

Coproduction Toolkit

Improving outcomes, together.



Introduction

Coproduction is an approach to improvement holding that everyone in a system is interconnected and each person has a role to play in improving it. The approach recognizes that those who are affected by a system are often best positioned to design or improve it.

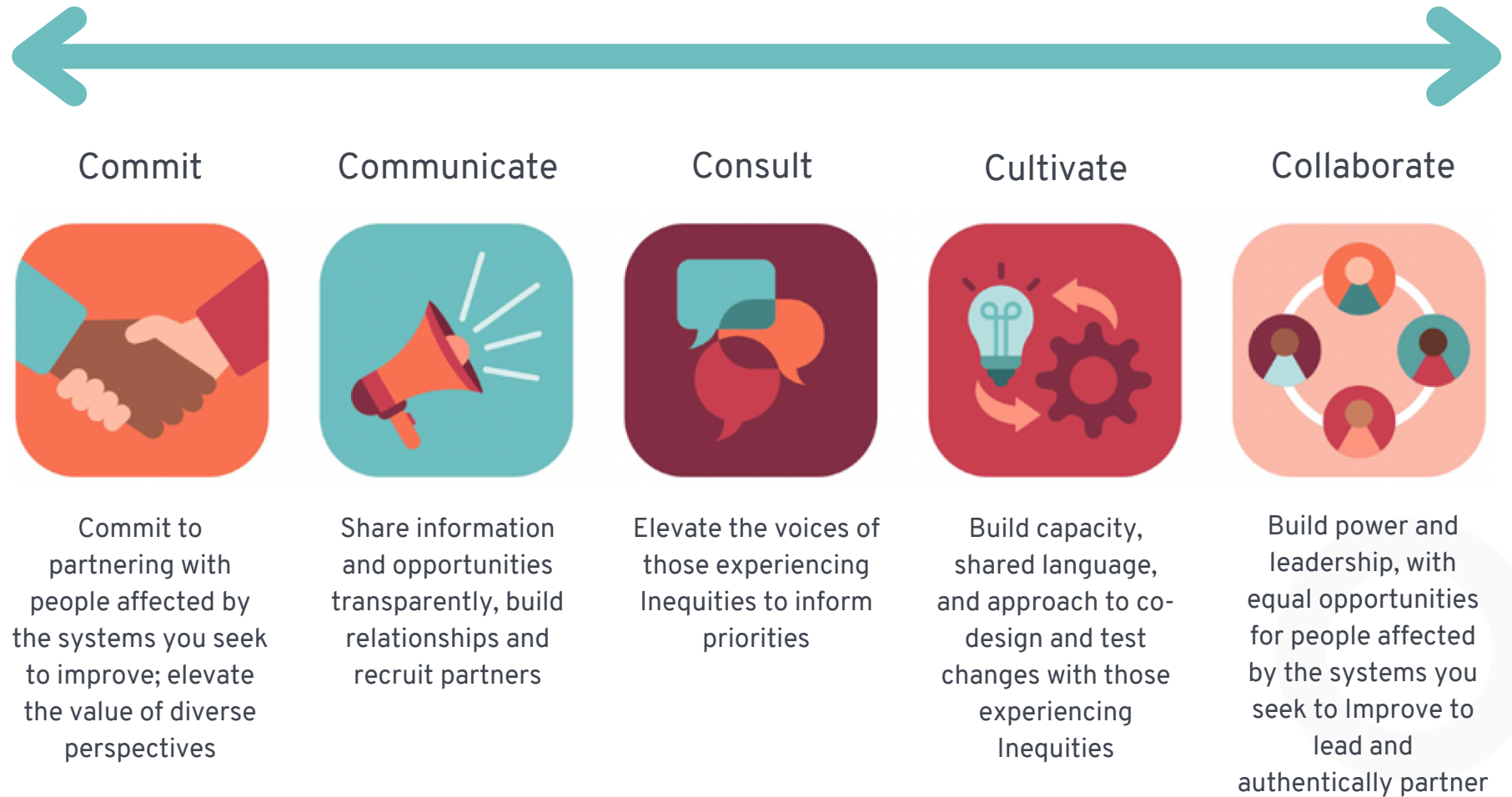
Shift's 'Foundations for Authentic Coproduction' provides a structure to build meaningful collaboration between partners as they bring about a shared vision for improvement. This approach is only possible through facilitating and supporting deep participation by everyone affected by a system, particularly communities often denied a seat at the design and decision-making table. True partnerships in improvement are developed when everyone can contribute their unique perspectives and valuable expertise.

Moving theory to practice

This toolkit is not intended to be all-inclusive; it will instead provide you with a set of materials to help ignite partnership opportunities with others in your system to accelerate and sustain improvement. You can adapt and modify these materials for your local context and to meet your specific needs. Although the materials are categorized by the 5 dimensions of Shift's approach to authentic coproduction, keep in mind that you will likely want to use a variety of tools and strategies to build robust opportunities for engagement in your organization. It will be helpful to visit this toolkit regularly as your team grows; in each stage, new tools and concepts will be relevant to your efforts to prepare for and partner with your community.

For purposes of this toolkit, we have organized our resources into five equal dimensions – commit, communicate, consult, cultivate, and collaborate. In a mature network, we would expect to see all these facets of coproduction.

