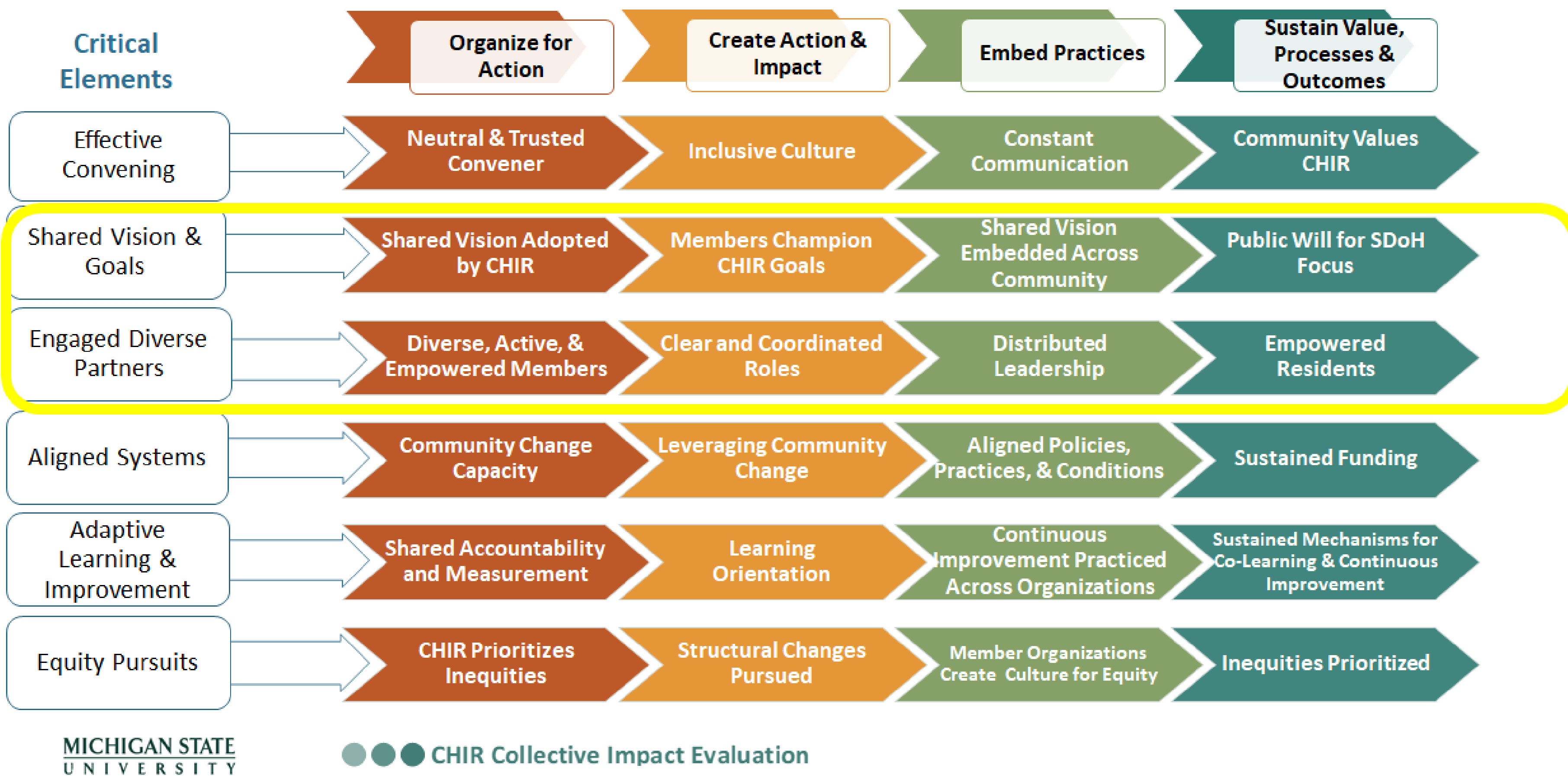
WHY: A Shared Vision provides direction for local efforts, inspires individuals to get engaged, and aligns the energies of diverse individuals and organizations around a common set of goals.[1,2]

Related ABLe Manual Pages: 49-101

Related section on MIcollaborative website

Which collective impact outcomes are related to this step?

Defining a Shared Vision will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess your collaborative's progress in defining a Shared Vision/Targeted Problem, and the key roles the BBO can play to support this process.

Step 1: Define a Shared Vision/Targeted Problem			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
Assess: To what extent has the collaborative engaged the community in defining a Shared Vision, including current inequities, to guide its efforts?	Assess: To what extent are collaborative members championing this Shared Vision to others in the community?	Assess: To what extent are local organizations and groups adopting the Shared Vision to guide their own efforts?	Assess: To what extent is the public becoming more aware and supportive of the Shared Vision goals?
BBO Role: Help the collaborative define a Shared Vision (p. 6)	BBO Role: Help collaborative members champion the Shared Vision (p. 13)	BBO Role: Help local organizations and groups adopt the Shared Vision (p. 17)	BBO Role: Help community build public will for Shared Vision goals (p. 21)

Critical BBO Roles to Organize for Action

Help the collaborative:

Define a Shared Vision

Overview

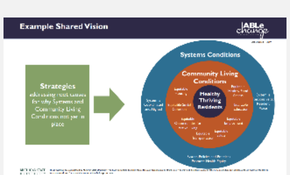
One of the most important steps in community change is engaging diverse stakeholders in **defining a Shared Vision or Targeted Problem.**[3] An effective Shared Vision/Targeted Problem describes:

- WHAT changes (e.g., to population-level outcomes, system conditions, social determinants of health) the community wants to bring about
- WHICH INEQUITIES are related to these goals
- WHY these goals are not yet in place (ABLe step 3)
- HOW desired changes can come about (ABLe step 4)

A Shared Vision/Targeted Problem can **help your community…**

Raise Critical Consciousness	A Shared Visioning process can increase people's critical consciousness about the conditions influencing local problems and inequities, and help them become more motivated to change these conditions.[4]
Develop Shared Outcomes	A Shared Vision can help communities develop shared outcomes and a shared measurement system (e.g., Shared Outcome Dashboard) to guide local change efforts and promote mutually accountability for the collective work.
Design and Align Diverse Strategies	A Shared Vision can help communities design and align a diverse range of strategies (across ecological layers) to address the root causes of local problems/inequities.
Promote Action	A Shared Visions can reduce ambiguity around what to take action on and clarify what roles people can take to support the change.[5]

NOTE: Some communities prefer to focus on a Targeted Problem because a "problem-solving" approach resonates best with stakeholders. Other communities prefer to define a Shared Vision because stakeholders prefer a positive goal-framed orientation to the work. Either approach can help your community pursue change. This chapter focuses on a Shared Vision process; you can adapt this into a Targeted Problem by flipping the language from positive to negative.



Want an example?
See the **Example Shared Vision** for an illustration

For talking points see ABLe Change Manual p. 51-65 and ABLe Equity Supplement p. 21-22.

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How the BBO Can Support this Activity

1. Facilitate a Shared Visioning process	2. Help the collaborative prioritize targeted in equities

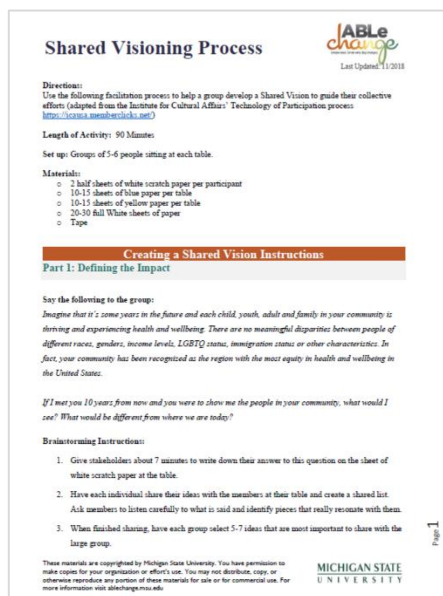
1. Facilitate a Shared Visioning process

Shared visioning is a process that starts with gathering the voices and perspectives of diverse stakeholders across the community - including local residents – about the changes they want to bring about, and continues developing over time with the additional perspectives, data, and emerging goals.

There are many ways to facilitate a shared visioning process. The process you design should fit the collaborative's needs and draw upon the types of group processes that typically work the best in the community. Consider the following to identify which process fits your situation:

- **Launch New Efforts**: Are you trying to launch a new initiative in the community?
  - If yes, design the Shared Visioning process to raise awareness of the initiative, identify shared goals, and create new relationships
- **Re-focus Existing Efforts**: Are you trying to re-focus existing efforts in the community?
  - If yes, design the Shared Visioning process to identify shared goals, align existing goals with these goals, and address barriers to collaboration

Refer to the **Shared Visioning Guide** for ideas and step by step instructions for how to facilitate this process in your community. You can adapt this process to fit local needs and context.



Shared Visioning Process

Last Updated: 11/2018

Directions:
Use the following facilitation process to help a group develop a Shared Vision to guide their collective efforts (adapted from the Institute for Cultural Affairs' Technology of Participation process https://icausa.memberclicks.net/)

Length of Activity: 90 Minutes

Set up: Groups of 5-6 people sitting at each table.

Materials:
- 2 half sheets of white scratch paper per participant
- 10-15 sheets of blue paper per table
- 10-15 sheets of yellow paper per table
- 20-30 full White sheets of paper
- Tape

Creating a Shared Vision Instructions

Part 1: Defining the Impact

Say the following to the group:
Imagine that it's some years in the future and each child, youth, adult and family in your community is thriving and experiencing health and wellbeing. There are no meaningful disparities between people of different races, genders, income levels, LGBTQ status, immigration status or other characteristics. In fact, your community has been recognized as the region with the most equity in health and wellbeing in the United States.

If I met you 10 years from now and you were to show me the people in your community, what would I see? What would be different from where we are today?

Brainstorming Instructions:
1. Give stakeholders about 7 minutes to write down their answer to this question on the sheet of white scratch paper at the table.
2. Have each individual share their ideas with the members at their table and create a shared list. Ask members to listen carefully to what is said and identify pieces that really resonate with them.
3. When finished sharing, have each group select 5-7 ideas that are most important to share with the large group.

Page 1

Check out the Shared Vision Video Series

These videos give ideas for how to plan and facilitate a Shared Visioning process.

TIP: show the first 2 videos listed below to your collaborative to build awareness and buy-in.

Video Series:
- What is a Shared Vision?
- Example Shared Vision
- How to Develop a Shared Vision

2. Help the collaborative prioritize targeted inequities

Inequities (i.e., differences in outcomes across groups) exist in every community, and chances are likely inequities exist related to the goals in your Shared Vision.

The following pages describe how to help your community identify and prioritize inequities related to their Shared Vision so they can be targeted for change, including how to:

- identify how to measure the Shared Vision outcomes
- gather disaggregated data
- use disaggregated data to prioritize inequities

NOTE: In later steps you will identify why local inequities are happening, as this is important to inform action.

Why pay attention to inequities?

If local inequities are not uncovered, understood, and addressed directly, your collaborative's strategies could unintentionally increase: [6,7]

- **inequities in access:** Adding program slots often benefits individuals with higher resources as they are better able to access those opportunities (e.g., they have transportation, knowledge of program, accommodating work schedules, money, etc.)
- **inequities in outcomes:** Some evidenced-based practices disproportionally benefit or exclude some types of residents over others – the spread of these practices could lead to greater disparities in outcomes.

Identify how to measure the Shared Vision outcomes

Your community's Shared Vision will most likely include population-level outcomes related to health and wellbeing, such as babies born healthy, employment, or homelessness**.** Help local stakeholders determine which "indicators" (i.e., specific and observable markers of change) they want to use to measure these outcomes. They can then use data on these indicators to identify local inequities.

How do you find potential indicators to measure your Shared Vision outcomes?
There are many ways to measure any given outcome. Take for example the outcome "babies born healthy." Think of all the ways you could measure whether babies are born healthy. Potential indicators could include the rates of: low birthweights, premature births, births to drug addicted mothers, etc.

To identify potential indicators for your Shared Vision outcomes, ask community partners the question: What data do you use to track (insert Shared Vision outcome)?

You can also help your collaborative look at recent research articles, evaluations, or reports to learn about the best ways to measure and understand these outcomes. Check out the set of Common Databases to the right for ideas.

Check out these **Common Databases** to find example indicators that could be used for your Shared Vision

Gather Disaggregated Data

After identifying indicators for your Shared Vision outcomes, help the collaborative gather disaggregated data (e.g., broken out by different demographic categories) on these indicators to more fully understand local needs in your community, and prioritize local inequities to address with your efforts.

For ideas on how to **locate effective data sources** see ABLe Change Manual p. 38-39

Example disaggregating categories

Consider these demographic categories as you figure out which groups in your community are experiencing inequities relevant to your work:

- ☐ Age
- ☐ Race/Ethnicity
- ☐ Gender/Gender Identity
- ☐ Sexual Orientation
- ☐ Religion
- ☐ Education Level
- ☐ Household Composition
- ☐ Geographic Area/Neighborhood
- ☐ English Language Proficiency
- ☐ National Origin
- ☐ Documentation Status
- ☐ Disability Status
- ☐ Employment Status
- ☐ Income
- ☐ Connection to Services/Supports
- ☐ Other

If the data has not been disaggregated, reach out to partners or sources to see if it is possible to supply the disaggregated data – often this data is available but simply not reported.

TIP: Pay attention to inequities affecting people at the intersection of multiple demographic groups – such as Latinx teenage moms or African American men with felony records. See ABLe Manual page 44 for more details.

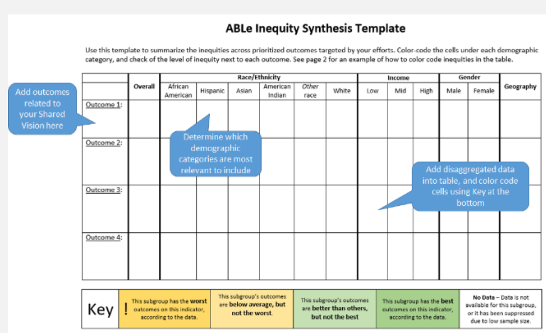
TIP: Try to find maps showing disaggregated data in your community, as many stakeholders find these maps extremely helpful to understand and visualize local inequities. See ABLe Manual page 45 for more details.

See the Finding Data on Local Inequities tool to help identify demographic categories to focus on in your disaggregated data

How can you summarize disaggregated data?

Summarize your disaggregated data into an easy to use format to help stakeholders understand local needs and inequities. This is especially important given most stakeholders lack experience in looking at disaggregated data and can become easily overwhelmed in these processes.

There are many ways to summarize data. See the **Inequity Synthesis Template** an example.



Use Disaggregated Data to Prioritize Inequities

Help stakeholders explore disaggregated data to identify which groups are experiencing the worst outcomes compared to other groups over time. These differences represent inequities that can be targeted in your efforts.

Example Inequity Synthesis

Outcomes	Overall	Race/Ethnicity						Age			Geography
		African American	Hispanic	Asian	American Indian	More than one race	White	0-34	35-64	65+	
Overcrowded Housing Households with more than 1.01 people per room. *Source: American Communities Survey, 2012-2016 combined estimate.*	2% (N=1,322)	! 4.2% (N=346)	! 5% (N=104)				1.6% (N=858)	! 4.3% (N=483)	2.2% (N=806)	0.2% (N=33)	! Creekside: 4.4% (N=45) Northview: 4.3% (N=35) West End: 4% (N=167) .... Southfield: 0.98% (N=32) Lakeview: 0.4% (N=12)
Homelessness Includes individuals who are 'Literally Homeless' and/or living with friends or family due to a housing crisis and facing immediate eviction with no other resources. *Source: HMIS Data, 2016.*	1% (N=2,057)	! 5.1% (N=1,211)			2.1% (N=27)		0.5% (N=813)	! 1.7% (N=1,327)	1.1% (N=731)	0.1% (N=29)	! Creekside – 10% (N=89) West End – 6% (N=119) .... Southfield – 2% (N=74) Lakeview – 1% (N=27)

Key				
! This subgroup has the **worst** outcomes on this indicator, according to the data.	This subgroup's outcomes are **below average, but not the worst.**	This subgroup's outcomes are **better than others, but not the best**	This subgroup has the **best** outcomes on this indicator, according to the data.	**No Data** – Data is not available for this subgroup, or it has been suppressed due to low sample size.

If you use the inequity synthesis template described on the previous page, stakeholders can easily see which demographic groups are experiencing worst outcomes compared to others by looking at the different color codes (yellow shows worst outcomes, green shows best outcomes - see key at the bottom of the table for more details). For example, stakeholders can look:

- **across the rows** of the table to see which groups are experiencing the worst outcomes for any given outcome
- **down the columns** of the table to find groups that are experiencing the greatest inequities across *multiple* outcomes.

Example Facilitation Questions

Use these facilitation questions to help stakeholders to use disaggregated data to prioritize inequities.

REFLECTION

Use the following questions to help people reflect on disaggregated data:

- Which outcomes/indicators show the greatest need across groups in the community?
- Which groups are experiencing inequities related to these outcomes/indicators?
- Which groups are disproportionally disadvantaged? Which groups are more advantaged?

PRIORITIZING

Use the following questions to help people prioritize inequities to target for change:

- Given the data, what outcomes/indicators should be targeted for change given local needs and inequities?
- Which groups should we prioritize in our efforts because they are experiencing the greatest inequities related to these outcomes/indicators?
- By tackling these outcomes/indicators, to what extent will we make progress in creating a more just and equitable community?

Example Shared Vision Elements

The following summarize typical elements of a Shared Vision. Work with your collaborative to adapt this template to fit your local needs and context.

<table>
<tr><td>Impact
The population-level outcome you ultimately want to bring about for the community

Example: Health Equity</td><td rowspan="3">Identified through the Shared Visioning process</td></tr>
<tr><td>Early Wins
The population-level outcomes that show you are on track to reach the Impact

Examples: healthy eating behaviors, physical activity, employment, homelessness, etc.</td></tr>
<tr><td>Community System Conditions
What needs to be put in place within the community to bring about the Early Wins and Impact.

Examples: Social Determinant of Health conditions (e.g., access to affordable housing, transportation, livable wage jobs, etc.), or Community System Conditions (e.g., Coordination, System responsiveness to resident voice, etc.)</td></tr>
<tr><td>Root Causes
The systemic reasons why the Conditions are not yet in place within the community.

Examples: policies, practices, mindsets, resources, connections, power dynamics, locations and times of local services, etc.</td><td>Identified through the System Scanning process (see page 53-61)</td></tr>
<tr><td>Strategies
Efforts to address the root causes and bring about the Conditions, Early Wins, and Impact.

Example: Simplify application protocols and processes to make it easier for people to get the services and supports they need.</td><td>Developed through the Powerful Strategy Design Process (see page 92-114)</td></tr>
</table>

Recommendations for Success:

- **Engage diverse perspectives** – especially local disadvantaged residents - in both developing the Shared Vision and also in looking at disaggregated data to identify and prioritize inequities to target for change. Collective action is more likely to occur when diverse stakeholders are engaged in developing the Shared Vision.

- **Take advantage of existing meetings** to engage people in the Shared Visioning process. You may need to facilitate the process in several different settings to make sure it's accessible to different types of stakeholders (e.g., residents), and/or facilitate the process over the course of a few meetings.

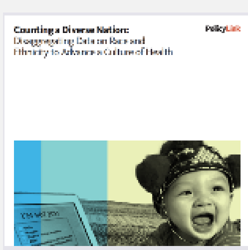
- **Engage an evaluator or data expert** to help with finding and analyzing disaggregated data if you need additional technical assistance.

Key Considerations for your Community:

- What Shared Visioning process makes the most sense for your community given local needs and context? Given this, who are the most critical stakeholders to include?

- How can you make it easy for diverse stakeholders to attend and authentically engage in your Shared Visioning and data prioritizing process? (e.g., provide transportation and childcare supports, translation services, meet and accessible time and locations, etc.)

Additional Resources



Counting a Diverse Nation: Disaggregating Data on Race and Ethnicity to Advance a Culture of Health
Recommendations for how to find, use, and promote disaggregated data

By the Numbers: A Race for Results
Case study on why the collection, analysis and use of race and ethnicity data should be an integral part of any strategy, initiative or legislative agenda affecting children, families and communities.

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Critical BBO Roles to Create Action and Impact

Help the collaborative:

Champion the Shared Vision

Overview

Once the Shared Vision has been developed, help your collaborative build local buy-in around the Shared Vision goals. This involves helping individuals see the value of a focus on health, understand how community conditions (social determinants of health) influence health, and understand the role they can play in promoting health.

How the BBO Can Support this Activity

1. Build awareness and support for Shared Vision
2. Gather additional perspectives to inform Shared Vision

1. Build awareness and support for Shared Vision

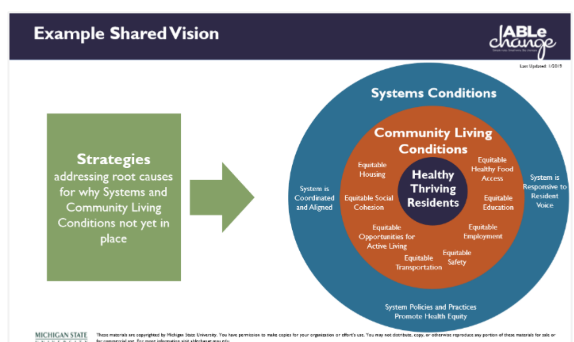
ABLe Manual Pages 196-205

Help collaborative members serve as local champions to build awareness and support for the Shared Vision in the community. Consider the following ideas.

Create a Visual Summary of Shared Vision

Summarize the Shared Vision into a visual to help people quickly understand prioritized goals and inequities. These visuals can take many different forms – consider what types of visuals are most successful and resonating in your community.

Talk with other regional collaboratives to see how they have visually summarized their Shared Vision. You can also consider the following example visual shown to the right to guide your design.



Prepare Shared Vision Talking Points


Shared Vision Talking Points

Use these talking points to talk with others about your community's Shared Vision.

What is a shared vision and why is it important?

A shared vision supports local change by bringing stakeholders together to clarify WHAT changes we want to see in the community and HOW these changes will come about.

Shared Visions:
- Help us come up with SHARED OUTCOMES to guide our work
- Trigger the design of MULTIPLE STRATEGIES to transform our community
- Motivate people and organizations for COLLECTIVE ACTION
- Raise up the PERSPECTIVES of individuals experiencing inequities

Here is how we got started creating shared vision for our community:

A group of [#] people from local organizations and groups came together to develop a Shared Vision around a healthy community.

We envisioned a future scenario where each child, youth, adult, and family in our community is thriving. There are no meaningful differences in health and wellbeing between people of different races, genders, income levels, LGBTQ status, immigration status or other characteristics.

Then we identified what we would see different across people, organizations, environments, and systems that would bring about this new reality. Here are some of the things we identified:

[Ask your backbone organization for a summary of the shared vision notes]

What do you think about this vision? Do you see anything missing we should add?

Then, we used local data to figure out which groups in our community are experiencing the worst outcomes related to the Shared Vision goals. After looking at this data, we prioritized the following groups to target in our efforts:

[Ask your backbone organization for summary of prioritized groups]

Help foster action!

How could your organization support the goals in our Shared Vision?

For example, how could your organization:
- Design your programs, strategies, grants, or strategic plans to target multiple Shared Vision goals?
- Ask your staff/colleagues, community partners, and most importantly residents from prioritized groups who are touched by your efforts about barriers to the Shared Vision goals?
- Talk with others about the Shared Vision and why it's important?
- Help us engage other local organizations and groups who help support the Shared Vision?

One of the main roles of a Champion is to talk about the Shared Vision. Unfortunately, some people struggle to know what to say.

You can help support Champions by creating talking points champions can use to describe what the Shared Vision is, why it's important, and how it was developed.

Draw on the example **Shared Vision Talking Points** to help craft these materials.

Prepare General Talking Points about Social Determinants of Health

Chances are likely your Shared Vision will include goals related to local Social Determinants of Health (SDOH - e.g., living wage jobs, affordable housing, quality learning environments, etc.).

Many people in the community may not be familiar with the SDOHs and why they are important, and this could create a barriers for building buy-in for your Shared Vision.

One way the BBO can help is to create some additional talking points collaborative members can use to help champion the SDOH goals within the Shared Vision. See the RWJF article to the right for specific ideas on how to craft these messages.

A New Way to Talk about the Social Determinants of Health
This RWJF report includes ideas on how to craft resonating messages about the social determinants of health.

Natural Causes Website – Expert Forum
The following provides ideas on how experts dispel powerful myths to reframe the conversation about the importance of social determinants of health.

Ideas for HOW to communicate talking points with others

Encourage collaborative members to use the talking points with colleagues and community members to promote buy-in and excitement. Consider the following types of communication opportunities:

Upcoming Meetings	Ask for a few minutes on an upcoming meeting agenda to use the talking points. Consider staff meetings, committees, or meetings with senior management.
Informal Conversations	Bring up talking points during conversations with colleagues, clients, community members, or other stakeholders who could play a role in promoting the Shared Vision.
Upcoming Events	Consider upcoming events or local gatherings within the community, particularly those hosted/attended by key local influencers.
Social Media	Use social media to share messages with peers, colleagues, and community members. (e.g., Twitter account, Facebook page, write short blog posts, etc.)
Communications	Consider how your organization could add information to its website supporting the Shared Vision, or include this information in bulletins, newsletters, posters, or mailings.

2. Gather additional perspectives to inform Shared Vision

Build further support for the Shared Vision by asking stakeholders who weren't part of the initial Shared Visioning process for their feedback and ideas. This can happen naturally while collaborative members or BBO staff are having conversations about the Shared Vision in the community.

As collaborative and BBO members gather ideas and feedback from these additional stakeholders, incorporate this information into the Shared Vision summary. Then provide opportunities for these additional stakeholders to support the Shared Vision (see next section for details).

Example Conversation Guide

- INTRODUCTION: Local organizations and community members recently worked together to create a Shared Vision (refer to Shared Vision talking points, see page 14 for more details). Here is what we came up with (refer to Shared Vision visual, see page 13 for more details).
- FEEDBACK: What are your thoughts on this Shared Vision? Do these goals represent the most important changes we need to make to improve health and wellbeing in this community?
- ADDITIONAL IDEAS: Are there any additional community system change goals that are missing from the Shared Vision?

Recommendations for Success

- **Strategically engage powerful champions** to help raise awareness and support about the Shared Vision in the community. Focus on recruiting collaborative members who are highly respected by their peers and colleagues and who have excellent communication skills.
- **Co-design talking points** with local stakeholders to make sure they resonate with different audiences and will be easy for people to use during community conversations.

Key Considerations for your Community:

- What Shared Vision messages and visuals will resonate most in your community?
- What are best ways to get these messages out in your community?
- Who are local champions who could help build awareness and buy-in around the Shared Vision?

Critical BBO Roles to Embed New Practices In Community

Help organizations and groups:

Adopt the Shared Vision goals

Overview

BBOs can support efforts to help local organizations and groups integrate the Shared Vision goals into their own efforts, and promote a Health in All Policies approach within the community.

How BBOs Can Support this Activity

1. Help organizations pursue and support Shared Vision goals	2. Promote Health (Equity) in All Policies approaches

1. Help organizations pursue and support Shared Vision goals

Encourage collaborative and BBO members to talk with local organizations about how they could support and pursue the Shared Vision goals in their work. This can naturally happen at the end of the conversations described in the section above (page 15).

Example Conversation Guide

- **Locate current goals:** Review the organization's current efforts (e.g., strategic plan, action plan, etc.). Ask, "Do you see any of your organization's current goals represented in the Shared Vision?" Use this conversation to help build their buy-in for the Shared Vision.
- **Identify additional goals.** Ask, "Are there opportunities for your organization to simultaneously address any *other* Shared Vision goals?" Focus on system and community goals.
  - EX**:** if org is focused on housing, ask: "how could your efforts to improve people's access to affordable housing simultaneously build their social relationships and engagement?"
- **Screen and refer**: Ask, "How could your organization help to screen clients for multiple basic needs (e.g., related to social determinants of health goals) and refer to local supports?"
- **Partner:** Ask, "How could you connect with other organizations addressing Shared Vision goals to share relevant information, co-locate staff, and pursue joint funding opportunities? How could the BBO support you in these roles?"

Help organizations build staff awareness and support for Shared Vision

In addition to pursuing Shared Vision goals within their efforts, organizations can also play a critical role by building staff members' awareness and support for the Shared Vision.

One of the ways BBOs can support these efforts is by compiling materials organizations can use to help build their staff members' capacity and support. Consider how you may need to tailor these materials to the needs and context of different sectors (e.g., business, education, health, local government, etc.).

Example capacity-building materials:

- **Tailored talking points** using language that resonates with the organization's sector
- **Shared Vision visual highlighting relevant goals,** for example, by circling or color-coding relevant outcomes and community system condition goals.
- **Conversation guides** organizational leaders can use to talk with staff (e.g., during staff meetings or annual staff reviews) about their ideas for how the organization can pursue the Shared Vision

See the following **MIcollaborative.org website pages** for example materials.

Align efforts across organizations

Another key role a BBO can play is to align and coordinate local organizations' efforts to pursue the Shared Vision and build their staff members' awareness and support.

Start by keeping track of local organizations' efforts related to the Shared Vision in a table (see below for example). Then, look down the columns of this table to identify similar efforts across organizations. As a BBO, talk about how you can help coordinate efforts across these organizations, for example by helping them share information, co-design strategies, co-locate staff, and pursue joint funding.

Example Tracking Table		
Organization Name	How is organization pursuing the Shared Vision goals? (e.g. specific actions, strategies, supports)	How is organization building staff awareness and support of Shared Vision? (e.g. specific communication, education, awareness activities)

2. Promote the Health (Equity) in All Policies approach

Health (Equity) in All Policies (HiAP) helps decision-makers across multiple sectors and levels of government embed a focus on health equity into their decision-making about policies, processes, resource allocations, and programs.[8]

There is a growing recognition that health is mainly impacted by sectors outside of healthcare and public health fields.[9] By infusing a health focus into cross-sector policy decision and resource allocations, the HiAP approach:[8]

- Creates a shared value for health in the community
- Brings together cross-sector efforts to collectively address community conditions affecting health
- Reduces the unintended consequences emerging from traditionally siloed projects (e.g., duplication of services, lack of coordination).

This can lead to better outcomes, as well as greater financial savings for partners and the community.[10]

See **ABLe Change Manual p. 207** for an example of what Health in All Policies looks like in practice

See **ABLe Change Manual p. 208** for additional resources, case studies, and tools

What role can the BBO play?

Consider the following ways the BBO can support the community in adopting a Health (Equity) in All Policies approach.

Raise Awareness

- Raise local stakeholders awareness of the HIAP approach during collaborative and other community meetings. Draw on the materials referenced above.
- Help people understand specific roles they can take to support this approach

Identify Champions

- Identify individuals and organizations within the collaborative who are interested in promoting the HIAP approach locally
- Convene these individuals into a task force to identify next steps

Create a Community of Practice

- Keep track of which organizations are engaging in this approach
- Help these organizations create a community of practice where they can share information, resources, and ideas on how to use the HIAP in practice

Recommendations for Success

- **Gather organization's input on Shared Vision** (see page 15) before talking with them about opportunities to pursue the Shared Vision goals. This will leave space to build needed buy-in.
- **Customize materials and examples** to resonate with organizations across different sectors (e.g., housing, education, healthcare, economic development) and characteristics (e.g., government, non-profit, business, grassroots efforts).
- **Recruit** new organizations to help talk with others in their networks about opportunities to pursue and support the Shared Vision.

Key Considerations for your Community:

- Who are some of the critical organizations and local stakeholders who could help pursue the Shared Vision goals?
- Who within the collaborative and BBO is best positioned to help facilitate these conversations?
- Who in the BBO can help with coordinating local organization's efforts to pursue the Shared Vision goals?

Critical BBO Roles to Promote Sustainability

Help the Community:

Build public will for Shared Vision goals

Overview

Public will happens when people not only understand the Shared Vision goals and why they are important, but are willing to take action to support it.[11] Public will can enhance the sustainability of change by helping to create new community expectations that influence how people think and behave.[12]

How the BBO Can Support this Activity

The BBO can play a critical role in promoting public will around the Shared Vision goals and values related to equity in health and wellbeing. This includes:

- **Framing a message** about the Shared Vision that resonate with different audiences and connects to their existing values
- **Engaging local champions** (e.g., faith-based leaders, business leaders, activists, local celebrities, and other opinion leaders) in grassroots outreach to spread awareness and buy-in around the Shared Vision
- **Aligning local news and social media** to reinforce messages

The following sources provide step-by-step guidance and recommendations on how to build public will in your community. BBOs can develop action plans to carry out these public will-building activities and use the learning and continuous improvement process (see chapter 8) to ensure efforts are successful.

Building Public Will
Describes a five phase communication approach for building public will and promoting sustainable change. *Source: Metropolitan Group*

Gaining Public Support for Addressing Community Health and Development Issues
Tips and recommendations for how to gain public support for addressing community conditions impacting health. *Source: Community Tool Box*

Recommendations for Success:

- **Talk with community members** to find out which local champions and news and social media sources are most popular and influential, and the best ways to communicate through these sources.

- **Gather rapid feedback** to see how public will building efforts are working so you can adapt to emerging opportunities and barriers.

Key Considerations for your Community:

- Who in the collaborative or BBO is best positioned to talk with local champions to explore opportunities to build public will for the Shared Vision?

- Who in the collaborative or BBO is best positioned to talk with local news media sources to explore opportunities to build public will for the Shared Vision?

