JACKSON COLLABORATIVE NETWORK ACTION PLANNING DISCUSSION GUIDE

This step by step discussion guide provides a clear road map to assist with developing a plan of action to identify and address the root causes of systems issues that are contributing to inequities for community members

Jackson Collaborative Network
Systems Change Action Planning Discussion Guide

Contents

About this Discussion Guide

This discussion guide is adapted from several action planning frameworks and methods that are used within the network to create an easy to use discussion guide. This guide is designed to be used by organizations and/or groups that are working to identify and address inequities in the community at a systems level.

The guide includes questions designed to support discussion, places to capture highlights from those discussions, tables and templates to assist with the planning and design process, helpful tips, and links to additional content that may be helpful.

This tool is designed to serve as a step-by-step guide to support action planning for systems change. It is not designed to serve as an educational resource to build understanding of the frameworks and methods that it is built upon. This content is available in the Network Information Hub Library and should be referenced as needed during planning using the following links:

- ABLe Change Process Guide (Foster-Fishman, Watson)
- A Virtual Crash Course in Design Thinking (Stanford D. School)
- Racial Equity: Getting to Results (Government Alliance on Race & Equity)

Each of these tools is a great resource if you need more information on how to work through one or more of the steps included in this guide.

Core Themes to Incorporate into the Planning Process

A cross-network retreat was held in October 2018. During this retreat, members of the Jackson Collaborative Network reviewed and discussed community data, explored a shared vision for change, and discussed accountability for taking action. From these discussions, four core themes emerged as crucial to our systems change work in the community.

The core themes listed below should be reviewed and discussed throughout your action planning process to ensure they are addressed. Addressing these core themes during the planning process will help ensure that the strategies you develop are designed to address targeted inequities and make lasting impact.

Core Themes:

- **Authentic Engagement:** Community voice from those most affected by the issue or problem must be incorporated as part of a co-design process. We cannot assume we know the root causes of problems, nor can we assume we know what strategies are needed to address them.
- **Trust and Relationships:** Your planning process and subsequent strategy implementation needs to include activities that build and strengthen trust and relationships throughout the community.
- **Hierarchy of Needs:** Our priorities and efforts should take into account the hierarchy of needs in the lives of those we serve. This can be supported by ensuring you focus on identifying root causes of inequities, rather than focusing on symptoms of the problem.
- **Structural and Institutional Racism:** Racism is present in every aspect of our community. The inequities that are present disproportionately affect people of color and other traditionally marginalized populations. At every stage in the planning process, it is critical that you consider who is most affected and why they are more affected than others. Strategies must intentionally address inequities that are present in the community, including those that are caused by systemic racism.

Let's Get Started!

Follow the process steps outlined throughout this guide to assist you in moving from vision to action.

Help is available to assist you with this process!

Contact network staff to request assistance:

Network Consultants:

Aimee Fors, afors2@hfhs.org or Sarah Williams, swilli76@hfhs.org

or Sheri Butters, Network Manager at sbutter2@hfhs.org

Visioning

The planning process begins with focusing on the end result that we hope to see. The desired result that is identified in this part of the process should focus on a population level outcome (i.e.: What do we want to see for all Jackson County residents?). We'll get more focused and address inequities as we continue through the process.

1. **What do we need/want to see in our community?**

   Record your vision in the Desired Outcome/Area of Opportunity section of the Action Plan Template once it is finalized. Link to Action Plan Template: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&rid=77&rl=bb9h.

2. **What would that look like in the community? What would you be able to see/feel/experience if that vision was achieved?**

3. **What would people affected by the problem see/feel/experience?**

4. **How would it be measured? What data would you look at to know whether or not progress was being made toward the vision you identified?**

Looking at Data

The next phase focuses on looking at data to better understand current community conditions. The steps below will assist you to identify what data is needed, where the data can be found, and to assign responsibilities for gathering the data.

It is important to include disaggregated data in this part of the process. This will assist you in being able to identify groups that are more affected by the problem than others. *(IMPORTANT: If disaggregated data is not readily available, you may need to engage with local partners to help with this part of the process. Many organizations gather and track data that may be relevant to the issue you are focused on.)*

5. **What data do we need to gather to understand current community conditions specific to the indicators identified in Step #4?** Use the chart below to identify the data needed, where to find it, and who is responsible for gathering this data.