Shift's Foundations for Authentic Coproduction



Much like Shift's approach to Improvement, these dimensions of coproduction are nonlinear; people can enter at any stage and stay there, or choose to organically progress. Typically, engagement begins on the ends of our framework through a commitment by an organization to building coproduction. This often starts by working with people who are highly motivated and already engaged in some capacity to improve your system – community leadership groups, advisory boards, and other organizations with the capacity and capabilities to work on the system itself. It is important that coproduction does not stop here as this group will likely not represent those most impacted by inequities in the system. This early group is essential to build the infrastructure or “lay down the tracks” by creating the structures, processes, and shared resources that attract more people to become involved in the work of improvement. As more tracks are laid, more people can be brought into this partnership work. Creating a culture and expectation of involvement by all - along with systems and processes to facilitate involvement - accelerates the work, builds the capacity to improve, and creates opportunities to more authentically engage those most impacted by inequities in the system.

It is important to keep in mind that while some partners are interested and comfortable in leading, others may look for more of an advisory or support role. Ultimately, the goal is not to get everyone to lead the effort and teach others; the point is to be intentional about building opportunities for your community to engage in ways that feel meaningful to them.

“

The greatest compliment
that was ever paid me was
when someone asked what
I thought, and attended to
my answer.

-Henry David Thoreau

”

Resources

Commit

Commit to partnering with those who can either affect or be affected by the system you want to improve; elevate the value of diverse perspectives.

- Mission Statement
- Core Values
- Organizational Coproduction Assessment

Communicate

Share information and opportunities transparently, build relationships, and recruit partners from groups most affected by the system.

- Social Media Campaigns
- Websites

Consult

Elevate the voices of those experiencing inequities to inform priorities.

- Process Observation
- Perspective Prism
- Surveys & Focus Groups
- Empathy Building Cards
- Ignite Talks
- Community Connection Activities

Cultivate

Build capacity, shared language, and approach to co-design and test changes with those experiencing inequities.

- Roles & Responsibilities
- Shared Agreements
- Training
- Partnership Policies

Collaborate

Distribute leadership, create equal opportunities for those most affected by the system to lead, sustain authentic partnerships.

- Applications
- Goal Setting
- Action Plans
- Peer Support Networks
- Partnership Assessment



Commit

Commit to partnering with those who can either affect or be affected by the system; elevate the value of diverse perspectives.

Mission Statement

Why

To align a team on a task and help guide everyday decision-making.

What

A mission statement describes the overall purpose of your organization. A clear mission is a way of putting a stake in the ground that your organization believes in authentic partnership and coproduction. This serves as a great motivational tool for building public understanding and engagement.

How

Procedures	Activity	Answers
1. Ask questions	Identify what your organization does, what your organization creates, and who the products and services are geared towards.	
2. Discuss Answers	Write down the ideas, words, and phrases that the answers in step one inspire.	
3. Edit ideas & keywords	Start to narrow the thoughts and keywords from your discussion.	
4. Draft mission statements	Begin drafting mission statements. Try creating several.	
5. Review	Share drafts with the team for their input.	
6. Publish your final effort	Incorporate feedback, copy edit the statement, and publish to the world.	

Final Mission Statement:

Core Values

Why

To ground everyone in the work that needs to be accomplished.

What

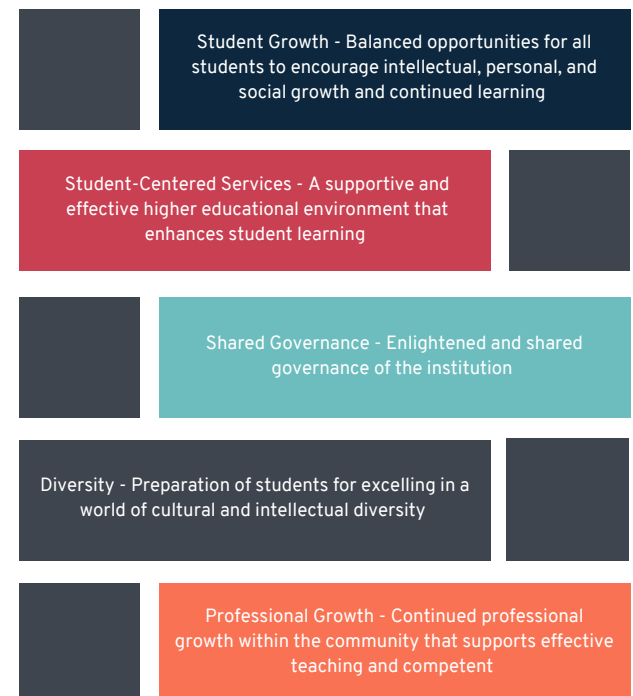
Values are not impossible dreams; rather, they are the foundation for all of the discussions you will have in improving your systems and community. They will enable everyone to understand and articulate the foundational beliefs that guide your work now and in the future. Your Core Values will not change much over time. It is a tool that can bring a sense of continuity to your work and community. It can also help recruit employees whose values are a good match for the organization.

How

To arrive at a set of values, ask yourself some questions:

- What behaviors do we want people to model?
- What do we want the community to understand about our organization from watching our behavior?
- What kinds of activities in our sector exemplify what we value most?
- What do we want those served by our organization to say about their experience with us?
- What about those who may feel less comfortable in our setting?
- What is our desired reputation in the community?

Example - Higher Education



https://www.jeffco.edu/sites/default/files/PR/Web/Current_Mission_Vision_Values.pdf

Organizational Coproduction Assessment

Why

To provide a comprehensive view of the team's coproduction efforts and energy.