- Who in the collaborative and BBO can help with gathering rapid feedback on the public will building efforts? What process can you put in place to use this feedback to inform decision-making?

Define a Shared Vision or Targeted Problem Checklist

Organize Action

- ☐ Collaborative has **engaged diverse community stakeholders** (e.g., leaders, staff, disadvantaged residents, community leaders, etc.) in **developing a Shared Vision**
- ☐ Collaborative has engaged these diverse stakeholders in helping to **prioritize inequities** to target for change related to the Shared Vision

Create Action and Impact

- ☐ Collaborative is engaging in **building awareness and support** for Shared Vision in the community
- ☐ Collaborative is engaging in **gathering input** from additional perspectives not engaged in initial visioning process to inform Shared Vision

Embed new Practices in the Community

- ☐ BBO has process in place to work with local organizations and groups to **identify opportunities and next steps to pursue the Shared Vision goals**
- ☐ BBO has process in place to work with local organizations and groups to identify opportunities and next steps to **build staff awareness and support for Shared Vision goals**
- ☐ BBO has process in place to **coordinate the efforts** of these organizations/groups (see page 17)

Promote Sustainability

- ☐ BBO has process in place to **build public will** for the Shared Vision goals.

Step 2:
Determine System Boundaries

ABLe Process Road Map

Once your collaborative has defined their Targeted Problem or Shared Vision, help them **determine system boundaries** around who and what to focus on with their efforts and who to engage as partners in the work.

The collaborative can then engage these partners in helping to understand the community system conditions affecting their goals to inform strategy design and action.

Step 2 in a Nutshell

WHAT: The collaborative identifies which local perspectives are needed to help understand and address their Shared Vision goals. Stakeholders representing these perspectives are then engaged to help the collaborative decide what to focus on with their efforts and to move to action.

WHY: Some systems thinkers say that collectively determining system boundaries around a Targeted Problem or Shared Vision can be one of the most transformative processes within a change effort.[13,3] This is because these boundaries determine:

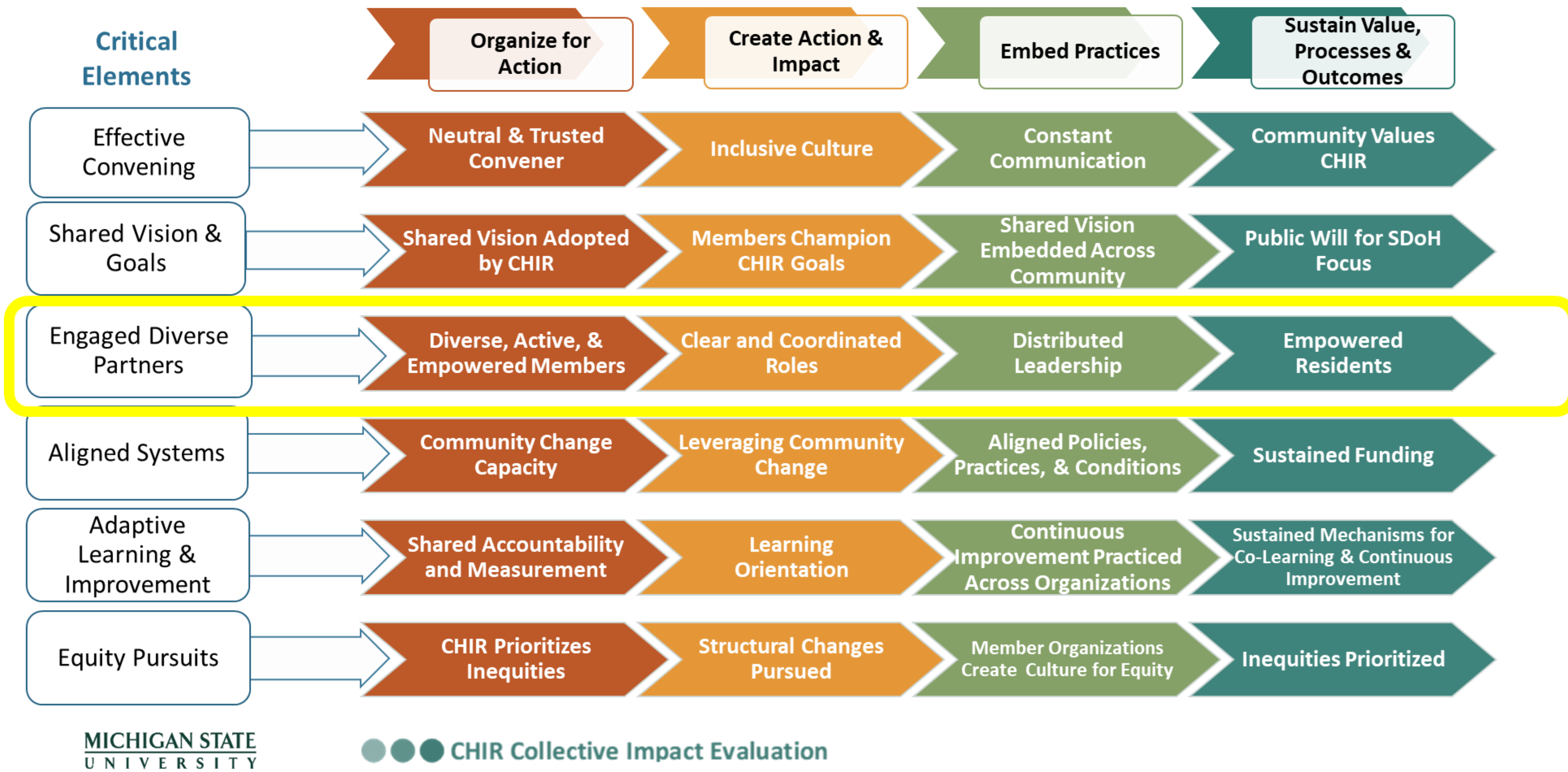
- which groups of people, neighborhoods, and systems will (and will not) benefit from the collaborative's efforts
- what resources will be available to support change
- which voices have (and don't have) a role in the effort's ongoing learning and action

Related ABLe Manual Pages:
49-101

Related section on MICHIR website

Which collective impact outcomes are related to this step?

Determining system boundaries will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are the most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess where your collaborative and community is related to determining system boundaries, and the key roles the BBO can play to support this process.

Step 2: Determine System Boundaries			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
Assess: To what extent has the collaborative prioritized additional stakeholder perspectives to start engaging to support their efforts, including local residents? BBO Role: Help the collaborative identify relevant perspectives to engage (p. 27)	Assess: To what extent has the collaborative determined roles for these stakeholders, and the best engagement methods for your community? BBO Role: Help the collaborative determine engagement roles and methods (p. 34)	Assess: To what extent are local organizations and groups taking leadership roles to carry out action around the shared vision goals? BBO Role: Help local organizations and groups initiate and carry out action (p. 41)	Assess: To what extent are residents mobilizing for action and influencing decision-making related to the shared vision goals? BBO Role: Help the Community put conditions in place to support residents mobilize for action and gain influence over local decision-making? (p. 43)

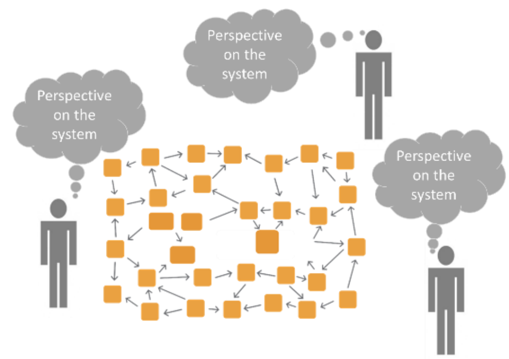
BBO Roles to Organize for Action

Help the collaborative:

Identify Relevant Perspectives to Engage

Overview

Help the collaborative consider a range of diverse perspectives they could engage to help understand and address their Shared Vision goals.



Why? It takes many different perspectives to understand complex problems like health equity.[14] A nonprofit agency leader might see things differently than a direct service provider or a local resident. Engaging these different perspectives can lead to a better understanding of local needs and more effective solutions.

How the BBO Can Support this Activity

1. Build the collaborative's readiness	2. Help the collaborative brainstorm perspectives	3. Support a prioritizing process

1. Build the collaborative's readiness

Some collaborative members may not have a lot of experience engaging diverse perspectives in their work – especially local residents experiencing targeted problems or inequities. Help build their readiness to expand the boundaries around who they typically engage by using **motivating talking points** and **resonating stories**.

Use Motivating Talking Points

Draw on the following talking points to help collaborative members see engaging diverse perspectives as necessary, beneficial, and feasible – research shows these areas are critical for building readiness.[15]

Example Talking Points

Now that we have defined our Shared Vision/Targeted Problem, we need to decide who to engage to help us pursue these goals.

Some of the most successful change efforts around the world engage a wide range of different perspectives in their efforts. Why?

Because…

- *Changing things like [add in your collaborative's targeted problem/vision area – e.g., health inequities] is complex work – these issues have many different causes that are impossible to understand from one perspective.*

  For example - leaders of large organizations often have different perspectives than local residents experiencing health inequities. Both perspectives are essential for tackling complex problems.

Engaging diverse perspectives is **necessary**

- *Engaging diverse perspectives can not only give us a better understanding of local community needs, but they can also contribute to more effective solutions – including how to make our existing efforts more effective.*

Engaging diverse perspectives is **beneficial**

- *Plus – we have access to tons of tools communities all over the world - are using to engage diverse perspectives in their work effectively.*
  We also have access to a network of other collaboratives who have been engaging diverse perspectives in their efforts over the years – we can reach out to these groups for ideas, tips, and lessons learned.

Engaging diverse perspectives is **feasible**

Need more ideas for talking points?
See Able Change Manual pages 51-65 and ABLe Equity Supplement pages 21-22.

Share Resonating Stories

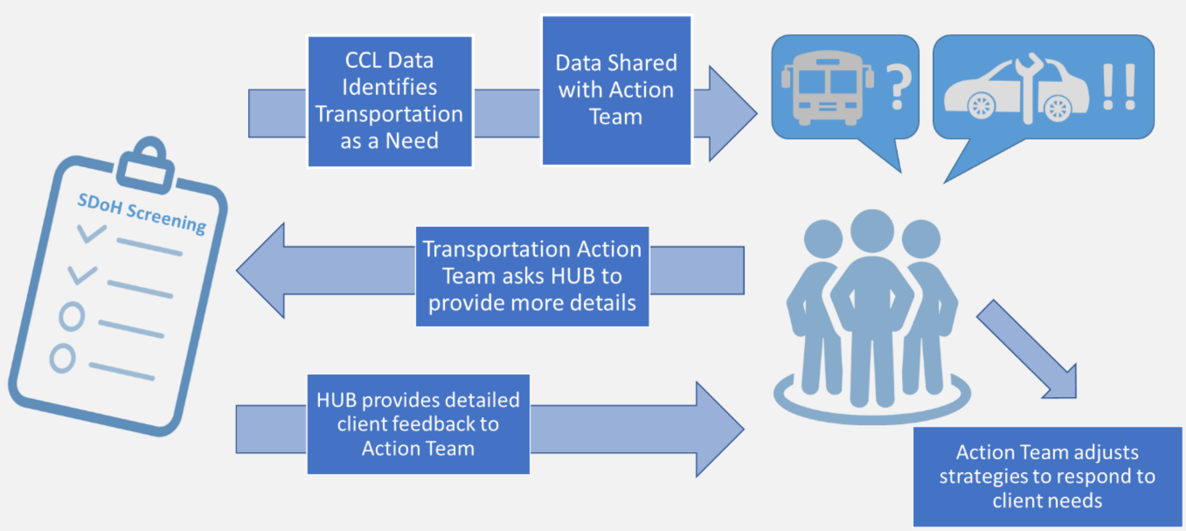
Share an example story – or have others in the collaborative share stories from their personal experience – about the benefits of engaging diverse perspectives in the work.

Example Story

A collaborative working within a very rural region identified a transportation problem where individuals were unable to get to needed services. Initially, one of the collaborative's action teams started working on and promoting public transportation as the solution.

However, the regional Community Clinical Linkages HUB gathered feedback from local residents that suggested the problem was not with public transport, but with people's cars breaking down.

This new feedback loop provided new information, which allowed the collaborative to think about the problem differently and create a solution that was more responsive to the needs within their unique region. Now, the collaborative is focusing on helping people get their cars fixed.



1

2. Help the collaborative brainstorm needed perspectives

After building their readiness, develop a process to help the collaborative brainstorm which diverse perspectives should be engaged to support their work. Consider asking a question like:

> *What perspectives are needed to help us fully understand and address what's getting in the way of our Shared Vision goals?*

Identifying Relevant Perspectives tool

Some groups find the following categories helpful to brainstorm perspectives:

Experiencing *the problem*	• Residents directly experiencing the targeted problem/inequity
Providing *services*	• Public and private service providers addressing the targeted problem/inequity
Supporting *at the local level*	• Stakeholders involved in resident-led, faith-based, and neighborhood organizations and local businesses • Individuals delivering informal supports
Deciding *on changes and how resources are used*	• Local institutions and local organizational leaders • Local officials • Funders

Brainstorming Tips

Some groups find it helpful to brainstorm perspective groups around the different Social Determinants of Health categories, as these are often tied to their Shared Vision or Targeted Problem.

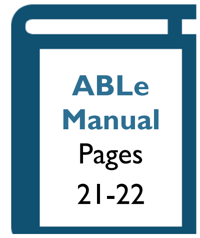
Also, consider different horizontal departments or sub-units within these sectors.

Adapted from Health People 2020

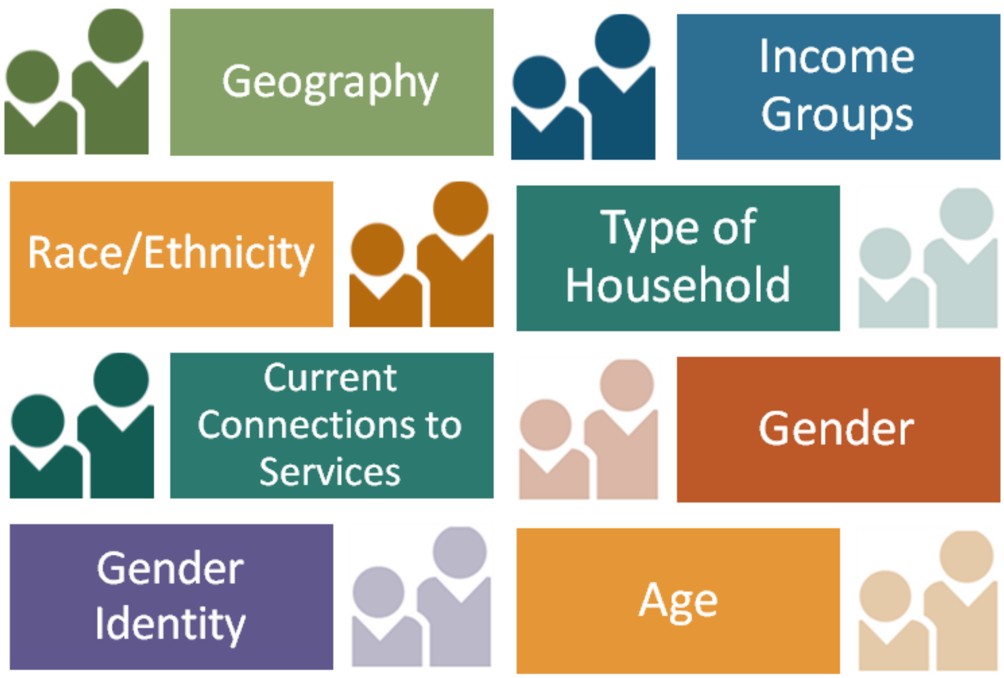
Remember!

Change efforts **most often exclude local residents from their efforts** – especially residents experiencing inequities. Excluding this perspective can:

- further marginalize these residents
- lead to outcomes that do not address the problem
- worsen or create additional inequities[16]



Help your collaborative consider this critical perspective by brainstorming which resident groups are most relevant to engage for your Shared Vision or Targeted Problem. Some collaboratives find the following categories helpful:



Tip: Use facilitation techniques to enhance brainstorming

Consider a variety of facilitation techniques to help the collaborative brainstorm relevant perspectives including:

- elbow partners
- small groups
- send out survey in advance
- many more!

3. Help collaborative prioritize perspectives to start engaging

Have the collaborative review their brainstormed list of perspectives and identify who they are currently engaging, and who is currently excluded. Help them prioritize which excluded perspectives they want to start engaging. Consider using the following facilitation questions:

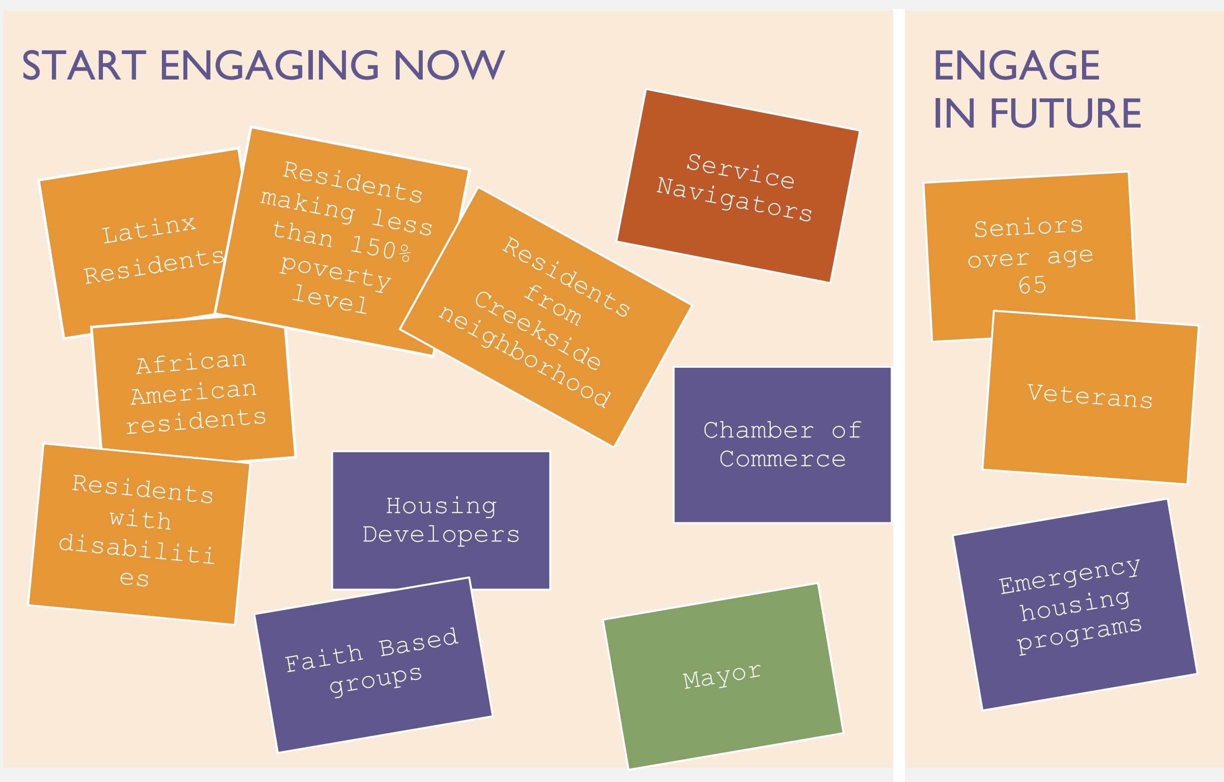
Of these perspectives you brainstormed…

- *Who is currently involved in our efforts? Who is currently excluded?*
- *What are the consequences if we don't consider these perspectives? Will our efforts succeed without them?*
- *What additional perspectives do we need to start engaging to help us pursue our goals?*

Case Example

A collaborative had a goal of decreasing the percentage of people needing to spend more than 30% of their income on housing. They brainstormed a list of perspectives that could help them understand and address this housing goal using the 4 perspective categories (see page 7).

The collaborative identified which of these perspectives were currently engaged in their efforts, and which were excluded. They reflected on the consequences of this for their work, and prioritized which new perspectives to start engaging in their efforts.



Recommendations for Success:

- **Allocate enough time.** Set aside enough time for collaborative members to thoughtfully go through a brainstorming and prioritizing process.
- **Get the right collaborative members involved.** Ensure the right collaborative members are part of this conversation. We recommend including more than just the steering committee.
- **Leverage champions.** Identify several champions within the collaborative who can support the purpose and value of engaging diverse perspectives in the work.

Key Considerations for your Community:

- Who are the most important collaborative members to include in this process?
- Are there any upcoming meetings where this process could take place? How else can you engage collaborative members in this process outside of traditional meetings (e.g., using technology, etc.)?
- What prioritizing processes does the collaborative typically use to make decisions? How can you draw on these processes as they prioritize perspectives to engage?

Critical BBO Roles to Create Action and Impact

Help the collaborative:

Determine Engagement Roles and Methods

Overview

Once the collaborative has determined **who** to start engaging, help them determine **how** to engage these perspectives. This includes deciding what roles stakeholders will play in the initiative, and what engagement methods are the best fit for the community. Determining these roles and methods can help the collaborative more effectively engage local stakeholders in their efforts.[14]

How the BBO Can Support this Activity

1. Help Collaborative determine engagement roles	2. Help Collaborative identify engagement methods

1. Help collaborative determine engagement roles

Help your collaborative determine engagement roles for their prioritized stakeholders. Stakeholders can play a variety of roles in the collaborative's change efforts including:

- providing input (e.g., on community conditions, strategy ideas, etc.)
- influencing decision-making within the collaborative (e.g., set priorities)
- taking action to pursue the Shared Vision goals

ABLe Manual Pages 66-67

Example Facilitation Questions

- What roles do residents and other community stakeholders *(e.g., non-profit organizations, direct service providers, grassroots efforts)* currently play as part of the collaborative's efforts?
- What additional roles could these groups play to help support the success of our efforts?

Remember!
Collaboratives often only engage residents in providing their input instead of also engaging them in influencing decisions and taking action. Without expanding to these other, more powerful roles, your collaborative could create a climate of dependency, reduce resident agency, and limit outcomes.

2. Help the collaborative determine engagement methods

Help the collaborative determine which engagement methods given these roles and your local community context. The following are some ideas you could bring into this conversation to help your collaborative's decision-making.

ABLe Manual Pages 80-90

Example Engagement Methods for Residents

Providing Input (e.g., on local community conditions, strategy ideas, implementation progress, etc.) to inform design and implementation decisions

Existing Interactions: Have individuals who have direct or natural interactions with your priority residents ask one or two questions with each client/family they touch. You can vary the questions every few months. Create an easy way for these individuals to send you this input (e.g., scan their notes and email to you, convene them together to share what they are learning, etc.), and have them close the loop with residents so they know how their input was used.

Example Interactions	
• Home visitation programs • Pediatricians/Health care • Pre-school/child care • Food pantry/donation center • WIC office • Police and probation department • Help or information hotlines • Substance Abuse Programs • Employment coaches	• Faith Based Settings (churches, synagogues, mosque, etc.) • Hair stylists, barbers, manicurists • Bank tellers • Libraries • Pharmacists • Mental Health Centers • Family support/education programs

Existing Meetings or Gatherings: Identify upcoming community gatherings or meetings engaging priority residents. Partner with the leaders of these settings to see if they could ask your questions with residents. Create an easy way for these individuals to send you this input (e.g., scan their notes and email to you, convene the providers together to share what they are learning, etc.). If possible, have them close the loop with residents so they know how their input was used.

Example Meetings or Gatherings	
• Neighborhood association meetings • PTA meetings • School events (e.g., open houses, kindergarten roundup)	• Community fairs or celebrations • Sports events • Religious gatherings • Support groups

Intake Forms: Add one or two questions onto the end of an intake form or questionnaire that is completed when residents enter or exit a service setting. Shift or add questions as necessary.

Clipboard: Have a representative ask residents in a waiting room or when they enter or exit a setting one or two brief open-ended questions about desires, needs, or services. The person asking the questions can keep the surveys on a clipboard as they go from family to family.

Invite Residents as Guest Speakers: Invite residents to attend staff meetings to share their experiences and answer questions from staff about how to improve local services. Prepare residents for these conversations by sharing questions in advance and helping them practice sharing their story.

Survey: Work with partner organizations to collectively develop survey questions for residents. Give surveys to residents receiving services from these partner organizations through direct touches, and share the information for collective learning and action.

Comment Box: Create a short (5 or fewer questions) closed-ended/multiple choice survey. Leave a stack of these surveys along with pencils and a box for residents to drop off their responses.

Reviews from Former Participants: Interview people who successfully or unsuccessfully participated in a service to ask them about what they would keep or change.

Technology: Post questions on the comment section of your efforts' website or Facebook page, and check for summaries of recent community conversations/forums to find ideas.

Influencing decision-making (e.g., set priorities, finalize design decisions, etc.)

Involve Residents as Voting Members in your Decision-Making Meetings

Engage residents as voting members of committees, work groups, temporary task force teams, and even board of directors. Residents can participate in the discussions and take part in influencing final decisions. Ensure that residents aren't treated as token members in these meetings by ensuring there are enough residents represented at the table, and that necessary supports (e.g., childcare, transportation, food, translation services, low literacy accommodations, etc.) are provided for them to participate fully. Also ensure that other members listen to and incorporate resident voice into the group's decisions.

Develop a Resident Coalition or Action Team

Support residents in setting up a coalition to partner with your efforts. These coalitions can not only provide ways for local residents to give you feedback, but they can actually create a way for you to engage residents in making decisions (e.g., selecting priorities, determining next steps, hiring staff, etc.) related to your work. Residents themselves can be hired and trained to support and facilitate these meetings

Taking actions as agents of change (e.g., to pursue Shared Vision goals)

Engage residents in helping to implement your efforts
Create new roles for residents in your work, and provide fair compensation for their efforts. For example, residents can co-facilitate programs or meetings, get the word out about available services and encourage residents to participate, and help with evaluations.

Develop a Resident Coalition or Action Team
Support residents in setting up a coalition or action team to partner with you in reaching your shared goals (e.g., preventing homelessness). These coalitions can not only provide ways for local residents to provide feedback and help make decisions, but they can also support residents in carrying out actions. For example, residents can co-design questions to understand local conditions related to your shared goals and then actively help collect information from the community. Residents can also develop and carry out their own action ideas to support your shared goals (e.g., create peer to peer support groups).

Sponsor a Photovoice Project
Provide opportunities for residents to document community conditions through photography in a "Photovoice" project.[17] Residents are trained in photography basics and then answer questions about local community conditions by taking pictures. Residents come together to share and discuss their photos, and the information is used to raise awareness of local problems (e.g., by putting photos in "gallery" style exhibits across community) and guide the design of strategies.

Develop Residents as Neighborhood Liaisons
Ask local residents to gather input from their neighbors, family, and friends and share this information with local organizations to help inform planning and decision-making. In some communities, Liaisons hold these gatherings in their homes and call them "Living Room" or "Back Porch Conversations."

Sponsor a Mini-Grant Program
Local organizations/funders create neighborhood small grant programs where residents can submit a simple application to get a small grant ($500 or so) to support a neighborhood improvement project (e.g., clean up a park, hold a neighborhood event). To qualify for the money, residents must include other residents in planning and implementing their project.

Support Residents as Advocates
Help residents in advocating for their prioritized goals and solutions with elected officials

Organize a 100 Day Challenge
A 100 Day Challenge is a process to engage diverse stakeholders in identifying and carrying out actions to bring about a concrete goal in 100 days. See **100 Day Challenge Planning Guide** for more details.

Example Engagement Methods for other Community Stakeholders

In addition to residents, efforts can also intentionally engage other types of stakeholders including direct staff within local organizations and agencies, grassroots organizations, business leaders, faith-based leaders, elected officials, community organizations, and neighborhood groups. Here are some examples:

Engaging other stakeholders as consultants to inform design and implementation decisions

Technology: Send out brief surveys or polls to stakeholders to get rapid feedback or input.

Existing Interactions: Have collaborative members ask stakeholders one or two questions as they naturally run into them in the community. You can vary the questions every few months. Create an easy way for collaborative members to send you this input (e.g., scan their notes and email to you, have them share what they are learning at upcoming collaborative meeting, etc.), and have them close the loop with partners so they know how their input was used.

Existing Meetings: Identify upcoming meetings that naturally engage your prioritized stakeholders. Ask the leaders of these meetings if they could ask your questions, or visit the meeting to ask the questions yourself.

Example Meetings	
• Staff Meetings • Community Collaborative Meetings • Coordinating Council Meetings	• Workgroup Meetings • Board Meetings • Strategic Planning Meetings

Engaging other stakeholders as partners in decision-making

Involve stakeholders as Voting Members in your Decision-Making Meetings
Engage stakeholders as voting members of committees, work groups, and task force teams. Partners can participate in the discussions and take part in influencing final decisions.

Engaging other stakeholders as agents of change

Develop an Action Team for Stakeholders
Invite stakeholders to join an action team to support the collaborative's efforts. These action teams can not only provide feedback and engage in making decisions, but they can also initiate action to help pursue shared goals. The BBO can help to weave questions and action ideas between these action teams and the collaborative.

Identify stakeholders as leads on actions
Encourage stakeholders to take lead roles on actions. Keep track of who is initiating these actions and provide behind the scenes support to help them succeed.

Track engagement efforts over time

Sometimes the residents or stakeholders who you *planned* to engage don't represent who you are *actually* engaging. For example, you may plan to gather input from residents across several demographic groups, but the majority of residents you are *actually* engaging only represent one demographic group. It's helpful to keep track of who you are actually engaging to know when you have to problem-solve.

There are a number of ways to keep track of this (e.g., spreadsheets, tallies, etc.) – choose whatever approach is right for you and your community.

Example

A collaborative was focused on several goals related to homelessness and wanted to track their engagement of residents from several demographic groups (African American, Latinx, and Low-Income) who had been homeless at some point during the last 2 years. They added in how many residents they wanted to engage from each of these demographic groups, and how many residents they had actually engaged so far.

When they compared the number of residents they wanted to engage across these groups with how many they actually engaged so far, they found some gaps related to Latinx residents. (see highlighting below)

They worked to understand why this gap was happening, and took measures to address barriers (e.g., ensuring their engagement materials were translated into Spanish, working with local settings that had existing relationships with Latinx residents, etc.)

	Who did you want to engage?			Who has actually been engaged so far?		
Demographic Groups	African American	Latinx	Low-Income	African American	Latinx	Low-Income
African American	**50**	**30**	**30**	**45**	**5**	**29**
Latinx		**50**	**30**		**20**	**5**
Low-Income			**50**			**46**

Recommendations for Success

- **Assess current engagement conditions.** Check out the Engagement Assessment Tool – this resource can help your collaborative assess and address local conditions needed to support expanded engagement.

- **Plan for action.** Check out the Engagement Reflection and Action Guide ABLe Change Manual page 63 – this resource can help your collaborative reflect on next steps related to promoting engagement.

- **Build a culture of engagement.** Help build a culture of engagement within the collaborative by using ideas described in the ABle Change Manual pages 94-110.

Key Considerations for your Community

- What engagement methods are currently being used across the community/region? What can you learn from these efforts to inform the collaborative's engagement plans?

- What local groups already have existing relationships with residents from priority groups – especially those experiencing targeted problems/inequities? How can the collaborative partner with these groups in their engagement efforts?

- What is the best way for the collaborative to track who they have engaged so far (compared to who they wanted to engage)? Who can be put in charge of this tracking role?

Critical BBO Roles to Embed New Practices In Community

Help organizations and groups:

Take action around Shared Vision goals

Overview

BBOs can help local organizations and groups lead changes within their own organization or community supporting the Shared Vision goals. These actions can create ripple effects of change into the community which can help trigger larger systems changes related to the Shared Vision.[18]

How BBOs Can Support this Activity

1. Encourage stakeholders to see themselves as change agents	2. Make purpose of committees about action

1. Encourage stakeholders to see themselves as change agents

Help stakeholders from local organizations see themselves as agents of change, and encourage them to take leadership around carrying out action related to your efforts.

Example questions

The following are facilitation and/or reflection questions to help stakeholders see themselves as a change agent. These questions are adapted from Lipmanosicz & McCandless, 2013.[19]

- What is your sphere of influence or area of responsibility related to _____________?
- Where do you have the freedom and power to act?
- What actions would require no or only a few additional resources?
- Given the above, what are some quick win activities you can initiate in the next 3 months to help move local change efforts forward?

2. Help committees define their purpose around action

Help local committees or workgroups define or re-define their purpose around taking action. This can help to encourage everyone to take the lead on some change target or effort.

NOTE: This action-orientation may be new for some groups, and they may not naturally gravitate towards this role. Consider bringing in some information on local system issues (e.g., access or coordination barriers) that these groups have an incentive to help problem-solve, and invite the group to expand their purpose to take action on these issues.

Recommendations for Success

- **Provide behind the scenes support.** Stakeholders who volunteer to initaite action often need support behind the scenes in actually carrying out these actions. For example, sometimes people experience barriers to carrying out their actions, or simply forget to do them. Providing support between meetings can help ensure quick wins are carried out and momentum continues to build to move the change effort forward.[20]

- **See quick wins resources.** Check page 41 in this field guide for more ideas on how to help local organizations take on leadership and action roles.

Key Considerations for your Community:

- Who are some of the critical organizations and local stakeholders who could start to take lead on initiating action related to the Shared Vision goals?

- Who within the BBO is best positioned to help facilitate these conversations?