   If you are unable to identify a readily available data source, focus on identifying who you know that might be able to help. If there is no readily available data, it may be necessary to move to the Planning for Engagement step in the process to gather real-time data from those that are affected by the problem.

Data Needed	**Data Source**	**Who is responsible for gathering this data?**	**When will this be completed?**

Now that you've gathered the data you identified, it is time to identify and discuss inequities that are present in the community. *(IMPORTANT: This step of the process is not focused on developing solutions. Stay focused on identifying inequities specific to the issue they've identified. Designing strategies comes later, once you have taken time to learn why some groups are more affected than others.)*

6. **Who is currently experiencing worse outcomes than others? What does the data tell you?**

   - What inequities exist between racial groups? (i.e.: Are people of color more affected than white people? Who specifically?)

   - What inequities exist tied to where people live? (i.e.: Are people within the City of Jackson more affected than those not living within the City? Who specifically?)
   - Are there inequities between other groups? (i.e.: gender, socio-economic status, education, etc.)

   Enter the targeted inequities you have identified in the Targeted Inequities section of the Action Plan Template.

7. **What is the problem that needs to be addressed?** In this step, reflect on the visioning you did at the beginning of the process and the inequities they have identified. Using this information, draft a problem statement that defines where you need to take action.

Problem Statement:

____

____

Enter this problem statement in the Action Plan Template.

8. **What assumptions do we have about why this group is experiencing worse outcomes than others?** (This question explores the mindsets of the stakeholders involved in the planning process)

    - What are these assumptions based on? (i.e.: personal experience? observation? feedback from those you serve?)

    - How might the assumptions we hold help us in our process? What challenges might we face because we hold these assumptions?

Planning for Engagement - Identifying and Understanding Root Causes

This phase of the process helps you develop a plan for engaging with people from the community to help identify and understand root causes. Up until this point, the focus has been on looking at data to identify *what* is happening – we can't fully understand *why* something is happening until we engage with those that are experiencing the issue. Understanding *why* is critical to getting to powerful strategies that will create lasting change in the community.

The steps outlined below will assist you to identify who you need to engage with, what questions you might use, and what method is best aligned with your needs.

9. **Who do we need to talk with to better understand why this group is more affected than others? Who can help us get connected?** *(IMPORTANT: At this point in the process, the focus is on identifying individuals in the community that are part of the group that is most affected. Resist the urge to identify other service providers, program staff, etc.)*

Who do we need to connect with?	Who can help us connect with this individual or group?	Who is responsible for making this connection?	When will this be completed?

10. What questions might we use to better understand why this group is more affected than others?

- How might we test these questions with members of our target population to gather feedback?

11. What questions might we use to understand what they feel would make it better?
(IMPORTANT: This is the first step to engaging those most affected by the issue to help co-design the solution.)

12. What engagement method seems best aligned with the audience and the information that needs to be explored? *(IMPORTANT: Consider a variety of methods, including but not limited to: system scans, empathic interviews, in depth interviews, touch points at service delivery, etc. Refer to the source materials included at the start of this guide to learn more about these methods.)*

- What makes this method the best choice?

- How will this engagement activity assist you to build and strengthen authentic relationships with community members experiencing this issue?

(IMPORTANT: Authentic engagement is not achieved through a survey, whether conducted electronically or in paper form in person. Surveys are a valuable tool to gather data, however they are seldom helpful in getting to root causes. Resist the urge to rely on a survey at this phase of the process – you won't get the information you need to move forward!)

13. What supplies, tools, or templates might you need to support this engagement activity to be successful? Consider a template for note taking, printed lists of the questions you will use to guide the facilitator, talking points to assist with providing any needed background or context.

Example tools and templates can be found in the Library on the Network Information Hub here: https://jcmr.quickbase.com/db/bkzudh2cj?a=td.