What

When working to improve human-centered outcomes like those in education and healthcare, a critical aspect of improvement is coproduction with those who can affect and be affected by the system. While there is a range of roles that these people may choose to play, improvement teams and networks should strive to create the conditions for authentic coproduction. Intentionally building opportunities for your community to engage in coproduction for equity increases the likelihood that your network will reach its intended outcomes.

How

1. Complete the assessment individually first. Each person on your team will have different perspectives on your network's foundation for authentic coproduction. Make note of the artifacts or examples of practices in your network that indicate your current coproduction status.
2. When you are done, reflect individually on where you see your network's strengths and where you would most like to see your network grow.
3. Discuss your reflections as a team. The real value in this activity is the conversation, not the number. Rather than taking the average, take the time to discuss each other's perspectives and agree on a value that best represents the current state of your network. Some suggested discussion questions are: Where are your responses similar? Where are the greatest differences in experience/understanding? What are the strengths of your network that you are most proud of? In what areas do you most hope to learn or improve?
4. Prepare to share early learning.

Organizational Coproduction Assessment

Example - Education

The assessment scale ranges from:

1 = Not on our radar

2 = Awareness: We are conscious of the need to address this in our network

3 = Exploring: We are actively reviewing approaches to address this in our network

4 = Experimenting: We are testing approaches to address this in our network

5 = Established: We have this in place and it functions well

Dimensions of Authentic Coproduction	Current Reflection				Our Artifacts/Indicators
	1- Not on our radar	2- Exploring	3-Experimenting	4-Established	
COMMIT: Our network has made a commitment to partnering with students and families. · Our mission statement commits to student and family leadership. · Teams are asked to collaborate with student and family leaders. · Leaders model that student and family voices should drive improvement.					
INFORM: Our network has a system to routinely share information and opportunities transparently with students and families. · Network calendar, convening dates, and other events are shared transparently. ·Event highlights and teams' learning are shared via network newsletter, social media or other platform. · All data is made available to the community (not just the positive).					
CONSULT: Our network elevates the voices of those experiencing inequities to inform priorities. · Network meetings feature students and families as speakers, panelists, and thought leaders. · Teams are expected to generate change ideas with students and caregivers/families. · Teams engage in empathy-building and activities that center the voice of those impacted by the system. · Teams contact students and families to gather input on their aims, and to better understand the system.					
INVOLVE: Our network engages with those experiencing inequities to co-design and test changes. · A team charter that includes the role of students and families in improvement. · Our network supports teams to recruit students and families and encourages that they "build a bench" of partners · Training and orientation sessions to create shared understanding and language for improvement. · Meeting times and technology facilitate student and family participation. · We have a system to fairly compensate families and students for their time and efforts supporting improvement.					
COLLABORATE: Our network intentionally distributes leadership and creates equal opportunities for students and families to lead and co-design changes. · System and network leaders embrace opportunities for distributed leadership. · Our network organizes structures to reliably center student and family voices such as advisory board, leadership councils, and student and family breakouts. · Our network leadership includes students and families as thought leaders. · Our network arranges for or provides professional development for students and family leaders.					



Communicate

Share information and opportunities transparently, build relationships, and recruit partners.

Social Media Campaigns

Why

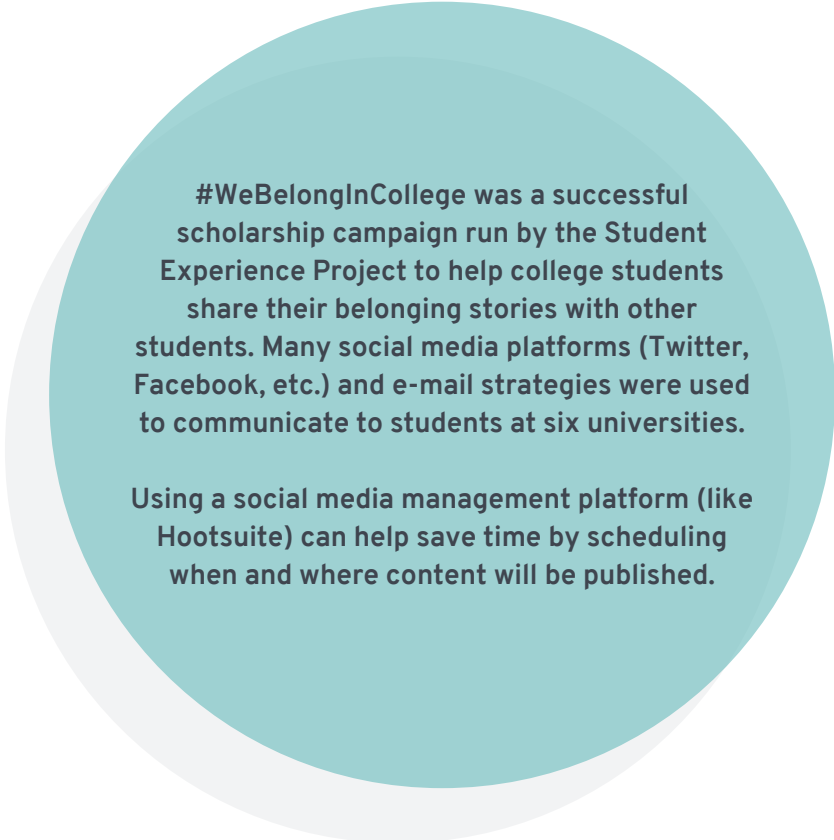
To attract those with whom you want to partner and/or those who would benefit from your campaign.

What

Social media campaigns and newsletters are coordinated marketing efforts to reinforce information (about a brand, product, or service). These campaigns are strategically focused, have measurable outcomes, and are intended to influence your audience to feel or act in a certain way.