Critical BBO Roles to Promote Sustainability

Help the Community:

Support resident mobilization and influence

Overview

To promote sustainability, effective initiatives engage and mobilize residents experiencing disadvantage in taking action to promote health equity within their own lives and in the community.[21]

Empowered constituencies not only help to initiate changes across the community,[16] but they are more likely to demand transparency and hold the coalition and organizations accountable.[18]

How the BBO Can Support this Activity

1. Support residents mobilization efforts
2. Help local organizations expand their engagement of residents
3. Encourage new funding expectations for resident engagement

1. Support residents' mobilization efforts

Help local residents take action to improve conditions affecting their health and well-being by building their capacity to take on these change roles. These roles are critical to ensuring sustainability of change efforts.[16,21]

See Empowered Resident Materials on MCHIRLearning.org

Consider the following BBO roles:

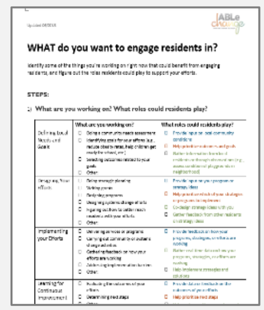
Be a Connector	Link and connect people, organizations, and groups working to mobilize local residents around health equity
Refer to Resources	Share resources, information, tools, and ideas you come across that can help support resident mobilizing efforts
Create Feedback Loops	Identify questions, ideas, and updates to weave between the collaborative and local groups working to mobilize residents.

2. Help local organizations expand their engagement of residents

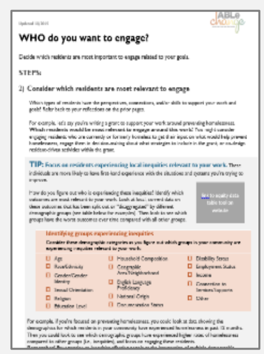
Connect with local organizations and groups to explore opportunities for how they could expand their current engagement of residents in their work. You can use the Change Agent Field Guide (see below for details) to help them explore these opportunities and plan out next steps.

Relevant Change Agent Field Guide Sections

Orientation: Page 3
This page includes some basic information about resident engagement and how it can benefit the work of organizations. You can draw on this page as you are talking with local organizations/groups about the purpose and benefits of resident engagement.

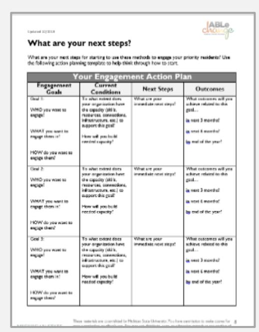


Identifying Engagement Opportunities: Page 4
This page includes a table with different organizational activities and potential roles for residents. Use this table to help the organization identify some of the things they're working on right now, how residents are currently engaged in those efforts, and additional roles residents could play. Note: the color coding comes into play in pages 7-9



Identifying Who to Engage: Pages 5-6
These pages provide some simple steps to help the organization identify which residents they want to engage. In particular, help organizations think through opportunities to use disaggregated data to identify residents experiencing local inequities related to their targeted outcomes.

Selecting Engagement Methods: Pages 7-9
These pages provide examples of how the organization could engage these residents. Help them find the methods relevant to the engagement roles they identified on page 4.



Creating an Action Plan: Page 10
This page provides a simple action plan template you can use with the organization to help them capture their engagement goals and plan out their next steps. Modify this template in whatever way is needed to help the organization or group take the next step to carry out their plan.

Support organizations in carrying out their engagement plans

BBOs can play a critical role in providing support to help organizations carry out their engagement plans, and aligning plans across the community. Consider the following BBO roles.

For example, follow up with organizations initiating local engagement action plans by taking a picture of the engagement action plans you help these organizations or groups develop using the Change Agent Field Guide (or having them send you a copy when they are finished completing it).

Enter the information from these action plans into simple database, and identify ways the BBO can follow up with these organizations to support their efforts. See the example database below for ideas.

Name of Local Organization or Group	**Engagement Goals**	**Current Conditions**	**Next Steps**	**Outcomes**
Enter organization/group name here	Goal 1: *describe who organization wants to engage, in what, and how* Goal 2: Goal #:	To what extent does organization have the capacity (skills, resources, connections, infrastructure, etc.) to support this goal? How will they build needed capacity?	What are their immediate next steps?	What outcomes will you achieve related to these goals… in next 3 months? in next 6 months? by end of the year?
Create new rows for each organization/group	*fill in same information as above*	*fill in same information as above*	*fill in same information as above*	*fill in same information as above*
BBO Support Roles	What organizations are pursuing similar goals? How can the BBO help to connect and align these efforts?	What organizations are building similar capacities? How can the BBO help to connect and align these efforts?	How can the BBO follow up with these organizations to check in on their progress?	How can the BBO help the collaborative leverage these anticipated outcomes to support the work?

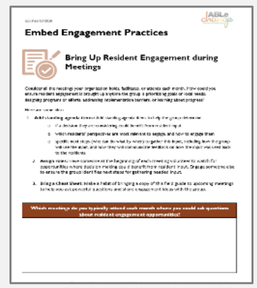
Help organizations embed new resident engagement practices

As local organizations and groups start to engage residents in new ways, help them to embed new resident engagement practices to ensure this engagement continues over time. Consider using the Change Agent Field Guide to guide this conversation.

Relevant Change Agent Field Guide Sections

Bringing up Engagement in Meetings: Page 11
Provides ideas for how stakeholders can ensure resident engagement is brought up during their naturally occurring meetings, including how to:

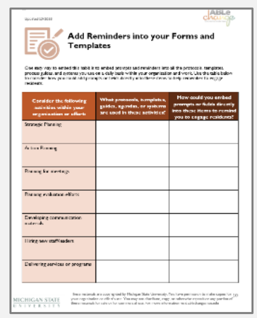
- add standing agenda items about resident engagement opportunities
- assign roles to meeting participants to listen for resident engagement opportunities coming up in the discussion.
- use the field guide to help prompt questions and ideas.



Embed Engagement Practices

Bring Up Resident Engagement during Meetings

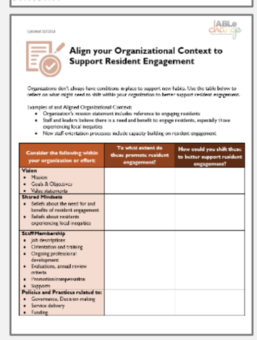
Add in Engagement Reminders: Page 12
Provides ideas for how organizations can embed reminders into their protocols, templates, guides, forms, or systems to take advantage of opportunities to engage residents. This can be an easy way to make sure resident engagement becomes embedded into their ongoing practice.



Add Reminders into your Forms and Templates

Align Organization Context: Page 13
Provides a table to help stakeholders reflect on what aspects of their organizational context might need to shift to better support resident engagement. Examples include:

- mission statements
- job descriptions
- staff orientation, training, professional development
- policies and practices related to governance, decision-making, and funding



Align your Organizational Context to Support Resident Engagement

3. Encourage new funding expectations for resident engagement

Consider the funders (e.g., foundations, state departments, etc.) involved in supporting efforts within your local community. How could the BBO work with the collaborative to help these funders adopt new practices and expectations for supporting ongoing resident engagement?

Consider the following examples:

Add resident engagement into RFPs

Funders can add questions into their RFP applications requiring grantees to demonstrate how they will engage priority residents within their work (e.g., to define local problems, design solutions, carry out action, and learn for continuous improvement).

Example RFP Question

Describe how you will engage local residents experiencing disparities related to your targeted outcomes to help guide and carry out your project?

Add expectations into grantee evaluation

Funders can add expectations requiring grantees to evaluate their progress on achieving resident engagement outcomes. Funders can provide these outcomes to grantees or help grantees determine their own outcomes.

Example Grantee Engagement Outcomes

- Organization is now gathering feedback from priority residents to inform its efforts.
- More organizational decisions are being made using input from priority residents.

Add resident engagement outcomes into funders' theory of change

Funders can add outcomes into their *own* theory of change assessing the extent to which their portfolio of grantee efforts are contributing to greater resident engagement. Help funders work with local partners and stakeholders to define specific indicators for these outcomes using your local community context.

Example Engagement Outcomes

As a result of our portfolio of grants…

- Local residents are becoming more engaged, educated, and mobilized to affect community change
- Local residents are taking more actions to improve their health and well-being

Example Questions for Funder Conversations:

Use these questions to discuss resident engagement with funders.

- *To what extent are there expectations related to resident engagement within your grant applications or evaluations? How could you expand these expectations?*
- *To what extent are resident engagement outcomes included in your theory of change?*
- *What capacity-building could you provide to your grantees to support their engagement of local residents in their work?*

Recommendations for Success:

- **Start with ready organizations.** Start working with organizations you know are ready and interested in expanding their engagement of residents. Help these organizations achieve some quick wins, and then use these successes to build momentum and encourage other organizations to expand their engagement of residents as well.

- **Revisit action plans often.** Revisit your own database summarizing information about local organizations'/groups' action plan (see prior page for details) on a regular basis to enter in new information and identify new opportunities to support and align the local engagement efforts.

- **Create standing agenda items.** Provide opportunities at collaborative meetings for organizations to share their engagement successes and problem-solve challenges. Make this a standard agenda item.

- **Support communities of practice** where partners can learn and support each other around promoting resident engagement.

- **Remember your role.** Remember, the BBO's role here is to help support others in the community around sustaining resident engagement – not for the BBO to do this all themselves (phew!). This involves connecting relevant partners together, referring people to resources or example strategies related to resident engagement, and creating needed feedback loops to keep local efforts aligned.

Key Considerations for your Community:

- Who in the BBO is best positioned to work with local organizations to expand their resident engagement? Who is the right person within the collaborative to talk with identified funders about opportunities to embed new expectations related to resident engagement

- How can you set up regular meetings for the BBO to review the summary of local action plans (see page 24) and talk about how to leverage local engagement efforts to support the collaborative's work?

- Who are some of the key groups, organizations, and/or community members involved in mobilizing residents for local action? How can you become more connected with these entities or individuals?

Determine System Boundaries Checklist

Organize collaborative for Action and Impact

- ☐ Collaborative members have **prioritized additional stakeholder perspectives** to start engaging to support their efforts, including residents experiencing targeted problems/inequities

- ☐ Collaborative has determined what **roles to engage these stakeholders** in (e.g., consultant, partner, change agent), and relevant engagement methods

Embed new Practices in the Community

- ☐ BBO has process in place to work with local organizations and groups to identify opportunities and next steps to **expand how they currently engage residents** to support their work

- ☐ BBO has process in place to **track and support the actions** of these organizations/groups to carry out their engagement plans (see page 39)

Promote Sustainability

- ☐ BBO has process in place to support local efforts to **mobilize residents** to take action on local health equity goals

- ☐ Processes and practices are in place to help local organizations and groups **expand their engagement of residents**

- ☐ BBO has process in place to work with relevant funders to explore how to **embed new expectations** promoting resident engagement.

Step 3:
Understand the Community System

ABLe Process Road Map

Once your collaborative has determined system boundaries around who and what to focus on with their efforts and who to engage as partners in the work, help them to understand the community system conditions affecting their Shared Vision goals or Targeted Problem.

The collaborative can prioritize which conditions to target for change, and use them to inform the Shared Agenda and guide strategy design.

Step 3 in a Nutshell

WHAT: A root cause analysis is a process to understand the reasons why a problem is happening.[6] A system scan is a type of root cause analysis that specifically explores community system conditions affecting your Shared Vision goals or Targeted Problems. These community system conditions inform strategy design.

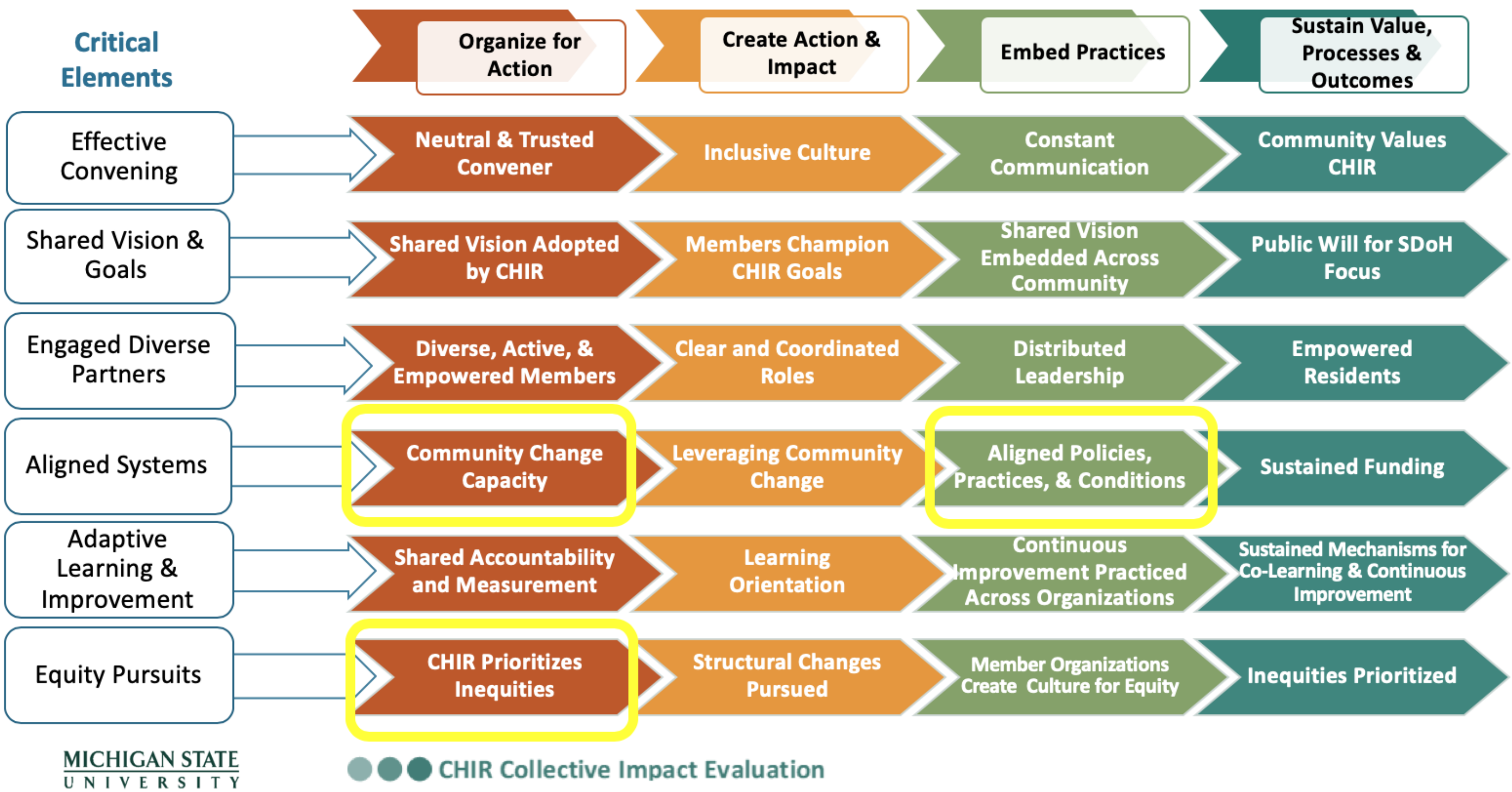
WHY: Strategies that address root causes are more effective at solving targeted problems.[7] Unfortunately, stakeholders often jump to a solution before taking the time to understand the underlying reasons why a problem is happening and risk wasting time and resources trying to fix the *symptoms* rather than the *causes* of a problem.[6]

Related ABLe Manual Pages: 111-181

Related section on MICHIR website

Which collective impact outcomes are related to this step?

Understanding the community system will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are the one most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess where your collaborative and community is related to understanding the community system, and the key roles the BBO can play to support this process.

Step 3: Understand the Community System			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
Assess: To what extent does the collaborative understand community and system conditions affecting the Shared Vision goals? BBO Role: Help the collaborative scan community system conditions to identify root causes to target for change (p. 53)		Assess: To what extent do local organizations and groups understand community and system conditions affecting the Shared Vision goals? BBO Role: Help local organizations and groups learn about root causes affecting the Shared Vision goals (p. 68)	

Critical BBO Roles to Organize for Action

Help the collaborative:

Scan community system conditions

Overview

System Scanning involves asking questions to identify system characteristics affecting your Shared Vision goals or Targeted Problem. The system scan can help the collaborative collect information from diverse stakeholders on the system, its problems, and possible solutions. This information is then used to:

- **Identify Systemic Root Causes to Target for Change:** Identify systemic root causes getting in the way of your Shared Vision goals to target for change within your efforts.
- **Promote Collective Impact:** Identify shared issues to collectively address with local efforts. This information can guide agenda development for local collaborative meetings.
- **Identify & Leverage Assets:** Discover and leverage system conditions that are aligned with addressing the Shared Vision as well as unused strengths and resources across the community.
- **Support implementation**: Identify system conditions needed to support effective implementation of efforts already underway (e.g., existing effort or strategic plan).

How the BBO Can Support this Activity

1. Help Collaborative design and carry out a System Scan	**2.** Engage stakeholders in making sense of data	**3.** Engage stakeholders in prioritizing change targets

1. Help collaborative design and carry out a System Scan

Help the collaborative design a system scan to understand the community conditions and deep structures influencing your Shared Vision goals or Targeted Problem.

See **System Scan Design Guide**

Determine what the collaborative wants to learn

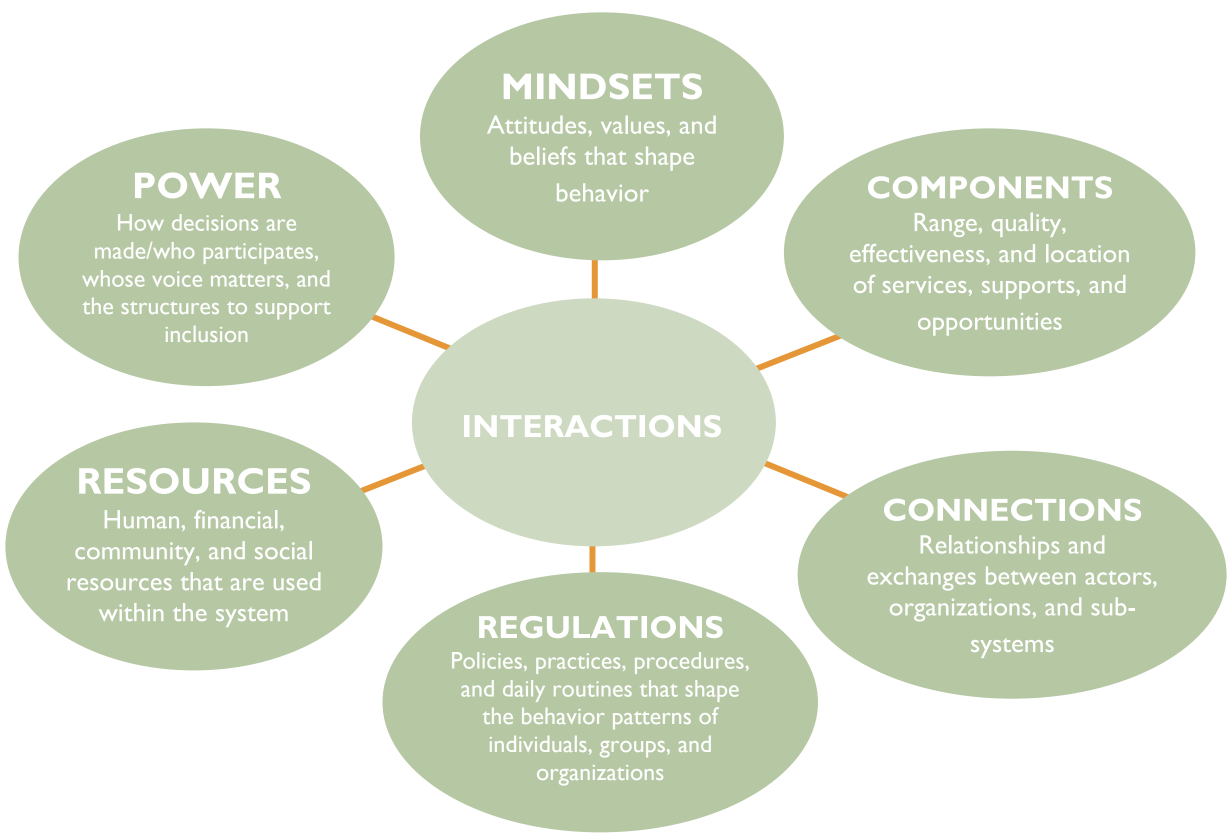
Your community's Shared Vision will most likely include different types of goals related to improving health or health equity, such as:

Example System Goals	Example Social Determinant of Health Goals
• Accessibility of services, supports, and opportunities • Quality of services, supports, and opportunities • Coordination of services/efforts • Responsiveness of the system to resident needs/voice	• Economic Stability: employment, expenses, debt, etc. • Neighborhood/Physical Environment: Affordable Housing, Transportation, Safety, healthy food options • Education: High school graduation, Literacy, Early childhood education, Vocational training, Higher ed • Community/Social: Social cohesion and Support • Health Care: Healthcare Access, Quality of care

A system scan can help your collaborative understand the community system conditions getting in the way of these Shared Vision goals; these conditions can then be targeted with strategies.

See **ABLe manual** pages 115-139 **and Equity Supplement** pages 26-38

The following are 6 common community system conditions you could explore in your system scan. It is helpful to explore several (if not all) of these conditions in your scan, given most system issues result from a combination of these characteristics.

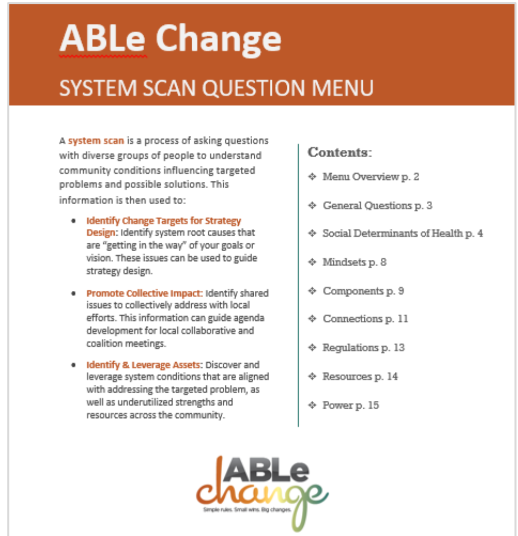


Select relevant questions

Help your collaborative select the specific questions they want to ask in their scan related to these community system conditions using the System Scan Question Menu.

This tool provides example questions for each of the 6 system characteristics, and highlights specific questions to use with residents and to understand equity conditions.

TIP: Break your collaborative up into small groups and assign each small group a different Shared Vision goal. Have each small group look through the System Scan Question Menu and prioritize which questions they think are most relevant for their Shared Vision goal.


ABLe Change

SYSTEM SCAN QUESTION MENU

A system scan is a process of asking questions with diverse groups of people to understand community conditions influencing targeted problems and possible solutions. This information is then used to:

- Identify Change Targets for Strategy Design: Identify system root causes that are "getting in the way" of your goals or vision. These issues can be used to guide strategy design.
- Promote Collective Impact: Identify shared issues to collectively address with local efforts. This information can guide agenda development for local collaborative and coalition meetings.
- Identify & Leverage Assets: Discover and leverage system conditions that are aligned with addressing the targeted problem, as well as underutilized strengths and resources across the community.

Contents:

ABLe change

Simple rules. Small wins. Big changes.

Determine who to engage in scan, and/or what existing data to gather

Diverse Perspectives

Help the collaborative engage diverse perspectives in their scan to understand root causes affecting your Shared Vision goals or Targeted Problem.

Why is this important? Each group will have its own unique view and experience with your goals or targeted problem and can provide essential information to guide strategy design.[3] Consider engaging the four perspective groups listed to the right in the scan – see ABLe Manual pages 52-62 for more details about these perspectives.

EXPERIENCING THE PROBLEM

PROVIDING SERVICES

SUPPORTING AT THE LOCAL LEVEL

DECIDING ON CHANGES & HOW RESOURCES ARE USED

Relevant Existing Data Sources

In addition to these perspectives, help the collaborative consider existing data sources that can help answer your system scan questions, including:

- Public Databases (e.g., Census, County Health Rankings, etc.)
- Local Organization or Institution Databases (e.g., city office, health department)
- Evaluation Findings and Reports (e.g., program evaluations, foundation reports, local resident surveys)

See **ABLe manual page 38** for more ideas on how to access existing data sources.

Determine the best way to collect the data you need

A system scan can draw on a variety of different methods and approaches to collect information. Use the following resources to help the collaborative create a plan for how to carry out their system scan.

Identify System Scan methods that fit your local needs and context

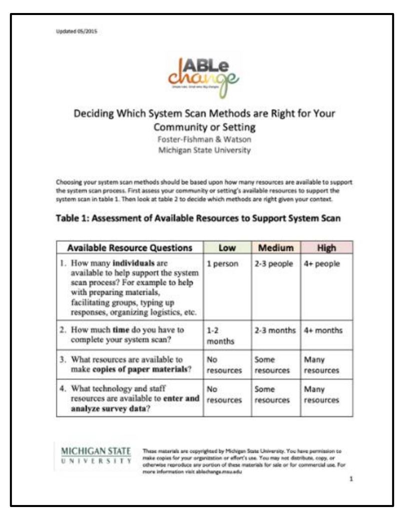
Chances are likely your collaborative already uses some effective methods for gathering input and data in the community. In addition to these methods, help the collaborative consider additional approaches described in detail in the ABLe Manual including:

1. **Hybrid meeting** (ABLe Manual pages 147-150)
2. **Conversations** (ABLe Manual pages 148-149)
3. **Surveys** (ABLe Manual page 151)
4. **Observation** / **Audit** (ABLe Manual pages 153-154)

Help the collaborative select which methods make the most sense using the following questions:

Do we need to move to action fast to maintain momentum or meet a deadline?	• Consider a small scale scan using methods that can be done quickly • **Examples:** hybrid meeting, questions asked during direct interactions with priority residents, observations
Do we need to build local buy-in around a systems approach? Do local stakeholders need consciousness-raising around local system barriers?	• Consider a larger scale scan that includes more perspectives and questions. • **Examples:** hybrid meeting, conversation at other local collaborative meetings, staff focus groups, observations, resident survey, resident focus groups to gather more detail on survey results

Use the **System Scan Methods Matrix** tool to help the collaborative identify which system scanning methods they can support given their available resources and capacities (e.g., time, materials, technology, and staff capacity to collect, enter, and analyze information).


Updated 05/2015

Deciding Which System Scan Methods are Right for Your Community or Setting

Foster-Fishman & Watson

Michigan State University

Choosing your system scan methods should be based upon how many resources are available to support the system scan process. First assess your community or setting's available resources to support the system scan in table 1. Then look at table 2 to decide which methods are right given your context.

Table 1: Assessment of Available Resources to Support System Scan

Available Resource Questions	Low	Medium	High
1. How many **individuals** are available to help support the system scan process? For example to help with preparing materials, facilitating groups, typing up responses, organizing logistics, etc.	1 person	2-3 people	4+ people
2. How much **time** do you have to complete your system scan?	1-2 months	2-3 months	4+ months
3. What resources are available to make **copies of paper materials**?	No resources	Some resources	Many resources
4. What technology and staff resources are available to **enter and analyze survey data**?	No resources	Some resources	Many resources

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ABLe manual references

See page 146-158 for more information on system scanning methods.

See page 153 for tips on combining survey and conversation methods.

Schedule your System Scan Process

Once the collaborative decides on which system scan methods to use, help them create a schedule to chart out when to collect data.

ABLe Manual Page 157

Try to leverage settings, meetings, or gatherings where your prioritized perspective groups are already engaged to keep the scan as feasible as possible. Consider the following:

- existing meetings (e.g., staff meetings, coalition meetings)
- direct interactions (e.g., home visitation sessions)
- natural gathering places (e.g., church worship gatherings, community events)

TIP: schedule the scanning methods so you can **use what you're learning to inform your questions and methods**. The following an example system scanning schedule:

Month 1: host a hybrid meeting first to get some initial information for diverse stakeholders.

Month 2: use what was learned in hybrid meeting to guide what to ask in conversations with residents through direct service interactions, and with staff through regular staff meetings

Month 3: use what was learned through conversations to develop a resident survey to collect a broader response.

Collect data and reflect over time

ABLe Manual Page 158

As the collaborative collects system scan data, make sure to pause and reflect on what you are learning so you can adapt and improve your system scan over time.

EXAMPLE:

Start collecting the first round of system scan data using the methods you selected.

Pause once some data has been collected and help the collaborative reflect by asking:

- To what extent are we getting quality information? How do we need to adjust the questions to get better information?
- What are we learning so far?
- Given what we're learning…What additional questions do we need to add? What question can we remove because we have sufficiently answered them?

Revise your methods and questions to address quality issues and build on what you're are learning

Collect remaining data using the same pattern.

TIP: Ensure System Scan Questions Evolve

As the collaborative collects system scan data, you will almost always reach saturation on some questions, meaning you are no longer getting any new information when you ask the questions. When this happens – stop asking these questions!

The point of the system scan is NOT to get as many respondents as possible – the point is to gain UNDERSTANDING of local issues.

TIP: Consider the following as you collect scan information:

- What questions are no longer needed?
- What new questions do you have?
- How should you collect this information?

Also, new questions will likely emerge as you learn about system issues. For example, through a survey you may learn that the cost of some local services is unaffordable for certain residents. To explore this finding, you might ask question like, "what services in particular are unaffordable?", or "what price would make these services more affordable?"

TIP: Ensure Your System Scan Data is Actionable!

ABLe Manual Page 150

Actionable data has enough specific details that someone could take action to address issues immediately.

Encourage stakeholders to get actionable information by asking the following probing questions:

- Who? What? When? Where? Why?
- Can you tell me more?
- Can you give me an example?

TIP: Track as you go!

ABLe Manual Page 160

As the collaborative begins to collect data, you might notice the individuals who you *wanted* to engage in the scan are not who is *actually* engaging.

For example, you may plan to gather data from a diverse range of residents, but the majority of residents *actually* participating in the scan only represent one demographic group. Similarly, you may set out to engage service providers from a wide range of sectors only to find out Early Education has been the only sector represented so far.

Help the collaborative to track who is actually engaging in your scan – for example, filling out surveys, coming to small group conversations, being reached through direct touches - compared to who was initially targeted. This information can be used to guide problem-solving to address gaps in engagement.

2. Engage stakeholders in making sense of system scan data

Once stakeholders have collected SOME system scan data, help the collaborative engage diverse stakeholders in making sense of it.

Consider the following types of stakeholders for sense-making:

- Collaborative members
- Local residents and families, especially those experiencing targeted inequities
- Community partners
- Workgroups or executive committee
- Evaluators

ABLe Manual pages 162-168

EXAMPLE TALKING POINTS: Why engage others in sense-making?
The very process of making sense of system scan data can be transformative for some stakeholders! It promotes stakeholder buy-in and motivation to take action, helps the collaborative interpret data, and raises people's consciousness about issues within the system.

Consider which sense making process fits your needs

There are many ways to make sense of data. Help the collaborative consider which of the following sense-making process is right for your local context.

Model Type	Who is involved?	Pros vs. Cons
"Deluxe"	EVERYONE engages in sorting most to ALL of the data, which can happen over several meetings.	Builds stakeholder buy-in. But…can take a long time, and people can start getting burned out if more than a few rounds of sorting.
"Mid-range"	Stakeholders engage in sorting SOME of the data – support team themes the rest behind the scenes and engages stakeholders in validating themes.	Stakeholders get experience theming data (which helps build buy-in), but in much less time. **This is the method selected by most collaborative groups.**
"High-Efficiency"	BBO sorts ALL of the data. Engages stakeholders in providing feedback only.	Extremely efficient – takes the least amount of time. But…creates limited buy-in and could result in some stakeholders questioning the process.

Organize System Scan Data for Sense-Making

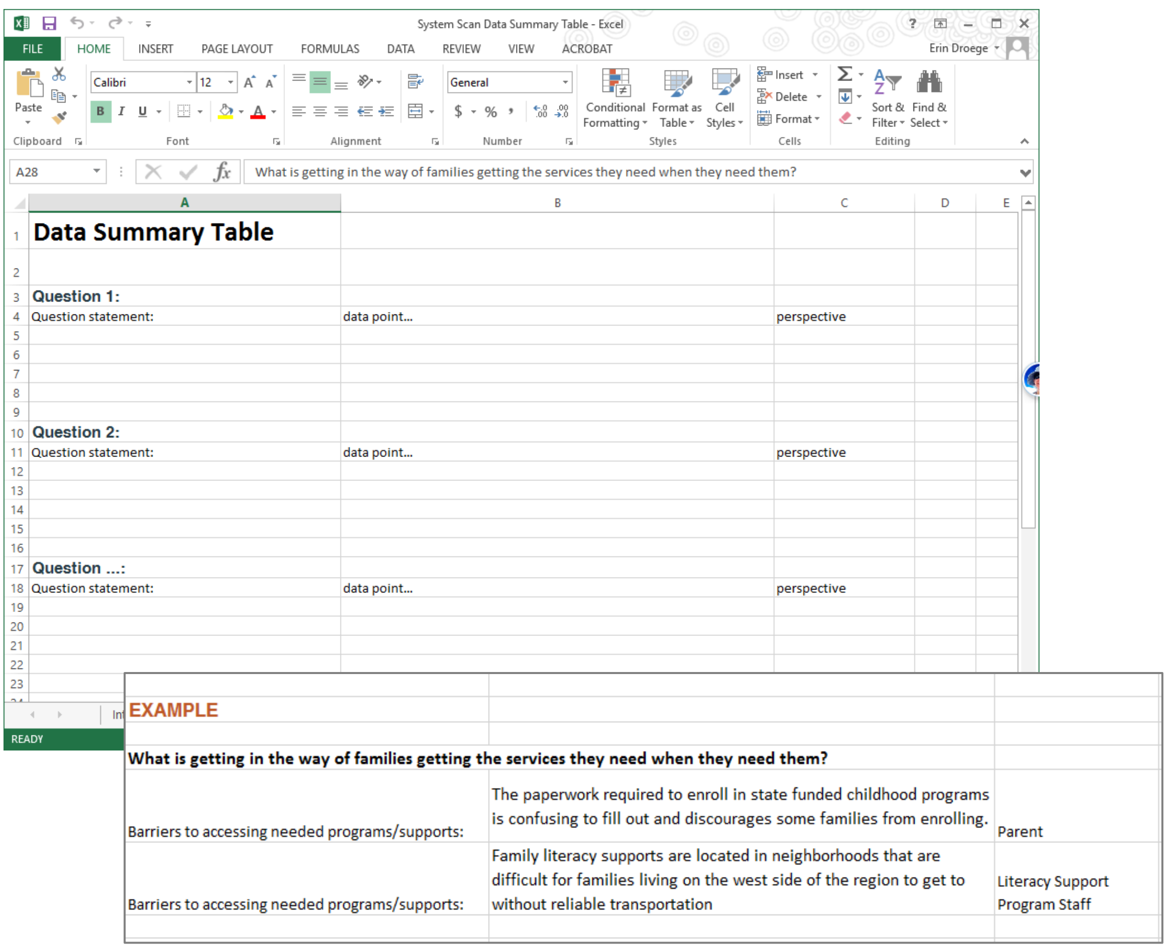
Use the following process to prepare system scan data for sense-making. Remember to organize this data as you go so it's not so overwhelming at the end.