Supply list:

Tools and resources needed:

14. Assign responsibilities for supporting the engagement activity and any required follow up. The specific roles and responsibilities will be unique to the engagement method you have designed. Use the table below to capture this information and use for tracking purposes.

Role or Responsibility	**Person Responsible**	**Timeline for** *Completion (if applicable)*

Go Forth and Engage!

Come back to this part of the discussion guide after you have conducted the engagement activities that were designed in the steps above.

Making Sense of Qualitative Data

Now it is time to make sense of the information that was gathered through engagement efforts. Compiling and theming the feedback and personal stories shared by community members is a key step in helping to understand and prioritize root causes.

15. Prepare data for sense making.

Compile all qualitative data (this is the information that was gathered through their engagement with community members) into a format that allows you to work with it more effectively.

- Excel is a helpful tool for this initial collection of data. Each question and set of data should have its own worksheet to support the analysis process.
- Here is a link to the template shown below: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&rid=78&rl=cj6.

<table>
<tr><td colspan="3">Question: (list the question that you used here)</td></tr>
<tr><td colspan="3">Description of Group/Individuals: (provide a high level description of the group or individual(s) that you included in the engagement activity. For example: Families living within the City of Jackson that have children ages 0-5. Include a general description of demographics whenever possible.)</td></tr>
<tr><th>Initial Data Points
(Enter the individual statements from those you engaged with in this column)</th><th>Refined Data Points
(Initial data points may need to be separated or refined to provide a clearer set of data. Examples included below.)</th><th>Perspective
(Community Resident, Stakeholder, Leader, Policy Maker, etc. This will help with data collection and sorting as more and more qualitative data is gathered.)</th></tr>
<tr><td rowspan="2">Example: It is hard to get the help I need to find employment because I don't know who to ask or where to go to get help and the ones I know of aren't located in my neighborhood.</td><td>Example: Residents are not aware of available employment supports and services.</td><td>Example: Resident</td></tr>
<tr><td>Example: It is difficult for residents to access employment supports and services outside of their neighborhood.</td><td>Example: Resident</td></tr>
</table>

16. **What themes are present in the data?** There are multiple ways you can tackle this step in the process. Explore the approaches below to help determine your next steps:

- **Sort and theme at a group level.**
  One activity you can use for this approach is to cut each refined data point, with corresponding perspective, into individual strips. Group members would work in pairs or small groups to identify things that are related. This works well if there is space to work at large tables or if there is wall space available.

  Once the small groups have sorted the data points into groups, each group considers the groupings and comes up with a name or title for the collection of data. This name represents the theme.

  Supplies needed for this activity:
  - Data Points with perspectives printed in large enough font for ease of reading, cut these into individual strips
  - Tape if you will be having groups work using a wall space
  - Post-it notes or half pages of colored paper for theming groups of data points
  - Markers

- **Staff or a small adhoc sort and theme, then present to the larger group for reflection.**
  Another approach you can use is to have backbone staff or a small group of members sort and theme prior to presenting to the group for discussion. This approach engages groups less fully in the process; however it can be useful when timing/scheduling is challenging, or when the group prefers to divvy up work for various processes.

The small group should present the identified themes as a draft, allowing the full group a chance to review before finalizing. The full group should have access to all of the engagement data as a reference.

Identifying and Prioritizing Root Causes

The next step in the process is moving from a set of themes to identifying and prioritizing root causes. Root causes are identified by getting to the "why" of the symptoms we see in the data. *(IMPORTANT: Identifying priorities provides you with a focused place to start. By choosing a place to start you are not saying the other root causes are not important. You can always come back to them once progress is made on the selected priorities.)*

17. Identify root causes. In order to understand what may need to happen to address the issues that are happening, you must understand why it is happening. One of the easiest ways to identify root causes is to ask a series of "why" questions.

- Remind those that are part of your action planning group of the Problem Statement they identified in step #6. Write your Problem Statement here:

- Using the themes that were identified in step #15, explore why this problem happening for the target audience that has identified. Keep asking why until the question can no longer be answered.