How

1. As a team, brainstorm and decide which media platform(s) will yield the highest traffic for your campaign and what messaging you will use.
2. Test what types of messaging will be most effective by engaging with your community.
3. Include content that is informative without being overly wordy, is visually engaging, and draws your targeted audience(s) to your website and/or to reach out for more information.
4. The use of relevant hashtags (#) on social media can be an effective way to reach a wider audience and spread the word about your campaign.



#WeBelongInCollege was a successful scholarship campaign run by the Student Experience Project to help college students share their belonging stories with other students. Many social media platforms (Twitter, Facebook, etc.) and e-mail strategies were used to communicate to students at six universities.

Using a social media management platform (like Hootsuite) can help save time by scheduling when and where content will be published.

Websites

Why

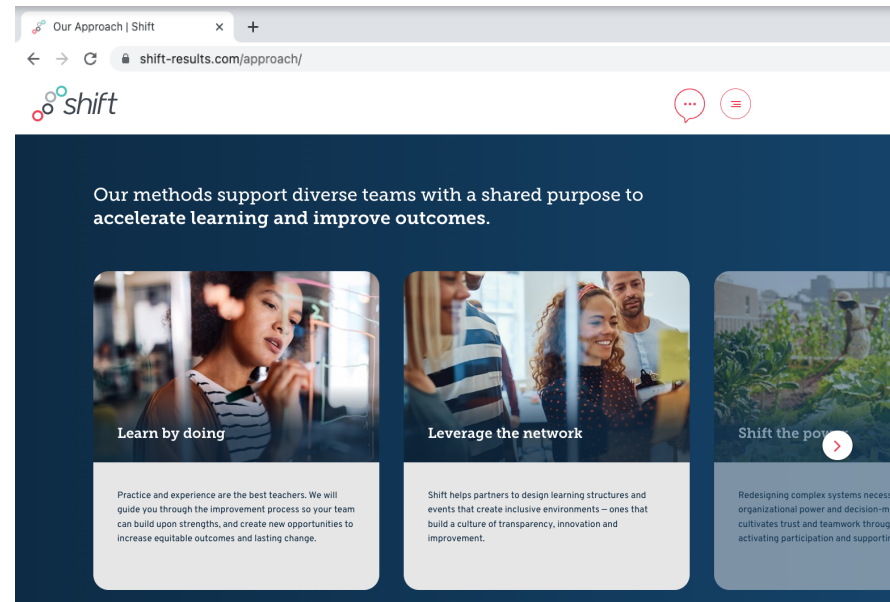
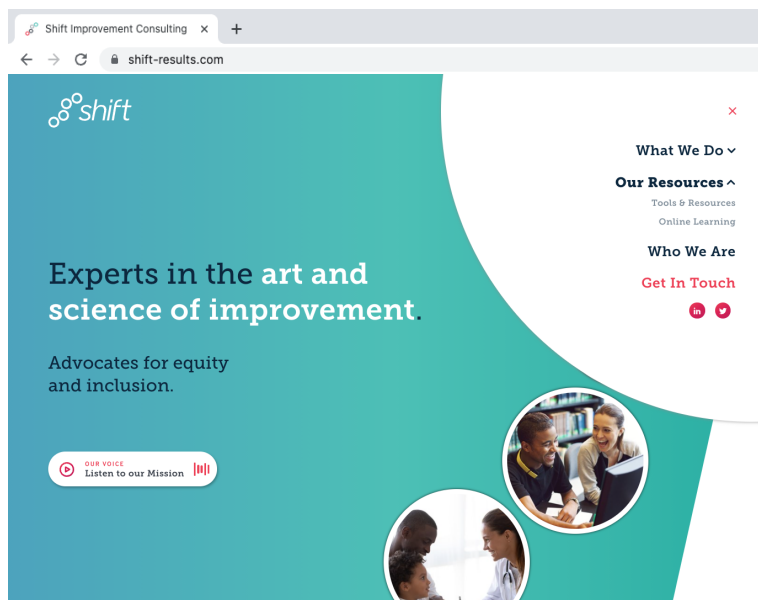
To raise awareness of your improvement efforts and actions and opportunities to join them.

What

Don't keep your vision, mission, and values statements filed away in a cabinet or folder. Design them, laminate them, and post them everywhere. Display them on the homepage of your website. Look at them on a regular basis, especially when you feel that your organization is drifting a bit or has a difficult set of priorities to weigh.

Example

Shift's website shares our mission, vision, and principles for interested clients and partners to easily access and learn more about the work that we do and values that we hold.





Consult

Elevate the voices of those experiencing inequities to inform priorities.

Process Observation

Why

To gain insight from the people that are most impacted by the issue that we would like to improve.

What

This simple activity can be done in as little as 15 – 30 minutes at any time during an improvement project. Not only will this process observation help your team to see a process through the eyes of students, families or others affected by the issue you're hoping to improve, it will also help to:

- Build empathy and relationships by seeing your work from different perspectives
- Inform improvement initiatives by uncovering new learning and exploring assumptions
- Identify steps to a process as well as areas where bottlenecks or lack of clarity exist
- Identify opportunities for improvement that would otherwise have been missed.