Enter conversation notes into summary table

System Scan Data Organizing Tool (shown in image below)

Ask stakeholders to write or type up their system scan notes shortly (within 24 hours) after holding a conversation. This will help them to fill in more details from the conversation while their memory is still fresh, and if necessary, allows time to check back with the individuals they spoke with to clarify their comments.

When stakeholders send you their conversation notes, type or enter them into a data summary table (see example Excel table below). Leave spaces to enter the questions stakeholders asked and the data they collected, including which perspective provided the information.



Clean Typed Up Notes

To prepare for sense-making, it is important to "clean" the typed-up notes to ensure they can be easily understood and sorted. Use the following cleaning rules to help clean the typed-up system scan data.

CLEANING RULE: Separate out different ideas within the same comment.

For example, a comment may include observations about both limited transportation *and* a lack awareness of affordable childcare in the same point. Separate these different issue areas out so they are each separate rows in the data summary table.

> Example
>
> **Initial Data Point**
> It's hard for families to get to quality childcare if it's located outside their neighborhood and to figure out what early learning services are available in the community.
>
> **Separated Data Points**
> It's hard for some families to get to quality childcare if it's located outside of their neighborhood.
>
> It's hard for some families to figure out what early learning services are available in the community and what can meet their needs.

CLEANING RULE: Address strategy comments

Harvest any system observations out of strategy comments and move the strategies themselves into a parking lot document. The collaborative will draw upon these potential strategies later in the strategy design process.

> Example
>
> **Initial Data Point**
> We need to create more brochures to help families know what behavioral health services are available and how to access them.
>
> **Improved Data Point**
> Some families don't know what behavioral health services are available and how to access them.

Cut Out Data Strips

Cut out the data points listed in each row of the data summary table into separate strips of paper. OPTION: to highlight differences in perspectives, consider printing each perspective group's data strips on a different color paper (e.g., data strips from family perspective printed on green, data strips from service provider perspective on orange, etc.) so stakeholders can easily see patterns.

> There is no shared agreement in the community about who (parents, teachers, care providers) is responsible for developing kindergarten readiness and providing early childhood developmental experiences. This leads lots of kids to enter school not ready. (Early Childcare Providers)

> People in a position of power who make decisions about how programs are designed or what services get funded think they know what's good for families who don't have resources – families like mine. But they don't know. It means services get designed or funded that don't meet my family's needs. (Parents)

> As a community, we haven't agreed upon common indicators that tell us if children are prepared for school, which makes it hard to have aligned preschool instruction and quality standards. (Early Childcare Leaders)

Select data for stakeholders to sort

Consider who should be engaged in making sense of the system scan data, and identify a cohesive subset of data strips for them to sort.

1. **Count how many stakeholders will be participating in the sense-making meeting**. Divide these stakeholders into several small groups, with at least 3 people per small group

2. **Select a sub-set of 35-40 data strips for each small group to sort** during the meeting. Select data points that are related to the same system scan question and are "self-contained - meaning there is no overlap with other groups or other sub-sets of data.

   For example, you could give each small group 35-40 data points related to 1-2 system scan questions. That way they won't have to integrate data across tables.

3. **Put selected data strips in envelopes** for each small group to sort at the meeting.

Help stakeholders group similar ideas

Split stakeholders into small groups, and give each small group their assigned envelope of data strips. Then have each small group look through their assigned data strips and **sort similar ideas, problems, or issues into clusters**.

Talking point: "As you organize the data points into similar 'buckets,' think about how the clusters relate to each other. Move data points around until you have found clusters that make sense. If one pile has most of the data points, try breaking it up into smaller clusters."

ABLe Manual page 162

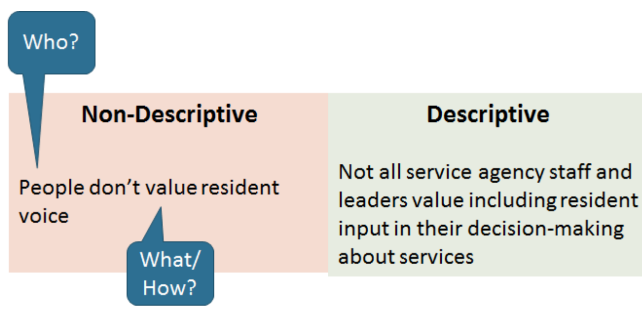
Help stakeholders create thematic labels

Guide stakeholders in creating a label or theme for each cluster of data points that describes the key issue, message, or root cause problem.

TALKING POINT: "One way to think about these thematic labels is to imagine you are writing the headline for a newspaper article. Consider these 3 tips…"

Tip 1: Make Labels Descriptive

- Make labels actionable by capturing who/what details
- Use words that will give a picture of all data points underneath



Tip 2: Don't Make Assumptions

- Only describe the data, don't make assumptions about why this is happening.

Tip 3: Avoid Stating a Strategy

- Word labels to describe the problems stated in the data - not as a recommendation for what *should* happen.

ABLe Manual reference pages

Page 163: example themes you could show during this process

Page 165: how to help group review their themes for clarity and logic.

Page 166: how to integrate themes with existing data

Page 167: tips for finding patterns across root cause data

3. Engage stakeholders in prioritizing change targets

ABLe Manual Pages 169-180

Help the collaborative engage stakeholders (e.g., including those in the sense-making process) in prioritizing root causes for strategy design and action.

Prioritize Root Causes

Help stakeholders consider the following 2 criteria to prioritize powerful and feasible root causes. You could put these on flipcharts, PowerPoint slides, or give out this **handout** for people to reference.

POWERFUL Root Causes

- have a big influence on Shared Vision goals
- affect or involve multiple settings and/or individuals at different ecological levels in the community
- play a unique role in influencing other root causes and outcomes in the system
- contribute to inequities in the community

FEASIBLE Root Causes

- are within the scope of work
- motivate local stakeholders to take action
- are seen as important by local residents
- can shift relatively quickly

Use whatever prioritizing process works best for your group. The following are several examples:

- **Sticky Dot Voting.** Create posters or signs with your root cause thematic labels; give each member several sticky dots to vote for their priorities, color coding the dots by stakeholder type (resident, service provider, decision-maker)

  If residents from disadvantaged groups are engaged in this process, ensure their voice is adequately represented by giving them more sticky dots so their votes are equitable to the number of votes from other types of stakeholders in the room.

- **Voting Worksheet.** Use the **Root Cause Prioritizing Worksheet** to help people vote for which they feel are powerful and feasible to tackle; collect the worksheets from each person and tabulate them to identify your targets

TIP: Tackle multiple system conditions

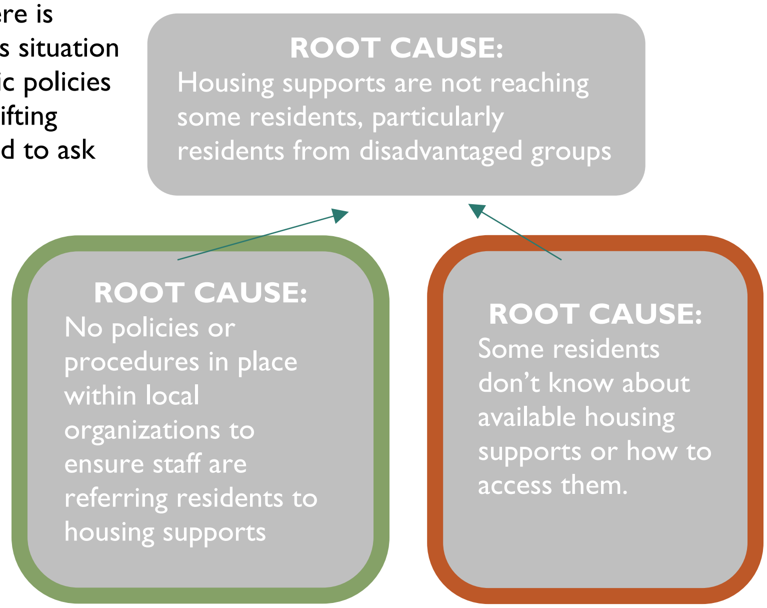
Effective change efforts tackle multiple types of system conditions (mindsets, regulations, etc. – see page 5). If you notice all prioritized root causes are related to the same condition, try to identify some additional root causes from other characteristics to boost the effectiveness of your change efforts.

Identify Deep Root Causes

How do you know when to ask why again in a root cause analysis?

Sometimes the root causes identified in a system scan are not deep enough to inform effective action. If it's unclear <u>what</u> needs to change to resolve the issue, ask why again.

For example, the root cause outlined to the right in green has a clear solution path. While there is additional information to gather about this situation before moving to action (e.g., what specific policies are needed, what barriers are there to shifting current procedures, etc.), there is no need to ask "why" again for this root cause.



In contrast, you *<u>should</u>* ask why the root cause outlined in red in happening because there could be multiple reasons why these residents don't know about available supports or how to access them. For example, information about these supports could be:

- difficult for families to understand
- incomplete or outdated
- not reaching all residents

Asking the question "why do some residents experiencing this problem not know about housing supports or how to access them?" would help to uncover some of these additional reasons, and better guide actions to address this situation.

If the collaborative determines a need to go deeper, here are two ways to identify deep root causes:

1. Ask stakeholders if there are any reasons WHY the prioritized root cause has occurred

2. Or, use the **<u>Systemic Root Cause Analysis Template</u>** to ask specific questions about system conditions (mindsets, regulations, etc.) to identify deeper root causes.

TIP: Engage multiple perspectives

It's impossible for any one person to understand all the reasons why a problem is happening. You can improve your root cause analysis by gathering **multiple perspectives** - particularly from **local residents** and **direct service staff** - about why the problem is happening.

Recommendations for Success:

- **Leverage champions.** Identify several champions within the collaborative who can help communicate the purpose and value of the system scanning and sense making process. Are there analytical individuals or people who have a knack for theming and organizing? Leverage their skills and interests to help bring others into the process.

- **Reflect and improve the scanning process.** The system scanning process will evolve as you collect data. Adapt the questions and methods as needed to collect the best data.

- **Key an eye out for patterns.** Patterns in the root cause data can help the collaborative prioritize issues to target for action. If one root cause is affecting several conditions it may be a powerful target for change. Also, look for patterns across system conditions and geographic locations in your community. Issues may be concentrated in some locations more than others.

Key Considerations for your Community:

- Are there any upcoming meetings or touch points where the system scan could take place?

- Who within the BBO can help support stakeholders in the root cause analysis and sense making process?

- Are there root causes that are not feasible for the collaborative to tackle? If so, who is best positioned within the community to help address these issues?

Critical BBO Roles to Embed Practices

Help local organizations and groups:

Learn about systemic root causes

Overview

The BBO can help organizations and groups use systemic root cause analysis to learn about system conditions affecting the Shared Vision goals. The BBO can also help organizations and groups to embed system root cause analysis into their daily work and as a regular habit.

How BBOs Can Support this Activity

1. Help stakeholders use systemic root cause analysis	2. Help stakeholders embed systemic root cause analysis as new habit

1. Help stakeholders use systemic root cause analysis

Some organizations and groups may not have a lot of experience with root cause analysis. Help build their understanding and buy-in around using a systemic root cause analysis to explore opportunities to use the process to enhance their work.

Consider sharing an example story – or have others in the collaborative share stories from their personal experience – about the benefits of using the root cause analysis in the work.

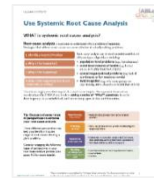
Example Story

An organization focused on adult literacy observed local residents who had expressed interest in the program at a recent school event were not coming to the afternoon sessions despite receiving the information about the days and times.

The organization followed up with the families who had signed up for information about the new program to ask why they weren't coming to literacy support sessions. The organization learned the program times were accessible for working families, and the program didn't provide onsite childcare. The organization used this information to adjust the program to be offered on weekends and to provide childcare on site during the 2-hour meetings. As a result, local engagement in the program increased.

Relevant Change Agent Field Guide Sections

Orientation: Page 15
This section includes some basic information about systemic root cause analysis and how it can benefit the work of organizations. Draw on this page as you talk with local organizations/groups about the purpose and benefits of systemic root cause analysis.
TIP: See Able Change Manual pages 113-144 and ABLe Equity Supplement pages 23-44 for additional talking point ideas.



Using Systemic Root Cause Analysis Methods: Pages 16-19
This section provides examples of how to use systemic root cause analysis. In addition to describing the process, you can also demonstrate how it works with an example problem.

Getting Detailed and Clear Root Cause Information: Page 20
This section provides some simple reminders to organizations to help get specific and actionable information. Use this this help remind organizations to ask questions during their root cause analysis conversations to get more detailed information.

Moving Prioritized Root Causes to Action: Page 21
This section helps organizations prioritize multiple root causes from different system conditions to tackle in their strategy design process.

Identifying Where to Use Systemic Root Cause Analysis: Page 23
This page provides some example activities for organizations to consider where to use systemic root cause analysis to improve the effectiveness of their problem solving. Use this table to consider opportunities to use systemic root cause analysis.

TIP: Consider Equity

Structural inequity is a result of system conditions that lead to advantages for some community members and marginalize or produce disadvantages for other members.[24]

See **ABLe Manual** page 134 for examples of structural (system) root causes of inequities, and **Equity Supplement** pages 39-44 for more information.

2. Help stakeholders embed systemic root cause analysis as new habit

As local organizations and groups start to use systemic root cause analysis in new ways, help them to embed practices to ensure this analysis continues over time. Consider using the Change Agent Field Guide to guide this conversation.

Relevant Change Agent Field Guide Sections

Bringing up Systemic Root Cause Practices: Page 24
Provides ideas for how stakeholders can ensure systemic root cause analysis is brought up during their naturally occurring meetings, including how to:

- add standing agenda items asking about root cause analysis opportunities
- assign roles to meeting participants to listen for root cause analysis opportunities coming up in the discussion.
- use the field guide to help prompt questions and ideas.

Add in Systemic Root Cause Analysis Reminders: Page 25
Provides ideas for how organizations can embed reminders into their protocols, templates, guides, forms, or systems to take advantage of opportunities to use systemic root cause analysis. This can be an easy way for organizations to make sure root cause analysis becomes embedded into their ongoing practice.

Align Organization Context: Page 26
Provides a table to help stakeholders reflect on what aspects of their organizational context might need to shift to better support systemic root cause analysis. Examples include:

- job descriptions
- staff orientation, training, professional development
- policies and practices related to governance, decision-making, and funding

Recommendations for Success:

- **Provide coaching to build capacity.** Root cause analysis can feel a little overwhelming or like new territory for some organizations and stakeholders. Think of yourself as their coach and guide in the process. Check-in with stakeholders to ask how the process is going and what barriers are occurring. Listen and offer tips and resources to steer them in a helpful direction.

- **Embed new habits.** Help organizations develop new habits for using root cause analysis. This could include adding root cause analysis questions or "pause and think about why" reminders to team meeting agendas, program planning sessions, strategic planning sessions, and service improvement planning.

Key Considerations for your Community:

- What opportunities are available for organizations to embed systemic root cause analysis in their daily work? How can root cause analysis be added to existing tools, meetings, and practices?

- How can organizations support each other in creating a new habit of using root cause analysis? Are there opportunities (e.g. meetings, forums, newsletters, social media) where organizations can share examples and successes?

Understand the System Checklist

Organize collaborative for Action and Impact

- ☐ The collaborative has conducted a system scan and they have **sorted data, clarified data for details**, and **themed the data**.
- ☐ The collaborative has identified a subset of **powerful and feasible root causes** to target.
- ☐ The collaborative has **located** root causes in the community system.
- ☐ The collaborative has **identified deep root causes** to target with strategies.

Embed new Practices in the Community

- ☐ BBO has process in place to work with local organizations and groups to **use the systemic root causes**.
- ☐ BBO has process in place to work with local organizations and groups to **embed systemic root cause analysis as a practice**.

Step 4:
Adopt a Shared Agenda

ABLe Process Road Map

Once your collaborative has engaged partners in understanding the community system related to your Shared Vision goals, turn prioritized root causes into a Shared Agenda**.**

The Shared Agenda focuses diverse stakeholders on a shared set of change targets that will become the focus of the strategy design process.

Step 4 in a Nutshell

WHAT:
Help the collaborative and community partners adopt a Shared Agenda to unite their work around a set of prioritized community change goals.

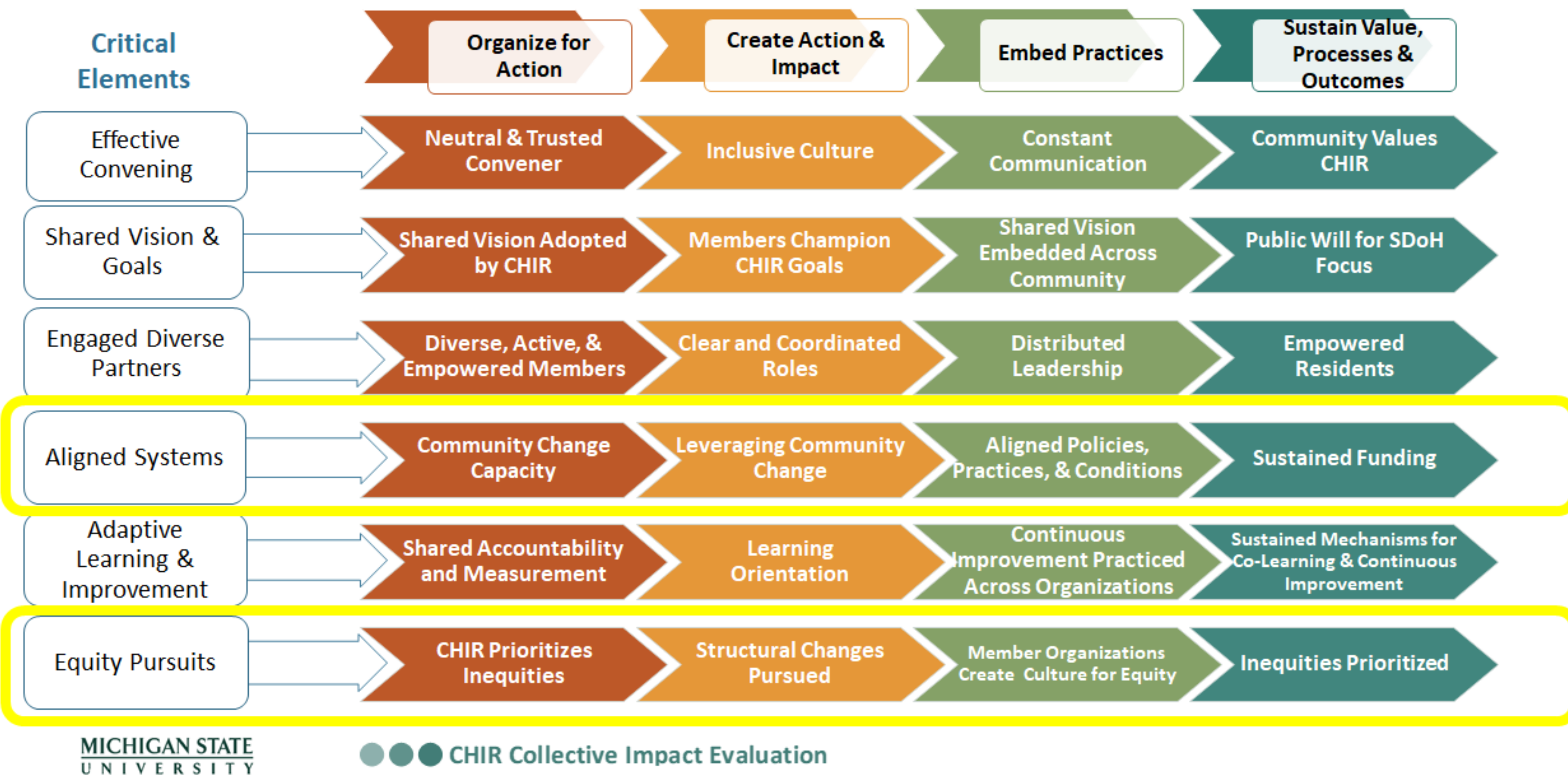
WHY:
The Shared Agenda helps to keep efforts focused on prioritized root causes related to the Shared Vision. The tool makes it easier to align all learning and action around shared priorities and helps to raise stakeholders' **critical consciousness** of local community issues.[23]

Related ABLe Manual Pages:
183-188

Related section on MICHIRLearning.org

Which collective impact outcomes are related to this step?

Adopting a Shared Agenda will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are the one most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess where your collaborative and community is related to adopting a Shared Agenda, and the key roles the BBO can play to support this process.

Step 4: Adopt a Shared Agenda			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
Assess: To what extent is the collaborative adopting a Shared Agenda to pursue targeted changes related to the Shared Vision?		Assess: To what extent are local organizations pursuing targeted changes from the Shared Agenda?	Assess: To what extent are local resources being aligned to support targeted changes from the Shared Agenda?
BBO Role: Help the collaborative adopt a Shared Agenda (page 76)		BBO Role: Help local organizations pursue the Shared Agenda (page 83)	BBO Role: Help the community align resources to support the Shared Agenda (page 86)

Critical BBO Roles to Organize for Action

Help the collaborative:

Adopt a Shared Agenda

Overview

A Shared Agenda summarizes the priorities emerging out of the Shared Visioning and system scanning process. A Shared Agenda is not only a description of the community's prioritized change goals, but it is also a tool groups can use to organize their meeting agendas and processes.

A Shared Agenda is powerful because it:

- brings together stakeholder groups to **target the same community changes (e.g., access, coordination, health environments, etc.)** but allows these groups to pursue unique action and learning from their particular role or system perspective.
- creates a **common language** to guide the work.
- **provides the same agenda and similar meeting format** across stakeholder groups, facilitating movement between and across groups.

How the BBO Can Support this Activity

1. Help the collaborative create a Shared Agenda
2. Facilitate collaborative meetings using the Shred Agenda

I. Help the collaborative create a Shared Agenda

The Shared Agenda summarizes prioritized change goals from the Shared Vision and System Scanning process. It will eventually include your collaborative's strategy ideas (see next chapter in this guide for more details).

The following pages describe how to help your collaborative create its own Shared Agenda

ABLe Manual Pages 183-188

Build awareness and buy-in around the Shared Agenda

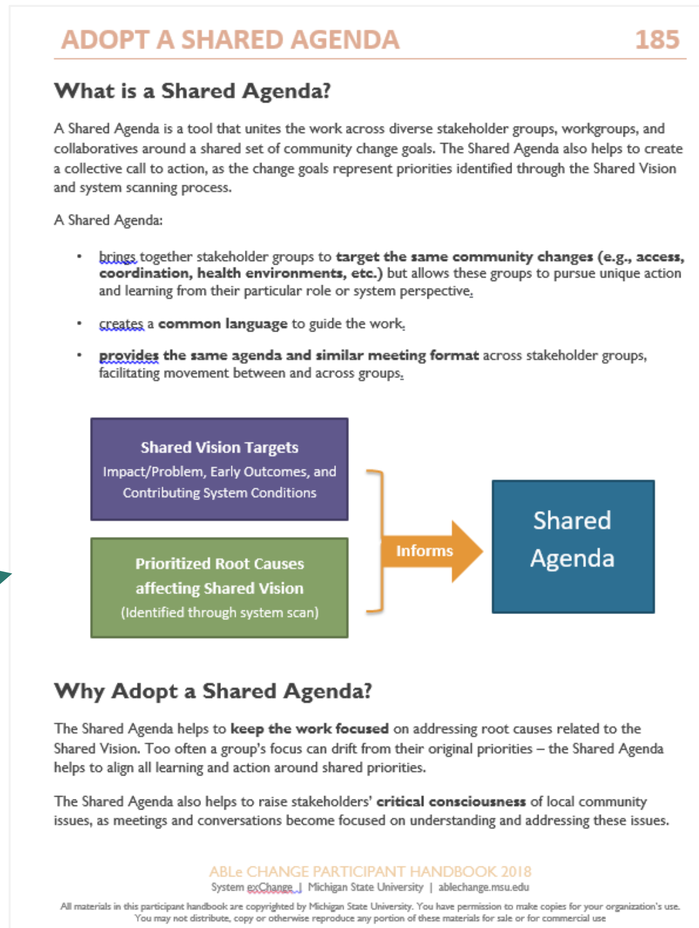
To what extent has your collaborative been exposed to the idea of a Shared Agenda? How can you build on this current understanding?

To what extent might collaborative members have different ideas about the purpose and role of a Shared Agenda? How can you describe the Shared Agenda in a way that brings these different perspectives together?

Reflect on these questions as you plan how to help members of your collaborative gain awareness and buy-in around the Shared Agenda.

Draw on **ABLe Manual page 185** to help you develop some talking points and visual aids to describe the Shared Agenda with your collaborative.

Also consider connecting with other collaboratives across the state (or country) that have adopted a Shared Agenda so you can bring in some examples of how the tool can enhance local change efforts.



ADOPT A SHARED AGENDA 185

What is a Shared Agenda?

A Shared Agenda is a tool that unites the work across diverse stakeholder groups, workgroups, and collaboratives around a shared set of community change goals. The Shared Agenda also helps to create a collective call to action, as the change goals represent priorities identified through the Shared Vision and system scanning process.

A Shared Agenda:

- brings together stakeholder groups to **target the same community changes (e.g., access, coordination, health environments, etc.)** but allows these groups to pursue unique action and learning from their particular role or system perspective.
- creates a **common language** to guide the work.
- **provides the same agenda and similar meeting format** across stakeholder groups, facilitating movement between and across groups.

Why Adopt a Shared Agenda?

The Shared Agenda helps to **keep the work focused** on addressing root causes related to the Shared Vision. Too often a group's focus can drift from their original priorities – the Shared Agenda helps to align all learning and action around shared priorities.

The Shared Agenda also helps to raise stakeholders' **critical consciousness** of local community issues, as meetings and conversations become focused on understanding and addressing these issues.

ABLe CHANGE PARTICIPANT HANDBOOK 2018
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Select a Shared Agenda Format

A Shared Agenda is highlights of the Shared Vision goals, the prioritized root cause themes related to these goals (identified through the system scan), and eventually strategies designed to address those root causes. Meeting agenda items can then be organized around these priority areas. There are many ways to format a Shared Agenda. Talk with your collaborative about which format will resonate best with collaborative members and local community partners. Consider the following:

- MORE DETAILED FORMAT**:** Some collaboratives prefer to have detailed information about their prioritized root cause themes directly on the Shared Agenda. This often works best when the group has a smaller number of Shared Vision goal areas (e.g., 2-3). The following is a template:

Impact: ***[add the Impact from your Shared Vision]***		
Goal: *[Add Systems Change or Social Determinant of Health Goal Areas from Shared Vision]*		
Objective	**Strategies**	**Agenda Items**
List Corresponding Prioritized Root Cause Themes (worded as positive Objectives) from system scan	*List strategies to bring about Objectives.*	*List agenda items to help the group understand local conditions related to their objectives, carry out strategies, and learn about progress.*
Goal: *[Add Systems Change or Social Determinant of Health Goal Areas from Shared Vision]*		
Objective	**Strategies**	**Agenda Items**

Add additional rows as necessary

EXAMPLE

Impact: Equity in health and wellbeing		
Goal: Greater equity in healthcare access		
Objective	**Strategies**	**Agenda Items**
Healthcare provider locations are easy for priority residents to access		
Healthcare intake/scheduling processes easy for priority residents to use		
No difference in the quality of healthcare provided to residents based on insurance status		
Goal: Greater equity in school achievement		
Objective	**Strategies**	**Agenda Items**
School discipline policies do not contribute to greater inequities		
School engagement processes responsive to needs of priority families		

- HIGHER LEVEL FOCUS: If your collaborative has a lot of goal areas from their Shared Vision and/or has a tendency to get overwhelmed with a lot of detail, consider an agenda format that has a higher level focus on cross-cutting systems change goals. NOTE: You can bring in more details about prioritized root causes through facilitation and meeting materials (e.g., handouts). The following is a template:

Impact: ***[add the Impact from your Shared Vision]***		
Systems Change Goals	**Strategies**	**Agenda Items**
Add Systems Change or Social Determinant of Health Goal Areas from Shared Vision	*List strategies designed to address prioritized root causes and bring about Goals.*	*List agenda items to help the group understand local conditions related to their goals, carry out strategies, and learn about progress.*

Add additional rows as necessary

EXAMPLE

Impact: Equity in health and wellbeing		
Systems Change Goals	**Strategies**	**Agenda Items**
Shared Value for Health Equity Community mindsets, engagement, and connections promote health equity.	*List strategies designed to address prioritized root causes and bring about Goals.*	*List agenda items to help the group understand local conditions related to their goals, carry out strategies, and learn about progress.*
Health Equity in All Policies and Practices Policies and practices support health equity outcomes.		
Improve Access Services, supports, opportunities are easy for priority residents to access.		
Coordination of Efforts Relevant efforts, programs, and supports are coordinated.		
System Responsiveness Local decision-making processes are responsive and adaptive to the needs and preferences of priority residents by using resident voice and data.		

2. Facilitate collaborative meetings using the Shared Agenda

You can use the Shared Agenda to help facilitate collaborative meetings (e.g., steering committee, workgroups, action teams, resident team meetings, etc.). While agenda items will shift for each group (e.g., agenda items for leaders typically focus on policy-level problem-solving, while items for direct staff typically focus more on implementation problem-solving), the goal areas stay the same to ensure alignment of efforts. Consider the following to help use the Shared Agenda in these settings.

Add Initial Agenda Items to the Shared Agenda

At this stage, the Shared Agenda includes agenda items to help the collaborative prepare for the strategy design process. At later stages, agenda items will help the collaborative actually design strategies and move to action. Consider the following example agenda items you could adapt for your Shared Agenda.

TIP: word agenda items as questions to help encourage inquiry and effective discussion.

Ensure Root Causes are Actionable

EXAMPLE AGENDA ITEM**:** Do we need to flesh out any of our root causes before moving to strategy design?

FACILITATOR NOTE: Help the collaborative ensure their prioritized root causes related to each goal area have enough detail to inform strategy design. Often groups will prioritize root causes that are still pretty vague, which makes it difficult to design targeted ways to address them.

Follow-up facilitation questions could include:

Let's take a look at the prioritized root cause themes and associated data points for each of our goal areas. Are there any root causes where it's unclear exactly what is happening? How can we flesh these root causes out with more details?

Note: The group will naturally gather more information about their root causes during the strategy design process. At this point focus on helping the collaborative clarify *what* needs to change related to their prioritized root causes (not how to change it).

Identify Relevant Partners to Engage in Strategy Design

EXAMPLE AGENDA ITEM**:** Who else do we need to engage in designing strategies to address our prioritized root causes?

FACILITATOR NOTE**:** Help the collaborative consider engaging diverse perspectives including residents experiencing prioritized inequities, cross-sector organizations, community-based organizations, the business sector, and government.

TIP: Add an introduction

One of the main struggles collaborative members often have with the Shared Agenda is getting their heads around the big picture. It can help to put a standing agenda item at the top of the agenda to orient stakeholders to the big picture. Be sure to provide facilitator talking points to help in this introduction. Some collaboratives use their Shared Vision visual to help orient stakeholders during this introduction.

Here is an example standing agenda item to give an orientation to the big picture, along with some example facilitator notes:

Welcome and Orientation to Big Picture

Facilitator Notes: *Refer to the Shared Vision visual on a slide or handout and say something like:*

Over the past months we have worked with cross-sector partners to identify a Shared Vision for improving health equity in our region. The Shared Vision includes a series of population-level outcomes and related cross-sector systems change goals (show goal areas on visual). Our committee/team is focused on addressing a subset of these systems change goals.

TIP: Add "System Check-In" questions

Add a few "System Check-In" questions after the introduction to help stakeholders identify emerging needs and opportunities related to the Shared Agenda goal areas. When new needs and opportunities are identified, add them into the overall scope of work and develop agenda items to help the collaborative problem solve them. This practice helps the collaborative stay responsive to changes in the local community system.

Example System Check-in Agenda Items:

- What's worked this past month to improve *[insert systems change goal]*? Why did it work? How can we spread this to other relevant settings?
- What's gotten in the way this past month of improving *[insert systems change goal]*? Why is this happening? What can we do about it?

