APPENDIX

To ACH Peer to Peer Learning
CURRICULUM

APPENDIX - TABLE OF CONTENTS

INTRODUCTION + ACKNOWLEDGEMENTS

Introduction

This Appendix is to serve as a resource to the ACH Peer Learning Lab CURRICULUM. It is organized by the five Phases that are mapped in the Curriculum and each section in this curriculum contains numerous resources to support your ACHs in co-learning and co-creation.

This is a choose-your-own-adventure: select the exercises that are relevant and meaningful to you! Not all exercises will be as relevant to your ACH as others, but we trust you will find many useful ideas and approaches.

With that in mind, we have notated those exercises that are recommended for all ACH teams and others are dependent on the ACH Team needs:

*** Highly Recommended Exercises
**   Recommended Exercises
      No star Exercises depends upon the ACH Team needs

Acknowledgements

Much of the material in this appendix has been adapted from other open source hosting and facilitation guides. This guide is particularly indebted to the Art of Hosting and Presencing communities, who have shared much high quality open-source materials. Where appropriate we have referenced the original sources as well as where to find additional materials and information.

Thank you to the State of Vermont for the wisdom, planning, funding, and guidance of the Accountable Community of Health (ACH) Peer Learning Lab. This experience brought together 10 ACHs from across Vermont, supporting the development, relationships and knowledge that can only occur when we come together to learn, co-create and innovate solutions for the future of a healthy Vermont.

The guide was a co-creative endeavor. Main organizers and writers were by Dana Pearlman, www.thelotus.info, Consultant and Facilitator, and Sue Grinnell, Public Health Institute's Population Health Innovation Lab. Inputs were offered from Teresa Posakony, emergingwisdom.net, Consultant and Facilitator; Maricsa Gutierrez, Public Health Institute; and many open sources resources. We are grateful for many open source creator's generosity for sharing this rich and valuable information openly, contributing to the co-creation of healthy systems into the future.

Phase 1 STEPPING UP *Shared Intent*

This phase requires participants to start by listening to one another, sharing the deepest intent through engaging in conversations and seeking solutions to creating health across the State of Vermont (VT). As many of us are gathered from various backgrounds, it is important to hear what is the intent for our shared work and how can we best support one another in creating health with and for our communities? Likewise, begin to listen to your own communities, how they believe health is created, the barriers they confront to accessing health, and the many avenues that can lead one towards living a healthy life and well-being. These individual stories and intentions evolve into one common intent – the desire and commitment to ensuring health across the VT. It is this common intent that is generating the commitment and energy needed to work together across our communities to achieve the tasks at hand.

Activities and Tools to support you in this Phase

- Four Levels of Listening + Talking ***
- Co-Creating Operating Principles ***
- Vermont Learning Lab Baseline Assessment: 9 Core Elements ***
- Design Challenge *(worked on during In-Person Convening June 7)*
- Backcasting exercise
- Sculpting Current Reality
- Identifying Shared Intent
- How Might We….
- Nine Why's
- Crowdsourcing
- Affinity Mapping
- Chaordic Stepping Stones
- Building a strong core team **
- Hosting an effective conference call or meeting **
- Check-in Circles **
- Setting Goals for the Year ***
- Harvesting: See Art of Hosting Workbook about documenting, disseminating information, and producing materials after you convene to ensure the outputs are shared and used moving forward.

Four Levels of Listening + Talking***

Goal: a framework to learn about four levels of listening and talking. Generally when co-creating, we need to tap into deeper levels of listening, levels 3 and 4 below.

Change work requires participant's capacity to deeply listen and fully share their perspectives, even when they have seemingly opposing viewpoints. Theory U has a framework that highlights 4 Levels of Listening to help people identify and shift their level of listening and talking that is taking place in order to create deep and lasting change.
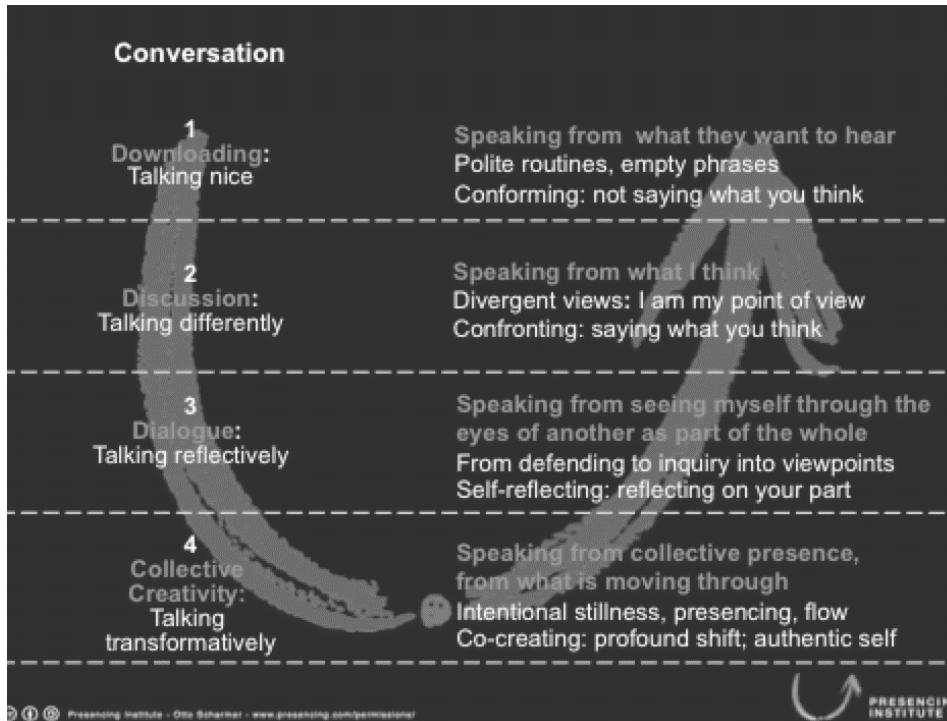
The First Level of Listening is Talking Nice, or Being Polite. Here we are talking and listening in a way that is culturally appropriate, conform to norms, and is generally everyday interactions. It is an essential aspect of being human, but not going to lead towards innovation.

The Second level of listening and talking is debate. It is standing firmly in your own beliefs and perspectives and not shifting. We often see this form of talking and listening when disagreeing on something. No one is open to shifting their perspective, and they are more concerned with persuading others to see   things as they see them. This is also a very unlikely way to co create or innovate the new.

The Third Level of Listening and Talking is Empathy. This is about putting yourself in another's shoes, and listening with an open heart. This is a reflective and heartfelt way of connecting and can lead towards co-creating based upon need.

The Fourth Level of Listening and Talking is Generative or Co-Creative. This is the space that leads towards innovation and responding to emerging needs. It is in this experience where we build upon each other's ideas, no one owns what we co-create, rather we created it together and all of our perspectives contributing led us towards the way forward.

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

See Art of Hosting Workbook for Storytelling methodologies to practice empathic listening and World Cafe and other dialogic methods to practice generative listening.

Co-Creating Operating Principles***

Goal: Create an atmosphere for trust and strong working relationships through aspirations of how we want to work together.

Co-Creating our Operating Principles and Team Building

We realize that what we are attempting to accomplish in our ACH will not be accomplished through ordinary working relationships and rules of engagement. We need to create an enabling environment capable of meeting high expectations from diverse leaders.

T*hink about a time you were part of an effective team, where your perspectives were honored, and true collaboration was possible.*

Share what made this possible. Generate a list by the group and make it visible in the room (on flip chart paper) as a reminder of the type of culture we are needing to create to do the work we have come to do here. Once you come up with the list ask if everyone is on board and if anyone objects, hear them out. Work towards collective agreements on these principles.

Capture the values and ways of working on a flip-chart, keep it visible in the space and refer to it when things get challenging. Ask are we aspiring to these expectations? What do we need to do get back on track? Have the difficult conversation and use a talking piece and pass it around the circle so all voices are heard.

Vermont Learning Lab Baseline Assessment: 9 Core Elements***

Goal: This is an assessment for your team to reflect on how the ACH is doing with the 9 Core Elements. It may be that as a result of new learnings or insights, the 9 Core Elements for your ACH need to be revised. This is an opportunity to celebrate what you are doing well, where you may have gaps, and where to focus your attention in your learning.

Vermont Learning Lab Baseline Assessment: 9 Core Elements

Administration Instructions: This survey is designed to be administered in an in-person, group setting. The facilitator should walk participants through each of the 9 Core Elements, beginning with the standardized description provided in this survey. The group should have an opportunity to ask questions and engage with the element to enhance their understanding. Then, the facilitator should read aloud the survey questions for the element and allow each participant to privately mark their answers on their version of the survey.

1. Please select the Accountable Community of Health (ACH) site to which you belong:

☐ Bennington – Bennington Accountable Community for Health

☐ Burlington – Chittenden Accountable Community for Health (CACH)

☐ Caledonia-Essex (St Johnsbury) – Caledonia-Essex Accountable Community for Health

☐ Middlebury – Community Health Action Team (CHAT)

☐ Newport (Orleans & Northern Essex Co)

☐ Rutland – Achieving Rutland County Health (ARCH)

☐ Springfield – Springfield ACH Peer Learning Lab

☐ St. Albans/Franklin & Grand Isle

☐ UCRV (Upper Connecticut River Valley-Dartmouth) – ReThink Health

☐ Windsor – Windsor HSA Coordinated Care Committee

The following questions ask about the level of development or activity that your ACH site is currently at for each of the 9 Core Elements of an ACH as defined by the Prevention Institute. For more information, please refer to: ACH - An Emerging Model for Health System Transformation.pdf

Mission

An effective ACH mission statement provides an organizing framework for the work. A strong mission defines the work as pertaining to the entire geographic population of the ACH's region; articulates the ACH's role addressing the social, economic, and physical environmental factors that shape health; and makes health equity an explicit aim.

---

2. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Mission.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Mission.	○	○	○	○

3. Please consider the description of mission above to be optimal activity for this core element. Thinking about your ACH site's mission, please select the best answer for the following questions:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Mission?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Mission?	○	○	○	○	○

Multi-Sectoral Partnerships

An ACH comprises a structured, cross-sectoral alliance of health care, public health, and other organizations that impact health in its region. Partners include the range of organizations that are able to help it fulfill its charge of implementing comprehensive efforts to improve the health of the entire population in its defined geographic area.

4. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Multi-Sectoral Partnerships.	○	○	○	○

	No Activity	Minimal Activity	Moderate Activity	Significant Activity
My ACH site is ready to achieve optimal activity related to Multi-Sectoral Partnerships.	○	○	○	○

5. Please consider the description of multi-sectoral partnerships above to be optimal activity for this core element. Thinking about your ACH site's performance in multi-sectoral partnerships, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Multi-Sectoral Partnerships?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Multi-Sectoral Partnerships?	○	○	○	○	○

Integrator Organization

To maximize the effectiveness of the multi-sectoral partnership, it is essential for the ACH to have a coordinating organization, known as an integrator or backbone. The integrator helps carry the vision of the ACH; builds trust among collaborative partners; convenes meetings; recruits new partners; shepherds the planning, implementation, and improvement efforts of collaborative work; and cultivates responsibility for many of these elements among collaborative members.

6. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity by serving as or partnering with an Integrator Organization.	○	○	○	○
My ACH site is ready to achieve optimal activity by serving as or partnering with an Integrator Organization.	○	○	○	○

7. Please consider the description of an integrator organization above to be optimal activity for this core element. Thinking about your ACH site's performance with an integrator organization, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site by serving as or partnering with an Integrator Organization?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve by serving as or partnering with an Integrator Organization?	○	○	○	○	○

Governance

An ACH is managed through a governance structure that describes the process for decision making and articulates the roles and responsibilities of the integrator organization, the steering committee, and other collaborative partners.

8. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Governance.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Governance.	○	○	○	○

9. Please consider the description of governance above to be optimal activity for this core element. Thinking about your ACH site's performance in governance, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Governance?	○	○	○	○	○

By December 2016, what level of activity would you like your ACH site to achieve related to Governance?	○	○	○	○	○

Data and Indicators

An ACH employs health data, sociodemographic data, and data on community conditions related to health (such as affordable housing, food access, or walkability) to inform community assessment and planning, and to measure progress over time. It encourages data sharing by partners to inform these activities. Equally important, an ACH seeks out the perspectives of residents, health and human service providers, and other partners to augment and interpret quantitative data.

10. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Data and Indicators.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Data and Indicators.	○	○	○	○

11. Please consider the description of data and indicators above to be optimal activity for this core element. Thinking about your ACH site's performance in data and indicators, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Data and Indicators?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Data and Indicators?	○	○	○	○	○

Strategy and Implementation

An ACH is guided by an overarching strategic framework and implementation plan that reflects its cross-sector approach to health improvement and the commitment by its partners (health care, local government, public health, business, and nonprofits) to support implementation. Frameworks to support strategy development include the Spectrum of Prevention, which encourages complementary, sustainable activities that range from individual to community-wide interventions, resulting in greater effectiveness of population health transformation, and The Three Buckets of Prevention,22 proposed by John Auerbach, (former CDC Associate Director of Policy), which can maximize the balance between traditional clinical prevention, innovative clinical prevention, and community-wide prevention.

12. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Strategy and Implementation.	◯	◯	◯	◯
My ACH site is ready to achieve optimal activity related to Strategy and Implementation.	◯	◯	◯	◯

13. Please consider the description of strategy and implementation above to be optimal activity for this core element. Thinking about your ACH site's performance in strategy and implementation, please indicate the current level of activity that best describes your ACH site:

	No Activit	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Strategy and Implementation?	◯	◯	◯	◯	◯
By December 2016, what level of activity would you like your ACH site to achieve related to Strategy and Implementation?	◯	◯	◯	◯	◯

Community Member Engagement

Authentic community engagement is a well-recognized best practice in the field of community health that requires commitment from the highest levels, designated staff, and commensurate resources to ensure effective integration into ACH processes and systems. Authentic community engagement recognizes and harnesses residents' own power in identifying and addressing challenges, while also creating leadership for and buy-in of the work in a manner that acknowledges and builds upon existing community assets and strengths.

14. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Community Member Engagement.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Community Member Engagement.	○	○	○	○

15. Please consider the description of community member engagement above to be optimal activity for this core element. Thinking about your ACH site's performance in community member engagement, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Community Member Engagement?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Community Member Engagement?	○	○	○	○	○

Communications

An ACH employs communications platforms to build momentum, increase buy-in amongst its partners, recruit new members, and attract grant investment to support its work, as well as to share successes and challenges with others. Communications is also a key tool for framing solutions in terms of community environments and comprehensive strategies.

16. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Communications.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Communications.	○	○	○	○

17. Please consider the description of communications above to be optimal activity for this core element. Thinking about your ACH site's performance in communications, please indicate the current level of activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Communications?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Communications?	○	○	○	○	○

Sustainable Financing

An ACH requires resources to support both its integrator function and ACH implementation work by others. An ACH makes use of existing and new funding sources and better aligns them to advance broad community goals.

18. How much do you agree or disagree with the following statements regarding this core element?

	Strongly Agree	Agree	Disagree	Strongly Disagree
I understand how my ACH site can achieve optimal activity related to Sustainable Financing.	○	○	○	○
My ACH site is ready to achieve optimal activity related to Sustainable Financing.	○	○	○	○

19. Please consider the description of sustainable financing above to be optimal activity for this core element. Thinking about your ACH site's performance in sustainable financing, please indicate the current level of   activity that best describes your ACH site:

	No Activity	Minimal Activity	Moderate Activity	Significant Activity	Optimal Activity
What is the current level of activity for your ACH site related to Sustainable Financing?	○	○	○	○	○
By December 2016, what level of activity would you like your ACH site to achieve related to Sustainable Financing?	○	○	○	○	○

Peer Learning Lab Design Challenge***

Goal: This challenge is designed to focus each ACH's efforts throughout the time we are together.

Peer Learning Lab **Design Challenge**:
Goal: Collectively move towards the shared intent and plan for the Peer Learning Lab Journey
How Might We Create an Award Winning ACH?

Peer to Peer ACH Learning Lab Design Challenge
"How might we create an award winning
Accountable Community for Health?"

Starting June 7, 2016, we are issuing the Vermont ACH Challenge!

The Accountable Community for Health (ACH) model has emerged as one strategy for several states and local /regional communities to come together to improve health.

We call on the Vermont ACHs to accept the challenge to build meaningful partnerships with community members, hospitals, health systems, providers, community-based organizations, and local health departments, to create an Accountable Community for Health recognized by the community for its innovative and collaborative approaches to improve population health.

The Vermont Department of Health Care Access and the Vermont Department of Health have joined in partnership to support local communities across the state of Vermont to create an ACH that generates a positive health impact. During the Vermont ACH Peer Learning Lab, communities will learn and work together to identify, accelerate, and spotlight what works best for them in their ACH structure.

In 2015, the Department of Vermont Health Access secured the Prevention Institute (PI) to research the emerging ACH model. The PI report identified nine recommended elements of an ACH (See back for list of elements). The ACH model is in the developmental stage and most communities do not have all the envisioned elements in place.

Nominations from each ACH community make it possible for award-winning strategies to gain the recognition and support they deserve. This award provides an opportunity for the community to recognize exceptional contributions the ACH made to improve health and quality of life. On January 13, 2017, each ACH site will share their work that the community recognized as valuable. Possible examples:
- Community recognizes and values the strong alliances the ACH has with business, government, and others needed to support community health
- Demonstrated return on investment that sustains and supports upstream prevention

- Disparities are decreased through a comprehensive systems approach that created increased access to health promoting services for all
- Community members understand and use their benefits demonstrated through improved patterns of utilization (preventive services, unnecessary care) and patient experience
- Progress on ACH elements and leadership identified supports important to your community

---

The Vermont Population Health Work Group's working definition of an ACH is:

"*An aspirational model—accountable for the health and well-being of the entire population in its defined geographic area and not limited to a defined group of patients. Population health outcomes are understood to be the product of multiple determinants of health, including medical care, public health, genetics, behaviors, social factors, economic circumstances, and environmental factors. An ACH supports the integration of high-quality medical care, mental and behavioral health services, and social services (governmental and non-governmental) for those in need of care. It also supports community-wide prevention efforts across its defined geographic area to reduce disparities in the distribution of health and wellness.*"

Elements of an Accountable Community for Health

1. Mission – An effective ACH mission statement provides an organizing framework for the work. A strong mission defines the work as pertaining to the entire geographic population of the ACHs region; articulates the ACHs role addressing the social, economic, and physical environmental factors that shape health; and makes health equity an explicit aim.

2. Multi-Sectoral Partnership – An ACH comprises a structured, cross-sectoral alliance of health care, public health, and other organizations that impact health in its region. Partners include the breadth of organizations that are able to help it fulfill its charge of implementing comprehensive efforts to improve the health of the entire population in its defined geographic area.

3. Integrator Organization – To maximize the effectiveness of the multi-sectoral partnership, it is essential for the ACH to have an integrator organization. The integrator helps carry the vision of the ACH; build trust among collaborative partners; convene meetings; recruit new partners; shepherd the planning, implementation, and improvement efforts of collaborative work; and build responsibility for many of these elements among collaborative members.

4. Governance – An ACH is managed through a governance structure that describes the process for decision-making and articulates the roles and responsibilities of the integrator organization, the steering committee, and other collaborative partners.

5. Data and Indicators – An ACH employs health data, sociodemographic data, and data on community conditions related to health (such as affordable housing, food access, or walkability) to inform community assessment and planning, and to measure progress over time. It encourages data sharing by partners to inform these activities. Equally important, an ACH seeks out the perspectives of residents, health and human service providers, and other partners to augment and interpret quantitative data.

6. Strategy and Implementation – An ACH is guided by an overarching strategic framework and implementation plan that reflects its cross-sector approach to health improvement and the commitment by its partners to support implementation. The process for developing this framework includes a prevention analysis that identifies community conditions that are shaping illnesses and injuries across the community. The implementation plan includes specific commitments from health care, local government, business, and nonprofit partners to carry out elements of the plan.

7. Community Member Engagement – Authentic community engagement is a well-recognized best practice in the field of community health that requires commitment from the highest levels, designated staff, and commensurate resources to ensure effective integration into ACH processes and systems. Authentic community engagement recognizes and harnesses residents' own power in identifying and addressing challenges, while also creating leadership for and buy-in of the work in a manner that acknowledges, and builds upon existing community assets and strengths.

8. Communications – An ACH employs communications platforms to build momentum, increase buy-in amongst its partners, recruit new members, and attract grant investments to support its work, and share successes and challenges with others. Communications is also a key tool for framing solutions in terms of community environments and comprehensive strategies.

9. Sustainable Financing – An ACH requires resources to support both its integrator function and ACH implementation work by others. An ACH makes use of existing and new funding sources and better aligns them to advance broad community goals.
http://healthcareinnovation.vermont.gov/sites/hcinnovation/files/Pop_Health/VT%20ACH%20Opportunities%20and%20Recommendations.pdf

Backcasting from the Desirable Future

Goal: Individually imagine where you want to be in the future as you build your ACH and then reflect upon those visions together as a team to plan.
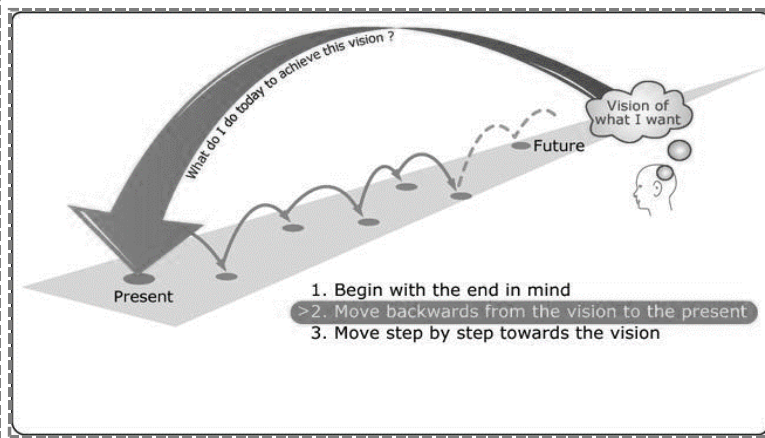
Backcasting from the Desirable Future
What is backcasting?
Backcasting is a strategic planning technique that helps to envision what you want to achieve in the desirable future. Additionally, backcasting includes the stepping stones (policy, community engagement, forming a strong core team, etc.), and action steps needed to get to the desirable future.

In backcasting, you paint a vivid picture of how you want your project or initiative to be in the determined future, when you reach success. **Backcasting is a strong alternative to forecasting. In forecasting you recreate an experience based upon what you already know. Backcasting is helpful if you are creating something that has not been created before and you do not know what the future project or initiative you are working on will look one day.**

Think about:
How this future outcome will look in 3 months or 1, 5, 10, 50 years.

After you paint a vivid picture of where you want to be in your desired future, you can then begin to write out the concrete steps you will take to get there.

Backcasting exercise for ACHs

Imagine your ACH in the desirable future, when you have been given an award for outstanding work in your community. What does it look like, who is involved, what kinds of partnerships exist, how do people relate to each other, what kind of health outcomes are happening, how is the community involved?