How

1. Identify a process that is clearly linked to your improvement initiative. For example, if your aim is to improve early literacy, consider observing how reading specialists are scheduled to work with students, how students use the school or public library, and/or how reading groups are run in classrooms.
2. Select one or two members of your team and make sure that they have protected time to observe the process. It is very important to make sure that the team members can focus on watching the work around them as an outside observer without the usual distractions of everyday work.
3. Direct process observation is the most powerful tool, but if this isn't possible, alternatives could be to role play or simulate the steps in the process and/or to interview a few people in the system on how they feel about this process and how it is and isn't working for them.

Process Observation

Step 1: Activity Planning

Aim of our Improvement Initiative:

What Is a key process that Impacts this aim?:

Starting point of the process:

Ending point of the process:

How could you shadow this process?

Process Observation

Write down your observations and learning to share with your team. Some key points are below, but please feel free to add others.

Step 2: Shadow & Observe

Team member(s) completing the activity and date:

What were the key steps in the process as you understood it before the observation? What happened differently than you expected?

Who was present and what are their roles and responsibilities in the process?

What surprised you?

Did you find anything confusing or frustrating?

What could be improved in how this process is done? Where were there bottlenecks or challenges?

What are some specific changes you could make to how this process is done that would lead to a better outcome?

Perspective Prism

Why

To fully study the system, as well as build empathy and capacity for the people involved, it is important to consider the issue from multiple angles and perspectives.

What

Just like a prism shows us different wavelengths of a spectrum of colors (red, orange, yellow, green, blue, indigo and violet), this activity will help us to see insights from different perspectives. Ideally your improvement team includes a variety of roles so that stakeholders can contribute their perspectives directly. This activity will likely lead you to identify additional stakeholders whose perspectives are important to fully understand the issue.

ROLE	Sample Discussion Questions: What are the issues that contribute to the problem? What are the possible solutions?
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How

- Identify the issue that you are working on together.
- List the key roles or people involved with that issue.
- Take turns going through the roles, imagining the issue from different perspectives.
- People who identify with the role of focus take the lead in sharing their perspective (this rotates with each color).
- Capture notes, quotes, insights on sticky notes. It is helpful to have markers with each color to coordinate with roles.
- Remember brainstorming practices: Listen without criticism; Build on each other's ideas and perspectives.

Surveys & Focus Groups

Why

To provide you with a wealth of information concerning the people you serve.

What

Survey data can help your team take an unbiased approach to decision-making; rather than base decisions on assumptions and “gut instincts,” you can base them on your survey results and the objective information provided. Even if those you serve are not able to provide consistent feedback, surveys continue to be a good way to learn about your broader population and to ensure that the views of multiple groups at different levels of the system are represented.

Focus groups are interviews of 6–10 people at the same time. They are a powerful means to evaluate or gather input on services and to test new ideas. You can gather a great deal of information in a short amount of time during a focus group session. It is great to involve people with a variety of roles in designing the focus group questions, or perhaps they might also assist with facilitation as a way to build trust among others in their positions. (i.e. parents might speak more freely and openly to another parent.)

How

Survey Basics

- Establish the goals of the survey
 - What you want to learn?
- Determine your target audience
 - From whom do you want to learn?
- Create your questionnaire, keeping your goals in mind as you develop the questions.
- Pre-test the questionnaire, with members of your target audience, if practical.

Focus Groups

- Identify what you want to learn
- Develop 5-6 questions to get you started
- Thoughtful facilitation
- Support for participation
- Close the loop

Empathy Building Cards

Why

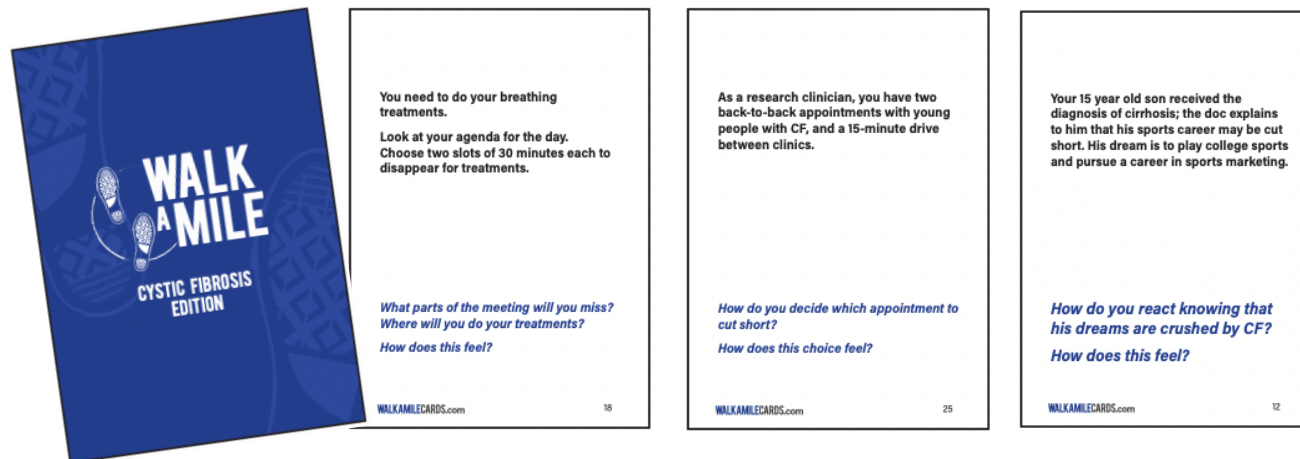
To build empathy and create connections across the many people involved in your improvement effort or network.

What

Empathy cards provide a way to create connections between people with different life experiences. Each card presents a true-to-life scenario written by someone experiencing that situation. They offer an opportunity to walk in their shoes and gain a sense of their experience.