18. Prioritizing root causes to make the greatest impact possible. You likely identified multiple root causes in the step above. Now it is time to identify priorities so you can develop powerful strategies that have a lasting impact. *(IMPORTANT: Identifying priorities provides you with a focused place to start. By choosing a place to start you are not saying the other root causes are not important. You can always come back to them once progress is being made on the selected priorities.)*

- Review the list of themed root causes identified in step #16 and use the following questions to help identify a small number of priorities:
    - Which of these root causes seem to have the most influence on the targeted problem?
    - Which of these root causes are affecting multiple people and settings across the community?
    - Are these issues within our current scope or focus?
    - What consequences might emerge in addressing this root cause?

- Are others in the community working to address these root causes? If so, how? Are there opportunities to partner for greater impact?

It may be helpful to use a table, like the one included below, to capture notes during prioritization discussion.

Prioritized Root Cause	**Is addressing this root cause within our current scope or area of focus? Why or why not?**	**What consequences might emerge in addressing this root cause?**	**Who else in the community is working to address this root cause? How?**	**How might you partner with those already working on this root cause?**

It is recommended that prioritization discussions take place in person with your organization's action planning group, however if time is limited and group participation is high in between meetings, it may be possible to utilize a survey or other method via email.

Designing Systems Change Strategies to Address Root Causes

Once your organization's action planning group has prioritized a small set of root causes, you can begin designing strategies. Keep in mind that strategies need to be necessary, feasible, and desirable in order to be successful. There are several resources available in the Learning Center on the Network Information Hub that can assist you with this part of the process. Visit: https://jcmr.quickbase.com/db/bmkknrmhy?a=td to explore.

- **Engagement Reminder:** Engagement activities were completed during an earlier step of this process to better understand why the problem is happening and why the target population is more affected than others. Leverage the relationships that have been established to re-engage so community voice is incorporated into the strategy design process.

Powerful systems change strategies shift the mindsets, policies, and practices that are contributing to the problem. Strategies that focus on program design and building access/awareness of existing programs and resources are the least powerful and are less likely to create lasting change.

19. Brainstorm strategy ideas. Each group member individually explores the following question:

How might we *(insert the vision for change that was developed at the beginning of the process)* given the prioritized root causes and related consequences?

- During this part of the process, members of your organization's action planning group use sticky notes to write down their ideas. One idea per sticky note.
- Encourage group members to apply an equity lens as they develop ideas. Will their idea improve system conditions for the target population?

20. **Sort and label groups of strategy ideas.** Members of your organization's action planning group place their sticky notes on the wall and verbally share with others. It is important that everyone's ideas are heard.

    Here are some process steps to use as a guide:
    - Ask the group to review and identify if any strategy ideas need to be added.
    - Organize like ideas together.
    - Label each group of strategy ideas. Ask the group to come up with a name for each strategy cluster. Place this name at the top of each cluster.
    - You may find it helpful to take a picture of the work that has been completed up to this point to ensure accurate notes are captured.

21. **Prioritize strategy clusters.** Use the following questions to help your action planning group prioritize the strategy clusters they identified in step #21.

    Keep in mind that not every strategy idea will move forward through the prioritization process – *this is ok!* Focus on a few powerful strategies at a time. Your action planning group can come back to the prioritization step to re-evaluate the remaining strategy ideas when there is capacity to do so.

    - Which of these strategy clusters tackle one or more of the root causes we aimed to address?
    - Are they necessary? feasible? desirable? Why or why not?
    - Do the strategies motivate stakeholders to engage in action? Why or why not?

22. **Finalizing strategies.** Use the following questions to screen each strategy before finalizing.

    - Does this strategy intentionally address the targeted inequity that has been identified? How?
        - If not, how might we refine it to ensure inequities are addressed?

- Are there others in the community working on a similar strategy? How? Are there opportunities to partner for greater impact?

- What unintended consequences might emerge if we implement this strategy? How might we mitigate these unintended consequences?

23. **Prototyping strategies.** How might you test the strategies that your action planning group has developed? This part of the process is a critical step before moving forward to begin implementation.

    - Identify the target population. Who is impacted by the strategy your action planning group has identified?

    - When, where, and how can your action planning group share and get feedback on the strategy idea(s) with this target population?