Brainstorm ideas of where you imagine your future ACH once it reaches success.

In the desired future, our ACH (pick your timeframe) will have x,y,z....

Be intentional about all the dimensions of the ACH and paint a vivid picture of what it look like in your desired future.

Backcasting a vivid picture

Instead of writing, you can also draw a picture and make it vivid. You could also use a metaphor, like a bridge or a tree.

For example, a tree. Perhaps you have a tree, with:
- Deep roots: articulate in this picture that you have a greater understanding of your community's needs.
- Branches: articulate in what ways the community is connected to the ACH.
- Roots: articulate the resources that exist and how the community is nourished and reaching a well-being.
- Trunk: what stabilizes the community? What kind of backbone is in place to ensure that the community is well tended to?
- Leaves: what is fruiting? What kinds of gifts, rewards and benefits are being created from the work that is happening?

After you have made a vivid description of your desired future, share your vision with your team. Together decide where to put your intention and make this vision concrete by writing an action plan.

Stepping stones to get you there….

Begin to write down the concrete steps you need to take to get you to the vision of the future. Map it out.

Identifying Shared Intent

Goal: Work together to see what your shared intent is and decide where to focus collective attention.

Once you have each individually completed a backcast of the desired future, take time to share and listen to your team about their intent. See where the shared work resides, where synergistic thinking is happening, and prioritize by voting on where to focus your attention. We imagine you may have focus areas you know that need your attention or you are not yet sure where to focus your attention. If you do know, in the next phase begin to map who to invite into the conversation. If you don't know where to put your attention, move to step two and do stakeholder interviews (in Phase 2 appendix below) with a wide spectrum of people to identify the needs in your community.

Sculpt Current Reality Workshop

Goal: Get a sense of the bigger picture of current reality in your ACHs and in the community you are serving. See through each other's eyes.

Sculpting exercise

Sculpting the current reality: *What is the current state of health in our communities? How are people collaborating? What is getting in the way of success?*

In order to get a collective and holistic understanding of current reality we will use a sculpting exercise from Theory U and get into small working groups to build a sculpture of the current system with **enablers** and **barriers that we are currently confronting**. This hands-on-building exercise helps participants explain the current system through 3D modeling exercise, moving beyond the limitations of dialogue alone. Participants split into groups to maximize diverse perspectives:

Get into groups of 4 or so and build sculptures paying attention to:

- Revealing the systemic forces, structures and processes that keep us from collaborating and innovating across the organization;
- Developing shared understanding of current reality, shared challenges, and opportunities in skills collaborating and innovating.

Answer the following questions:

- What is the shape of the current system of collaborating and innovating at your organization? What enables or prevents it?
- Please explore: policies, strategies, activities, information flows, processes, decision making.

Sharing our Sculptures

In order to increase collective understanding, the groups cross-pollinate by sharing their sculptures, through the **4-direction model** following these questions:

1.   What do you appreciate about how things are currently?

Pro-tip: *Pay attention to responses getting deeper and deeper...drill down into these questions to see the systemic forces--try to move past superficial responses.*

2.   What frustrates you?
3.   If we have to move away from the current reality – what are some of the harsh truths/obstacles that we have to face?
4.   If this sculpture were made to teach you, what advice would it give you?

What else needs to die and what needs to be born?

The group witnessing the model then asks clarifying questions to more fully understand what the model is revealing about the greater system, and then they switch to share their model.

How Might We (HMW)...

Goal: Articulate your shared intent through a question that grounds your inquiry. Use your HMW question to focus attention and make sure you stay on track.

How might we…. Statements

In order to launch your team into brainstorming around the challenge or opportunity, begin crafting *How Might We* (HMW) statements. For example: *How might we become an award winning ACH-that is serving the community in responsive and meaningful ways?* This question would become a guide for your team in the next step of work.

> **"How"** assumes that solutions exist and provides the creative confidence needed to identify and solve for unmet needs.

> **"Might"** says that we can put ideas out there that might work or might not—either way, we'll learn something useful. Feel free to get it wrong. In fact getting it wrong is key to innovation. Wrong is good! Keep the ideas flowing, more ideas, and more potential for innovation. That "wrong" idea might lead you to the right one!

> **"We"** signals that we're going to collaborate and build on each other's ideas to find creative solutions together.

First, everyone take a piece of paper and quickly brainstorm on your own some potential **How Might WE (HMW)** statements. Then collectively share one idea at a time, when an idea is similar cluster them together. Once complete, begin putting stars next to the top statements and refine it down to one or two shared HMW statement to use as guides. This question may also evolve in time, so be open to changing it if needed.

Nine Why's and Crowdsourcing

Two creative and engaging exercises to use with a team in **generating and clarifying purpose** are Nine Why's and Crowdsourcing. These two exercises are published online with a high level of detail at www.LiberatingStructures.com. They are summarized here with a link to the specific exercises.

Nine Why's
Goal: Make the Purpose of Your Work Together Clear

With breathtaking simplicity, you can rapidly clarify for individuals and a group what is essentially important in their work. You can quickly reveal when a compelling purpose is missing in a gathering and avoid moving forward without clarity. When a group discovers an unambiguous shared purpose, more freedom and more responsibility are unleashed. You have laid the foundation for spreading and scaling innovations with fidelity:

Structuring Invitation: Ask, "What do you do when working on   (the subject matter or challenge at hand)? Please make a short list of activities." Then ask, "Why is that important to you?" Keep asking, "Why? Why? Why?" up to nine times or until participants can go no deeper because they have reached the fundamental purpose for this work.

See the following for full description of exercise - http://www.liberatingstructures.com/3-nine-whys/

Crowdsourcing

Goal: Rapidly generate many ideas and sift a group's most powerful actionable ideas and not get bogged down in decision making (30 min.)

You can help a large crowd generate and sort their bold ideas for action in 30 minutes or less. With Crowdsourcing, you can spread innovations "out and up" as everyone notices the patterns in what emerges.

Though it is fun, fast, and casual, it is a serious and valid way to generate an uncensored set of bold ideas and then to tap the wisdom of the whole group to identify the top ten. Surprises are frequent!

Structuring Invitation: Invite participants to think big and bold and discover the most attractive of their ideas together by asking, "If you were ten times bolder, what big idea would you recommend? What first step would you take to get started?"

See the following for full description of exercise - http://www.liberatingstructures.com/12-2510-crowd-sourcing/

There are software programs available that can also assist with this technique as well. It can be useful for engaging community members and others in generating ideas. Listed below are some that we are familiar with and that you may wish to further explore:

Thoughtexchange: https://thoughtexchange.com/

The Thoughtexchange Group Insight Platform™ leverages the principles of crowdsourcing, interest-based negotiation, and experiential education. They work with school districts and other organizations facing change to engage tens of thousands of people from diverse backgrounds in a single coherent conversation. They enable the people affected by decisions to share their thoughts, consider and value the perspectives of others, and learn from the entire group. The process naturally leads participants from one or two sentiments to a broader and more balanced understanding of the issues raised and discussed. We are unique in creating robust data and detailed analysis from only two or three very simple, open-ended questions. The results allow our customers to understand, in an actionable way, how the people affected are feeling and how much and which directions smaller positional groups are willing and able to shift.

Windtunneling: http://windtunneling.com/

WindTunneling enables new options for leaders, options that reflect all the participants' unique perspectives as they evolve from pools of ideas into more firmly formed options for action. In the process, everyone involved understands better how "the system works" and also learns important new ways to contribute for the benefit of the whole organization. Social Capital grows in the form of healthy relationships based on engaging equally with transparency and candor. Emerging insights strengthen both individuals and groups. WindTunneling is designed to help us work with Complex Issues, AND its design embeds specific Systemic Principles.

Spigit: https://www.spigit.com/home-v2/

Spigit engages internal and external crowds in innovation, anywhere in the world. The crowd helps you find and implement that valuable idea that your company has never tried…until now. And only Spigit finds the best ideas automatically, using patented crowd science algorithms. Spigit crowdsourcing software is used every day for process innovation, breakthrough ideas, cost reductions, and to engage employees in innovation initiatives.

UnitedHealthGroup used this technique to improve the patient experience
https://www.spigit.com/united-health-group/

Affinity Mapping

Goal: To make the collective intelligence of the group visible, to move around ideas, so you can cluster the ones that are alike, start seeing patterns, and for the bigger picture to become visible to the whole group.

This method can be used to capture and share new perspectives, insights, ideas, and knowledge after any collaborative process (e.g. World Cafe). It can also be used on its own as a way to brainstorm ideas. You need a group, you need ideas, you need post-its or small pieces of paper that you can move around and you need a space, like a big table or wall (depending on the size of your group). It works with any size of group, only the logistics change.

Process

- Towards the end of a collective conversation ask people to take 5-10 min (depending on how much time you have overall, remember more time doesn't always mean the quality of the results will increase) to reflect on the key insights of their conversation. You can give them a specific question to think of related to the topic at hand (e.g. what are the major challenges and opportunities for our new initiative).
- Important: ask them to write each insight on one sticky note so you can cluster the ones that are alike.
- Once finished or the time is up, ask for a volunteer to start sharing their first insight. You can invite the group to play 'bingo', meaning to call out 'bingo' when they have an insight that is the same or very similar to what was just shared.
- Group the 'bingos' on a wall visible to everyone.
- It's important to have someone who understands the content to help you with the clustering. This process can get sometimes a little bit chaotic so it is good to have several people do this - e.g. one person who manages the group sharing, one 'runner' who collects the post-its and 2 people clustering.
- You can name the clusters and share them back to the group. Sometimes it is good to do that after a break so you can use the break time to name the clusters.

Chaordic Stepping Stones

Goal: Planning framework with just the right amount of form for invitation, gathering, harvest and wise action

The Chaordic Stepping Stones
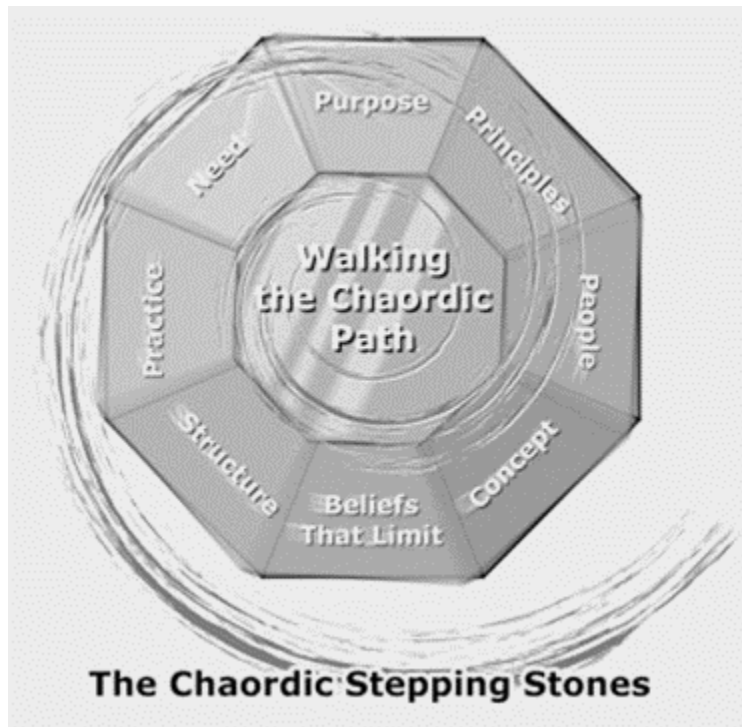
Chaordic Stepping Stones allow us to create conversational processes that are rooted in real need that are sustainable for the community they serve and the people working within them. These steps can be used both as a planning tool and to help understand what you are discovering about an organization, community, or initiative. They are all interdependent, although in working with these as a planning tool, it is most common to begin with need.