How

1. Assemble a variety of people from your team – in-person or virtually.
2. Within the group, go through a number of role-specific scenarios and take turns answering guided questions from the perspective of the other persons role.
3. Another example would be to discuss a scenario and have people offer their perspectives about how to best address it with guided questions.



Ignite Talks

Why

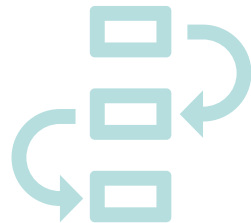
To build empathy and trust across different groups in a community.

What

One way to build a culture of transparency and empathy is to continuously provide opportunities for community members to share their story with others. An Ignite Talk is a powerful, persuasive speech or monologue that lasts no longer than five minutes, and demonstrates an important element of vulnerability. The goals of the Ignite Talk are to evoke empathy and amplify the importance of the community's work together. A powerful Ignite Talk leaves others with a sense of importance and urgency for why we are here together and why we do this work. Given the vulnerability involved with sharing a personal story, Ignite Talks help to build trust and break down barriers between groups.

How

1. Think about a story that you'd like to tell – why you are doing this work, why does this/should this matter to the audience?
2. Write a rough first draft in the format of Diagnostic – Prognostic – Motivational.
3. Schedule time with a coach who can provide feedback and refine the speech for greatest impact.
4. Practice, practice, practice



Diagnostic

What is the problem that we are addressing? What is the extent of the problem? What is the specific source or sources?

Prognostic

What could the future look like?
What is our strategy to reach this vision of the future?

Motivational

Why is this urgent? What is our call for action that connects with the motivational and emotional drivers of our audience?

Tips

- Focus on a key takeaway
- Be succinct, specific, vulnerable, personable and honest
- Paint pictures with your words
- Write in the first person and use feeling words such as “I felt...” “It hurt when...” “I wished...” “I was afraid...”
- Follow style of a persuasive/empowerment speech:
 - Write a strong opening
 - Offer persuasive evidence
 - Address the counter-argument
 - Conclude with a call to action
 - Why is this story an important one to tell?
- What is it that you wish others knew/would do?
- What is it like to be you and go through what you go/went through?
- How do you want your audience to feel, think, react or act?

Community Connection Activities

Why

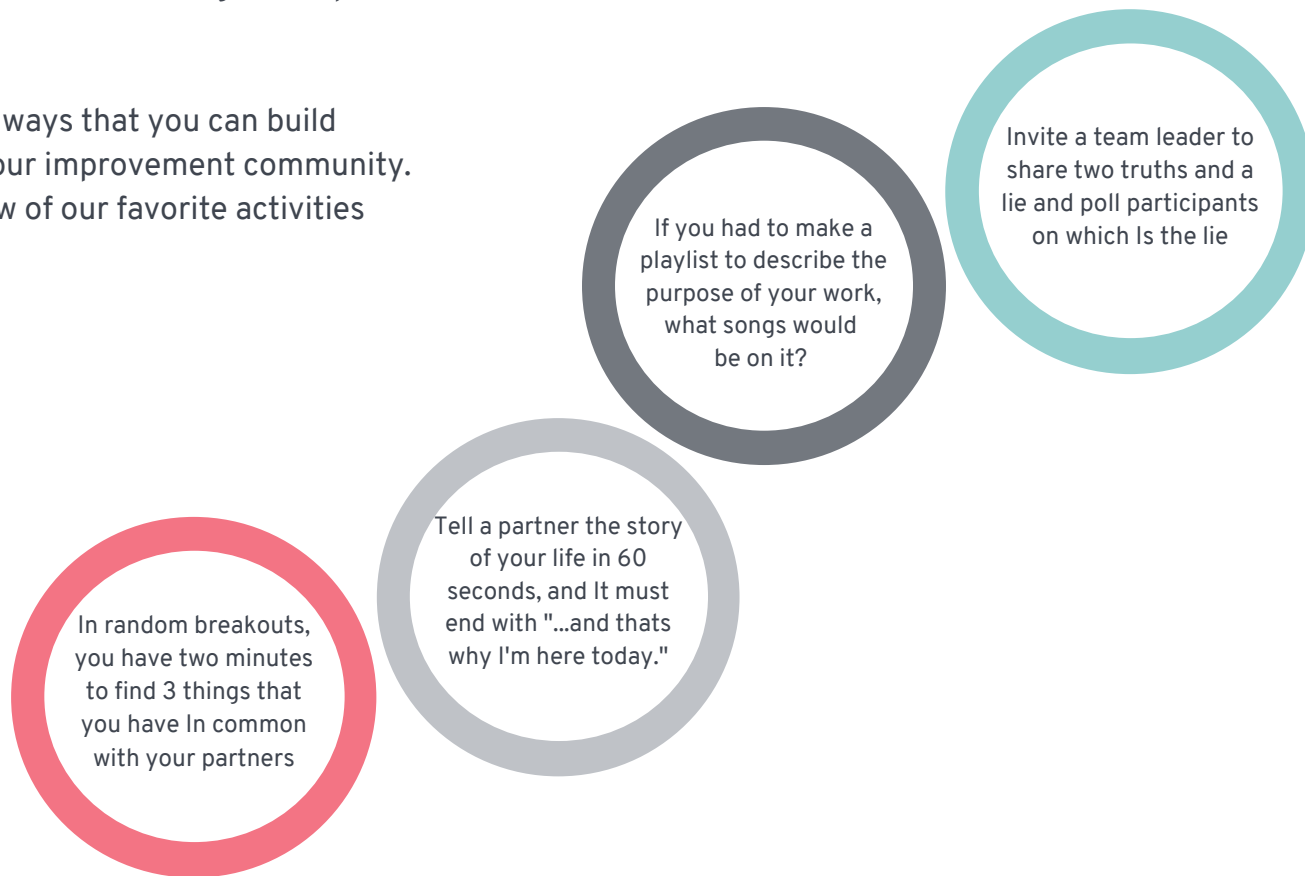
To build empathy and trust across different stakeholder groups in a community.