Facilitator notes: *Ask one or both of these questions around <u>one</u> Systems Change Goal area per meeting.*

Recommendations for Success:

- **Set aside enough time** to introduce the Shared Agenda to committees and workgroups within your collaborative. Explain the benefits of a Shared Agenda and the connection to the shared visioning and system scan processes. Discuss how it will influence the meeting format. Allow enough time for questions and comments.

- **Use clear language.** Use concise, everyday language on the Shared Agenda. Avoid the use of jargon and technical terms that may not be familiar to all stakeholders, especially residents.

- **Provide context.** Emphasize the connections to the Shared Vision and system scanning process as you introduce the Shared Agenda. This will help build buy in and provide context for those who participated in these processes, and will orient newly engaged collaborative members and groups to the prior work.

Key Considerations for your Community:

- Are there any barriers (e.g., buy-in, skills, conflicting policies, etc.) to adopting the Shared Agenda within the collaborative? How could you engage the collaborative in identifying and addressing these barriers?

- Which collaborative members are ready to adopt the Shared Agenda? How could you engage these individuals as champions to help build needed buy-in among other stakeholders in the collaborative?

- Who in the BBO is best suited to facilitate meetings using the Shared Agenda? Who can help with preparing the agendas for each meeting?

Critical BBO Roles to Embed New Practices In Community

Help organizations and groups:

Pursue the Shared Agenda

Overview

Help community organizations and groups start using the Shared Agenda to guide their work. This can help to reinforce and promote a diversity of actions addressing the Shared Agenda priorities and can increase alignment across these local efforts.

How BBOs Can Support this Activity

1. Build buy-in for the Shared Agenda	2. Bring the Shared Agenda in local meetings and groups

1. Build buy-in for the Shared Agenda

Ask the collaborative to identify local organizations and groups – both within and outside the collaborative – that are in a position to help support or pursue the Shared Agenda goals and prioritized root causes. For example, perhaps there are several key housing groups in town that could play an important role in pursuing efforts around the housing goals and root causes in your Shared Agenda.

Help the collaborative plan out how to talk with these organizations and groups to build buy-in around the Shared Agenda at upcoming meetings or in one-on-one interactions. Consider the following ideas:

Describe the purpose of the Shared Agenda

Refer to page 77 of this guide for ideas on how to build this awareness. Remember to customize your talking points to fit your audience.

Describe how the Shared Agenda was developed

Help stakeholders understand how the Shared Agenda was developed through the Shared Vision and system scanning processes that engaged diverse stakeholders across the community.

TIP: use visuals you have already developed in prior steps (e.g., Shared Vision visual) to help you communicate

Highlight how their current efforts are aligned with the Shared Agenda goals

Before meeting with an organization or group, look to see what their current efforts are focused on. For example, look through available websites, strategic plans, or recent evaluation reports describing their work.

Draw on this information as you talk with these organizations and groups about the connections between their work and the Shared Agenda priorities.

TIP: highlight other local organizations and groups that have already committed to working on the Shared Agenda to build buy-in.

Invite them to consider how they could *expand* on their current efforts to support the Shared Agenda goals

After reviewing about their current efforts, talk about opportunities for them to expand on their current efforts to pursue additional Shared Agenda goals.

For example, imagine you are meeting with a housing group to talk with them about the Shared Agenda. In addition to highlighting how their current efforts are aligned with the Shared Agenda goals related to housing, you could invite them to think about how they could expand their efforts to simultaneously work on other Shared Agenda goals, such as promoting social connections and improving coordination.

Bring some concrete examples (see grey box to the right for how to find these on the MICHIRLearning.org website) of how other organizations and groups have done this to aid the conversation.

Look at the "Leverage SDoH Intersection Examples" in the **Social Determinants of Health section** on MICHIRLearning.org to find examples to bring into these conversations

2. Bring Shared Agenda into local meetings and groups

After you build the necessary buy-in, help the BBO and collaborative members bring the Shared Agenda into relevant meetings and interactions with organizations and groups in the community.

For example, you can use the Shared Agenda to help organizations and groups:

- **Problem solve current issues.** Ask questions to engage these organizations and groups to help problem-solve prioritized issues currently included in the Shared Agenda.
- **Problem solve new issues.** Listen for new issues or opportunities related to the Shared Agenda goals that are brought up in conversation. Help organizations and groups problem solve these issues or opportunities, and keep track of their action steps so the BBO can provide behind the scenes support.
- **Create feedback loops.** Ask questions to identify opportunities to share relevant information, questions, and/or action ideas with other groups or individuals working on the Shared Agenda. These feedback loops are critical for promoting aligned action and system responsiveness.

Recommendations for Success

- **Make a Shared Agenda Template accessible** to all BBO and Collaborative members so they can easily bring it into upcoming meetings. Make sure to build collaborative members' capacity on how to use the tool with local organizations and groups.
- **Make reference materials handy**, like system scan summaries or data about local inequities, so you and others can use them alongside the Shared Agenda. These materials are often necessary to provide enough detail to effectively problem-solve.

Key Considerations for your Community:

- What examples or talking points will work best to describe the Shared Agenda with local stakeholders given their experiences?
- Who can you enlist to help promote the Shared Agenda? Consider identifying individuals who already have buy in or are part of another group already using the Shared Agenda.

Critical BBO Roles to Promote Sustainability

Help the Community:

Align resources to support the Shared Agenda

Overview

Aligning community resources to support the Shared Agenda can help to promote sustainability of local change efforts and build needed momentum. Consider the following ways the BBO can support this alignment.

How the BBO Can Support this Activity

1. Build buy-in around the Shared Agenda	**2.** Help local decision-makers and funders align resources to support Shared Agenda

1. Build Buy-in around the Shared Agenda

Ask the collaborative to help identify local decision-makers (county and city government officials, hospital systems, health plans, etc.) and funders (e.g., foundations, state departments, etc.) with resources that could be leveraged to support the Shared Agenda goals. These resources could include:

- financial resources
- staffing resources
- technology resources
- data resources

Create a plan for how BBO and collaborative members can build these decision-makers and funders' buy-in around the Shared Agenda. Refer to ideas on page 87-88.

Communicating Information to Funders for Support and Accountability
Resources for how to effectively communicate with funders to build support for the initiative's efforts.
Source: Community Tool Box

2. Help local decision-makers and funders align resources to support the Shared Agenda

After building their buy-in, BBO and collaborative members can talk with these decision-makers and funders about opportunities and next steps to align their resources to support the Shared Agenda. Consider who in the BBO/collaborative is best positioned to have these conversations.

Compile examples to bring into these conversations of how other decision-makers and funders have aligned resources to support goals similar to those on your Shared Agenda. Consider the following:

Align hospital investments (e.g., community benefit dollars) with the Shared Agenda goals

In some communities, hospital systems address broader community health needs by shifting their investments away from traditional clinical care towards efforts to improve community conditions. For example, some hospitals are starting to use their Community Benefit Dollars to invest in increasing affordable and supportive housing – see case study in box to right for more details.

Innovative Models in Health and Housing

Case studies of how healthcare organizations are leveraging resources to support affordable, supportive housing for their highest healthcare users.

Source: The California Endowment

Develop RFPs targeting Shared Agenda goals

Private and public funders align their resources by developing Requests for Proposals (RFPs) specifically focused on change targets from the Shared Agenda. These RFP processes are even more effective when funders provide needed capacity-building to current and potential grantees to help them pursue the Shared Agenda goals.

Example Questions for funders:

- To what extent do your RFPs focus on the Shared Agenda goals?
- What capacity-building could you provide to your grantees to help them pursue the Shared Agenda goals?

Engage private and corporate support for Shared Agenda goals

Some communities work with private businesses to align funding and support with the Shared Agenda goals. See the resource in the box to the right for more details.

Obtaining Corporate Resources

Tips and resources for how to engage corporations in supporting local change efforts through various ways (e.g., financial, in-kind, matching, etc.)

Source: Community Tool Box

Focus strategic planning processes on Shared Agenda goals

Decision-makers and funders can focus their strategic planning and budget planning process on pursuing change targets from the Shared Agenda. See the resource in the box to the right for more details.

Changing Policies to Increase Funding for Community Health and Development Initiatives

Resources on how to shift policies to align funding in support of community health initiatives.

Source: Community Tool Box

Add Shared Agenda goals into a theory of change

Decision-makers and funders can add change goals from the Shared Agenda into their *own* theory of change. This can help to ensure these goals are considered in all future efforts.

Shift operational policies and practices to address prioritized inequities

Decision-makers and funders can use their institution's economic power in partnership with the community to address inequities highlighted in the Shared Agenda. For example, institutions can align their operational resources with the Shared Agenda equity goals by using:[24]

- **hiring practices** that create pipelines for local, diverse residents to gain employment and promotions within the institution
- **sourcing practices** that use local businesses owned by residents from disadvantaged groups or communities to purchase needed materials, supplies, and services
- **construction practices** that use local vendors and hires diverse, local residents to help build capital projects

.

Anchor Mission Playbook

Guide for how nonprofit or public place-based entities such as universities and hospitals can leverage their institutional resources to both advance their nonprofit missions and to reduce health and wealth disparities in their surrounding communities.

Source: Democracy Collaborative

Recommendations for Success:

- **Recruit respected local funders and leaders** to help encourage their colleagues to align their resources with the shared agenda**.** Provide them with the examples described on pages 87-88.

- **Start with organizations that already have buy in and are ready to begin aligning their resources.** These organizations can serve as early adopters and become a resource for other organizations.

Key Considerations for your Community:

- To what extent are local resources already aligned to support the goals of the Shared Agenda? How can you build on these examples, and use them to encourage other decision-makers and funders to do the same?

- Are there any upcoming grant cycles in the community? How can you facilitate a conversation with relevant funders about prioritizing the Shared Agenda goals in their RFPs? How can you connect them with other funders who have successfully done this in the past?

Adopt a Shared Agenda Checklist

Organize collaborative for Action and Impact

- ☐ Collaborative has **created a Shared Agenda** based on priorities emerging from Shared Visioning and system scanning process.
- ☐ Collaborative is **using the Shared Agenda** within its meetings and planning processes.

Embed new Practices in the Community

- ☐ BBO has process in place to build local **organizations' and groups' buy-in** around the Shared Agenda goals.
- ☐ BBO has process in place for BBO and collaborative members to **bring the Shared Agenda into meetings** with local organizations and groups.

Promote Sustainability

- ☐ BBO has process in place to build local **decision-makers' and funders' buy-in** around the Shared Agenda goals.
- ☐ BBO has process in place to help local decision-makers' and funders' **align their resources** to support the Shared Agenda goals.

Step 5:
Design Powerful Strategies

ABLe Process Road Map

Once your collaborative Understands the Community System conditions affecting their Shared Vision goals or Targeted Problem and Adopts a Shared Agenda, help them to Design Powerful Strategies.

The collaborative can use prioritized targets for change from the system scan process to design powerful systems change strategies.

Step 5 in a Nutshell

WHAT: Powerful strategies shift the status quo and accomplish the outcomes in your Shared Vision. Powerful strategies are intentionally designed to create transformative change. Systemic change emerges because powerful strategies help to: transform purpose, create a new narrative, expand boundaries, align policies and protocols, create opportunities, and promote new roles and relationships.

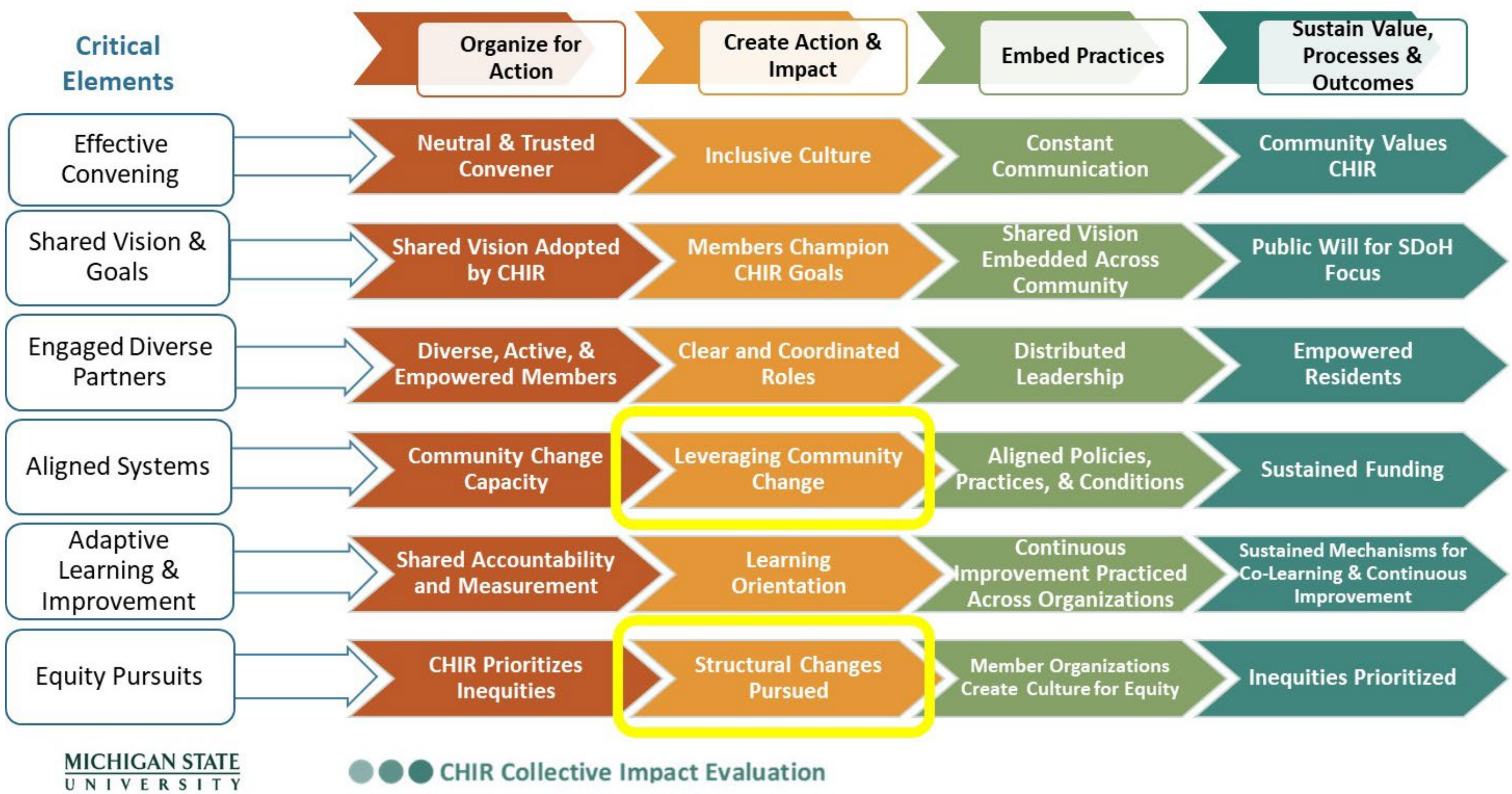
WHY: Many initiatives fail to achieve their change goals because their strategies are simply not powerful enough to shift community system conditions and create sustainable improvements in targeted outcomes.[20] The strategy design process supports the development of more powerful change strategies.

Related ABLe Manual Pages: 189-300

Related section on MICHIRLearning.org website

Which collective impact outcomes are related to this step?

Designing Powerful Strategies will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess your collaborative's progress related to designing powerful strategies, and the key roles the BBO can play to support this process.

Step 5: Design Powerful Strategies			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
	Assess: To what extent has the collaborative **designed powerful strategies** to address prioritized change targets? **BBO Role:** Help the collaborative design powerful strategies to address prioritized change targets (p. 93)		

Critical BBO Roles to Create Action and Impact

Help the collaborative:

Design Powerful Strategies

Overview

Engage stakeholders in designing powerful strategies to address prioritized root causes. Powerful strategies are intentionally designed to shift the status quo and create transformative change related to the Shared Vision. This systemic change emerges because powerful strategies:

Transform Purpose	Change the purpose and goals driving organizations, institutions, initiatives, and communities.
Create New Narratives	Shift the local assumptions and stories about local barriers getting in the way of the Shared Vision goals and how to address them, and the strengths, needs, and aspirations of local residents.
Expand Boundaries	Shift which settings and stakeholders have power, influence, and authority, including whose voice matters and who decides what happens and how it happens within a change effort.
Align Policies and Protocols	Shift the policies, rules and guidelines that: drive local behavior, determine what is available and for whom, determine resource flows and allocations, and influence how work is done.
Create Opportunities	Creating living, working, schooling, and playing conditions and opportunities that promote equity and health for all residents.
Promote New Roles and Relationships	Alter the roles and responsibilities across settings, stakeholders, and residents, including who is responsible for health and who is an actor of change. Expand relational networks across residents and organizations to promote cohesion, support and efficiency.

Adapted Carey & Crammond, 2015; Meadows, 2008, 1999, Midgley, 2000

How the BBO Can Support this Activity

1. Help stakeholders design powerful strategies
2. Help stakeholders prototype strategy ideas
3. Help stakeholders prepare strategies for action

1. Help stakeholders design powerful strategies

Help the collaborative engage diverse stakeholders (e.g., collaboration members, community partners, residents) in designing strategies using the following steps. This strategizing process can happen during existing meetings (e.g., collaborative meetings, staff meetings) or new meetings.

A. Select root causes for strategizing
B. Brainstorm strategy ideas to address root causes (ABLe Manual page. 217-219)
C. Consider strategy examples (ABLe Manual page 220)
D. Prioritize strategy clusters (ABLe Manual page 221)
E. Use powerful strategy approaches

ABLe Manual
Pages
215-221

A. Select root causes for strategizing

Help stakeholders select an initial set of root causes to strategize around. This makes the strategizing process manageable yet helps stakeholders come up with more comprehensive strategy ideas. You can repeat this process to cover more root causes if needed.

Example Process

1. Pick a Shared Vision goal. The first step when facilitating a strategizing meeting is to have stakeholders decide which Shared Vision goal they want to focus on for strategy design. Review the Shared Vision with everyone in the meeting (have individuals look at a handout or PowerPoint slide as you're going through the information). Then give them a 1-2 minutes to decide which goal area they want to focus on.

2. Form small groups. Put table tents with the Shared Vision goal area written on them at different tables. Have people move to a table with the goal they selected. Adjust the small groups so there are about 5-7 people in each. Make sure each goal area has at least 2 people (if there is only 1, have them join another group).

3. Select root causes. Have each small group review the root cause themes associated with their selected Shared Vision goal and prioritize 3 themes to start strategizing around.

> TIP**:** encourage small groups to select root cause themes from different system characteristics (mindsets, regulations, connections, etc.) that if addressed together could make a big difference in the Shared Vision goal area.

4. Write on paper. Have small groups write the Shared Vision Goal at the top of a piece of paper and the 3 associated root causes underneath. Make sure small groups have access to the detailed data for each of their 3 root cause themes to reference during strategy design.

Shared Vision Goal
- Root Cause Theme 1
- Root Cause Theme 2
- Root Cause Theme 3

Brainstorm strategy ideas

Let stakeholders know that later on they will be viewing some example strategies and tips for designing powerful strategies, but that they are going to start the strategy design process with some open brainstorming because this has been shown to help promote creativity.

Example Process

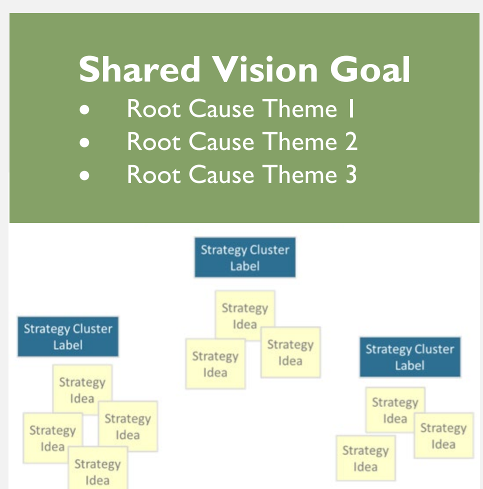
Adapted from IDEO (2009; 2015) and Plattner (2016)

Example Strategy Idea:
Repurpose underused buildings on West side for affordable housing and co-located services

1. **Move to wall.** Have each small group gather at some wall space and tape up their Shared Vision Goal and 3 selected root cause themes. Make sure everyone has sticky notes and marker.
2. **Individual brainstorm.** Ask individuals to take a few minutes on their own to write or draw a few strategy ideas to address their selected root cause themes and Shared Vision goal, silently. Remind everyone to write clearly, add detail, and use one idea per sticky note.

TIP: Remind stakeholders to include enough details on the sticky note so the idea is ACTIONABLE.

3. **Share Ideas.** Have small group members share their ideas with each other.
   - Make sure each individual idea is heard.
   - Help team members place ideas under the Targeted Problem (see example).
4. **Build on ideas.** Have small groups continue collectively brainstorming, building off initial ideas by adding new ideas on sticky notes on the wall. This should last about 10-15 minutes.
5. **Cluster.** Have small groups cluster similar strategy ideas by moving related sticky notes together, then reflect on the following:
   a. How well do these clusters address our selected root causes and Shared Vision goal? What is missing?
   b. To what degree have we addressed the most significant needs and desires of the people we are designing for?
   c. What ideas might need to be added or merged together to build more robust clusters?
6. **Label.** When small groups are finished creating their strategy clusters, have them name each one by putting a simple label on a sticky note of a different color and place it above each cluster.



B. Help stakeholders consider example strategies

After brainstorming some initial ideas, have stakeholders consider existing strategy examples to see if they want to incorporate any into their strategies. Guide small groups to either add ideas into their existing sticky notes or create new sticky notes.

ABLe Example Strategy Guide

Consider the following sources to further inform the collaborative's brainstorming:

Where to find strategy ideas?

Ask about "Bright Spots"

Ask people for any instances where they've been able to overcome or address your targeted root causes. Learn about what people have naturally done to make this happen.

Look at formal resources

Look for examples in reports, news reports, evaluations, or strategic plans.

Look at informal resources

Look for examples in blogs and Facebook groups around topics.

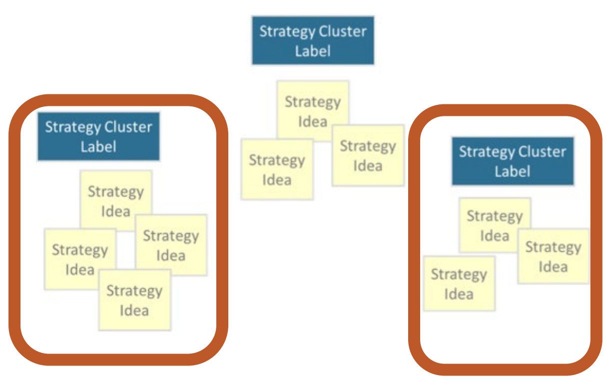
ABLe Example Strategy Guide

This guide includes hundreds of strategies used by communities around the world to promote systems change. See link in grey box above.

C. Help Stakeholders prioritize strategy clusters

After considering example strategies, help stakeholders prioritize several strategy clusters to move forward in the strategy design process. Guide stakeholders to prioritize clusters that:

1. Tackle root causes of the Shared Vision Goal
2. Motivate stakeholders to engage in action



TIP: Have stakeholders put non-prioritized strategy clusters in a parking lot for later use.

D. Help Stakeholders Use Powerful Strategy Approaches

After stakeholders have developed some initial strategy ideas targeting their prioritized root causes, help them to consider the following approaches for enhancing the power of their strategies. These approaches are described on the following pages and include:

- Saturate the Community
- Disrupt the Status Quo
- Design for Equity
- Align System Conditions

Powerful Strategy Design Checklist

Use this checklist to design powerful strategies to address local problems and inequities.

TALKING POINT:
"Now that we have developed some initial strategy ideas, let's look at some approaches for increasing the power of our ideas. The goal is to ensure our strategies are powerful enough to shift the status quo and create transformative change."

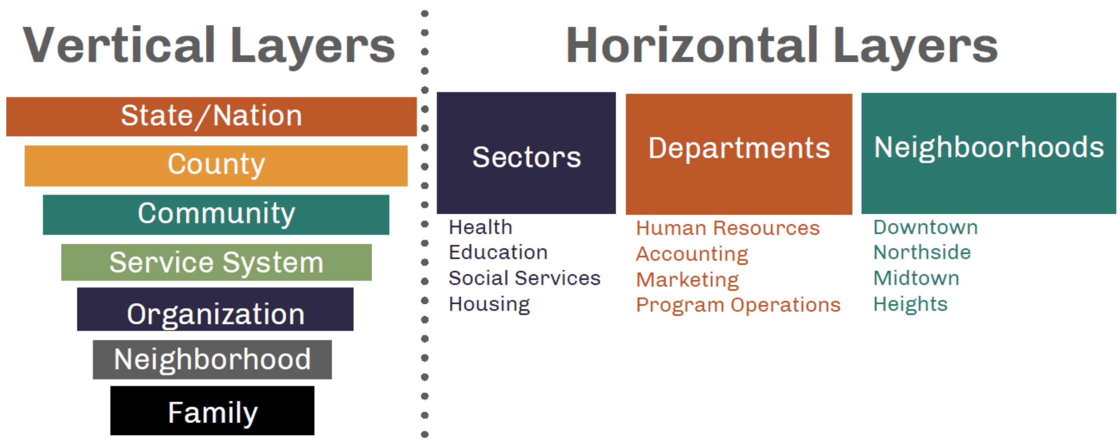
GROUP PROCESS IDEAS:
There are different ways to bring powerful strategy approaches into the collaborative's strategy design process. Consider your local context to figure out what might work best:

One strategy approach at a time	• Use one powerful strategy approach at a time, over course of one or more meetings.
Peer to peer strategy approach consultation	• Facilitate a peer to peer consultant activity where each person takes on a different strategy approach in the conversation and provides ideas and recommendations.
Strategy approach rotation	• Break into groups and assign one approach to each group to discuss and share ideas with the larger group.

Saturate the Community

ABLe Manual Pages 222-231

Powerful Strategies are embedded and reinforced by individuals, settings, and processes across vertical and horizontal ecological community layers. This helps new habits, practices, and opportunities to take hold.[25]



Key Design Questions

Help stakeholders design their strategies to embed change into the vertical and horizontal community layers by considering the following questions:

- What individuals, settings, and processes across vertical and horizontal ecological layers could help reinforce and embed your strategies?
- What changes do you need them to make? How can they support the strategy?

For more details see the "Assessing ecological layers" worksheet on ABLe Manual page 224.

TIP: policies, environments, systems

The Centers for Disease Control suggests three levers when attempting to create change across various ecological layers: Policy, Environment, and Systems.

See ABLe Manual page 226 for more details.

TIP: Tackle multiple outcomes

Help the collaborative consider how to design strategies to simultaneously tackle multiple outcomes, such as multiple social determinants, community system conditions, and intermediate and population-level outcomes related to the Shared Vision.

See ABLe Manual pages 229-231 for more details, including a list of exemplar strategies.

Disrupt the Status Quo

ABLe Manual
Pages
232-235

Major movers and shakers in the systems world say that in order to make transformative change, you need to shift the way the work is done.

Disruptive Strategies flip taken for granted assumptions about how work is done to create more powerful ways to promote transformative change.[26]

Use the following disruptive questions to help the stakeholders shift, enhance, or expand their strategy ideas to make them more powerful:

Disruptive Strategy Questions

How could we disrupt:

- **How** this strategy works**?**
- **Who** carries it out?
- **What roles** people play?
- **Where** it happens?
- **When** it happens?

See **ABLe Manual pages 234** for an exemplar disruptive strategy example where a hospital renovated a motel to help at-risk discharged patients get temporary housing to meet their care needs – and prevent hospital re-admittance.

Use the following ideas to help your collaborative brainstorm disruptive strategies.

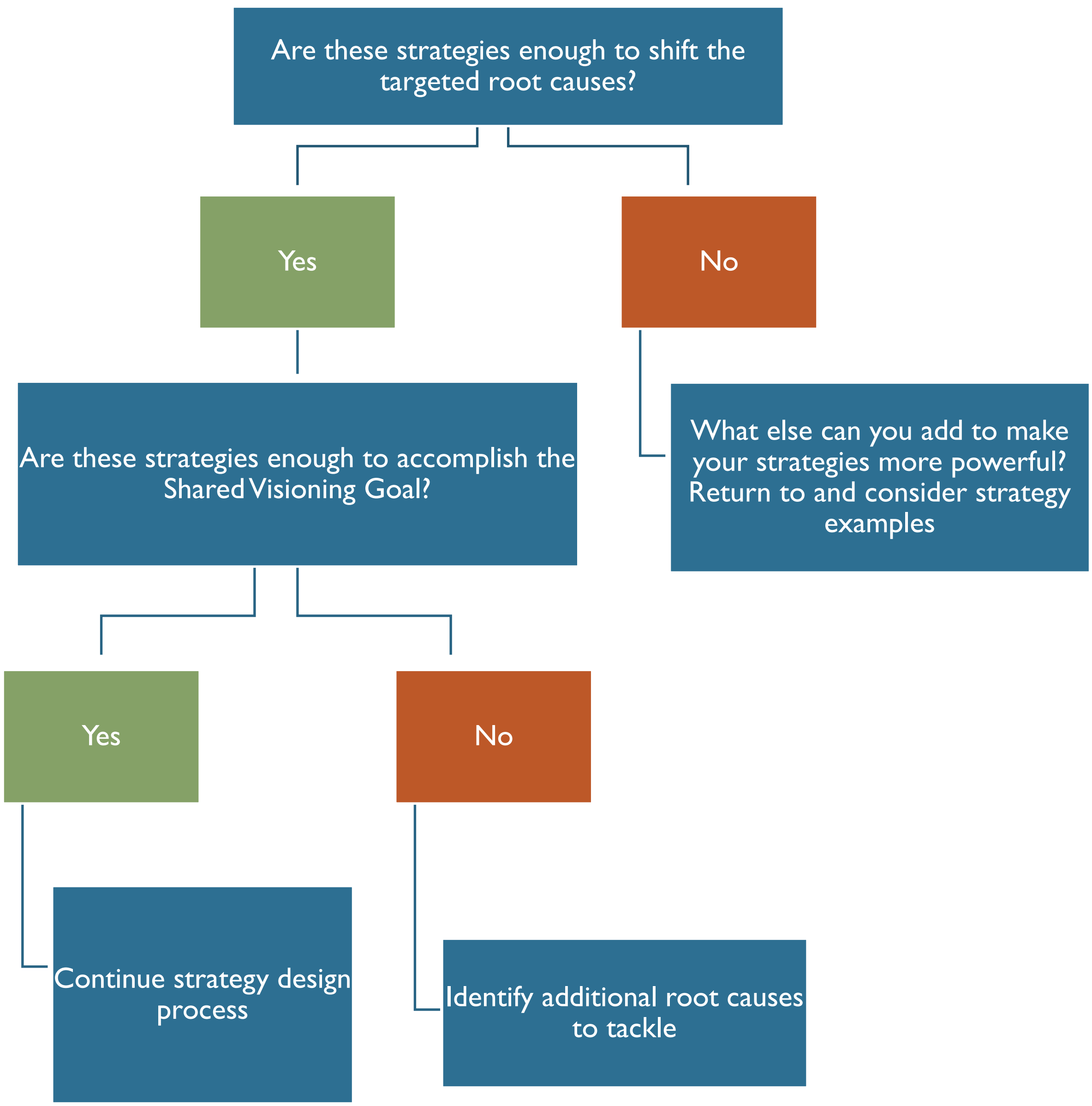
Innovative Strategy Ideas to Disrupt the Status Quo	Examples
Decentralize Empower non-professionals to take action to meet local needs	• Uber/Lyft • Airbnb • Wikipedia • Family Independence Initiative
Harness Efficiency Take an expensive and complex support and make it more affordable and accessible for people who don't need all the bells and whistles.	• Outpatient surgery • Zipcars • Peer to peer support groups • Virtual healthcare
Co-Locate Integrate multiple opportunities in same location or interaction.	• Locate laundry and food pantry in schools • Doctors teach patients about healthy cooking and eating

Remember!

Pause and check the power of your strategies!

Before moving onto the next step in the design process, check the power of your strategy clusters.

Use the following decision tree to see if your strategies are powerful enough to accomplish your Shared Visioning Goal. Think of this like a sufficiency test: Are the strategies we have created so far sufficient to shift the targeted root causes?



Design for Equity

Too often change efforts design strategies that unintentionally increase local inequities instead of reducing them. Why?