Designing Meetings and Processes
In designing a meeting or a process, each of these stepping stones is activated by asking key questions. In beginning to design work together we can select from these questions (or create others) to help us explore each stone as we lay it in place.

Need:
The need is the compelling and present reason for doing anything. Identifying the need helps to anchor an invitation or effort. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant. Needs can be identified in a number of ways through research, dialogue, large meetings, or individual sensing interviews.

Context is important.
• What time is it in the world now?
• What time is it for our initiative now?
• What are the challenges and opportunities we are facing?
• Why is it important that we do this work?

Create a needs statement for the project or effort: A shared understanding about why it is important to do work now. A clear statement of urgency or timing with which to create an invitation

Purpose
Purpose statements are clear and compelling ideas about where we are going that guide us in doing our best possible work. Discerning a shared purpose is helpful to guide work and seek outcomes, but don't get too attached. Working in a chaordic space means constantly making adjustments as you learn and create new ideas and solutions.

A purpose statement should be a direction, not a necessarily a destination.
Once you have a purpose statement, continue to check in to make sure it is valid and true. Adjust it if you need to based on what you're learning as you go.
• If this work should live up to its fullest potential, what do you imagine is possible?
• What could this work do/create/inspire/result in?
• Where should we be heading?
• What are the stories we want more of?

Create a purpose statement: A common understanding of the basic direction for the work. Create shared commitment and buy in to a direction and intention for the work

Principles
Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.
The best principles help to guide us when the plan breaks down, so make them observable and simple to remember.
> • What key principles guide us in our work?
> • What is it important to remember about how we want to work with the participants in our initiative?
> • What unique ways of doing work and being together can we bring to this work?
> • If the plan breaks down, what principles will guide us anyway?

Create a shared set of principles to rely on when your work enters a complex or chaotic space and you need to reground. These are a set of commitments to one another that helps keep good work going.

People
Once the need and the purpose are in the place and we have agreed on our principles of cooperation, we can begin to identify the people that are involved in our work. Mapping the network helps us to see who is in this work for us and who will have an interest in what we are doing. To map the network, create a diagram with a set of three or four concentric circles.

In the center of diagram goes your purpose statement. Place the names of your team in the first circle. This is the core team of people most fully committed to and responsible for the project.

On the second ring, place the names of individuals who are essential participants in the process, but not a part of the core team. These might be people whose expertise you need, or whose approval or political influence are required to sustain the work.

On the third ring, place the names of people who you will consult with and keep closely informed about the process. They may not have decision making authority, but not including them in meetings and gatherings will diminish the project.

Finally, on the fourth ring, place the names of people who will need to know what you are up to, even though they may not be directly engaged.

This scheme and process needs to be customized for your work and your project, whether you are planning a single event or a longer term strategic initiative. In general, people closer to the center will be more committed, more involved and more responsible for the outcomes. The closer you move to the center the more time and energy you need to spend on communications and involvement. Those towards the edges will require less intense communications - perhaps brief communication updates, or one way blasts of information. Those in the middle rings can be engaged using different types of processes that will bring them into the heart of the project on a more frequent basis.

Organizing people this way also makes it easier for people to become more or less involved in the project. For example, someone on the core team who needs to step out for time or other commitments can move out to a wider ring and still be involved. They can be replaced by someone closer to the center, who will have to do less work to get up to speed on the work of the core team.
• Who needs to be at the core of our project?
• Who do we need to talk to make this work, and what questions do we have for them?
• Who has answers or expertise we need?
• Who has the authority to accelerate or impede this work and how can we involve them?
• Who will be affected by this work?

Structuring
Once we have established the center of a project by connecting a need and purpose to the people who should be involved, and we have an idea how we will support implementation, we can turn our minds to the kind of structures, processes, and activities that help us address our purpose. We move through three stages of identifying a concept, investigating our limiting beliefs, and then finally deciding on a project plan for moving.

Concept

As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high-level look at the shape of our endeavor. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept is important, because it gives form to very different structures for doing our work. Coming up with a concept delays final decisions about structuring work, and it allows us to pause and check out our general direction with those who are resourcing and enabling the work. Avoid the temptation to jump immediately to a final design. Conceptual plans are valuable because they can be used to test limiting beliefs and discover what's   missing before making final decisions about how to organize the work.

• What is a good high-level approach to addressing our need and meeting our purpose?
• What basic elements, activities and exercises will best serve our purpose?
• How will we ensure that our work reflects our principles?

Create: a first draft, prototype, or sketch of what the work might look like.

Limiting Beliefs

So much of what we do when we organize ourselves is based on unquestioned models of behavior. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models, approaches, and ways of thinking. It pays to examine ways in which we assume work gets done in order to discover the new ways that might serve work with new results.

Engaging in this work together brings us into a co-creative working relationship, where we can help each other in new and powerful ways of working together, alleviating the fear and anxiety of the unknown. Limiting beliefs appear in both individuals and groups and so it's useful to engage in practices that work at both the individual level and the group level to surface and deal with fears, anxieties, shadows, and limiting beliefs before we inadvertently build them into our plans and processes.
• What makes us tremble, and what do we fear about new ways of working together?
• Who would we be without our stories of old ways of working?
• What will it take for us to fully enter into working in new and unfamiliar ways?
• What is our own learning edge in working together?

Structure

Once the concept has been chosen and we have worked through the limiting beliefs, it is time to create the structure that will channel our resources, and enable work to happen. This is where we decide upon a plan of action and define the roles and responsibilities of those involved. It is in these conversations that we make decisions and choices about the resources of the group: time, money, energy, commitment, and attention.
• What are we going to do together?
• How will we enable our work to happen?

- What resources are needed in time, money, and attention and where are these going to come from?
- What will happen with the results of the work?
- What logistical questions need to be resolved?
- What expertise can help us with our work?

Harvest

There is no point in doing work in the world unless we plan to harvest the fruits of our labors. Harvesting includes making meaning of our work, telling the story, and feeding forward our results so that they have the desired impacts in the world.

- What are the forms of harvest from our work that best serves the need?
- What intentional harvest will serve our purpose?
- What are the artefacts that will be the most powerful representations of what we have created?
- How will we carry the DNA of our work forward?
- What are the feedback loops that we need to design to ensure that learning and change accelerates itself?
- How will we stay open to emergent learning?
- What are the questions we need to carry about what we are learning by meeting this way?

It is very important to note that harvesting is an activity that needs to be planned up front, in the spirit of "we are not planning a meeting, we are planning a harvest." Chris Corrigan

http://chriscorrigan.com/Chaordic%20stepping%20stones.pdf

Building a Strong Core Team**

Goal: Get on the same page as a team. We all thrive in certain conditions and struggle on another condition. Share what you need to thrive on your ACH team and how to survive the slumps.

Take the time to better understand your team. An essential part of forming an alliance is the ability to collaborate and work well with your teammates.

The below is abbreviated from a process called *The Blueprint of We* (www.blueprintofwe.com). The aim of this collaboration document is to build a foundation of knowledge and understanding about each other, so that the team can dive in and activate their creativity and collective intelligence to bring good things to life.

Process:
1. Each person shares elements about themselves that will help the group better understand what they care about, how they show up on their best days and how they show up when life is challenging. Elements of the *personal template* to share on the first round are:
   a. **Personal Values:** What's important to you? (Click here for an expanded activity to identify core beliefs and personal mission statement)
   b. **Awesome**: What you look like on your best day when you're feeling awesome.
   c. **Stressed**: What you look like when you're feeling stressed, under slept or overwhelmed.
2. While one person is sharing, the others write down key things about that person that will be helpful to remember once everyone is in the thick of the project. (This can be written in the ***Understanding We template***). The aim is that when relationship dynamics start to emerge from being in the work and having different personalities and work styles, group members will have empathy and understanding about one another's motives from taking the time to learn about each other in this context. Feel free to ask questions of one another to really understand what is being offered.

3. The group determines a few key **guidelines** for how you want to work together, be sure to document these.
   a. Each person has written what is important for them when working on a team in their *personal template*. Discuss as a group what simple guidelines will help you create the conditions for a strong collaboration.

Hosting an effective conference call or meeting**

Goal: Create a simple structure for focusing attention, creating patterns for ease and having agendas that elevate the team's ability to work well together.

Hosting an effective conference call or meeting

Implementing structure and creating an effective meeting or conference call is an important skillset in collaboration. Think about the main purpose of the meeting and set the context well from the beginning. Create an outline for the flow of the conversation, with timing to ensure you cover what is essential while being willing to let go of the agenda should another more important need arise. Also ask for input to see if anything is missing from the agenda and make necessary changes to ensure everyone is onboard for the call and the agenda.

Here is an example of a possible call/meeting flow or agenda

- **1:00 -1:03 Welcome**: host those people joining the call, welcome them and create a hospitable space so that we can do good work together;
- **1:03 - 1:10 Set the context** for the purpose of the meeting: why are we gathering, what do we hope to accomplish on this call? If we answer this question, we will have made great strides (i.e. *"on today's call we will figure out the roles and responsibilities people have for our upcoming event"*); see if anyone has any items to add to the agenda before beginning.
- **1:10 - 1:30 Check-in:** ask a question that helps people become present to our call (i.e. *"as we prepare for our upcoming event, what skill set are you most excited to learn?"* or more personal questions like *"based upon all that you are working on, what has your attention most these days?"*) everyone gets a chance to share their voice on the call and gets an opportunity to say something. Research shows that the sooner you can get people's voices in a meeting, the more participatory they will be throughout the meeting.
- **1:30 - 1:40 Updates** since the last meeting
- **1:40 - 1:50 Framework:** any frameworks that will support our work
- **1:50 - 2:00 Inquiry:** purpose of the call is explored. This could be done through dialogue, through a relevant and powerful question, through presentation/q&a format, form depends upon the topic.
- **2:00 - 2:10 Requests and Offers:** this is a process where team members make requests for what they need or offers to others for things they think would be helpful. It is not a requirement to offer or request, just a space holder for those that need/want to.
- **2:10 - 2:20 Planning** any **next steps:** and next meeting times (or create a doodle if this task is too complex for the call).
- **2:20 - 2:30 Check out**

Check-in Circles***

Goal: Build relationships, create a regular pattern for coming together and learning about what is in each of your hearts and minds.

Creating commitment and building relationships through circle check-ins

At the start of each meeting, before getting to work, begin by setting the context and connecting the whole group to the larger purpose of why we were doing this work. The fact of the matter is the work has the potential to impact many people, perhaps the whole of our community. In these brief, but impactful circle check-ins we make an effort to remind participants of their role in creating change.

Examples of Circle Check-Ins

Have the group stand or sit in a large circle-like shape. Stand in silence for a moment and take a collective breath. Share an inspirational quote or poem. Then ask a question for the group to contemplate. For example, how could our actions today impact many people for years to come, and as we move about our day, planning and thinking, *what is a greater intention we can set to be the leaders our community is asking us to be?* Then everyone has the opportunity to share, from both their head and their heart, a response to the question.

These check ins can take various forms. Sometimes they may be through movement, improv (for example building the future together) or any other creative means the host guides the group through. Practice taking turns hosting this process so everyone has the opportunity to step into leadership.

Visual Metaphor: Bridging the Gap and Identifying Goals

Goal: Identify current reality, desired reality, obstacles, resources, and steps towards reaching your shared goals.

Visual Metaphor: Bridging the Gap and Identifying Goals

Date:

5.
4.
3.
2.
1.

Resources

Current Reality

Steps

Desired Reality

Date:

Obstacles

visualThinkingmagic.com

Using visual thinking metaphors is much like building a story and the journey towards the goal. You are effectively taking your thoughts, different scenarios, choices, and options out of your head, and making them concrete and real in front of your eyes. This helps you to clarify things, to identify patterns, and make better and more effective decisions.