What

Shift's approach to continuous improvement values a combination of strong technical skills and tools, while also emphasizing individual, team and community work. This is necessary to avoid reproducing or reinforcing oppressive structures that were intentionally designed to create inequitable outcomes. Shift's approach is built on diverse teams that work together with shared purpose to accelerate learning and improve outcomes.

How

There are a variety of ways that you can build connections across your improvement community. We have outlined a few of our favorite activities below.





Cultivate

Build capacity, shared language, and approach to co-design and test changes with those experiencing inequities.

Roles & Responsibilities

Why

The expertise of those affected by the systems adds a unique and valuable perspective to your improvement work. Articulating the role that they will play as full partners in the improvement work is critical to ensuring productive and sustainable relationships.

What

Information for potential partners about improvement, the role they might play in it, and expectations for participation. You can use it to create a flyer, brochure, or PowerPoint presentation, or simply use it as talking points.

How

Sample Role Description - Healthcare

Patient and family leaders bring a valuable perspective to the improvement team and the work. Your ideas, experience, and expertise help shape every step of an improvement project—from setting priorities and crafting the aim statement to assessing impact and identifying potential new changes. We consider you essential allies and partners in planning, implementation, and evaluation throughout the improvement process. Your role, along with other patient and family members, is to represent families who receive the services of _____. You will bring information to the improvement team from the groups in your community with whom you are involved, and report back to those groups about the work we are doing and the resources available to them. Your role may also include serving on subcommittees or workgroups.

Expectations of Partnership

- Learn the fundamentals of improvement science and human-centered design
- Attempt to attend monthly meetings, communicating if/when unable to attend
- Serve as an active voice in improvement meetings by participating in discussion, asking questions, offering feedback and insight
- Serve as a community liaison by providing insight and information and disseminating group information to personal networks
- Positively represent organization at events
- Communicate with team as barriers to active participation arise

Shared Agreements

Why

Community agreements are an important first step to address and remove hierarchy from the team's work and to encourage active participation across the team.

What

Each team decides how it will work together. A thoughtful agreement that everyone signs on to can help the day-to-day work go more smoothly, ensuring that all members are on the same page from the beginning. Also, written accountability generally ensures that people are more likely to adhere to the agreement and take it seriously.

How

	Always Do	Sometimes Do	Never Do
How will we discuss ideas and options?			
How will we make decisions?			
How will we schedule and run our meetings?			
How will we respect each other's time with respect to deadlines?			
How will we assign responsibilities for tasks or ensure follow through on our commitments?			
What are our expectations for meeting preparation and attendance?			
How will we communicate with one another?			
How will we transfer information?			
How will the team manage conflict constructively?			

Adapted from: Cambridge Health Alliance Practice Improvement Team. (2013). Development Toolkit. Cambridge, MA: Author.

Training

Why


To ensure shared language and approach to the work.

What

You likely have many ways to onboard new team members, but are they accessible to those affected by the system in the same way to those who work in the system? Shift has created a series of free videos that cover basic improvement skills. These can be used as a level-set on improvement for all team members.


Example

Shift's online learning library provides methods for improving equitable aims and building more diverse & inclusive improvement communities. Visit <https://shift-results.com/online-learning/> to learn more.



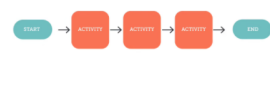
SMARTIE Aims

An Aim is the desired result that a group of people envision, plan, and commit to achieve. This video explains a process that will help teams create Aims that go beyond the typical framework of being specific, measurable, actionable and realistic, to also ensure that the aim is inclusive and equitable.

 [View Introduction](#)


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[Tools & Templates](#)




Process Mapping

In this video you'll learn how to use Process Mapping to visualize your system as a whole prior to attempting changes. Process maps help you to look critically at the present state of how your system is designed and to gain a better understanding of the ways in which various elements interact with each other.

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Building a Culture of Empathy & Capacity for Change

Learn how empathy and other skills will positively impact your improvement process by helping to foster trust, increase engagement across your community and, ultimately, create long-lasting outcomes centered on what really matters.

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Root Cause Analysis

Learn how root cause analysis helps you avoid the harmful assumptions and costly mistakes that can derail your improvement project. This video will introduce you to a set of proven tools to identify the most effective and lasting levers for change.

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Creating a Theory of Change

Key Driver Diagrams can play an important role in helping you realize your vision for change and achieve your intended outcomes. Your theory of change is a visual description of how you expect a change to happen, while a Key Driver Diagram is a tool to organize that theory and make it actionable.

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Developing Measures

A critical aspect of improvement work is measurement. This video focuses on measurement for improvement through an emphasis on using a diverse family of measures, frequent measurement over time and, most importantly, using measurement for learning, not judgement.

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Partnership Policies

Why

Growing and sustaining community leadership in improvement work requires an organized and intentional approach.

What

As you strive to increase leadership, it will be important to work with senior leaders in your organization to plan strategies for support. We have outlined 10 success strategies for growing and sustaining diverse leadership in your improvement work.