Inequities can easily emerge or get exacerbated when strategies aren't designed to address root causes of inequities, fail to reach certain populations, and create negative, unintended consequences.[27,21]

Use the following questions to help the collaborative design strategies that are powerful enough to reduce inequities and promote equity:

How can we ensure our strategies address the **unique needs and circumstance** of people experiencing the greatest inequities?	See page 8-10 of the ABLe Equity Design Supplement
How can we design our strategies so they increase social, economic, political, and learning **power and capacity** of groups experiencing the greatest inequities? *(This is referred to as the Targeted Universalism approach)*	See page 11-13 of the ABLe Equity Design Supplement
How can we design our strategies to target multiple **system leverage points** powerful enough to shift inequities? *System leverage points include mindsets, goals, power dynamics, regulations, connections, service components, and resources (listed in decreasing order of power)*	See page 14-16 of the ABLe Equity Design Supplement
How can we design our strategies to address potential **unintended consequences** for groups experiencing the greatest inequities?	See page 17-19 of the ABLe Equity Design Supplement

TIP: Co-design strategies with residents from disadvantaged groups

Help your collaborative consider how to co-design strategies with local groups experiencing disadvantages and inequities. Authentically engaging groups experiencing inequities in the strategy design process helps to:[28,29]

- ensure strategies are responsive to their needs, preferences, and goals
- lead to more creative problem solving
- build collective efficacy and relational power
- create community partnerships critical for the success of transformative change
- empower those in the margins as leaders to influence decisions affecting their lives and communities

2. Help stakeholders prototype strategy ideas

Prototyping is a process to gather feedback from "end users" (e.g., residents, staff, etc.) to test out strategy ideas before they are implemented. Prototyping can help to:

ABLe Manual Pages 238-245

- **Enhance communication:** Prototypes can often demonstrate ideas better than words, and can be used as a conversation starter with end users.
- **Rapidly test many options – cheaply:** Prototypes are cheap and quick to make, and help designers test out multiple ideas before deciding which to pursue. Prototypes can "fail fast" so designers can make quick revisions.
- **Keep things manageable:** You can create prototypes for small chunks of the overall strategy idea and prototype in stages to keep things feasible.[29]

Check out www.ideo.org for more information and free tools to support your use of these ideas

Consider the following prototyping steps to guide the collaborative in gathering feedback on their strategies:

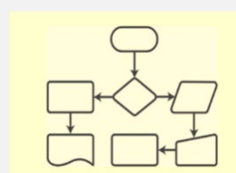
- Flesh out strategy details (p. 102)
- Identify questions to gather feedback (p. 103)
- Build prototypes (p. 104)
- Gather interactive feedback and revise ideas (p. 105-106)

Flesh out strategy details

Brainstormed strategy ideas often lack detail, which can make them difficult to use for prototyping. Help the collaborative flesh out their strategy ideas with enough detail so end users can provide useful feedback.

For example, have the stakeholders read through the strategy sticky notes for one of their prioritized strategy clusters, and think about what detail is needed to make the strategy clearer and more actionable. The following shows how details (shown in red text) were added to a strategy about housing.

TIP! Encourage visuals on your sticky notes to help bring ideas to life.



***Strategy Label:** Put policies in place to promote access to affordable housing for residents* under 150% poverty

Strategy Idea:
Work with city government to shift zoning codes, taxes, and density bonuses to incentivize the expansion of affordable housing **near employment, schools, and transit lines**

Strategy Idea:
Work with city government to mandate regularly scheduled inspections of all rental properties **to ensure substandard housing conditions are addressed earlier.**

Identify questions to gather feedback

Help the collaborative come up with specific questions they need to ask end users (e.g., stakeholders who will be implementing and/or benefiting from the strategy) to get feedback and test out critical elements of their strategy. This often relates to whether the strategy will work in the real world, be easy to implement, and resonate with end users.

Remember!

You don't have to gather feedback on everything.

Identify what parts of your strategy you need feedback on the most – come up with questions to gather input on just these things. See www.IDEO.org for more details.

Example Questions to Gather Feedback

- How easy will _[insert strategy element]_ be to carry out in your day to day job? How could it be made easier for you to use?
- What should _[insert strategy element]_ look like?
- Where should _[insert strategy element]_ happen?
- When should _[insert strategy element]_ happen?
- Will _[insert strategy element]_ meet the unique needs of _[insert prioritized demographic groups]_ residents? If not, how could the idea be improved?

Example Process

Consider the following process for determining what to prototype with the collaborative. Adapted from IDEO (2009; 2015) and Plattner (2016)

1. **Identify relevant prototyping questions.** Have the team look at one of their strategies and identify the most important questions to help understand if the strategy idea will work and resonate with end users (e.g., stakeholders who will be implementing and/or benefiting from the strategy). Write each question on a separate sticky note.
2. **Prioritize prototyping questions.** Engage the team in prioritizing which questions to answer first. Consider which feature of your idea is most critical (e.g., the question, "Is there sufficient demand for a community HUB?" may be prioritized before the question, "What colors are most preferred by families for the HUB reception area?").
3. **Repeat.** Repeat these steps for the other strategies.

Help the collaborative build prototypes to get feedback

Once the collaborative has prioritized what feedback questions they want to ask about their strategies, help them build simple prototypes (if necessary) to help gather useful feedback from end users.

The goal of building and testing a prototype is to understand how the strategy might work for the end user and get specific feedback to make the system, product, service, and/or experience better.

Remember!

Prototypes can often demonstrate ideas better than words, and can be used as a conversation starter with end users.

Prototypes should:

- ☑ Be quick and cheap to make
- ☑ Demonstrate strategies with users
- ☑ Help to gather user feedback
- ☑ Be iterative in nature

Help the collaborative consider which of the following common prototypes could help them ask their feedback questions with end users.[30,31]

Role Play	Act out the experience of the idea. Consider props and attire to increase the reality of the user experience
Story Board	Use a comic-book style format to quickly draw out key interactions or processes and create accompanying narrative
Process Map	Map out the process steps used within a strategy using boxes and arrows, or graphics
Physical Model	Build a simple three-dimensional representation of the idea using basic materials – paper, cardboard, pipe cleaners, etc.
Diagram	Draw out the structure related to a strategy – a mindmap can also be considered diagrams
Advertisement	Create a fake advertisement that promotes the idea. Consider using different frames or tones to see which most resonates.

Example Group Process

Consider the following group process for building prototypes. Adapted from IDEO (2009; 2015) and Plattner (2016).

1. **Determine prototype.** Engage the team in deciding which type of prototype it can best use to answer each prioritized question. The intention of any prototype is to help your targeted users experience your product or service as real, so the feedback they provide can be more specific and detailed.

2. **Build prototype.** Work together to build a prototype to help answer the questions (see examples). It is okay for initial prototypes to be rough because the team will be evolving them over time, based on multiple rounds of feedback.

Help the collaborative gather interactive feedback and revise ideas

The collaborative can use their prototypes to share strategy ideas, get feedback, and learn how to improve the strategy. The feedback gathered can provide insight on the strategies and the next iteration of prototyping. The collaborative might refine and iterate prototypes a few times until the solution is working well for end users.

Consider the following examples of ways to gather feedback on the prototype:

Individual Conversations

- Schedule one-on-one conversations

Group Conversations

- Convene a group of individuals to discuss the prototypes

On the Street Conversations

- Conduct "person on the street" interviews to randomly engage individuals in settings which match the one in which the team's strategy/solution will be ultimately used

Co-Design Sessions

- Invite potential end-users and/or implementers of your strategy to a "co-design" session to help rapidly refine and iterate a prototype together

Example Group Process

Consider the following process for gathering iterative feedback and revising ideas.
Adapted from IDEO (2009; 2015) and Plattner (2016).

1. **Identify end users.** Help the collaborative identify which key "end users" of the strategy to engage in feedback sessions.

2. **Identify specific feedback activities.** Determine which feedback methods (e.g. individual conversations, group conversations, on the street conversations, co-design sessions) makes sense for the prototype and for the information you hope to gather. <u>**TIP**: the most specific, detailed, and ultimately useful feedback comes from providing opportunity for stakeholders to interact with prototypes as directly as possible in the settings in which they will ultimately be used.</u>

3. **Gather feedback.** Use the feedback methods to gather input, reactions, and reflections from end users. <u>**Tip:** in addition to asking your specific prototyping questions, also pay attention to other observations and input you can gain when someone responds to a prototype.</u>

4. **Use feedback.** Use feedback to revise your strategy, and determine if additional prototyping is needed before launching.

3. Help stakeholders prepare strategies for action

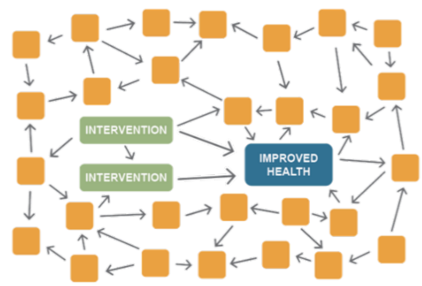
Once the collaborative has gathered and used end user feedback to improve their strategies, help them prepare their strategies for action and implementation. Consider the following to guide these conversations.

ABLe Manual Pages 249-299

Address System Misalignments

Strategies do not exist in a vacuum and are instead carried out within an existing community context (see orange boxes below).

- Some aspects of this context may be aligned with your strategies and outcomes (e.g., existing networks support strategies to improve service referrals) and will support the success of your strategies.
- Other aspects of this context may be misaligned (e.g., local attitudes and beliefs that cause people to resist new strategies) and can impede your success.



Help the collaborative engage diverse stakeholders to understand current conditions that are misaligned with their strategies and to design ways to address these misalignments. The collaborative can just add these elements into their strategies. Doing this BEFORE launching strategy can increase your likelihood of success.[32,21].

Facilitation Questions

See ABLe Manual page 251 for example facilitation questions to help your collaborative understand system misalignments related to your strategies

Improve System Flow

As you are thinking about "connection" misalignment take a look at ABLe Manual pages 258-277

Strategy Ideas

See the Preparing Strategies for Action Resource Guide for examples of how communities have addressed system misalignments.

TIP: Draw on local **Bright Spots** or instances where local people o settings successfully overcame problems to come up with ideas for how to address system misalignments.

Anticipate Future Misalignments

Anticipate Future Misalignments as strategies move through different action phases. It is important to align the system over time in order to support success and sustained strategies. See ABLe Manual page 255 for information on how to anticipate future misalignments.

Design Strategies for Effective Implementation

The power of any intervention or strategy– no matter how well designed – is entirely dependent on how well it's implemented.[33] See ABLe Manual pages 281-285 for more details.

Effective Strategies + **Effective Implementation** = **Improved Outcomes**

Adapted from Fixsen et al., 2013

How can you promote effective implementation?
Ask questions during planning meetings to help your collaborative design ways to address implementation needs *before launching their strategies*, and add these ideas right into their strategy package.

Use the following facilitation questions to help your collaborative promote critical implementation processes. Refer to the page numbers below for the full list of questions.

TIP: Engage diverse perspectives

Diverse perspectives - including residents, staff, decision-makers, and local community partners - can help identify and address potential implementation challenges.

Diffusion: the adoption, use, and spread of strategies and new behaviors across the community.[7&8] Includes promoting:

See ABLe Manual page 286-289

Awareness	Buy-In	Scale
How can you spread the word about this strategy to people who need to adopt it?	What is the best way to describe your efforts so individuals want to participate or learn more?	How can you expand your diffusion efforts over time to reach other stakeholders/settings?

Use: Stakeholders/ settings are effectively using strategies and continuing to use them over time. Includes promoting:

See ABLe Manual page 290

Effective Use	Continued Use
How can you build local stakeholder capacities to effectively carry out new behaviors?	How can you embed strategies into existing routines and promote accountability for new behaviors?

Dose: strategies are reaching and benefiting targeted residents, and are powerful enough to make a difference. Includes promoting:

See ABLe Manual page 291

Reach	Strength
How can you increase the number of targeted residents you reach with your strategies?	How can you increase the strategy's strength to shift relevant outcomes for targeted residents?

Define Outcomes

An outcome is a change resulting from your strategies. Outcomes tell you whether, and how much, your change goals have shifted and guide decision-making about whether to continue, adapt, or scale up your efforts.

ABLe Manual Pages 292-294

Help your collaborative identify outcomes they hope to achieve as a result of their strategies so they can track whether they are bringing about these changes over time.

If stakeholders struggle with understanding the difference between outcomes and outputs (i.e., counts related to your strategy activities), provide an example, such as the following:

Strategy Activities → **Outputs** → **Outcomes**

- **Strategy Activities** — **Example:** Engage regional planning councils in creating policy incentives for the development of affordable housing
- **Outputs** — **Example:** # of planning meetings held to discuss affordable housing
- **Outcomes** — **Example:** New zoning and tax incentives in place for affordable, healthy housing development **Example:** more people living in affordable, healthy housing

TIP: consider different types of outcome

Outcomes can relate to people or place conditions, and your efforts will most likely bring about both types of outcomes as described below. See ABLe Manual pages 292-293 for more examples:

People outcomes include shifts in the knowledge, skills, behaviors, and/or the state of psychological and physical wellbeing of individuals.

Examples:

- **Knowledge**: more residents understand resources available to meet their needs.
- **Skills**: more residents have skills to effectively engage in formal decision-making processes.
- **Behaviors**: more residents engage in healthy eating behaviors.
  Status: more babies born with a healthy birth weight

Place outcomes include shifts in conditions within the community system (e.g., neighborhood, service delivery system, city, county, or region)

Examples:

- **Policies**: More affordable housing zoning codes in place within the region.
- **Community resources**: More convenience stores selling affordable, healthy food options
- **Mindsets**: More organizations prioritize goals around promoting equity in wellbeing
- **Connections:** Stronger referral network for young mothers between health settings and other local services and supports.

TIP: Define outcomes over time

Outcomes will emerge over time as a result of your strategies. The following is one way to think about outcomes over time:

- **Short term outcomes** are changes occurring in the **beginning** of your effort.
- **Mid-term outcomes** are changes occurring in the **middle** of your effort.
- **Long-term outcomes** are changes occurring **by the end** of your effort.
- **Impact** is the **ultimate change** you want to bring about for people or the community.

ABLe Manual Page 294

TIP: Define Equity Outcomes

As you used disaggregated data to identify and prioritize local inequities to target for change, you may have identified inequities related to any combination of the following demographics:

ABLe Equity Learn Supplement page 2-8

- Age
- Race/Ethnicity
- Gender/Gender Identity
- Sexual Orientation
- Religion
- Education Level
- Household Composition
- Geographic Area/Neighborhood
- English Language Proficiency
- National Origin
- Documentation Status
- Disability Status
- Employment Status
- Income
- Connection to Services/Supports
- Other

Help the collaborative consider these inequities as they define the outcomes they hope to achieve as a result of their efforts. This will help them track whether efforts are ultimately leading to greater equity in the community. Consider the following facilitation questions:

What would success look like if your targeted inequities were reduced or eliminated?

What outcomes could be used to track progress on reducing these inequities?

Additional tips for defining outcomes

- Look at the Shared Vision to identify potential outcomes (most likely long term)
- Review community assessment questions related to different social determinants of health for potential outcomes
- Explore evaluation reports on similar efforts
- Identify potential outcomes by flipping your root causes into the positive

Identify Relevant Partners

As the collaborative prepares for implementation, help them consider which relevant partners you still need to engage to help support and carry out your strategies. Consider partners who can help support **diffusion, effective use,** and the **reach** of your efforts.

Facilitation questions

Consider asking the following facilitation questions during your collaborative planning processes. See ABLe Manual page 297-300 for more details.

1. Who needs to be engaged in these efforts because they are in a position to:
   - make decisions as to whether their organization or initiative will adopt the strategies
   - diffuse messages to staff and colleagues about the strategies and new behaviors
   - support successful implementation
2. How can you engage these relevant partners?
   - What processes have you successfully used to engage new partners in your efforts?

Overcome Engagement Barriers

Communities often encounter challenges to engaging needed stakeholders (see table below).[34] Ask questions to help your collaborative assess and problem solve these types of engagement barriers during planning processes. Refer to the *Preparing Strategies for Action Resource Guide* for examples of how communities have addressed these engagement barriers.

Mindset Barriers	**Lack of Readiness**: stakeholders don't see the change as necessary, desirable or feasible. **Competing Priorities**: stakeholders don't understand how the change complements or fits with their own priorities. **Prior History**: stakeholders remember their community's history of exclusion, ineffective prior change efforts, or cumbersome collaboration efforts. **Time Commitment Burden**: stakeholders worry they don't have the time needed to support this new effort.
Capacity Barriers	**Lack of Awareness**: Stakeholders are unaware of the change. **Lack of Skills**: Stakeholders don't feel they have the knowledge or skills to support or implement the change effort.
Regulation Barriers	**Lack of Supportive Protocols/Processes**: Sometimes stakeholders do not get engaged because they don't have the processes and tools to support their efforts. For example, they may lack assessment tools to make good referrals. **Unaligned Funding Expectations**: Funders communicate expectations that are misaligned with your strategies.

Recommendations for Success:

- **Foster creativity.** Help the collaborative to tap into their creativity to design strategies and to build on to bold strategies that have worked in other communities. Bringing in exemplars to the strategy design process will help "designers" to find inspiration, take ownership of change, and transform the system.

- **Design with intentionality.** Help the collaborative to intentionally design to shift the status quo and create transformative change related to the Shared Vision. Help stakeholders to zoom out and consider whether strategy approaches are sufficient, disruptive, just, and embedded. Keep in mind that systemic change happens when strategies: transform purpose, create new narratives, expand boundaries, align policies and protocols, create opportunities, and promote new roles and relationships.

- **Build an experimental mindset.** Prototyping is a key skill in strategy design to help stakeholders to learn quickly what works and what needs improvement. Building a mindset to test, play, and experiment with strategy ideas will allow the collaborative to learn from and further develop their ideas.

Key Considerations for your Community:

- What is the best way for the collaborative to consider the four powerful strategy approaches?

- What opportunities are there in your current efforts to prototype strategies with stakeholders for feedback? What questions need to be asked to get direct feedback from users about the strategies?

- Which organizations and groups can help to prototype strategies? Who can help gather feedback on strategies in order to refine and iterate? How will feedback be used to inform strategy design and refinement?

- How can prototyping be embedded as a new practice within the collaborative and within organizations?

Design Powerful Strategies Checklist

Organize the Collaborative for Action and Impact

- ☐ The collaborative has **brainstormed strategies** to address root causes.
- ☐ The collaborative has **reviewed strategy exemplars** and built upon strategy ideas.
- ☐ The collaborative has developed and prioritized **strategy clusters** for action.
- ☐ The collaborative has considered **powerful strategy approaches** in their strategy design process.
- ☐ The collaborative has designed strategy **prototypes** and is using them **to gather stakeholder/user feedback** on their strategies.
- ☐ The collaborative has added elements into their strategies to promote effective implementation, including **system misalignment**, **diffusion**, **effective use**, and **dose**.
- ☐ The collaborative has **defined outcomes** they hope will emerge from their strategies
- ☐ The collaborative is engaging **relevant partners** to help support and carry out the strategies.

Step 6:
Promote Quick Wins

ABLe Process Road Map

Once your collaborative has designed powerful strategies to address their prioritized root causes, help them to promote quick wins to carry out these strategies.

Step 6 in a Nutshell

WHAT: A quick win is a change in the system that is accomplished within three months or less. Quick wins meet little resistance and any barriers are easy to overcome. Communities can create the conditions to foster quick wins across multiple stakeholders and community and layers as well as track progress to guide and reinforce actions.

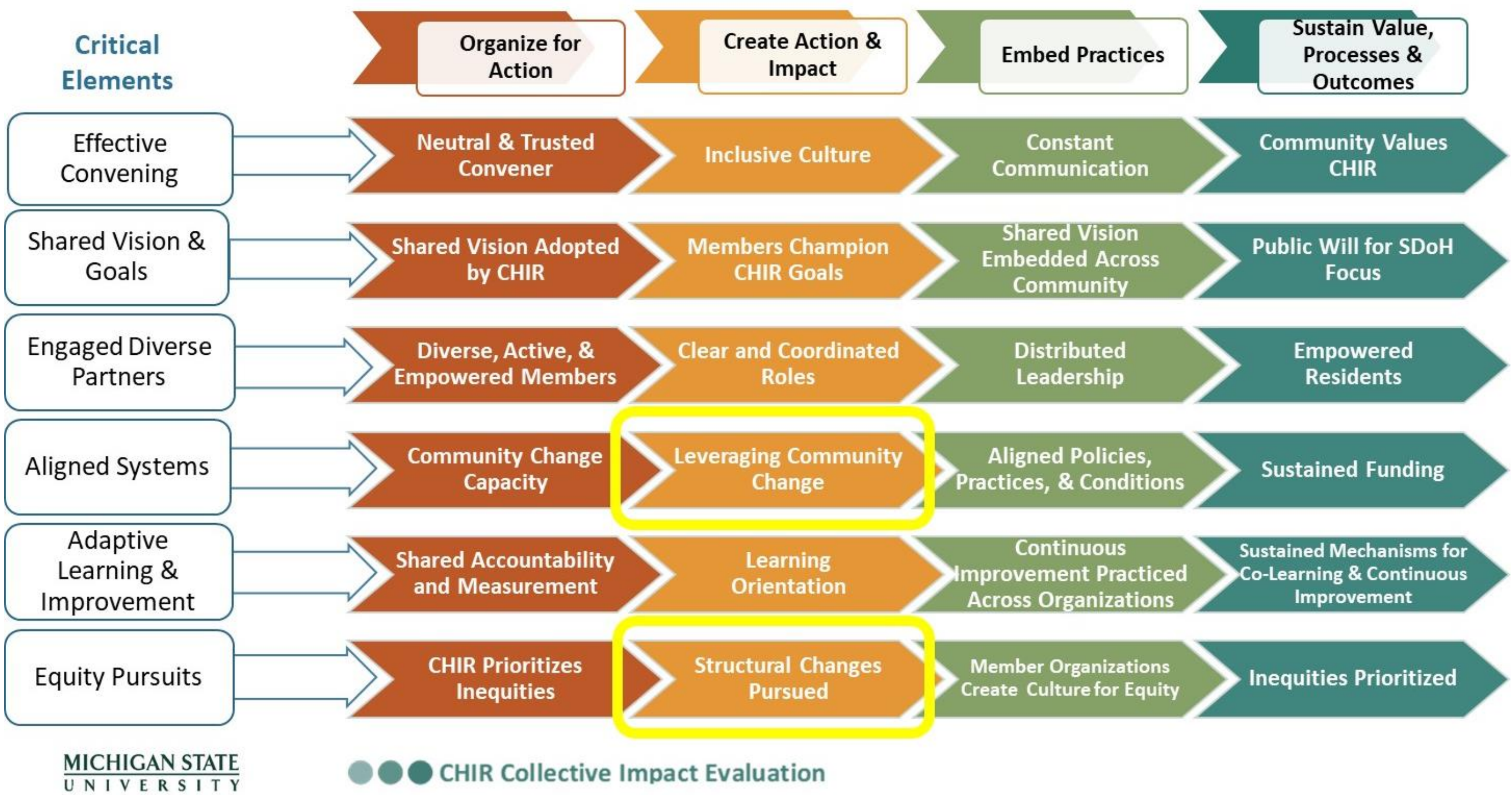
WHY: Effective change efforts foster small, immediate changes across the system that can build momentum and ultimately lead to larger wins and to the desired systems changes.

Related ABLe Manual Pages: 189-300

Related section on MICHIRLearning.org website

Which collective impact outcomes are related to this step?

Promoting Quick Wins will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess your collaborative's progress related to promoting quick wins, and the key roles the BBO can play to support this process.

Step 6: Promote Quick Wins			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
	Assess: To what extent is the collaborative **initiating quick actions** to pursue their change targets? BBO Role: Help the collaborative initiate quick action to pursue their change targets (p. 115).		

Critical BBO Roles to Create Action and Impact

Help the collaborative:

Initiate Quick Win Actions

Overview

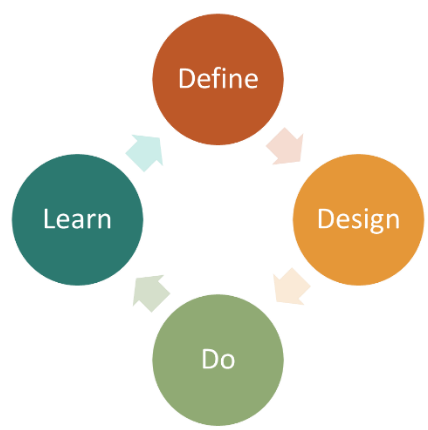
Transformative change goals – such as improving health equity outcomes – can feel overwhelming, making it more difficult for some stakeholders to move to action. To overcome this natural tendency, the BBO can help to engage diverse stakeholders (staff, leaders, community partners, residents) in taking small, "quick win" actions to move the overall change process forward.[35,36]

A quick win…

- is an action that is accomplished within 3 months or less.
- meets little resistance. Barriers are easy to overcome.
- leads to larger wins and to desired systems changes.

Quick wins can support strategies *and* overall change efforts

Stakeholders can initiate quick win actions to both carry out their strategies ***and*** support the overall change effort. For example, quick wins can occur at any stage in the action learning process:



- DEFINE: Quick wins focus on revealing and understanding local problems and inequities (e.g., gathering data on root causes, creating data summaries, etc.)
- DESIGN: Quick wins focus on designing strategies, programs, or other efforts (e.g., finding example strategies, gathering input on strategy ideas, developing strategy materials like protocols or new policies)
- DO: Quick wins focus on carrying out strategies (e.g., put new policy in place) and supporting implementation (e.g., developing talking points to build buy in, training staff in how to use new practices, etc.)
- LEARN: Quick wins focus on assessing the progress made (e.g., gathering rapid feedback to see if strategies are making a difference) and identifying next steps

How the BBO Can Support this Activity

1. Help Stakeholders Initiate Quick Wins	2. Track Progress

1. Help Stakeholders Initiate Quick Wins

Use the following processes to help stakeholders initiate quick win actions related to your strategies and overall change efforts.

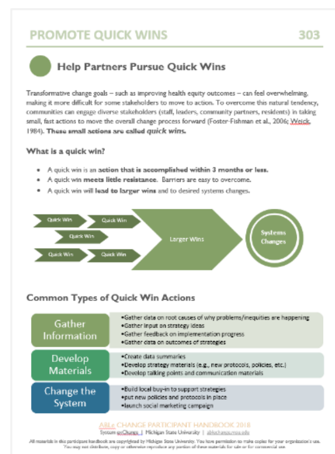
Build awareness

Some stakeholders may be unfamiliar with the idea of a quick win and the important role they can play in fostering community change.

In fact, many stakeholders are probably more accustomed to groups that focus on initiating large scale activities (vs. a series of quick wins) and engaging in extended planning processes that rarely result in action.

Help these stakeholders see an alternative to this status quo!

Use **ABLe Manual pages 303-309** to create some talking points to raise people's awareness of quick wins and their role in promoting change. Make sure to tailor these talking points so they resonate with local stakeholders. See the examples below for ideas.


PROMOTE QUICK WINS 303

Help Partners Pursue Quick Wins

What is a quick win?

Common Types of Quick Win Actions

Gather Information	
Develop Materials	
Change the System	

Example talking points

- A quick win is an action that is **accomplished within 3 months** or less and **leads to larger wins** and systems changes.
- Quick wins can help promote change because they:
    - **reduce overwhelm** by making change feasible.
    - **avoid triggering resistance to change**.
    - **build momentum** as the engagement of multiple, diverse stakeholders across the community fosters even greater engagement over time.

Facilitate conversations to incubate quick wins

Facilitate conversations in a variety of settings to help stakeholders identify and launch quick win actions.

What quick win actions should you focus on?

Keep track of what the collaborative is working on related to the four main project phases (defining problems, designing solutions, implementing strategies, learning for continuous improvement). Facilitate conversations to help stakeholders initiate quick win actions to move these efforts forward.

See ABLe Manual pages 307-208 for example actions at each project phase.


ABLe Change
Quick Wins Guide

See the **Quick Wins Guide** for more examples.

Who should you engage in these conversations?

Consider diverse stakeholders who can play a role in initiating the quick win actions needed given the collaborative's efforts. This could include leaders, direct staff, residents, and other community members.

Note, your collaborative already started this in the strategy design process (Section 5) as they identified relevant partners to help implement their strategies.

TIP: Engage multiple stakeholders in taking action

Whenever possible, try to engage multiple stakeholders in promoting small wins for the same strategy to help generate community wide momentum and buy in.

What faciltiation questions could you use?

Consider using the following facilitation questions to help stakeholders initiate quick win actions.

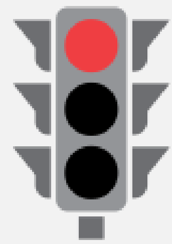
- What can you do within the next 1-3 months to help move this process forward? [provide examples from the table on ABLe Manual page 307]
- [If stakeholders say they don't think they have time to carry out action…] How can we break this action into a series of more feasible steps?
- Who else can partner to carry out these actions? How can we coordinate your actions?
- Let's plan out the specific details for this action…
    - What needs to be done *(e.g., ask residents for their input on strategies, develop protocols for the new referral process, etc.)*?
    - How should this action be carried out *(e.g., have staff ask clients questions during service visits, gather example protocols, etc.)*?
    - Who can do what? By when?

Helping stakeholders create these detailed action plans is crucial to ensure action!

Additional Faciltiation Tips and Resources

The following are several additional facilitation tips to help you promote quick win actions. See ABLe Manual page 311 for more facilitation techniques.

TIP: Pause conversation when action opportunity emerges!



Whenever an opportunity emerges within a conversation or meeting to take action, pause the conversation to help stakeholders identify feasible quick wins they can accomplish within the next 3 months to move the action forward.

Without this intentional pause, it is likely many opportunities for action will be overlooked and never initiated.

TIP: Avoid data paralysis!

Sometimes stakeholders stall taking action because they believe they need to look at more (and more and more) data before they know enough to act.

Reinforce that it is <u>impossible</u> to know everything about an issue, and starting to take action (and learning as you go) can actually help increase understanding of the problem.

Help stakeholders identify barriers or root causes where they *<u>do know enough</u>* to move to action without potentially creating harm to individuals or settings.

TIP: Help everyone become an actor of change!

Sometimes stakeholders falsely believe they don't the power to take action. EVERYONE HAS THE POWER TO TAKE ACTION.

The following facilitation and/or reflection questions can help stakeholders identify how they can become an actor of change. These questions are adapted from Lipmanosicz & McCandless, 2013.[17]

- *What is your sphere of influence or area of responsibility related to _____?*
- *Where do you have the freedom and power to act?*
- *What actions would require no or only a few additional resources?*
- *Given the above, what are some quick win activities you can start to explore?*

Support Quick Win Actions *Behind the Scenes*

Stakeholders who volunteer to initaite quick wins often need support behind the scenes to actually carry out these actions. For example, sometimes people experience barriers to carrying out their actions, or simply forget to do them.

Providing support between meetings can help ensure quick wins are carried out and momentum continues to build to move the change effort forward.[18]

Example behind the scenes activities

Check-in with stakeholders initiating actions and provide behind the scenes support to ensure actions are implemented effectively. As the BBO, here are a few things to do between regular meetings:

- **send meeting minutes** highlighting everyone's actions. See the **meeting minute template** and **meeting minute example** for ideas.
- **contact any stakeholders** initiating action to check-in on progress and provide needed support
- **send reminders** to prepare stakeholders to give updates at upcoming meetings

See the **Quick Win Coaching Tool** to help coordinate and track your behind the scenes efforts

Example schedule to support stakeholders initiating action

The following is an example schedule a BBO can use to help stakeholders carry out their quick win actions between regular meetings.

Meeting #1
- Capture detailed notes during meeting. Be sure to capture specific actions and who is responsible

Recap
- Send meeting minutes to stakeholders within 1 week
- Clearly identify stakeholders with action items

Check-In on Progress
- Contact stakeholders about action item progress
- Provide necessary supports to individuals carrying out actions

Reminder
- Send meeting reminder 3 days in advance
- Ensure stakeholders are ready to report on with action items

Meeting #2
- Ask stakeholders to give updates on action items – celebrate wins, problem solve barriers

Track Progress

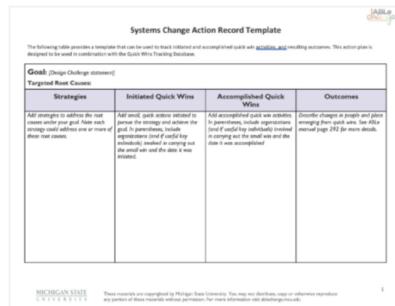
ABLe Manual Pages 315-319

Along with supporting stakeholders in carrying out quick win actions behind the scenes, the BBO can also help with tracking which types of quick win actions have been initiated over time. This information can help the collaborative make decisions about where to focus their energy.

System Change Action Record

Use the Systems Change Action Record to track quick win actions initiated through your efforts. The Systems Change Action Record can be used to:

- Celebrate successes and build momentum for change
- Coordinate actions across the system to promote synergy and alignment
- Document systems change progress. Some communities use this action plan as a reporting tool to funders
- Encourage accountability across organizations and action learning teams
- Illuminate gaps around particular systems change targets


Systems Change Action Record Template

The following table provides a template that can be used to track initiated and accomplished quick win activities, and resulting outcomes. This action plan is designed to be used in combination with the Quick Wins Tracking Database.

Goal: *[Design Challenge statement]*

Targeted Root Causes:

Strategies	Initiated Quick Wins	Accomplished Quick Wins	Outcomes
Add strategies to address the root causes under your goal. Note each strategy could address one or more of these root causes.	*Add small, quick actions initiated to pursue the strategy and achieve the goal. In parentheses, include organizations (and if useful key individuals) involved in carrying out the small win and the date it was initiated.*	*Add accomplished quick win activities. In parentheses, include organizations (and if useful key individuals) involved in carrying out the small win and the date it was accomplished*	*Describe changes in people and place emerging from quick wins. See ABLe manual page 292 for more details.*

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See **ABLe Manual pages 315-316** for more details and a filled out example of the tool.

Run Chart visual summaries

Help stakeholders interpret information about quick win actions by creating visual summaries called "Run Charts."

Run charts display different types of actions over time. These charts are powerful tools to inform decision-making about how to focus current and future action.

For example, stakeholders can see which of their goal areas have the most and least actions initiated, and use this feedback to adjust their actions moving forward. See **ABLe Manual page 319** for more details.

TIP**:** Create individualized action records for key organizations within the collaborative to help them see their progress compared to other de-identified organizations.