This process might not seem revolutionary on the surface. However, do not let that fool you. The simple act of getting thoughts out of your head and putting them down on paper provides incredible clarity that you would never experience if held onto.

Visual thinking explores a number of key critical areas that are fundamental to the process of goal setting. It explores the following:
- Current reality
- Desired reality
- Obstacles standing in the way
- Available resources
- Steps required achieving your desired reality

Here is an overview of how you would use this visual thinking metaphor:

Identify Your Goal

In the cloud area, write down the goal that you would like to achieve, using keywords, being as specific as possible.

Identify Current Reality

On the left cliff, write down a list of keywords that define your current reality. You are outlining where you the Accountable Community for Health is right now. Include everything that is good, bad, and ugly. Alternatively, you can represent your current reality using sketches and symbols.

Identify Desired Reality

On the right cliff write down a list of keywords that define your desired reality. You are essentially defining the type of ACH you would like to live, work and play in the date you specified. It is not necessary to go into too much detail at this stage, but simply jot down keywords that stand out in your mind.

On top of the cliff, represent these keywords (your desired reality) using a series of sketches, symbols or both.

The sketches can depict feelings you want to experience, physical things you want to have, etc. Completing these sketches will help you to create more meaningful associations.

Identify Obstacles

Within the gap between the two cliffs, write down all the obstacles that are standing between your current reality and your desired reality. Again, write down only keywords without going into too much detail. Alternatively, you can represent these words in a visual way, as described above.

Identify Key Resources

On the tree branches, outline five key resources that you have at your disposal that you could use to help you overcome the obstacles that are standing between you and your desired reality. Again, just jot down keywords.

Bridge the Gap

Now that you are clear about where you are, where you want to be, the obstacles standing in your way, and the resources you have at your disposal, it is now time to build a bridge that will take you over the cliff towards your desired reality. This bridge is going to be built using a series of steps that you will take over a certain period of time that will get you to where you want to go.

Action Planning Template Samples (or use your own)

Goal: Planning tools to help support you in guiding through your Peer Learning Journey.

Learning Objectives

Based upon your *Design Challenge* and the *9 Core Elements of an ACH*, begin to articulate your learning objectives and make a plan. There may also be other learning needs that you want to prioritize. As a team decide where you want to focus your   attention and prioritize these learning goals with a timeline.

See Collective Action ToolKit By Frog Design: Seek New Understanding and Plan for Action section for unearthing additional learning needs.

Identify learning priorities with your team.
1. Do a Backcasting exercise (see appendix Phase 1). Imagine it is the end of the peer learning year. What do you hope to have learned? Write these out as learning objectives.
2. Individually brainstorm "As an ACH, what are our learning objectives?"
3. Each team member begin to share each objective one by one. When a commonly shared objective is identified yell BINGO, and cluster them together and name the cluster (for example *identify a mission statement)*.
4. Once complete, begin prioritizing. Everyone vote on the top learning objectives.
5. Identify top learning objectives.
6. Place them on timeline between now and January.
7. Each objective needs a lead to ensure you are moving ahead, tracking progress, and developing next steps.

Timeline

Now

_____January '17

ACH Learning Goals and Objectives					
Learning Objectives		**Activities planned to achieve this objective**	**Lead: Who will take the lead**	**Timeline: when will complete this?**	RESULTS
1.					
2.					

Organization Name

ACH Action Planning Chart 2016-2017

Action Step	Steps to Achievement	Lead Person(s)	By When?	Resources	Evidence of Success
Fill in based on Assessment Results	*Steps that need to be taken to accomplish Action Step*	*Who will take responsibility to ensure steps are accomplished?*	*By what date will you accomplish each step to achievement*	*What resources (people, tools, technical support, funding) are needed to accomplish action steps?*	*What evidence is needed?*

RACI Matrix Template

	Project Leadership				Project Leadership				Project Leadership				External Contributors			
	Role #1	Role #2	Role #3	Role #4	Role #1	Role #2	Role #3	Role #4	Role #1	Role #2	Role #3	Role #4	Role #1	Role #2	Role #3	Role #4
Plan Phase Activities																
Execute Phase Activities																
Control Phase Activities																
Close Phase Activities																

Instructional Notes for the RACI Matrix:

The RACI Matrix is a powerful tool to assist in the identification of roles and assigning of cross-functional responsibilities to a project deliverable or activity.

RACI represents:
R – Responsible   A – Accountable   C – Consulted   I - Informed

RACI Definitions:
Responsible = person or role responsible for ensuring that the item is completed
Accountable = person or role responsible for actually doing or completing the item
Consulted = person or role whose subject matter expertise is required in order to complete the item
Informed = person or role that needs to be kept informed of the status of item completion

Simply place an R, A, C, I or any appropriate combination in each of the applicable roles for each activity. Each activity should have at least one individual Accountable while there may be shared responsibilities depending on the activity.

Phase 2 STEPPING IN *Deep Immersion*

After generating shared and common intent, participants will embark upon sensing journeys to deepen their learning about the task. Co-sensing is about learning fast through observing and listening to those whose depth of knowledge and experience can assist participants fast-track the learning process.

Divide into ACH groups and immerse yourselves in a learning process. Participants suspend the knowledge they had on health in their communities so that they could learn with **fresh eyes**.

Go to different institutions and people (experts, practitioners, and users) to learn fast about the challenges. For instance, plan a day in town and ask community members on the streets how they define health, what makes them healthy, and what barriers they confront to being healthy. Go out and speak to community members, academics, policy makers, other ACHs in and outside Vermont and find out their perspective.

Activities and Tools to support you in this phase

- Map the current system**
- Co-create Sculptures of Current Reality
- Identify Stakeholders***
- Analogous Inspiration -- See [Field Guide to Human Centered Design](#) By IDEO
- Mapping Stakeholders
- Stakeholder Interviews***
- Talking to those working with this challenge in other context and exploring their lessons learned from the field***
- Host dialogues

Map the Current System**

Goal: Together, identify what is happening in the current system to get a bigger picture from each other.

Map the current system. Put a piece of flipchart paper on the table, make concentric circles and put the How Might We guiding question in the center. Map out aspects (resources, people, organizations, health focused entities, etc.) that are a part of the current system. Place people that are more closely connected to the challenge/opportunity closer to the center, and those less so further out from the center. See the bigger picture.

Identifying Stakeholders***

Goal: Identify the stakeholders in your ACH community. This includes those people that may not yet be engaged and asks you to expand your reach to include the stakeholders that are most affected by your overarching purpose or challenge.

Identifying Stakeholders

Participatory planning requires the involvement of concerned stakeholders. This includes identifying public concerns and values and developing a broad consensus on planned initiatives. It is also about utilizing the vast amount of information and knowledge that stakeholders hold to find workable, efficient and sustainable solutions.

The identification criteria of stakeholders will have to answer the following questions:
- Who are the people/groups/institutions that are interested in the intended initiative? What is their role (educator, regulator, executor, direct beneficiaries, indirect beneficiary, etc.)?
- Who are the potential beneficiaries?
- Who might be adversely impacted? Who has constraints about the initiative?
- Who may impact the initiative? Who has the power to influence?

Ensure that core players from all sectors that are involved in health are being invited:
- government institutions and agencies,
- funders,
- academia and vocational training institutions (public and private),
- NGOs who provide training,
- businesses in all identified sectors but also entrepreneurs or associations of entrepreneurs, and
- leaders of innovative projects in the relevant fields.

For innovative and grounded results of this process it's very important to think outside the box.
- Ensure that both the implementers and decision makers are invited, and those who work in the relevant fields who are closest to the action of the issues at hand.
- Invite people whose lives get impacted by the outcome of this project, e.g. parents and young people to bring their voice to this context.

Here are some additional considerations to help you think of who to invite to the conversation:
Learning from past and ongoing engagement: Look at your past/existing stakeholder engagement activities. Which stakeholder groups have contributed the most? Which individuals have contributed positively?
Be forward thinking: Where can you reach beyond your existing comfort zone to engage with lesser-known stakeholders? Have you considered entrepreneur associations, alternative/innovative education institutions, and small scale innovative projects? Based on your objectives, the relevant stakeholders you need to engage with may not play the usual roles, but may instead serve other functions relevant to this project and its desired outcome.

Be diverse: Make sure to include a rich diversity of stakeholder expertise, geography, and tactics from across the spectrum. This is an opportunity to reach out and mix the old with the new, including individuals from each of the following stakeholder categories: influencers, collaborators, advocators, and implementation partners.

Be social: Social media provides an unparalleled opportunity to identify and reach lesser-known stakeholder groups. Canvas blogs, forums, networking, reviews, and news sites to discover stakeholders relevant to your business and to learn about their interest in your activities.

Be aware: There is a tendency to focus on formal authorities when identifying stakeholders for an engagement process, but the loudest voices or heaviest campaigners are not necessarily your key stakeholders. Step back and add those institutions and individuals to your list who just do really good work but don't make a lot of noise about it, because they may have a hidden wealth of expertise.

Step 2: Analysis

Once you have identified a list of stakeholders, it is useful to do further analysis to better understand their relevance and the perspective they offer, to understand their relationship to the issue(s) and each other, and to prioritize based on their relative usefulness for this engagement.

Contribution (value): Does the stakeholder have information, counsel, or expertise on the issue that could be helpful to this project?

Willingness to engage: How committed is this stakeholder to participate, collaborate, and move beyond their own organization's interest?

Influence: How much influence does the stakeholder have? (Clarify "who" they influence, e.g., other companies, NGOs, educational/training institutions, funders, etc.)

Necessity of involvement: Is this someone who could derail or de-legitimize the process if they were not included in the engagement?

Stake: Do the individuals, groups or departments answer yes to the question: Does the success of this project influence the success of your own work?

Legitimacy: How legitimate is the stakeholder's claim for engagement?

Map Stakeholders***

Goal: Identify stakeholders within your ACH.

Map stakeholders. On the map include stakeholders: those people directly impacted by the challenge or opportunity, organizations serving those people that are most impacted, decision or policy makers, academics, etc. Think outside the box, who else in your community is serving the health of community members in ways that aren't normally identified that way but indeed are providing well-being in diverse ways, for example friendly grocery store cashiers, transportation planners, flower stands workers, or housing commissioners.

Stakeholder Interviews***

Goal: Engage stakeholders in your ACH through interviews and expanding your perspective through their eyes.

Stakeholder Interview Process - Design Team

Directions: read through the process and develop questions that will enable you to get a BIGGER picture perspective of your inquiry.

Purpose
- Strengthen relationships with key stakeholders,
- Gather pertinent information through exploration and questions, and
- Ascertain the key barriers and enablers for our shared work.

Outcomes
- Why: why are we doing this process?
- What: What will this process help us see in the system?
- Who: Who do we need to engage? Who is affected? Who has key knowledge? Who makes decisions?
- How: Will we go about getting a wide system perspective?

Stakeholder interview Process

As we engage with stakeholders with our initial set of questions, we will reflect upon the key inquiry, remembering the deeper layers beneath the surface, as well as additional stakeholders that need to be included (who else should I talk to about this?).

1. **Identify what stakeholders to interview.** Create a list of people to talk to. Ideally, this is a microcosm of the entire system we are interested in including in impacting through our outcomes.
2. **Create questions to ask stakeholders** and allow the interviews to flow naturally should the conversation turn into something different than anticipated. What we want to understand most is how this person perceives the larger system we are working in and what key insights they have that we need to listen to.
3. Schedule calls, either in person, on the phone or through videoconferencing. Determine length of interviews, but ideally these will be spacious conversations so that what is not obvious will reveal itself so we can learn more about the hidden and unspoken perspectives.
4. Create an intention as an interviewer. I.e. May this interview support our work, may it be of service to creating waves of health among many populations for futures to come. As an interviewer, deeply listen to what the participant is sharing with you, so much so that they sense this is a different experience than they have ever had, where someone genuinely cares, and listens to their wisdom.