    - Who will be responsible for this activity?
    - Following the prototyping activity, you will need to review the feedback received on each strategy idea to determine if adjustments are needed.

24. **Document your strategies!** Use the Action Plan Template to document the strategies your group has developed. The template can be found in the Library on the Network Information Hub here: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&rid=77&rl=q5p.

Process Check

At this point, you should have the following sections filled out in the Action Plan Template:

- Desired Outcome/Area of Opportunity (Visioning)
- Targeted Inequities (Looking at Data)
- Problem Statement (Looking at Data)
- Root Causes/System Change Targets (Identifying and Prioritizing Root Causes)
- Systems Change Strategy (Designing Systems Change Strategies to Address Root Causes)

<u>Selecting Indicators</u>

Now that you have identified a set of strategies, you will need to identify indicators to help track results. An indicator is the name of what is being measured, it is not the impact you hope to have or the data itself. Indicators include things such as smoking, homelessness, poverty, unemployment, high school graduation, teen pregnancy, life expectancy, etc.

Indicators may apply to more than one strategy. For example, you may have a group of strategies that are focused on creating greater access to food in inner city neighborhoods. A meaningful indicator for this group of strategies might be food deserts.

25. **Identify a set of indicators and add them to the Action Plan Template.** You should have at least one indicator defined for each strategy; however you are not limited to only one. It may be helpful to review the information your group gathered in step #4.

    Focus on key indicators, rather than a list of all the possible indicators that might be associated with your strategy(ies).

<u>Identifying Metrics</u>

Now that you have a set of indicators, it is important to determine what, specifically, will be tracked over time to measure results. The goal is to have a core set of metrics that will be used to track and measure progress on the strategy(ies) that have been developed.

The final list of core metrics needs to be clear, concise and manageable so the group can commit to tracking and measuring them over time.

26. **Brainstorm question to support discussion within your action planning group: What do we need to know about *(insert indicator)* to know whether or not progress is being made on this strategy?**

    Here are some suggestions for how to engage others in the metric development process:
    - Have each group member reflect on the brainstorm question individually and write their metric ideas on a sticky note, one idea per sticky.
        - It is helpful to have the strategy and each indicator visible to group members during this exercise.
    - Group members place their individual metric ideas on the wall, placing theirs near others that are similar.
    - As a group, review what has been placed on the wall and group similar metric ideas together.
    - Determine if groups of similar metric ideas can be refined into one metric. Provide additional sticky notes for this step in case refinements are needed to the proposed metric language.
        - Identify what demographic variables need to be considered for each proposed metric. Demographics include things like age, race, marital status, place (i.e.: City, County), gender, veteran status, etc. There should be a connection to the targeted inequity that has been identified.

27. Using the list of proposed metrics from step #27, determine the feasibility of tracking and reporting metric data. The table below may be helpful. This step of the process can be completed outside of the group process and shared back with your action planning group for review and feedback.

This template is available in the Library on the Network Information Hub here: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&rid=81&rl=rru.

Indicator:					
Metric	**Demographic Variables**	**Data Source**	**Is this data publicly available? If not, how will the data be obtained?**	**How often is the data updated?**	**Is the data able to be disaggregated by the demographics that have been identified?**

Enter your final metrics in the Action Plan Template before moving to the next step. Keep the information you have gathered in the table above to assist with data collection and analysis throughout implementation.

Developing Action Steps/Tasks to Support Strategy Implementation

Now that you have a set of strategies and you have identified how you will track and measure progress, it is time to break things down into actionable steps to support successful implementation. Action steps, also commonly referred to as tasks, define what action needs to be taken to implement the strategy(ies) that have been identified.

At this stage in the process, it will be helpful to work directly in the Action Plan Template. The template is available in the Library on the Network Information Hub here: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&rid=77&rl=r89.

Each action step or task that is identified should be clear and concise, have an estimated timeline (start and end dates), and clearly defined responsibilities for completion.

28. Use the following questions to complete the task section of your organization's Action Plan:

- What needs to happen? By when?
- Who will do it?
- What resources are needed?