Quick Win Run Chart Database
Use this database to generate run chart visuals of quick win actions. Request via email: ablechangeteam@gmail.com

Click the link below to access additional tools and resources on **MCHIRlearning.org**

Recommendations for Success:

- **Keep it feasible.** Focus on actions that are feasible enough to give stakeholders confidence in their ability to make change happen and yet significant enough to make a difference. Break actions down into smaller, more manageable steps to ensure action continues forward.
- **Promote engagement.** Engage multiple, diverse stakeholders in quick win actions to build momentum, foster deeper engagement, and promote sustainable change.
- **Support action.** Provide behind the scenes support to stakeholders in carrying out actions. This can include checking in on efforts, offering reminders, and helping to troubleshoot barriers.
- **Make it visual.** Utilizing a visual summary or a Run Chart can help community stakeholders see quick win actions and can support the decision-making progress.

Key Considerations for your Community:

- Which community stakeholders are likely to engage in quick win actions? How can multiple community stakeholders be engaged in quick win actions?
- To what extent does the collaborative have the capacity to track quick wins? Consider who will support the tracking and follow-up process.
- How can you take advantage of existing or upcoming meetings to engage stakeholders in quick wins?
- How can the collaborative keep the action record alive? How can the collaborative make the quick wins visual?

Promote Quick Wins Checklist

Organize the Collaborative for Action and Impact

- ☐ Local stakeholders are **initiating quick win actions** to support the collaborative's strategies and overall change efforts
- ☐ The collaborative is **tracking quick win action progress** over time to inform decision-making.

Step 7:
Build a Climate for Effective Implementation

ABLe Process Road Map

Once your collaborative understands the community system and designs powerful strategies, help them to build a climate for effective implementation.

This implementation climate will set up the collaborative to engaging continuous learning and improvement processes.

Step 7 in a Nutshell

WHAT: Building a climate for effective implementation involves putting processes and expectations in place to monitor and rapidly address implementation issues and responses as they emerge.

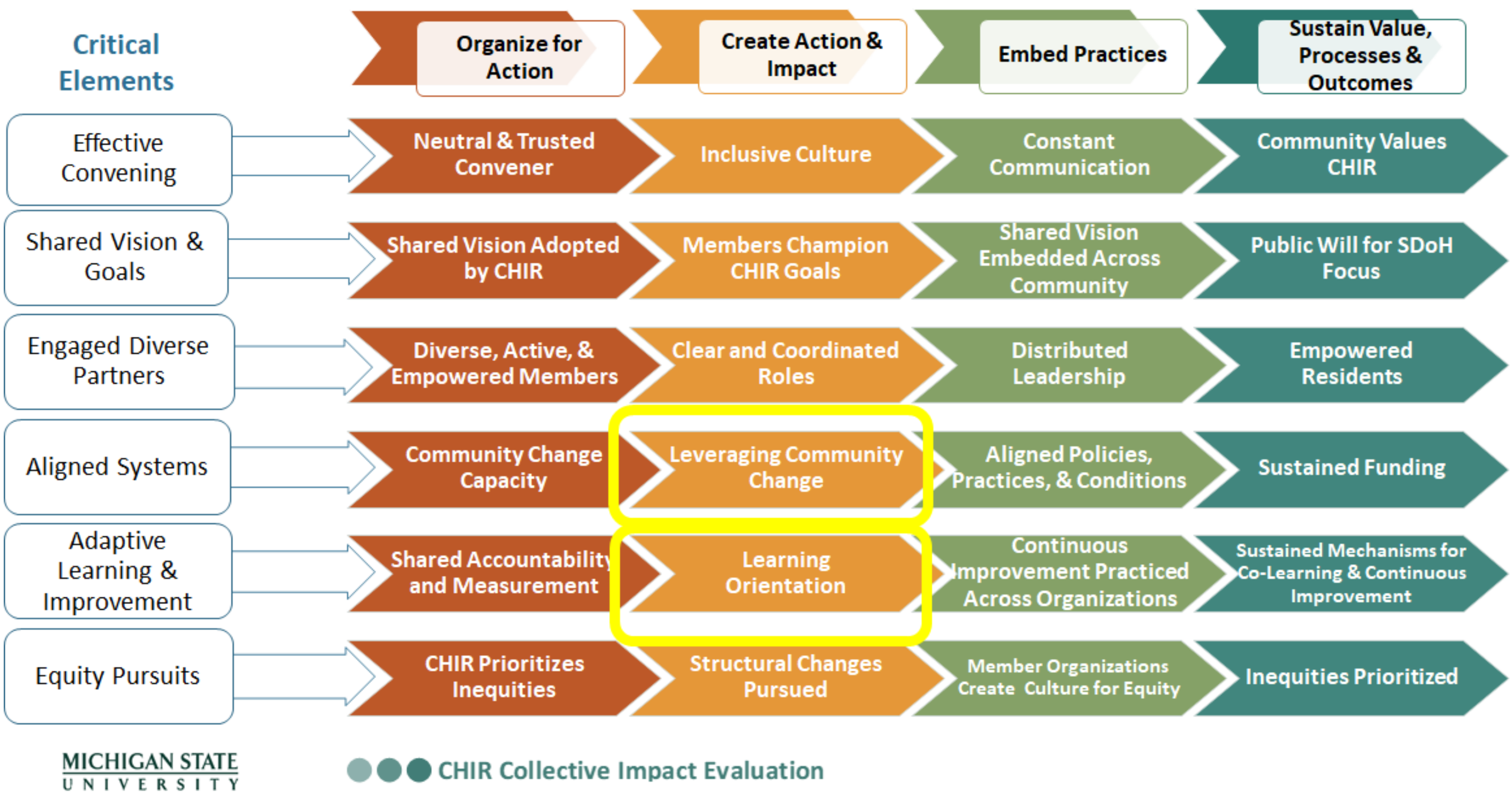
WHY: Even the best-designed strategies will face unanticipated barriers during implementation. The system works to maintain the status quo and neutralize the changes you are trying to make.[37] Therefore, gathering implementation feedback and adapting to opportunities and barriers is critical for sustaining transformative change.

Related ABLe Manual Pages: 321-342

Related section on MICHIRLearning.org website

Which collective impact outcomes are related to this step?

Building a Climate for Effective Implementation will help your collaborative pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess your collaborative's progress related to building a climate for effective implementation, and the key roles the BBO can play to support this process.

Step 7: Build a Climate for Effective Implementation			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
	Assess: To what extent is the collaborative tracking and addressing emerging implementation barriers affecting their strategies and change efforts? BBO Role: Help the collaborative track and address emerging implementation barriers (p.127)		

Critical BBO Roles to Create Action and Impact

Help the collaborative:

Track and Address Implementation Barriers

Overview

The power of any community systems change intervention or strategy – no matter how well designed – is entirely dependent on how well it is implemented.[33]

Effective Strategies + Effective Implementation = Improved Outcomes

When launching systems change strategies, it is an important assumption that implementation will not go as planned. No matter how well you anticipated and addressed implementation issues prior to launching your strategies, unknowable issues will always emerge.

REMEMBER! Effective change efforts gather rapid feedback on implementation and adapt to opportunities and barriers as they come.

How the BBO Can Support this Activity

1. Help collaborative gather rapid feedback on implementation
2. Help Collaborative respond to feedback

1. Help collaborative gather rapid feedback on implementation

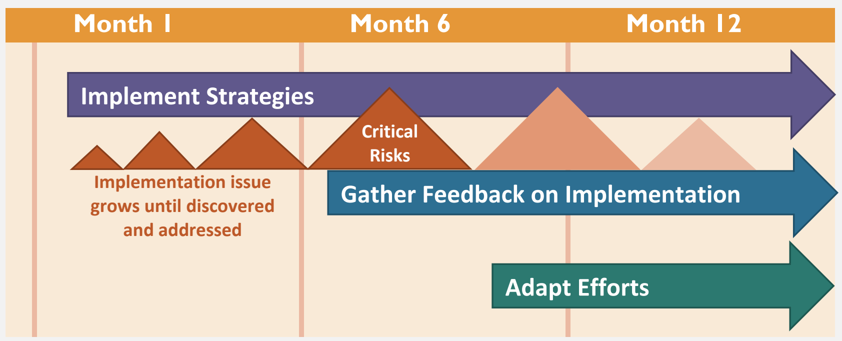
The collaborative can help stakeholders gather rapid and real-time feedback to identify emerging implementation barriers and opportunities. This is critical to ensure strategies and efforts are implemented effectively and lead to intended changes.

ABLe Manual
Pages 215-221

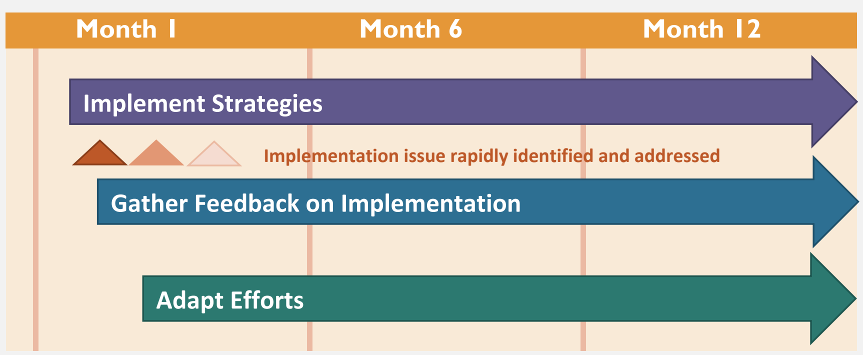
Build buy-in for gathering rapid feedback

Some stakeholders may not be familiar with the purpose of gathering rapid feedback. Draw on the following to craft some talking points to help raise their awareness and buy-in.

Example Talking Points



- Many initiatives **do not gather feedback** on how their strategies are being implemented **until well after their efforts are underway**.[22]
- Unfortunately, implementation **issues can emerge soon** after strategies are launched.
- **This delay in feedback** leaves time for initial implementation issues to grow in size and influence, posing greater risks to **derail the change effort's success**.

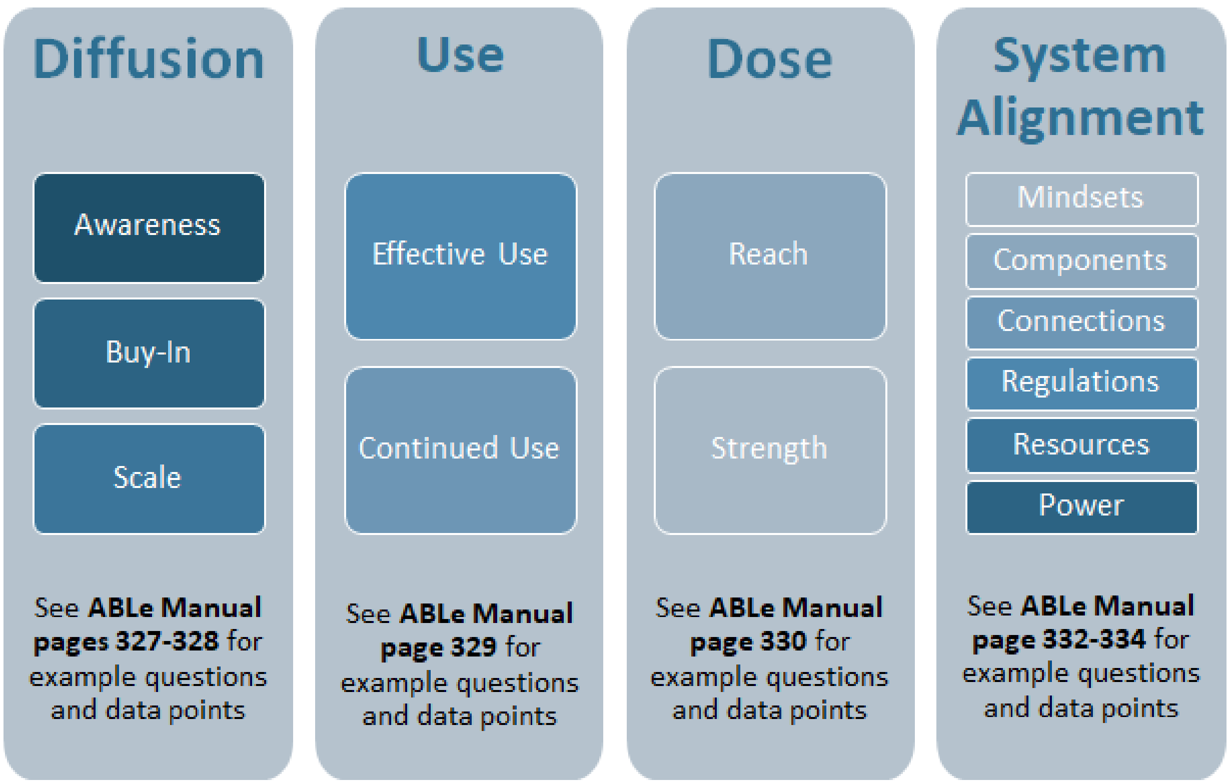


- **Fortunately, there is another approach**. To avoid these delays, many initiatives gather **rapid implementation feedback** *as soon as strategies are launched* to quickly identify and address issues.
- This type of data helps you **take the pulse of the effort**, and allows you to **immediately troubleshoot problems** that may emerge long before any formal data would be available.

Determine WHAT feedback to gather

Gather rapid feedback on the same implementation processes you put in place before launching your strategies (see page 130), including: diffusion, use, dose, and system alignment.[22,38,39,40]

Help the collaborative track these 4 implementation processes to identify any emerging implementation barriers. Use the ABLe Manual pages referenced below to find specific questions and example data **points** to help guide your conversation.

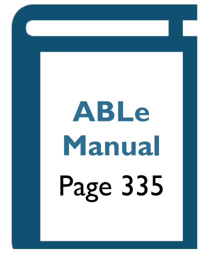


TIP: Gather rapid feedback from multiple stakeholders

Help the collaborative gather rapid feedback on implementation from leaders, staff, residents, and community partners – with the most important being residents experiencing inequities related to the Shared Vision goals. This will help give you a full picture if how implementation is going.

REMEMBER! Determine which feedback questions are most relevant to each of these stakeholders groups. You may need to customize the language of each question to fit their unique perspective and literacy needs.

Identify feasible approaches to gather rapid feedback



Once the collaborative has identified their rapid feedback questions and data points, help them identify which methods to use to gather this feedback.

Chances are likely the collaborative is *already* using effective methods for gathering feedback. Consider these example approaches to help identify any additional methods relevant for your community:

- Collaborative meeting check-ins
- Staff meeting discussions
- Direct touches with residents
- Brief surveys
- Existing documents and forms
- Observations

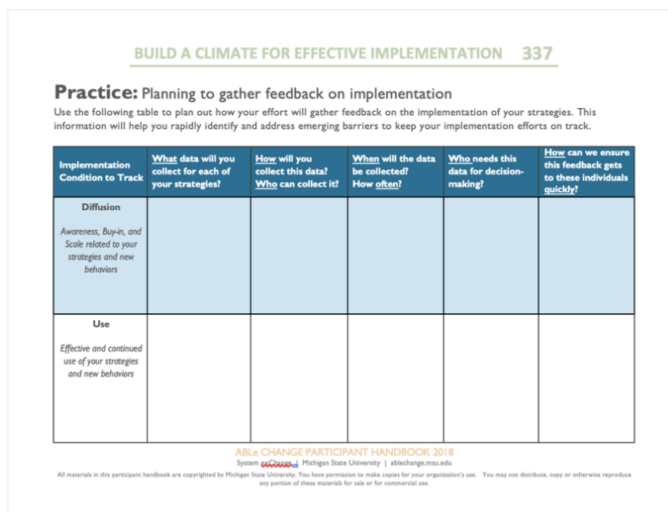
TIP: Make it feasible!

As much as possible take advantage of existing meetings, naturally occurring conversations, and routine forms to gather this information.

Create a plan for gathering feedback

Once the collaborative has identified what methods to use to gather rapid feedback, help them create a plan for how and when to use these methods.

ABLe Manual page 337 provides an example table you can use or adapt to help the collaborative create this plan.



BUILD A CLIMATE FOR EFFECTIVE IMPLEMENTATION 337

Practice: Planning to gather feedback on implementation

Use the following table to plan out how your effort will gather feedback on the implementation of your strategies. This information will help you rapidly identify and address emerging barriers to keep your implementation efforts on track.

Implementation Condition to Track	What data will you collect for each of your strategies?	How will you collect this data? Who can collect it?	When will the data be collected? How often?	Who needs this data for decision-making?	How can we ensure this feedback gets to these individuals quickly?
Diffusion *Awareness, Buy-in, and Scale related to your strategies and new behaviors*					
Use *Effective and continued use of your strategies and new behaviors*					

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Once the plan is created, the BBO can then play a central role in helping the collaborative carry out this plan by providing behind the scenes support and coordinating activities over time.

2. Respond to feedback

ABLe Manual Pages 339-342

Help the collaborative engage diverse stakeholders in making sense of implementation feedback in real-time and using the information to address emerging barriers and opportunities.

Ask the following questions in meetings and conversations to promote a learning environment where partner organizations and stakeholders are continuously sharing information about implementation progress and working together to immediately address issues:

Example facilitation questions

Use these questions to help stakeholders make sense of implementation feedback. Bring up specific questions related to diffusion, effective and continued use, reach and strength (see page 129 for details).

What's working	Where and how is implementation going well? • What is working? • Why is it working? • How can we reinforce effective implementation strategies?
What's not working	Where and how is implementation <u>not</u> going as well? • What implementation strategies are not working as well? Why? • What implementation barriers are emerging? • How can we address these issues?
What are we learning?	What are we learning about: • emerging implementation successes and how to support them? • emerging implementation barriers and how to address them?
What's needed?	What changes… • does our collaborative need to make to address these conditions? • do our organizations need to make to address these conditions? • do each of us personally need to make to address these conditions?
What are our next steps?	What are the next steps – as an initiative, an organization, and an individual - in making the changes we have suggested? • What resources or supports might be helpful?
How can we apply this moving forward?	How can we collectively apply what we have learned moving forward? • How will each of us personally apply what we have learned? • What follow-up would help us more effectively apply what we have learned?

Recommendations for Success:

- **Buy-in.** Build local buy-in around the need for rapid feedback and adaptation to promote effective problem-solving and a climate for effective implementation.

- **Continuously assess and adjust.** Effective change happens when efforts are continuously assessed, and real-time adjustments are made to address barriers and opportunities as they emerge.

- **Reach and equity.** Recall the data used when defining your Shared Vision outcomes and which groups of people are experiencing local inequities. It is important to track and address implementation issues related to reaching these groups and to prevent unintentionally creating greater inequity.

Key Considerations for your Community:

- How can the collaborative ensure that strategies do not contribute to greater inequities in the community?

- Which system misalignment is most relevant to track related to the collaborative's strategies? Consider mindsets, components, connection, regulation, resources, and power.

- What are some feasible ways to gather rapid feedback on the collaborative's implementation efforts?

- Who will be a part of collecting implementation feedback? Who needs this data / information for decision making?

- What are some ways to integrate making sense of implementation feedback into regular meetings and conversations?

Determine System Boundaries Checklist

Organize the Collaborative for Action and Impact

- ☐ The collaborative is **gathering rapid implementation feedback**.
- ☐ The collaborative is **responding to implementation feedback** by addressing emergent barriers and opportunities.

Step 8:
Learn for Continuous Improvement

ABLe Process Road Map

Once the collaborative has launched Quick Wins to initiate Powerful Strategies and established a Climate for Effective Implementation, the BBO can help the collaborative to embed a process to Learn for Continuous Improvement.

Ongoing cycles of learning and action help ensure that the efforts of the collaborative are bringing about the changes sought through the Shared Vision.

ABLe Process		
Define	1	Define a Targeted Problem
	2	Determine System Boundaries
	3	Understand the Community System
	4	Adopt a Shared Agenda
Design	5	Design Powerful Strategies
Do	6	Promote Quick Wins
	7	Build a Climate for Effective Implementation
Learn	8	Learn for Continuous Improvement

Step 8 in a Nutshell

WHAT: To continuously learn and improve, the collaborative can work to embed an Action Learning Process, or an ongoing problem-solving cycle. Throughout the action learning cycle stakeholders gather feedback and adapt their efforts in real time. The action learning process is used in all meetings and conversations to help the collaborative continuously learn and improve their efforts overtime.

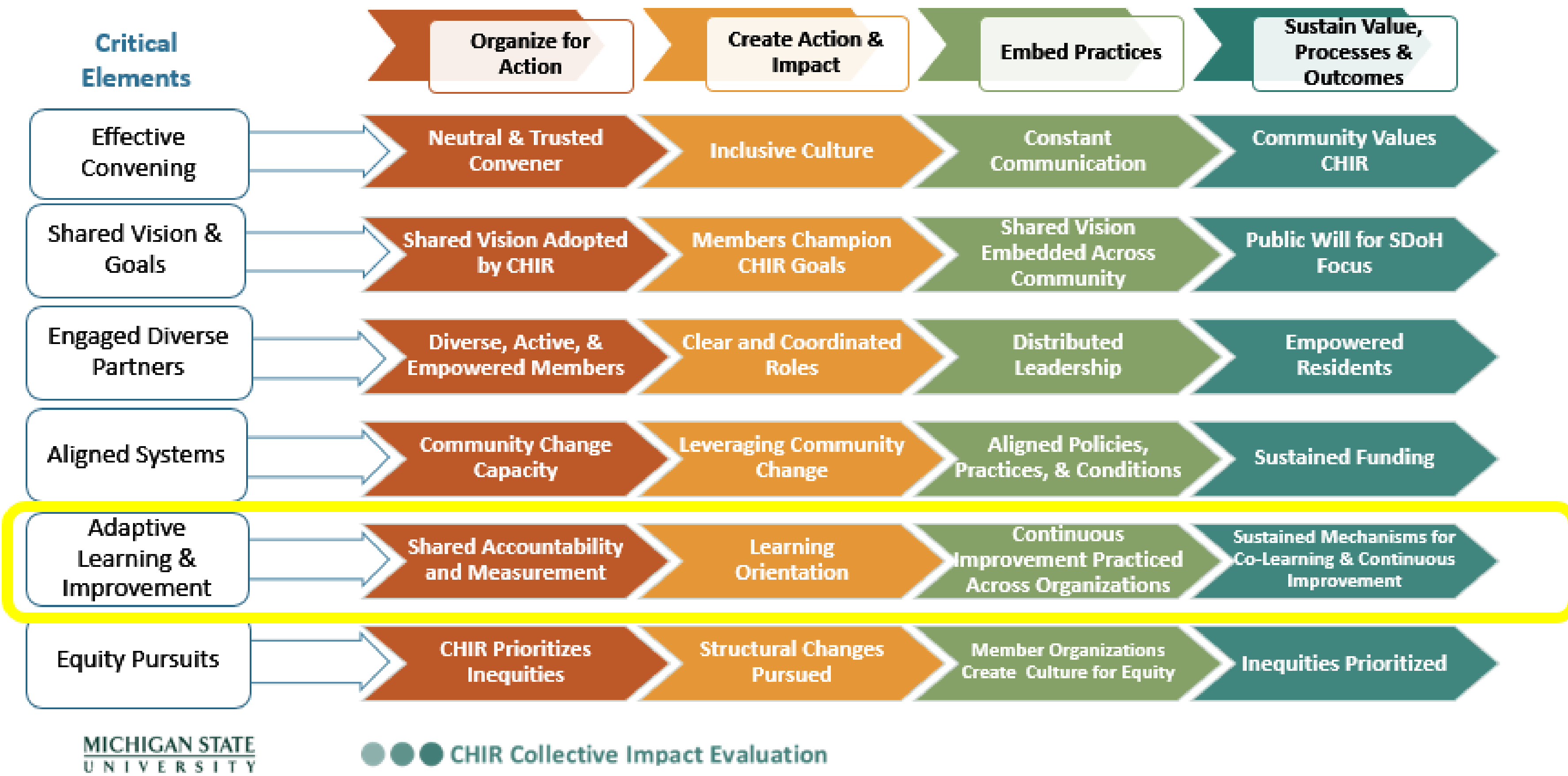
WHY: Implementation issues often emerge quickly. Learning about problems in real time allows communities to take action to address them before they become even bigger problems.

Related ABLe Manual Pages: 345-382

Related section on MICHIRLearning.org website

Which collective impact outcomes are related to this step?

Learning for Continous Improvement will help your CHIR pursue the following collective impact outcomes. While all of these outcomes are interconnected, the outcomes highlighted below are most directly linked to this ABLe step.



Critical BBO Roles

The following table can help you assess where your collaborative and community is related to learning for continuous improvement, and the key roles the BBO can play to support this process.

Step 8: Learn for Continuous Improvement			
Organize for Action	Create Action and Impact	Embed Practices	Sustain Value, Processes, & Outcomes
Assess: To what extent is the collaborative committed to tracking progress on **short, mid, and long-term outcomes** related to the Shared Vision goals?	Assess: To what extent is the collaborative **gathering and using rapid feedback and data** to improve their efforts?	Assess: To what extent do **local organizations and groups use rapid feedback and data** to improve their efforts?	Assess: To what extent do local funders, payers, and institutions **support continuous improvement and data-sharing** efforts within our community?
BBO Role: Help the collaborative create shared accountability for outcomes (p. 137)	BBO Role: Help the collaborative gather and use rapid feedback (p. 141)	BBO Role: Help local organizations and groups use rapid feedback and data to improve their efforts (p. 153)	BBO Role: Help local funders, payers, and institutions support continuous improvement and data-sharing efforts (p. 157)

Critical BBO Roles to Organize for Action

Help the collaborative:

Create Shared Accountability for Outcomes

Overview

A critical step in any change initiative is to identify a set of prioritized outcomes. These outcomes serve as a "North star" to guide the work, as all activities are designed to bring about these outcomes.

The collaborative has engaged in identifying outcomes throughout the ABLe process, starting in the Shared Visioning process and continuing through strategy design and implementation. At this point it is important to summarize and review these outcomes to help the collaborative track their progress.

However, identifying outcomes is only one piece of the puzzle. Effective collaboratives also build shared accountability among collaborative members for achieving results related to changes in community conditions and population-level outcomes. This includes shared accountability for taking action and an ongoing commitment to creating a system that is responsive to residents' needs.

How the BBO Can Support this Activity

1. Summarize the collaborative's prioritized outcomes
2. Build shared accountability for results

1. Summarize the collaborative's prioritized outcomes

ABLe Manual Pages 292-294

Outcomes are changes resulting from your strategies and efforts. They tell you whether and how much your goals have shifted over time and can guide decisions about whether to continue, adapt, or scale up their strategies.

Indicators are specific and observable markers of change used to measure outcomes. For example, "% of babies born with low birthweights" is an example indicator of the outcome "babies born healthy."

The collaborative can identify outcomes and indicators at several points in the ABLe process including:

Outcomes defined during shared visioning	•Stakeholders prioritized outcomes and indicators related to their Shared Vision goals, including related inequities •See pages 6-8 of this Field Guide for more details
Outcomes defined during strategy design	•Stakeholders identified outcomes that would be brought about by their strategies •See ABLe Manual page 292-294 and 363 for more details

.

TIP: Create an outcomes summary

As the collaborative prepares to learn about their progress, it can be helpful to summarize and review the list of these prioritized outcomes. Stakeholders can often become overwhelmed by large scale change efforts, and keeping these outcomes at the forefront can help provide clarity and direction

The following is an example summary of a few outcomes and indicators related to the impact "Health Equity." NOTE: most collaboratives will prioritize more outcomes/indicators than shown below.

Impact The population-level outcome you ultimately want to bring about for the community	Outcome: More people are experiencing Health Equity • Indicator: Avg. # of good mental health days per month • Equity Indicator: Decrease in the gap between demographic groups with the most and least # of good mental health days per month
Early Wins The population-level outcomes that show you are on track to reach the Impact	Outcome: More households are economically self-sufficient • Indicator: % of households above ALICE threshold • Equity Indicator: Decrease in the gap between demographic groups with the most and least % of households above ALICE threshold
Community Conditions What needs to be in place to bring about the Early Wins and Impact.	Outcome: More livable wage employment opportunities are accessible to disadvantaged residents • Equity Indicator: More (%) households below ALICE threshold accessing open job positions with pay exceeding ALICE threshold for family with 2 children
Strategy Outcomes Outcomes resulting from strategies designed to address the root causes of why the Conditions are not yet in place within the community	Strategy: Shift local employer hiring policies to remove use of criminal background checks in employment decisions Outcome: Fewer (%) local employers using criminal background checks • Indicator: Fewer (%) local employers providing open positions exceeding ALICE threshold for family with 2 children using criminal background checks in employment decisions.

2. Build shared accountability for results

Effective change efforts create shared accountability for achieving results.[41]

This culture of accountability can help all community partners take responsibility for the role they can play in promoting wellbeing and equity.

ABLe Manual
Equity Learn Supplement
Pages 11-12

Consider the following as you help build your collaborative's shared accountability for results.

Data Dashboard

- Turn the collaborative's prioritized outcomes into an easy to read data dashboard, and make this dashboard available to both collaborative members and the broader community.
- For example, the Magnolia Place Initiative created a Shared Outcome Dashboard with both population-level and community system outcomes, and put processes in place to gather data on these outcomes to update the dashboard on a regular basis.

Action Record

- Keep track of which and how many actions each organization or community partner is initiating to bring about outcomes using an Action Record Template. Use the action record to help the collaborative celebrate successes, and create a transparent record.
- Some communities turn their Action Record into a visual summary called a "run chart" that helps stakeholders quickly interpret the patterns of action over time. See ABLe Manual pages 318-319 for more details and examples.

Effective Communication

- Put processes in place to help collaborative members continually communicate about their progress towards shifting prioritized outcomes.
- This continuous communication can help to build trust and shared accountability for the work.[42]

Build Recommendations for Success:

- **Engage diverse stakeholders in identifying outcomes.** Stakeholders will be more likely to engage in your ongoing efforts if they have helped decide on your outcomes. Consider all of the organizations that will be implementing strategies; your targeted resident groups; and key leaders and funders within the collaborative.

- **Keep outcomes front of mind.** Include identified outcomes on the Shared Agenda and Shared Vision. Display your outcomes at meetings on chart paper or PowerPoint.

- **Promote shared accountability for equity.** Create a culture of accountability for achieving equity results by making equity a priority, encouraging all partners to take ownership of equity outcomes, and equity-focused learning. See Equity Supplement: Learn page 16.

Key Considerations for your Community:

- What types of outcome summaries resonate best with members of your collaborative and community?

- Who in the collaborative can help identify outcome indicators and available data sources?

- How can you engage a local evaluation team or expert to support your efforts? Is there a university or other organization with expertise in this area?

Critical BBO Roles to Create Action and Impact

Help the collaborative to:

Learn for Continuous Improvement

Overview

Help the collaborative develop systems and processes to gather and use rapid feedback to see if their strategies are *starting* to make a difference in outcomes. At the same time, help the collaborative embed ongoing Systemic Action Learning processes to help stakeholders identify and address emerging issues and learn for continuous improvement.

How the BBO Can Support this Activity

1. Gather and Use Rapid Feedback on Outcomes	2. Support ongoing Systemic Action Learning Processes

1. Gather and Use Rapid Feedback on Outcomes

ABLe Manual Page 361

In ABLe step 7, your collaborative gathered rapid feedback on the implementation of their strategies.

In ABLe step 8, the BBO can help the collaborative plan out how to gather rapid feedback to see if their strategies are *starting* to make a difference in prioritized outcomes. This feedback is then used to help guide the collaborative's decision-making about whether to continue, adapt, or scale up your efforts.

TIP: Pay attention to timing

The collaborative will most likely have defined short, mid, and long-term outcomes to track as a result of their efforts (see ABLe Manual page 294 for more details).

As you plan how to gather rapid feedback, focus on the outcomes your strategies are most likely to have shifted at this point in time.

TIP: Create a data point person

Identify someone in the BBO who is familiar with both qualitative and quantitative data to serve as the main data point person.

Ask any organization or stakeholder collecting rapid feedback to send their information to this data point person so they can compile it and have it ready to share at meetings.

Example methods for gathering rapid feedback on outcomes

Help the collaborative consider different methods (see examples below) for gathering rapid feedback on whether strategies are starting to bring about your outcomes.

Consider which methods are most feasible and relevant, and work with stakeholders to share data on an ongoing basis to help the collaborative learn and adapt quickly.

TIP: Engage organizations and stakeholders across the collaborative in helping to gather rapid feedback on the strategies.

TIP: Take advantage of existing meetings and interactions to gather feedback data

Methods for Gathering Rapid Feedback	Examples:
Conversations Use when you need in-depth, detailed information, or when you need to describe your questions to help respondents answer ABLe Manual page 366 for more details.	Ask questions in/during: • regular meetings, gatherings • service interactions • Small (focus) group conversation • One-on-one interviews • Photovoice
Surveys Use when you need numbers/counts or statistical analysis to answer your questions ABLe Manual page 367 for more details.	• Resident surveys given through direct service interactions • Questions added to intake forms • Staff surveys • Questions added into planned community surveys • Questions on social media
Observations Use if what you are trying to learn about can be easily observed, and/or if people may not be able to accurately describe the change because they want your approval or are biased in other ways. ABLe Manual page 368 for more details.	• Community audit to track conditions of physical structures (grocery stores, fast-food restaurants, playgrounds with broken swings) and/or patterns of individual behaviors (e.g., people engaging in physical activity, driving cars, interacting with neighbors, etc.). • Immersion in stakeholder activities
Impact Assessments Use to learn whether/how current efforts or polices are impacting health equity outcomes ABLe Manual page 368 for more details.	• Health Impact Assessments • Health Equity Impact Assessment • Racial Equity Impact Assessment
Existing Data Sources Use if you have or can access data that already exists to answer your question ABLe Manual page 369 for more details	• Datasets, open data sources • Policy records • Meeting minutes • News media content • Evaluation reports • Website analytics

Assess Shifts in Equity Outcomes

Help your collaborative learn whether they are starting to shift equity outcomes by tracking whether efforts are closing the gap between groups with the best and worst outcomes.