Create a hospitable environment while conducting the interviews:

1. Set the context for why we are having this interview and how the information will be used. Their responses will be shared with our team, anonymously with other people's responses in order to get a better understanding of us.

2. Invite personal wisdom about the system they are a part of. I.e. if you had a magic wand, what would you do to…or from your experience, what are the biggest barriers…. Let their perspective inform the conversation.

3. Observe yourself as the interviewer. Notice when you have judgments or barriers getting in the way to you fully listening. Listen from levels 3 (empathic listening) and 4 (generative listening) from Phase 1 Appendix.

4. Seek to understand deeper structures of the system we are engaging, as though you are seeing it from above. Map out the system, see where connections, barriers, blocks, and blind-spots exist. What mental models are you hearing? Is their skepticism or enthusiasm? When something is spoken that you are curious about and you have rapport with the stakeholder, probe to find what is underneath what you are hearing and seek out patterns. What are their greatest concerns?

5. When the conversation has come to a place where it feels it is time to close, keep the door open. *Is there a question you wish I had asked that I did not?* Encourage them to contact you should they have any additions.

6. Immediately following the interview, reflect and debrief the process with someone or on your own and thank your interview with a note.

Stakeholder questions: formulate questions that will help you unearth your inquiry, challenges, opportunities, barriers, and what is working well. Also unearth what would solving this problem look like to the person you are interviewing.

    a. What does x mean to you?
    b. What are you working on to improve health and quality of life?
    c. What would support you in doing your work more effectively?
    d. We are working on x, how would you define this? What advice would you give? From where you sit, how are you affected? If we were to solve this puzzle, what would happen?
    e. If you had a magic wand what would you do to create change?

Also look to speak with communities that have already solved this challenge:

    a. What is the purpose/vision mission of the organization?
    b. What is their focus?
    c. How do they work with this challenge? What did they do to address it?
    d. What would they suggest to us?
    e. What lessons learned could you share?
    f. Looking into the future, what legacy do you hope to leave behind?

After interviews are complete, journal and quietly reflect answering the questions:

- What struck me?
- What surprised me?
- What touched me?

Then debrief findings with your ACH team. Take pertinent quotes and speak them as though you are representing that person. See what patterns emerge from the many perspectives. Pause between shares to let the sentiment really sink in.   *Adapted from "The Presence Workbook"*

Talk to people already working with solutions in other ACHs***

Goal: Glean lessons learned from the field from those currently working in the ACH framework.

Talk to **ACHs** that are currently building a collaborative culture or that are creating something we could aspire to become. Inquire what they are doing through their lens to see potential **best practices** that could be applied in your ACH in becoming a collaborative entity. Maybe there is a cutting edge organization you hope to aspire to, engage them through questions and reflection on what is working well and what challenges they are confronting when collaborating.

Map those doing it differently. Create another map and identify other ACHs (in the state or across the country) already working on a similar challenge or receiving accolades for their innovative work to improve health in their communities. Scan the internet, talk to colleagues and find out who else may be solving or working to solve this challenge. Do stakeholder interviews (see appendix) with them. Ask them about their lessons learned and what pitfalls to avoid.

- **Washington State, Kings County site**
  http://www.hca.wa.gov/about-hca/healthier-washington/accountable-communities-health-ach
- **Minnesota**
  http://www.dhs.state.mn.us/main/idcplg?IdcService=GET_DYNAMIC_CONVERSION&RevisionSelectionMethod=LatestReleased&dDocName=SIM_ACH
- **Virginia**
  http://www.vahealthinnovation.org/wp-content/uploads/2015/07/FAQs-about-ACC-Project-Design.pdf
- **Washington State**
  http://www.hca.wa.gov/hw/Pages/communities_of_health.aspx
- **CA ACH RFP**
  http://www.communitypartners.org/sites/default/files/documents/cachi/rfp/2016%20CACHI%20RFP.pdf
- **Connecticut**
  http://www.cthealthcouncil.com/docs/default-source/pdfs/garcia_sim-ach-final_3-30-16.pdf?sfvrsn=2
- **Maine**
  http://www.maine.gov/dhhs/oms/vbp/accountable.html

If you don't know where to start, start anywhere

Goal: To get started even when there is no clear path.

> If you don't know where to start, go out and begin asking people questions about health and well-being in your communities. Ask the cashier at the grocery store, bank teller, and other random people what they would do create health and well-being in their communities. If they had a magic wand, what would they do to manifest health?

Host Dialogues in your teams and communities

Goal: Expand your own perspective by hearing others' points of view.

> **Host a dialogue** with your team to get a great sense of your team's point of view of the current system and need you are serving. (See *Art of Hosting Journal*: Circle Practice)
>
> **Host a dialogue in the community** to answer a complex question that you don't know the answers. (See **Art of Hosting Journal**: World Cafe, Open Space Technology, Appreciative Inquiry). Come up with a meaningful ***How Might We (see Phase 1 appendix)*** question and invite participants to be co-explorers with you!
>
> Imagine the inquiry *HOW MIGHT WE be an award winning ACH for our community? What can we provide to you that would bring greater health into your life and those around your lives?* Imagine asking your community and seeing what kind of answers you might find that could support your work.

Phase 3 STEPPING IN *Meaning Making*

After immersing yourselves into fast and deep learning experiences, participants gather together to reflect on the meaning of what they have learned. Various techniques at this stage are used to deepen the learning and picture the vision of the future they wanted to work towards.

Sometimes it is essential to embark upon a "Solo-Walk". A solo-walk is a practice where one observes reflective silence for a period of time, taking advantage of the beauty found in nature to reflect upon what they are learning, and perhaps their role in supporting the change needed. After the solo-walk, participants come back together to share the insights they gained during the reflective moment.

This can also be a participatory process for multi-stakeholder dialogue that allows participants to create a shared vision of the future, identify key gaps and barriers, and develop initiatives for closing the gaps.

## Activities and Tools to support you in this phase

After greatly increasing your perspective of the larger system through interviews, scanning materials, mapping the bigger picture, talking to impactful ACHs and community engagement, begin to make sense both individually and collectively with your team regarding what you are learning. What *patterns* are emerging from all the complexity?

Both alone and together with your team, focus on making sense of the patterns, system needs, and higher purpose from the many perspectives, together as a group-let your collective wisdom broaden your perspective and inform the way forward.
● Reflect Quietly and the Together: What, So What, Now What--Transformative Learning Cycle***
● Solo Reflection and Pair Share (similar to Reflect Quietly above, please see which makes more sense for your group)**
● Divergence Convergence Framework
● Dialogue

Reflect Quietly and then Together: What, So What, Now What?**

Goal: Reflect quietly on your own. Take the stakeholder interviews and notes and begin to reflect on how you make meaning of all the new information you're learning.
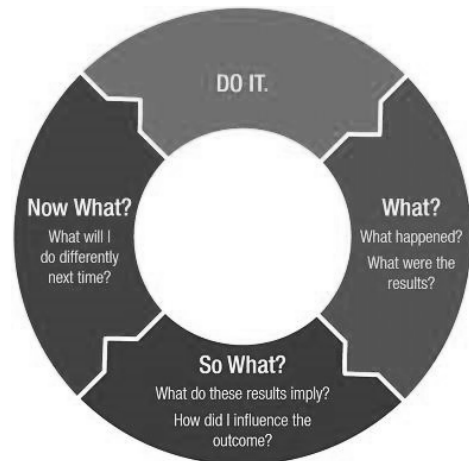
- **Head**: What struck you
- **Heart**: What moved you?
- **Gut:** What are you moved to act upon? What does all this mean moving forward?

With the team, share quotes directly from your interviews then use the **Transformative Learning Cycle** to co-explore what is emerging from the wider systemic perspective.

What, so what, now what

Goal: Together, Look Back on Progress to Date and Decide What Adjustments Are Needed (45 min.) You can help groups reflect on a shared experience in a way that builds understanding and spurs coordinated action while avoiding unproductive conflict. It is possible for every voice to be heard while simultaneously sifting for insights and shaping new direction. Progressing in stages makes this practical—from collecting facts about *What Happened* to making sense of these facts with *So What* and finally to what actions logically follow with *Now What*. The shared progression eliminates most of the misunderstandings that otherwise fuel disagreements about what to do. Voila!

Transformative Learning Cycle
This Is a framework for learning and integrating a new level of thinking, acting and way of being from an experience. Initially, there is *an event* that occurs, so experience has taken place. Perhaps your ACH did a community engagement or stakeholder interviews. When it is complete, you gather for a debrief and cycle through these questions:
After a shared experience, ask,

- "WHAT? What happened? What did you notice, what facts or observations stood out?"After all the salient observations have been collected, ask:
- "SO WHAT? Why is that important? What patterns or conclusions are emerging? What hypotheses can you make?" After the sense-making is over, ask:
- "NOW WHAT? What actions make sense knowing what we know now?"

Now that your team has worked through a transformative learning cycle, you may want to restate or redesign your future actions based upon what you know now with this increased understanding of the larger system to make meaning of what you are learning, together.

Solo Reflection and Pair Share**

Goal: Spend solo time reflecting and integrating what you are learning. Then share to tap into the team's collective wisdom for bigger picture and next steps with a larger systems perspective.

Journaling and Presencing Walk

After collective sense making and in-depth learning, perspectives have the opportunity to expand and inform a different level of thinking and knowing. Extensive research and interviews of some of the most famous innovators around the world has found that for thinking to expand one needs to take a pause and create 'empty space'.

This practice is done in solo, and ideally in nature. Begin with individual reflection through journaling. Journaling is a practice where one writes or draws one's stream of thought and feelings. It is the art of transferring one's thoughts and feelings on paper without examining or interrogating them. This is said to allow the person journaling to access levels of clarity and knowing without too much self-censorship.

Give participants questions and asked them to go outside by themselves in nature to journal and explore the following inquiries:

- What do I really mean by healthy in the community? What constitutes health? What is most needed?
- What is my community asking from me at this point in time?
- What is my place in this system and what influence do I have to create change?
- What mindset do I need to let go of to be of service to what is wanting to happen?
- What do the young people and unborn children need from me now?
- Imagine you're at the end of 2021, what would you like to see have happened in your community/region with regards to health?

Pair & Whole Group Generative Dialogue Reflection Post-Journaling and Solo Presencing Walk

Upon participants' return, pair up in groups of 2 to practice sharing their reflections and listening to one another (See Appendix Phase 1 *4 Levels of Listening and Talking*). One person share what is emerging for them after their solo reflection time and the other would silently, with their full presence and attention, listen at level 3 to the reflections of the other person. Then switch roles.

Then have the whole group engage in **whole group dialogue** practice.

- What is something that the whole group needs to hear about your solo journal time in nature? One person at a time shares a reflection that is present for them;
- Once someone shared, another person was invited to add to what they are saying if they had a reflection that was connected. If no one had a similar reflection, move to a new reflection.

This practice is to create greater depth of understanding the system and *generative listening* where they *build upon each other's ideas*. This enabled us to deepen our collective understanding of what is needed now, moving forward, as we think about our ACHs.

Divergence / Convergence Framework

Goal: Often in the middle of a change process people move into the "groan zone" and lose heart. It is important to identify and name where we are in process, and how people deal with it diversely. It can help people push through the challenge to get to the other side.