29. Reflect before you finalize your action steps/tasks. As you work to break down each strategy into a set of actionable steps, it is important to consider the following questions:

- **Are there too many action steps/tasks?** If so, your strategy may be too big and broad. Consider breaking it down into smaller, more manageable chunks.
    - For example, if your organization is working on a shared consent form, if may be necessary to create separate strategies. One might focus on the development of the form and one might focus on implementation of the consent form within partner agencies.
- **Do the timelines for action steps/tasks align with the overall strategy timeline?** Your start of your first task should align with the start of strategy implementation. The end of your last task should align with the end date of strategy implementation.
- **Do the action steps/tasks get you from here to there?** Does it seem likely that completion of the action steps/tasks will result in successful completion of this strategy? Is anything missing?

Reflecting on the Planning Process

At the beginning of this process, a set of core themes were provided. Take a few minutes to consider the questions below before moving to implement the strategies and tasks that have been identified. Revisit any steps in the action planning process as needed to ensure each of the core themes have been incorporated into your process.

30. How well did the planning process incorporate and/or address the following core themes? Refer back to the descriptions of each core theme at the beginning of this guide.

- Authentic Engagement
- Trust and Relationships
- Hierarchy of Needs
- Structural and Institutional Racism

Congratulations!

You have successfully completed the action planning process!
At this point, you should have the following sections filled out in the Action Plan Template:

- Desired Outcome/Area of Opportunity (Visioning)
- Targeted Inequities (Looking at Data)
- Problem Statement (Looking at Data)
- Root Causes/System Change Targets (Identifying and Prioritizing Root Causes)
- Systems Change Strategy (Designing Systems Change Strategies to Address Root Causes)
- Indicators (Selecting Indicators)
- Metrics (Identifying Metrics)
- Action Steps/Tasks (Developing Action Steps/Tasks to Support Successful Implementation)

As you move forward to implementation, remember to build in opportunities to reflect on what is being learned and share those learnings with others. The final section of this guide focuses on supporting that process.

Continuous Learning

Successful change efforts not only initiate action, they also provide insight into whether or not strategies are making a difference in targeted problems. Throughout implementation of your strategies it is important to take time to reflect on how it's going.

Understanding what is going well and identifying opportunities for improvement are key to successful implementation. Action Plans are not static, they need to be flexible – the strategies and tasks that have been identified may need to be adjusted over time based on what you learn through implementation.

31. Create intentional opportunities to gather feedback on implementation and incorporate what is being learned. There are many approaches you can use to guide your action planning group through this step.

Here are a few ideas:

- **Include time during meetings to reflect as a group.** You might consider using an activity that asks individual members to consider the following questions:
    - What is going well? Why is it going well?
    - What isn't going well? Why is that?
    - What might need to change to address opportunities that have emerged through implementation?
    - What didn't we think about? Is anything missing?

- **Gather feedback from group members using a survey.** It is important to keep in mind that a survey alone is not adequate to support the continuous learning process. Include time for robust group discussion in an upcoming meeting so members of the group can review the results and discuss implications for the work.

  Here is a link to an example set of survey questions you might find helpful: https://jcmr.quickbase.com/db/bkzudh2cj?a=dr&r=ck

- **Gather feedback from your target population.** The best and most effective way to get feedback from those most affected, is to talk with them. Earlier in the process you engaged with individuals throughout the design process. It is equally important to check in to see how implementation is going.

  This can be an informal conversation to check in, it does not need to be a formal focus group. You might consider framing this as a reflecting activity.
    - Provide a brief description of what was planned. What did you set out to do?
    - Share what you hoped to accomplish at this stage of implementation.
    - Include the following reflection questions:
        - What is going well? Why do you think that is?
        - What isn't going well? Why do you think that is?
        - What do you think would help make it better?

- Is there anything that seems to be missing?

32. **Adapt strategies as needed to support continuous improvement.** Using the information gathered from members and your targeted population, identify adjustments that may need to be made to your strategy(ies).

    Reflection and continuous learning should be built into your implementation process at regular intervals to ensure success.

<u>Tell us what you think!</u>

Did you find this Discussion Guide helpful?
Have ideas for how it can be improved?
Do you need other resources to support action planning and effective implementation?
[Add Feedback]