TIP: Engage residents experiencing targeted inequities to help analyze and interpret data using their lived experiences.

Example Facilitation Questions:

- To what extent are we seeing the gap between groups with the best and worst outcomes getting small over time?
- To what extent are our efforts (and relevant changes in community conditions) contributing to these changes?

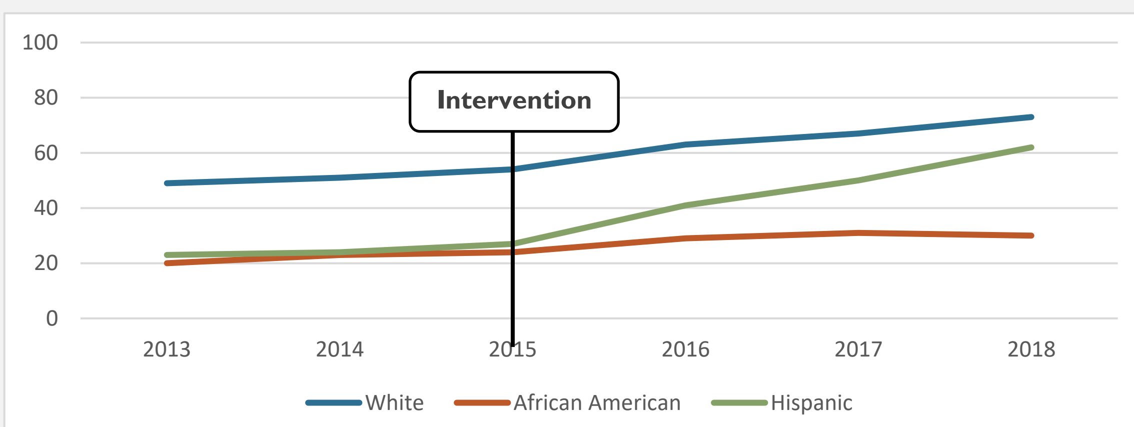
TIP: Use disaggregated line graphs to track progress on equity

Longitudinal line graphs can be a useful tool for understanding these changes over time.

Example:

The graph below shows an outcome over time for three demographic groups (blue line = White, red line = African American, green line = Hispanic). The black line shows when the intervention started.

- **What we can observe:** White residents started with best outcomes in 2013 compared to African American and Hispanic groups. After the intervention in 2015, all three groups improved their outcomes, although the Hispanic group improved faster than the other groups. The African American group improved the least over time compared to the other groups.
- **What conclusions can we draw?** The outcome gap between the Hispanic group and White group has narrowed over time. However, there still remains a large outcome disparity gap between the African American group and the other groups.
- **Next Critical Questions:** Why did the Hispanic group's outcomes improve more compared to other groups? Why did the African American group's outcomes improve less than other groups?



2. Support ongoing Systemic Action Learning Processes

ABLe Manual
Pages
347-382

No matter how successful your collaborative's efforts are at shifting outcomes, new issues (e.g., new housing shortage) and opportunities (e.g., new community asset) will always emerge over time.

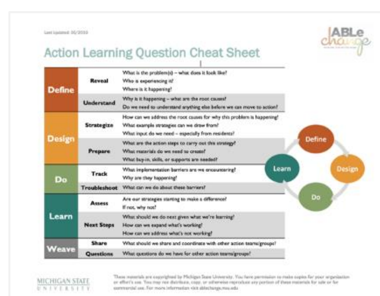
Action Learning is a process your collaborative can use to identify and address these emerging issues and opportunities. The Action Learning process is an ongoing problem-solving cycle where people:

- DEFINE and understand emerging problems and opportunities
- DESIGN strategies to address those problems and leverage opportunities
- DO or carry out action to implement strategies
- LEARN about whether actions are starting to make a difference and determine next steps.

Action Learning Facilitation Questions

Use the **Action Learning Question Cheat Sheet** to help facilitate action learning processes with local stakeholders.

Many stakeholders bring this cheat sheet with them to their naturally occurring formal and informal meetings.



TIP: Bring an equity focus

Promote a culture of equity by embedding equity into your action learning questions. See **ABLe Equity Learn Supplement** pages 13-15 for more information.

TIP: Be a powerful role model.

Use action learning processes anytime a problem comes up that needs to be solved. This will encourage others to make continuous learning and action a habit.

See **ABLe Manual page 351-352** for details.

Build awareness and buy-in around Action Learning process

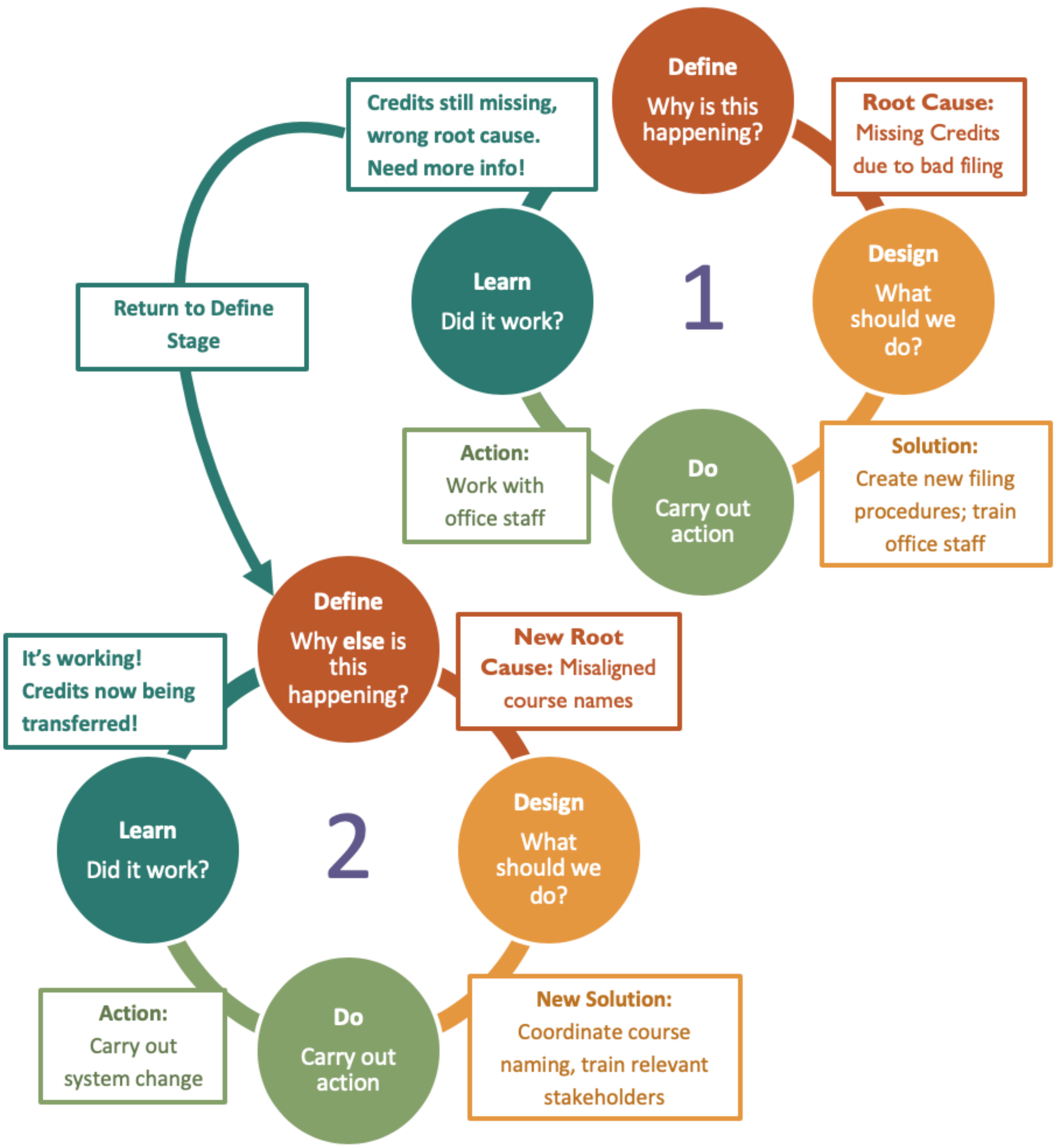
Use the example on page 350 of the ABLe Manual to help collaborative members and community stakeholders understand what action learning looks like in action and why it's important for community problem-solving.

This example comes from an initiative working to improve outcomes for youth experiencing poor social-emotional and behavioral outcomes. The effort involved organizations representing education, behavioral health, the courts, local police departments, and health and human services.

REMEMBER!

Action Learning is iterative.

Strategies will rarely (if ever) succeed perfectly the first time. If you LEARN strategies are not starting to make a difference, DEFINE any implementation issues and/or additional root causes of the problem and DESIGN strategies to address them.



Action Learning Facilitation Tips

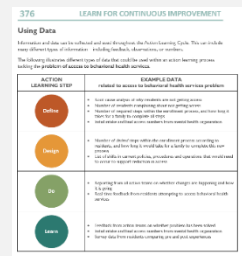
Use the following tips to effectively facilitate action learning with your groups.

TIP: Help stakeholders get "unstuck" from root cause analysis

Some groups find it easier to just discuss why problems are happening instead of moving to designing and initiating actions to address those problems.[43] This is a VERY common tension.

FACILITATION TECHNIQUE: If the collaborative is addressing a system issue, limit their root cause analysis process to just 1-2 layers. This is often enough to get started, and you can always identify additional issues as the group begins designing strategies

TIP: Use data throughout the action learning cycle



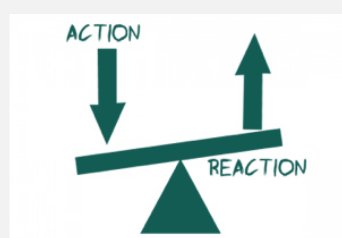
Help the collaborative collect and use data throughout the Action Learning Cycle (define, design, do, learn). This data could include feedback, observations, and/or numbers. See **ABLe Manual page 376** for an example of how one community used data to problem solve an access issue related to behavioral health services.

TIP: Set System Problem Solving Norms

Systems change will only start to happen when the conversation starts to be about **us** – our organization, our policies and practices, our access barriers, our mindsets, etc. Set norms at beginning of conversation to promote open and honest problem-solving about systems issues. Consider the following group norms…

- Everyone has best intentions
- We are the system so WE will need to change
- It's okay to bring up issues with specific organizations or practices for constructive problem-solving. Problems brought up are about the system we're all a part of - not about us as people.

TIP: Anticipate, Track and Address System Consequences



Every system will naturally respond, in some way, to the changes your collaborative is initiating. Remember Newton's Third Law "For every action, there is an equal and opposite reaction." Help the collaborative to anticipate and address some of these unintended consequences before strategies are implemented. See ABLe Manual pages 370-374 for more details and example facilitation questions.

Promote Systemic Action Learning

ABLe Manual
Pages 71-78
and 377-382

Too often, our typical approaches for engaging diverse perspectives (e.g., everyone in one large group) leads to little learning and limited action.

Many communities are instead moving to a Systemic Action Learning group infrastructure that engages "parallel and interacting" affinity teams.[44]

Affinity teams are made up of individuals from the same system role (e.g. team of residents, team of leaders, team of direct service staff) or who are focused on the same goal (e.g., housing, employment, etc.). Each team focuses on the same Shared Agenda goals, but uses their unique perspective to design and implement creative actions to create change.

Example Talking Points

Why Affinity Teams?

- More Balanced Power Dynamics
- Participants have shared experiences
- Minimized differences in participant capacity levels
- Legitimizes diverse perspectives
- Creates safe spaces for honest dialogue

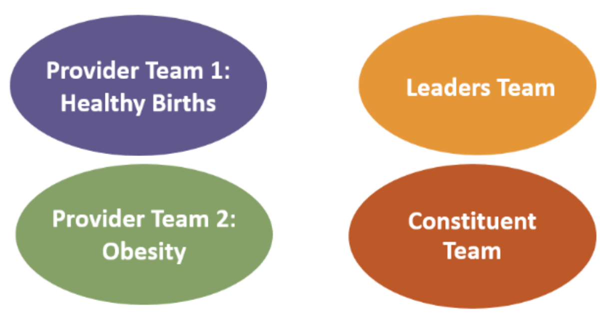
Typical Structures	ABLe Structures
Less powerful stakeholders silenced	ALL key stakeholders influence decisions
Too much sharing of information, not enough deciding and action	Emphasis on problem solving and action
Little accountability	ALL stakeholders take action, held accountable
Little learning	Learning and continuous improvement is primary purpose
No supports for implementation	Behind the scenes supports provided

Consider Developing Affinity Teams

The following show 2 example infrastructures with different types of affinity teams. See ABLe Manual pages 73-74 for more details on how to select the right infrastructure for your context.

Example Infrastructure 1

Example Infrastructure 2



Use the Shared Agenda to promote Systemic Action Learning

While each team in a Systemic Action Learning infrastructure is focused on the same Shared Agenda goals, the specific agenda items and facilitation questions used in each of their meetings will vary based on their unique perspective and role. Consider the following:

Leader Team Agenda Items	• Typically focus on understanding and addressing issues related to policies, resource allocations, organizational structure, etc.
Direct Provider Team Agenda Items	• Typically focus on understanding and addressing issues related to implementation.
Resident Team Agenda Items	• Typically focus on understanding and addressing issues making it difficult for residents to get their needs met and reach their goals.

Example Shared Agenda Items for Different Action Teams

The following table shows agenda items related to the same Shared Agenda goal for 3 separate action teams. NOTE: all agenda items are in the form of a question to promote group discussion.

Leaders Team Agenda

Systems Change Goals	Strategies	Agenda Items
Improve Access: Services, supports, opportunities are easy for priority residents to access	Simplify service enrollment processes	• What policies need to shift in your organization to simplify your enrollment process? • What questions do we have for residents and staff?

Resident Team Agenda

Systems Change Goals	Strategies	Agenda Items
Improve Access: Services, supports, opportunities are easy for priority residents to access	Simplify service enrollment processes	• Are the proposed enrollment processes easy for residents to use? How could it be improved?

Direct Provider Team Agenda

Systems Change Goals	Strategies	Agenda Items
Improve Access: Services, supports, opportunities are easy for priority residents to access	Simplify service enrollment processes	• What training is needed to prepare staff to use the new simplified enrollment process?

Prepare Action Learning Agenda Items & Facilitation Questions

Use these example agenda items to help populate the Shared Agenda for each action team meeting. Draw on the facilitation questions during the meetings (HINT: add questions into your version of the agenda as reminders)

For any actions that were initiated at prior meetings/between meetings

Agenda Item: How's it going with *[refer to initiated action]*?

Facilitation Questions

- *[Name of individual(s) who initiated this action], can you give us an update?*
- If action was completed successfully, help team celebrate and then ask: *What are our next action steps with [insert relevant strategy here]?*
- If action was not completed successfully, ask: *What barriers are you encountering? How can we address these barriers?*

For any strategies/efforts that are being (or have been previously) launched

(e.g., new simplified application policy, new 211 processes)

Agenda Item: What feedback do we need to gather – and from whom - to see if [insert relevant strategy/effort] is on track and starting to make a difference?

Facilitation Questions

- *What specific feedback questions do you want to ask to see if [strategy/effort] is being implemented effectively? If it is starting to make a difference in [root cause or problem]?*
- *What are some feasible ways to gather this feedback?* Review methods on page 335-338 of ABLe manual so you can bring in examples to help the group brainstorm
- *What are our next steps? Who can do what, by when?*

Agenda Item: [Once feedback is gathered] What are we learning? What are next steps?

Facilitation Questions

- *Is [strategy/effort]* ***being implemented effectively****?*
    - *Do relevant people know about it – are they* ***adopting*** *it?* ***Using*** *it effectively?*
    - *Are we* ***reaching/benefiting*** *priority residents (e.g., low-income residents)?*
    - *What are our* ***next steps*** *based on what we're learning?*
- *Is [strategy/effort] starting to* ***make a difference*** *in [root cause or problem]?*
    - *What changes are we* ***starting to see happen*** *– and why? How can we support and scale up successful efforts?*
    - *What changes are we* ***NOT starting to see happen*** *– and why? How can we problem solve this? What are our next steps?*

Facilitation Questions Continued

- *Are we seeing any positive or negative **unintended consequences** in response to [strategy/effort]?*
    - For **positive** unintended consequences (e.g., new funding opportunities, new relationships) ask: *How do we **leverage** or spread these positive responses?*
    - For **negative** unintended consequences (e.g., new organizational policy is disadvantaging certain groups, new process is overloading staff capacity) ask: *How do we **address** these negative responses?*

For any new issues ready for team to problem-solve:

(e.g., another team identified an issue they want this group to help problem solve)

Agenda Item: How can we help problem-solve [insert issue]?

Facilitation Questions

- Describe how issue emerged and why it's relevant for their group/team to work on
- If issue is in **DEFINE** phase (i.e., need to understand the problem and root causes for why it's happening) ask: *What do we know about this issue and why it's happening? How can we help learn about this?*
- If issue is in **DESIGN** phase (i.e., we need to design a solution to address root causes) ask: *How could we address [root causes]? OR What feedback do you have on [another team's strategy idea]?*
- If issue is in **DO** phase (i.e., we need to implement strategy) ask: *How can we help support effective implementation of this strategy?*
- If issue is in **LEARN** phase (i.e., we need to see if strategy is on track and working) ask: *How can we help gather rapid feedback to see if this strategy is on track and starting to make a difference in [root cause/problem]?*

Standing Agenda Item: Feedback Opportunities

Agenda Item: Do we have any questions, problem-solving opportunities, or successes that need to be scaled up to share with other groups/teams?

Facilitation Process

- Ask the group if they see any opportunities for sharing feedback with other teams that has emerged during the conversation. See the Feedback Loops Tool for more details on the types of feedback and next steps
- If opportunities for feedback emerge during conversation, pause the group and help them explore what to share and how to share it.

Weaving role in Systemic Action Learning

ABLe Manual
Pages 378-382

A key role of the BBO is to help weave insights and actions emerging from the different action teams into a cohesive change effort. Weaving not only helps to create coordination and alignment across the teams, but it also helps to create information feedback loops that improve decision making and system responsiveness.

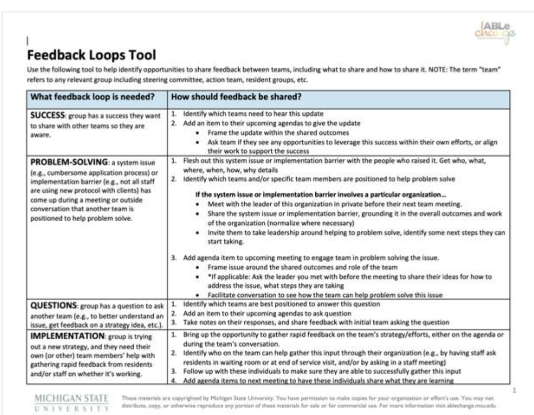
Weaving can happen through informal conversations and across action team meetings. Consider the following question to identify weaving opportunities:

Key Questions to Identify Weaving Opportunities

- What insights or questions should be exchanged between action teams?
- Has anything come up in this conversation that should be shared with other stakeholders across the system?
- How can the activities initiated by each action teams be coordinated?
- Are there any outside stakeholders or organizations that we could connect with to improve our efforts?
- Who can help us understand whether our strategies are being implemented and diffused across the system?

Feedback Loop Tool

Use the **Feedback Loops Tool** to help identify opportunities to share feedback between teams, including what to share and how to share it. Use the Feedback Cheat Sheet on page 2 of this tool to keep track of opportunities you hear at each meeting to weave feedback across groups and stakeholders.



Feedback Loops Tool

Use the following tool to help identify opportunities to share feedback between teams, including what to share and how to share it. NOTE: The term "team" refers to any relevant group including steering committee, action team, resident groups, etc.

What feedback loop is needed?	How should feedback be shared?
SUCCESS: group has a success they want to share with other teams so they are aware.	1. Identify which teams need to hear this update 2. Add an item to their upcoming agendas to give the update • Frame the update within the shared outcomes • Ask team if they see any opportunities to leverage this success within their own efforts, or align their work to support the success
PROBLEM-SOLVING: a system issue (e.g., cumbersome application process) or implementation barrier (e.g., not all staff are using new protocol with clients) has come up during a meeting or outside conversation that another team is positioned to help problem solve.	1. Flesh out this system issue or implementation barrier with the people who raised it. Get who, what, where, when, how, why details 2. Identify which teams and/or specific team members are positioned to help problem solve **If the system issue or implementation barrier involves a particular organization…** • Meet with the leader of this organization in private before their next team meeting. • Share the system issue or implementation barrier, grounding it in the overall outcomes and work of the organization (normalize where necessary) • Invite them to take leadership around helping to problem solve, identify some next steps they can start taking. 3. Add agenda item to upcoming meeting to engage team in problem solving the issue. • Frame issue around the shared outcomes and role of the team • *If applicable: Ask the leader you met with before the meeting to share their ideas for how to address the issue, what steps they are taking • Facilitate conversation to see how the team can help problem solve this issue
QUESTIONS: group has a question to ask another team (e.g., to better understand an issue, get feedback on a strategy idea, etc.).	1. Identify which teams are best positioned to answer this question 2. Add an item to their upcoming agendas to ask question 3. Take notes on their responses, and share feedback with initial team asking the question
IMPLEMENTATION: group is trying out a new strategy, and they need their own (or other) team members' help with gathering rapid feedback from residents and/or staff on whether it's working.	1. Bring up the opportunity to gather rapid feedback on the team's strategy/efforts, either on the agenda or during the team's conversation. 2. Identify who on the team can help gather this input through their organization (e.g., by having staff ask residents in waiting room or at end of service visit, and/or by asking in a staff meeting) 3. Follow up with these individuals to make sure they are able to successfully gather this input 4. Add agenda items to next meeting to have these individuals share what they are learning

1

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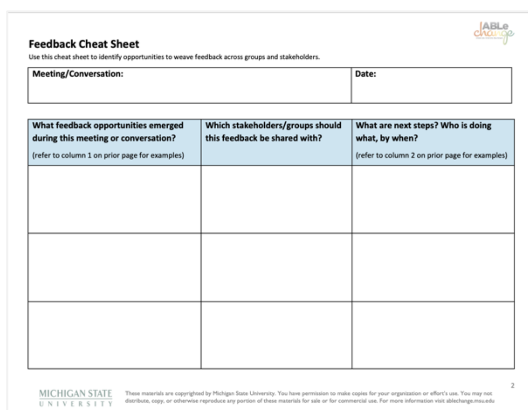

Feedback Cheat Sheet

Use this cheat sheet to identify opportunities to weave feedback across groups and stakeholders.

Meeting/Conversation:	Date:

What feedback opportunities emerged during this meeting or conversation? (refer to column 1 on prior page for examples)	Which stakeholders/groups should this feedback be shared with?	What are next steps? Who is doing what, by when? (refer to column 2 on prior page for examples)

2

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Recommendations for Success

- **Keep data collection processes simple and easy!** Ask questions in naturally occurring meetings and add questions to existing forms or surveys.

- **Create real-time feedback loops.** Integrate questions into meeting agendas to engage stakeholders in gathering and making sense of feedback in real-time. When problems and opportunities come up in conversations, help the group problem-solve them immediately and add future shared agenda items to help them move through implementation to learning for continuous improvement.

- **Engage residents.** Develop or tap into a local resident team or coalition to engage residents in the systemic action learning process. Ensure this resident team represents individuals from groups experiencing inequities related to your targeted problem, and consider what supports are needed to ensure participation.

Key Considerations for your Community:

- What are some local settings and upcoming opportunities where action learning can be used? What are the barriers to embedding ongoing learning processes across the collaborative? Consider how you can address these barriers and who can help.

- Are there organizations and individuals within the collaborative with expertise in data collection and analysis? Are there individuals who would be willing to take an active role in leading/carrying out this work?

- If needed, are there any local universities that could provide expertise around data?

- How can you support the weaving of information and action in your community? What barriers might you encounter in the weaving process? How can these barriers be overcome?

Critical BBO Roles to Embed New Practices In Community

Help organizations and groups to:

Use rapid feedback and data to improve efforts

Overview

The BBO can help local organizations and groups develop a work climate that has a strong focus on learning and continuous improvement.

For example, help organizations make a habit of gathering more real-time feedback from the individuals they serve or impact to improve their efforts, and more regularly use data to track their progress and improve efforts.

Promote a value for equity within these learning and continuous improvement efforts by helping organizations and groups assess how inequities could emerge from their efforts and take steps to address these consequences accordingly.

How BBOs Can Support this Activity

1. Support organizations and groups in using action learning processes
2. Help organizations and groups embed action learning practices

I. Support organizations and groups in using action learning processes

Connect with local organizations and groups to explore opportunities for how they could embed action learning and use rapid feedback. You can use the Action Learning Change Agent Field Guide (see below for details) to help them explore these opportunities and plan out next steps.

Relevant Change Agent Field Guide Sections

Orientation: Page 28
This page includes some basic information about action learning and how it can benefit the work of organizations. You can draw on this page as you are talking with local organizations/groups about the purpose and benefits of action learning and using rapid feedback.

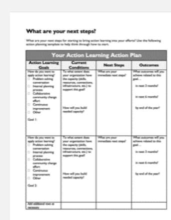

Solve Problems in New Ways
WHAT is action learning?
Define
Design
Do
Learn

Identifying Who to Involve in Action Learning: Pages 29
This page provides some ideas on who to engage in your action learning process. Help organizations to consider who to engage in action learning to help them problem solve situations.

Consider How to Use Action Learning: Pages 30-33
These pages provide examples of how the organization could use action learning. Help them understand methods for: facilitating problem-solving conversations, facilitating planning processes, supporting a collaborative community change process, continuously improving a new practice, and addressing inequities.


HOW could you use an action learning process?

Creating an Action Plan: Page 34
This page provides a simple action plan template you can use with the organization to help them capture their action learning goals and plan out their next steps. Modify this template in whatever way is needed to help the organization or group take the next step to carry out their plan.


What are your next steps?
Your Action Learning Action Plan

2. Help organizations and groups embed action learning practices

As local organizations and groups start using action learning processes, help them to take the next step to embed new practices to ensure this learning continues over time. Consider using the Change Agent Field Guide to guide this conversation.

Relevant Change Agent Field Guide Sections


Embed Problem Solving Practices

Use action learning during meetings

Bringing up Action Learning in Meetings: Page 35
Provides ideas for how stakeholders can ensure action learning is brought up during their naturally occurring meetings, including how to:

- Add standing agenda items asking about action learning opportunities
- Establish periodic action learning meetings
- Bring a cheat sheet of powerful action learning questions


Add reminders into your forms and templates

Add in Action Learning Reminders: Page 36
Provides ideas for how organizations can embed reminders into their protocols, templates, guides, forms, or systems to take advantage of opportunities to use action learning. This can be an easy way for organizations to make sure action learning becomes embedded into their ongoing practice.


Assess and align your organizational context to support action learning

Align Organization Context: Page 37
Provides a table to help stakeholders reflect on what aspects of their organizational context might need to shift to better support action learning. Examples include:

- Strategic planning and team planning
- Evaluation efforts
- Communications materials
- Hiring staff
- Delivering services or programs

Recommendations for Success

- **Model new habits.** Use action learning questions and processes in any situation or setting in the community where a problem comes up that needs to be solved. Modeling these new practices can help raise awareness, build excitement, and encourage others to use the practices within their own efforts.

- **Support a community of practice.** Help interested organizations or groups develop a community of practice to support each other in using action learning practices and creating a work climate that values learning and continuous improvement.

Key Considerations for your Community:

- Which local organizations or groups are most primed to start using action learning processes? Who in the BBO or collaborative is best positioned to talk with these groups about opportunities for embedding new learning and continuous improvement practices? Refer to the Change Agent Field Guide.

- Who in the community can serve as a champion for using learning and continuous improvement practices like action learning?

- Which organizations or stakeholders within the community may need more capacity-building around using action learning processes? How can you provide support to these individuals or groups?

Critical BBO Roles to Promote Sustainability

Help the Community to:

Support continuous improvement and data-sharing efforts

Overview

The BBO can play several roles in helping to sustain learning and continuous improvement processes.

For example, the BBO can help funders explore opportunities to help their local grantees put a greater emphasis on using data for continuous improvement.

In addition, the BBO can also help decision makers and funders align their resources to better support continuous improvement and data-sharing efforts within the community.

How the BBO Can Support this Activity

1. Encourage new funding expectations supporting continuous improvement
2. Help local decision-makers and funders align resources to support continuous improvement

I. Encourage new funding expectations supporting continuous improvement

Consider the funders (e.g., foundations, state departments, etc.) involved in supporting efforts within your local community. How could the BBO help these funders adopt new practices and expectations for supporting continuous learning and improvement? Consider the following examples:

Add expectations for continuous learning processes into RFPs

Funders can add questions into their RFP applications requiring grantees to demonstrate how they are using continuous learning processes to help them achieve their goals.

You can bring up some of the example RFP questions listed in the box to the right as you talk with local funders. Consider referring them to some of the tools and ABLe Manual reference pages described in prior sections of this Field Guide.

Example RFP Questions

- How will you gather and use rapid feedback from users or beneficiaries of your efforts to promote continuous improvement?
- How will you gather and use rapid feedback to ensure your efforts are not unintentionally contributing to local inequities?

Add learning outcomes into funders' theory of change

Funders can add outcomes into their *own* theory of change related to learning and continuous improvement. See box to right for examples.

Help funders work with local partners and stakeholders to define specific indicators for these outcomes using your local community context.

Example Outcomes

Organizations are:

- More regularly using data to track their progress and improve their efforts
- Creating a work climate that has a stronger focus on learning and continuous improvement.
- Gathering more real-time feedback from the individuals they serve to improve their efforts
- Considering how inequities might emerge from their policies and practices and adjusting them accordingly

Provide grantee capacity-building on learning for continous improvement

Help funders explore the need and opportunity to provide their grantees with capacity-building around learning for continouous improvement. Consider referring them to some of the tools and ABLe Manual reference pages described in prior sections of this Field Guide.

2. Help local decision-makers and funders align resources to support continuous improvement

Identify BBO or collaborative members who could work with local decision-makers and funders to align their resources in support of continuous improvement and data-sharing efforts within the community. Consider the following examples:

Support a community dashboard around Shared Vision outcomes

Explore opportunities for local decision-makers and funders to support the creation of a community dashboard summarizing outcomes prioritized in the Shared Vision. This includes both population-level outcomes as well as community system outcomes. See page 138 for more examples.

Decision-makers and funders can encourage the use of this dashboard in the community, including providing resources to help organizations share data to update the dashboard and use the information to guide decision-making.

Example Dashboard

The Magnolia Place Initiative in California created a **Shared Outcome Dashboard** with both population-level and community system outcomes

With support from local funders and decision-makers, the initiative put processes in place to gather data on these outcomes to update the dashboard on a regular basis.

Support a local systemic action learning infrastructure

Explore opportunities for local decision-makers and funders to provide resources to support the development and facilitation of a local systemic action learning infrastructure. If needed, these stakeholders can provide facilitation training to equip local stakeholders to support local action learning processes.

TIP: Bring in examples

Refer to pages 144-148 in this Field Guide to explain a Systemic Action Learning infrastructure during conversations with funders and

Support development of local feedback loops

Decision-makers and funders can explore how they can use staff and technology resources to promote data and information feedback loops across local organizations and groups in the community.

For example, decision-makers and funders can provide resources to support BBO staff in weaving information, action ideas, and questions between relevant groups and stakeholders.

TIP: Make it relevant

Refer to page 151 in this Field Guide to provide examples of feedback loops during conversations with funders and decision-makers, and talk about what feedback loops could directly benefit their work.

Recommendations for Success:

- **Pay attention to timing**. Identify the timing of local grant-making cycles, and set up conversations with relevant funders to help them embed new expectations for learning and continuous improvement into their efforts.
- **Select the right messenger.** Identify which BBO or collaborative members are well known and respected by local funders and decision-makers. Have these members initiate conversations with local funders and decision-makers about how they can support local learning and continuous improvement efforts.
- **Provide examples.** Bring example tools and materials (e.g., example RFP questions, example theory of change outcomes) related to continuous improvement to help funders and decision-makers get their heads around this content. Also consider bringing examples of how gathering feedback has helped improve efforts in real time to promote buy-in.

Key Considerations for your Community:

- Who are the critical leaders / decision-makers / funders within your community who could play a role in supporting learning and continuous improvement efforts?
- Who in the BBO or collaborative is best positioned to engage with these decision-makers and funders?
- To what extent are local resources already aligned to support learning and continuous improvement in the community? How can you build on these examples, and use them to encourage other decision-makers and funders to do the same?

Learn for Continous Improvement Checklist

Organize collaborative for Action and Impact

- ☐ The collaborative has **identified and summarized a set of prioritized outcomes** at population and community condition levels
- ☐ The collaborative has built **shared accountability for results**.
- ☐ The collaborative is **gathering and using rapid feedback on outcomes of strategies** to improve their efforts
- ☐ The collaborative is **facilitating an ongoing systemic Action Learning Process**.

Embed new Practices in the Community

- ☐ BBO has a process in place to help local organizations and groups **use action learning processes**
- ☐ BBO has a process in place to help local organizations and groups **embed action learning practices**

Promote Sustainability

- ☐ BBO has a process in place to **encourage new funding expectations to support continuous improvement.**
- ☐ BBO has a process in place to help local **decision-makers and funders align resources to support continuous improvement.**

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