> **See the *Art of Hosting Journal* for the <u>Divergence / Convergence Framework</u>.** This is often a time where you are now holding a lot of complexity and information. It may feel confusing or exciting and many other experiences may be emerging for you. That is normal. You are expanding your perspective and it is stretching you beyond what you originally knew, if you spent the time to see the bigger picture. As a leader, it is important to begin to learn how to expand your capacity to sit in uncertainty for longer periods of time, being in the "not knowing" mind. Many leaders practice meditation, yoga, or other types of personal practice to increase their capacity to sit in the not knowing mind, especially when they have been the "expert" for much of their lives.

Dialogue

Goal: Create the conditions for people's perspectives to emerge within a group setting and co-explore for a larger system perspective.

> Host a workshop. See the Art of Hosting Workbook to support you in selecting a methodology for the dialogue.

Phase 4 STEPPING IN *Co-Prototyping*

After making meaning from deep immersion, begin co-creating the desirable future that is wanting to happen. This is a time for experimentation (prototyping) of ideas, services, products, and potential actions that will bring us to our desired state.

In this phase we experiment and play with potential ideas and solutions. The goal here is to crystalize ideas through an iterative (repeated movement of going forward and backward with the aim of improving something) process of coaching and support from peers and subject matter experts (including end users, practitioners, community members, and those directly affected by the challenge).

The process supports continuous learning and iteration so that all work is improved upon to provide rigor and include multiple perspectives.

Activities and Tools to support you in this phase

- Create an atmosphere of trust, fun and brainstorming through *IMPROV exercises***
- Co-Create and Sculpt Visions of the Future**
- 15 % Solutions and Troika Consulting**
- Feedback and Iteration***
- Prioritize Ideas***
- Host a *ProAction Cafe* (see the Art of Hosting Workbook) and collaboratively workshop projects and questions on the team (you can workshop up to 25% of the team's projects in this process)
- Narrow the Set -- See Collective Action Toolkit By Frog Design

Now it is time to ideate possible solutions through prototyping, brainstorming, dialogue, and other methodologies that help us co-create breakthrough innovation to support our greater purpose.
There is a lot of wisdom on your team after increasing your perspective of the system. Now is the time to unearth it and co-create!

Brainstorming is a method where ALL ideas come forth. Do not limit the idea generation. Even ideas that are *way out there* and may not even be possible are shared because they may lead towards the idea that is the one you move forward on.

When brainstorming, begin by individually coming up with as many ideas as possible on sticky notes, one idea per note. Then share each idea one by one, clustering like ideas. Name the clusters and continue as a group adding even more ideas. Then begin to vote individually on the ideas and see what ideas come up on top as favorites.

IMPROV**

Goal: Team building, trust, fun and learn the art of building on each other's ideas. Improv is a great warm up to get into a space of co-creation. Begin the session with someone hosting an improv experience, and reviewing the principles of Improv!

Principles of Improv

*1. **Listen** – As simple as this seems, it is probably one of the most difficult skills to master. Listening will free you from having to think of what you are going to say ahead of time.*

*2. **Agreement (Yes, And…)** – Assuming you have listened, you will be able to agree with what was said AND add information. Agreement is what allows a scene to progress!*

*3. **Team Work (Group Mind)** – Improv is a vast mechanism of give and take and support. The group mind is greater than the individual.*

*4. **Don't Block** – One of the quickest ways to destroy group mind is by blocking other players, going for the joke or not listening.*

*5. **Relationship** – The scene is always about the relationship, not things or what you are doing. Make the scene focus on the relationship.*

*6. **Initiation** – This is the Who, What and Where of the scene… establishing the Who, What, and Where of the scene is essential to having a great scene.*

*7. **Point of View, Opinion & Intention** – Enter a scene with a point of view, opinion or intention… let these drive your character and response.*

*8. **Be in Character** – Maintain your character throughout the scene. Be the character to the top of its intelligence.*

*9. **Don't Ask Questions** – Questions make your scene partner to do all the work. Make assumptions and turn questions into statements.*

*10. **Make Active Choices** – Do something, don't be a talking head. Do something but don't make the scene about that something.*

Potential exercises (or perhaps you have your own!)

Yes, Lets!

This is a very simple, yet effective drama warm-up that sets a positive tone for the day's activities.
Have all players scatter about in the playing space. One person calls out an activity for everyone to start miming, the rest of the group members shout out "Yes, let's!" and then they start doing the activity.
For instance, if someone calls out "Let's start jogging in place!" the group responds with "Yes, lets!" and everyone starts jogging in place until someone calls out a new activity.
Encourage players to only offer one suggestion until they sense that everyone else has had a chance to play. As an alternative, play in a circle, allowing each student a 'turn.'

10 Fingers
Great game for getting to know each other in a new group. All players in a circle, holding all 10 fingers up in the air. One person at a time, start asking personal questions that take yes-no answers; whoever cannot answer yes to a question, drops a finger. Last person with a finger left wins.
Good questions are things like "I have a cat", "I have never stolen anything" and so on.

Create Obstacles
Two players chase each other about the room. The player that is being chased mimes obstacles for the other, who then has to overcome these obstacles.

Mirror
Two players face each other. They can move (arms, legs, eyebrows) slowly, and the other player will mirror them. This is a game of give and take - no-one should be (continuously) leading. Keep movements slow.

Stretching
As a warm-up, let's do some simple stretching exercises. Everyone in the group shows a stretch of a body part, and that is then done by all others. Repeat until the whole body has been stretched.

On a silly note, try stretching unstretchable body parts: eyeballs, ears, hair, noses, and toenails.

Whoosh
Everybody in a circle. Start with one person, who waves both hands to his/her neighbor, saying `Whoosh`. The next person passes the Whoosh to his neighbor, and that way the Whoosh is passed around the circle.

Word Ball
Another association game. All players in a circle. One player starts by tossing a word to another player. The receiver associates on this word, and throws his association to yet another player.

Family Portraits

Fun game to get everyone to work together. Players are going to `build` family portraits. Ask for e.g. Family of accountants, bean counters, Pop Stars, snakes, rats, cats, garden tools.

Supernova

All players are dispersed around the room. Have everyone stand up comfortably, feet apart, eyes closed. Ask your players to imagine they've got a ball of energy hiding in their chests, radiating warm light. Ask them to imagine this light and energy starts filling their chest, their arms and legs, their hands and feet, their head, their whole body.

Then ask the players to imaging this light starts shining out of their bodies, through their eyes, their fingers and toes, filling the whole room. Then imagine the light starts filling the whole building, the street, the city, the country, the whole world.

Finally, imagine this warm light starts reaching into the skies, up to the moon, overpowering the sun, and filling the whole of the universe.

End the exercise by asking the players to open their eyes.

Resource: http://improvencyclopedia.org/games

Sculpt a vision of the future**

Goal: Co-create a vision of the desired future with your ACH teams.

After all of your reflections and seeing the bigger system, there is a lot of wisdom in the team ready to express itself through this exercise. This is an exercise (see the Sculpture of Current Reality exercise in Phase 2 appendix) where you build a vision of the future together. Do this in groups of 4-5. Have one person scribe for each team.

Imagine it is 2021 or some other predetermined time in the future. Our ACH has been wildly successful. Take objects from nature or random things you can collectively build a sculpture with. Here are some guiding questions to support your thinking, but come up with other ideas!
•What impacts have we made? How is this concretely manifesting in communities and out in the world?
•What is happening in our community? What is the health like? How do we define health?
•What formats, processes and technology is supporting this work?
•How are people (internally and externally) collaborating? What kinds of relationships are developing?
•Who is impacted by this work? How far reaching is it?
•What is the impact in the community?
•What kinds of interventions has our ACH made to reach success and the vision?
•How do resources flow? Financial, Knowledge, Skills etc.
•What is the difference that makes the difference?

Share your models with other groups and reflect upon what you want to create in the future. Ask clarifying questions. Scribe takes notes.

15% Solutions**

Goal: Discover and Focus on What Each Person has the Freedom and Resources to Do Now

You can reveal the actions, however small, that everyone can do immediately. At a minimum, these will create momentum, and that may make a BIG difference. 15% Solutions show that there is no reason to wait around, feel powerless, or fearful. They help people pick it up a level. They get individuals and the group to focus on what is within their discretion instead of what they cannot change. With a very simple question, you can flip the conversation to what can be done and find solutions to big problems that are often distributed widely in places not known in advance. Shifting a few grains of sand may trigger a landslide and change the whole landscape.

Structuring Invitation: Invite the group to explore the questions "What is your challenge?" and "What kind of help do you need?"
For full instructions on the Troika consulting exercise go to - http://www.liberatingstructures.com/8-troika-consulting/

15 % Solutions triads (30 min) -Get into groups of 3 (or pairs if the numbers don't permit)
This will be Peer to Peer Coaching and Consulting rounds. See http://LiberatingStructures.com for future reference.
Roles: 1 person shares their Idea (Idea Sharer), 2 people act as Peer Coaches or Consultants. Rotate 3 times
(All three people will be Idea Sharers and Consultants two times by the end of the 30 minutes)

> **STEPS**
> 1. Form groups of 3 and have 7-9 minutes total per rotation (3 rotations total)
> 2. Idea Sharers spend 2 minutes sharing the idea
> 3. Spend 5 minutes receiving feedback from the two Consultants
> 4. Idea Sharer spend 1-2 minutes reflecting back new learning and thanking consultants
> 5. Rotate to next Idea, Share.

SMART Objectives**

Goal: Take your solutions and ideas and see if they align with the SMART Objectives.

SMART OBJECTIVES

Apply rigor to your idea or solution and ensure they are measured against these SMART principles. Ask are they:
- *Specific* – target a specific area for improvement.
- *Measurable* – quantify or at least suggest an indicator of progress.
- *Assignable* – specify who will do it.
- *Realistic* – state what results can realistically be achieved, given available resources.
- *Time-related* – specify when the result(s) can be achieved.

You can add any other objectives to this list that are relevant to your team.

Feedback and Iteration**

Goal: Create a team culture where ideas are shared and feedback is generated. Offer solutions and ideas and make them better by presenting them to your peers and iterating through feedback.

Process for constructive feedback Present ideas and solutions
1) The audience asks constructive questions to provide feedback and improve the idea,
2) Presenters listen quietly, and do not respond so they could maximize the number of people giving feedback, and
3) All questions are written down on paper and provided to the presenters so the feedback was then integrated into their work and iterated.

What is constructive* feedback?

One of the ways to build capacity during is to coach participants on how to ask constructive questions. It has been proven by behavioral psychology that people will actually hear feedback better and are more willing to change when they feel appreciated, rather than judged or blamed.

A constructive question is open and asked with curiosity.

Examples: 'Have you considered including xyz in your idea?" Instead of asking "Why haven't you included…?" or even saying "You've done it wrong, xyz is missing."

ITERATION is a core part of the methodology. In Theory U, prototyping is one form of iteration. You take what you are learning and continuously feed it back into your work so it becomes more holistic.

Narrow it down**

Goal: Begin to narrow down your focus on what solutions and ideas to move forward.

Focus on narrowing down the many possible solutions to what the collective wisdom sees as having the greatest possible outcome that will support our purpose based upon available resources. Be strategic and make some guidelines to support choosing the way forward. You may prioritize based upon different criteria, such as:

- Great Return on Investment ROI (the ROI could be financial, social, environmental, etc.).
- Low hanging fruit -- it is easy to implement with low costs.
- It leads us towards our purpose and mission.
- Will increase social capital with the community.
- Any other criteria you want to use to make decisions.

Begin to look at your options and prioritize ideas based upon these criteria. If you are using many ideas, try putting them on a timeline to see what comes first, etc.

Phase 5 Stepping Out *Co-Evolving*

Ideas that have been tested and improved in the prototyping phase can be translated into a detailed implementation plan with clear indication of the resources required to bring about desired change. Issues that could 'power' initiatives or responses are moved forward.

It is important to harvest and make known the learning and how it leads to this plan.

Activities and Tools to support you in this phase

- Identify who will champion an initiative**
- Host a *ProAction Cafe*: See Art of Hosting resources for this 2.5 hour methodology to workshop your projects
- Host an Open Space Technology: See Art of Hosting resources for this methodology to workshop your projects
- See *Collective Action Toolkit*: Making Something Real exercises
- Create an implementation plan**
- Business Canvas Model

After converging on the way forward as a team begin to focus on taking action and testing these initiatives or ideas. There may be various things the team plans to take action on.

Identify who will champion an initiative**

Goal: Identify who will be the champions of these initiatives or ideas and begin action planning and testing.

ACTIONS TO BE TAKEN			
Champions: Lead and / or Team	Steps needed to lead us towards our initiative	Timeline	Completion / Results

Create an Implementation Plan**

Goal: Clarify the steps and implementation plan and outline your next steps. (See RACI Matrix on page 40)

- **Goals** – identify the high-level goals and critical success factors.
- **Roles & Responsibilities** – outline the key individuals involved in different phases. The more detail you provide here, the less misunderstandings or assumptions will arise when the project starts.
- **Tasks** – describe the different tasks which must be accomplished to implement the new system.
- **Schedule** – describe the schedule and/or sequence in which tasks which must be performed.
- **Resources** – identify the software, hardware, equipment, and other resources you need to perform these tasks. This will help the Project Manager estimate the cost of the project.
- **Requirements by Site** – describe the different requirements for each site. In large projects, you may need to identify different tasks for different sites and schedule these accordingly.

The Business Model Canvass

Goal: Identify the new business model you are implementing more rapidly than a traditional business plan

The Business Model Canvas, is a strategic management and entrepreneurial tool. It allows you to describe, design, challenge, invent, and pivot your business model. If you are rethinking how you do business, this process can support you in doing it much more rapidly than writing a whole new business plan.

1. **Customer Segments**: Who are the customers? What do they think? See? Feel? Do?
2. **Value Propositions**: What's compelling about the proposition? Why do customers buy, use?
3. **Channels**: How are these propositions promoted, sold and delivered? Why? Is it working?
4. **Customer Relationships**: How do you interact with the customer through their 'journey'?
5. **Revenue Streams**: How does the business earn revenue from the value propositions?
6. **Key Activities**: What uniquely strategic things does the business do to deliver its proposition?
7. **Key Resources**: What unique strategic assets must the business have to compete?
8. **Key Partnerships**: What key partnerships and relationships are needed for success?
9. **Cost Structure**: What are the business' major cost drivers? How are they linked to revenue?

For more information http://www.businessmodelgeneration.com/

The 9 Core Elements of an ACH

1. **Mission**: An effective ACH mission statement provides an organizing framework for the work. A strong mission defines the work as pertaining to the entire geographic population of the ACH's region; articulates the ACH's role addressing the social, economic, and physical environmental factors that shape health; and makes health equity an explicit aim. For example, an ***ACH's mission is: to improve health, safety, and equity within a defined geographic area through comprehensive strategies including clinical services, behavioral health services, social services and community supports, and community-wide efforts to improve community conditions that influence health*** **(p. 3 Prevention Institute).**

Exercises + Tools + Frameworks
- What is your ACH's overarching Purpose or Mission? Why do you exist in the first place? When writing your mission statement be clear about ***what you do, the impact you have, and who you do it for.***
- Scan other ACHs mission statements, what do you like about them? What strikes you? What words feel essential to your mission statement? Mission and Vision Handout
- Vision and Mission Statements
  Shared Purpose Drives Collaboration

2. **Multi-Sectoral Partnerships** - An ACH comprises a structured, cross-sectoral alliance of health care, public health, and other organizations that impact health in its region. Partners include the range of organizations that are able to help it fulfill its charge of implementing comprehensive efforts to improve the health of the entire population in its defined geographic area.

Exercises + Tools + Frameworks
- Map the alliance: who is currently in the alliance, who is missing? - see Phase 2 appendix
- Map the ideal alliance: if you had a magic wand, who else would be a part of the alliance?
- Interview stakeholders and map the alliance with them - see Phase 1 and 2 appendix
- Scan other ACHs, in Vermont as well as in other states and identify who is in their alliances
- Talk to people already working to solve challenges in other ACHs - see Phase 1 appendix
- Partnership Self Assessment
- Collective Impact Resources
- Embracing Emergence: How Collective Impact Addresses Complexity
- Partnership Tool Kit
- Team Blueprint: A tool for building a strong partnership foundation
- Guide to Ecocycle Mapping – A guide for systems thinking

3. **Integrator Organization** - To maximize the effectiveness of the multi-sectoral partnership, it is essential for the ACH to have a coordinating organization, known as an integrator or backbone. The integrator helps carry the vision of the ACH; builds trust among collaborative partners; convenes meetings; recruits new partners; shepherds the planning, implementation, and improvement efforts of collaborative work; and cultivates responsibility for many of these elements among collaborative members.

Exercises + Tools + Frameworks
- Blueprint of Us - see Building Strong Core Teams, Phase 1 appendix
- Hosting an effective meeting - see Hosting an Effective Meeting or Conference Call, Phase 1 appendix
- Team + Trust building exercises - see Hosting an Effective Meeting or Conference Call, Phase 1 appendix, IMPROV, Phase 4 appendix, and Art of Hosting Workbook: Collective Story Harvest, Circle Practice, Appreciative Inquiry, Reflective listening
- Recruitment - see Identifying Stakeholders Phase 1 appendix
- Planning, Implementation and Improvement Frameworks
- Decision making framework, See Art of Hosting Workbook 5th Organizational Paradigm
- Quarterback Model Video
- Community Quarterback Model
- Collective Impact Backbone Resources
- Habits of a Systems Thinker
- Collaborating for Equity and Social Justice

4. **Governance** - An ACH is managed through a governance structure that describes the process for decision making and articulates the roles and responsibilities of the integrator organization, the steering committee, and other collaborative partners.

Exercises + Tools + Frameworks
- Decision Making Frameworks, See Art of Hosting Workbook: 5th Organizational Paradigm
- Roles and Responsibilities, identify the various roles and responsibilities of your ACH
- Running effective meetings: See hosting effective meetings Phase 1 Appendix, Art of Hosting Workbook
- PPT- Principles of ACH Governance
- ChangeLab Solutions ACH Governance Report
- Maine Accountable Communities of Health Governance Structure
- King County, WA ACH Structure
- Puzzling the Governance of Collective Impact- Canada
- Bridgespan Collective Initiatives
- How to guide – Build the Collaborative Governance

5. **Data and Indicators** - An ACH employs health data, sociodemographic data, and data on community conditions related to health (such as affordable housing, food access, or walkability) to inform community assessment and planning, and to measure progress over time. It encourages data sharing by partners to inform these activities. Equally important, an ACH seeks out the perspectives of residents, health and human service providers, and other partners to augment and interpret quantitative data.

Exercises + Tools + Frameworks
- Data sharing tools
- LiveStories   http://www.livestories.com/
- Seeking out diverse perspectives - see Designer's Workbook: Design Thinking for Educators, blank canvas and template
- Mapping Stakeholders - see Mapping Stakeholders Phase 1 appendix
- Surveys: gather information from stakeholders through surveys
- Community Commons
- Webinar: Making data work for the Public's Health
- Webinar – Key data for community health needs assessment
- Webinar: Community Health Needs Assessment
- Results Based Accountability
- Vermont Health Rankings – 2016
- Connect 2 Health
- Healthy Vermonters 2020
- Vermont Hospital Community Health Needs Assessment
- Vermont State Health Improvement Plan Appendix A
- Mobilizing Assessment through Planning and Partnership

6. **Strategy and Implementation** - An ACH is guided by an overarching strategic framework and implementation plan that reflects its cross-sector approach to health improvement and the commitment by its partners (health care, local government, public health, business, and nonprofits), to support implementation. Frameworks to support strategy development includes the Spectrum of

Prevention 21, which encourages complementary, sustainable activities that range from individual to community-wide interventions, resulting in greater effectiveness of population health transformation, and The Three Buckets of Prevention,22 proposed by John Auerbach (former CDC Associate Director of Policy), which can maximize the balance between traditional clinical prevention, innovative clinical prevention, and community-wide prevention.

- State Levers to Advance Accountable Communities for Health
- Registry of evidence-based programs for youth
- Exploring a Community Service Model
- National Quality Forum Action Guide
- CDC 6-18 Initiative: Accelerating Evidence into Action
- The Community Guide
- Guide to Clinical Preventative Services (US Preventive Services Task Force))
- MMWR Weekly Reports
- NACCHO Model Practices Clearinghouse
- National Guideline Clearinghouse (Agency for Healthcare Research and Quality)
- Promising Practices Network (RAND Corporation)
- What Works for Health (County Health Rankings What Works
- Community Health Improvement Navigator
- Practical Playbook
- StartUp Health – Entrepreneurs in Health Care
- CDC – Community Health Navigator
- JSI-PI ACH Portfolio Approach 2_2016
- Measuring and Increasing Dose HIghlighted
- A Physician's Guide to Climate Change and Health Equity
- A Toolkit to Help Hospitals and Health Systems Build Community wealth
- Roadmap to Community Integrated Care

7. **Community Member Engagement** - Authentic community engagement is a well-recognized best practice in the field of community health that requires commitment from the highest levels, designated staff, and commensurate resources to ensure effective integration into ACH processes and systems. Authentic community engagement recognizes and harnesses residents' own power in identifying and addressing challenges, while also creating leadership for and buy-in of the work in a manner that acknowledges and builds upon existing community assets and strengths.

Exercises + Tools + Frameworks
- Art of Hosting Workbook: Hosting Conversations that Matter through Participatory Methods
- Frog Collective Action Toolkit

- [Chaordic Stepping Stones](#), planning just the right amount of form for invitation, gathering, harvest and wise action
- World Cafe, Art of Hosting Workbook
- Open Space, Art of Hosting Workbook
- Circle, Art of Hosting Workbook
- Check-in, Art of Hosting Workbook
- Design Thinking, [Field Guide to Human Centered Design](#) By IDEO
- Harvesting and making visual meaning of what happens in a community engagement, Art of Hosting Workbook
- [Sonoma County Best Practices in Community Engagement](#)
- [Asset Based Community Development](#)
- [Stanford Social Innovation Review – Community Engagement](#)

8. **Communications** - An ACH employs communications platforms to build momentum, increase buy-in amongst its partners, recruit new members, and attract grant investment to support its work, as well as to share successes and challenges with others. Communications is also a key tool for framing solutions in terms of community environments and comprehensive strategies.

Exercises + Tools + Frameworks
- **Harvesting** --using visual graphics, photographs, newsletters, videos, LiveStories, documenting, social media, etc. to create visual representations and documentation See [Art of Hosting Workbook](#)
- Social Media
- Disseminating and sharing information
- [Thought Exchange Software](#)
- [Social Media Strategy Worksheet](#)
- [GAME Plan Template](#)
- [Message Tips Suzanne Samuel Consulting](#)
- [Slack Communication Software](#)

9. **Sustainable Financing** - An ACH requires resources to support both its integrator function and ACH implementation work by others. An ACH makes use of existing and new funding sources and better aligns them to advance broad community goals.

- ACH Sustainable Financing
- Bending the Cost Curve: Four Policy Recommendations
- Vermont Business for Social Responsibility
- Field Guide for Health Sector Leadership
- Build Healthy Places Investment Resources
- Sustainable Financing: Jim Hester and Mary Pittman Webinar
- Sustainable Improvements in Population Health