How



Decentralize power



Build empathy



Clarify roles



Meeting time and location



More than one community leader



Establish financial support



Support over time



Provide training



Plan ahead; close the loop



Recognize success

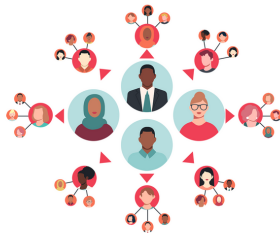
Partnership Policies



Decentralize power

Many organizations are designed with hierarchical power structures in place, where one person at the top holds the power. This chain-of-command model creates a dependency on a strong leader, slows communication and progress, reduces autonomy and creates competition. Rather than learning and improvement, these power structures often perpetuate systems of inequity. It also inhibits a culture where other people can lead and contribute their unique perspectives.

At Shift, we recommend model of inclusion described by Marshall Ganz in which power is built outward from a few leaders to other interconnected leaders to achieve a shared purpose. Instead of chain-of-command, this model creates a chain of creativity and commitment. When people are permitted to use their own creativity and experiences to complete their work, they take more psychological ownership, which creates more buy-in and higher quality outcomes. We've found these structures for distributed leadership to better support learning and improvement when designing improvement initiatives.



Build empathy

It's difficult for one individual or group to fully comprehend the nuances of an entire system, when they have only their personal perspective to draw on. The Shift Approach centers building empathy as essential to understanding the lived experiences of the people involved in any system you want to transform.

For example, if you were asked to improve a school, it would be valuable to understand the points of view of the teachers, students, administrators and others. This inclusivity ensures that you don't miss out on the expertise and experiences of all the people who have important insights about what isn't working and how it should change.

In addition to building empathy and community relationships, it is also important to provide your team with deliberate learning opportunities to build their own equity consciousness and leadership skills. This an important foundation to explore and identify potential biases to prevent improvement efforts that inadvertently amplify inequities.



Partnership Policies



Clarify roles

Effective teamwork is critical for improvement and improvement methods can be used to impact team functioning. Strong team work facilitates role clarification, better hand-offs, and participation of all team members. Sharing and alternating responsibilities and leadership is one way that your team can avoid reproducing inequitable habits that amplify some voices while minimizing others or assigning disproportionate work. Before the meeting starts, team members are given one of the meeting roles. To ensure that all people are given equal voice, make sure the roles shift at every meeting so that the same person is not always the leader, for example.

Leader

Responsible for ensuring the flow and direction of the meeting

Remember:

- Guide and structure the discussion to cover relevant topics on the agenda.
- Collect agenda items prior to the meeting.
- Assign any action items, and move discussion between agenda items.
- Redirect discussion back on-topic if it gets derailed.
- "What are some topics people want to be sure to cover during this discussion?"
- "This is an important discussion, but I don't think we can do it justice in this session."
- "Any volunteers to follow up on this and bring back to our team?"
- "This is an interesting discussion, but I'd like to return to the original question."

Facilitator

Responsible for active participation from all team members

Remember:

- Engage all of the members of the team.
- Politely interrupt people who have been monopolizing the discussion.
- Invite people who haven't said anything yet to speak.
- "Excuse me, I'd like to give some other folks a chance to speak now."
- "You look thoughtful, would you like to share any thoughts with us?"

Community Liaison

Acts as a point person and ensures the student/family voice is included

Remember:

- Ensure all front-line community members (families and students) provide input on agenda items.
- Be the point person if there are any questions.
- Make sure there are no acronyms or technical terms used.
- "I want to learn from our community partners. What do you think?"
- "Can I help with any clarification?"

Time Keeper

Responsible for managing time

Remember:

- Estimate the time needed for each agenda item.
- Politely interrupt if people are going seriously over time.
- Give a warning at halfway and 5-10 minutes left or periodic time checks.
- "I just want to do a time check, we have 10 minutes left and 3 agenda items to go."
- "This is an important discussion, but we have other topics. Should we table this for the next meeting?"

Note-Taker

Responsible for recording main points of discussion & action items

Remember:

- Record main discussion points, areas of agreement and disagreement, action items, etc.
- Ensure all team members receive a copy/have access to the team notes.
- "Could you repeat that again, please?"
- "Sorry, how do you spell that?"
- "Let me try to recap what I hear as the action item."

Participant

Responsible for participating in discussions, brainstorming, and planning

Remember:

- Contribute items to meeting agenda.
- Contribute during meetings in team discussions, brainstorming, strategic planning, and special projects.
- Undertake assigned special project tasks.
- Read meeting notes and project plans to keep up to date with important team and business information, strategic planning and special project initiatives.

Technology

Responsible for meeting technology (video call, microphone, etc)

Remember:

- Sets up meeting technology and troubleshoots as needed.
- Tests technology platform before the meeting to ensure limited interruptions.
- Send meeting links if needed.
- "For those on the phone, can you hear or see us?"



Partnership Policies



Establish financial support

Financial support is an essential component of the infrastructure needed to grow and sustain community leadership. As a first step in creating clear financial systems, it is important to have a shared understanding of the principles behind offering financial support to the community leaders on your continuous improvement team.

Sample Guidelines

- All compensation provided to parent leaders is taxable, but taxes are not taken out of each check. You are encouraged to set aside money from each check to account for the taxes you may owe when tax season arrives.
- Honorarium reimbursement is generally available to parent leaders for CQI-related business. It is paid at a rate of \$X/hour or \$X/day, with total time calculated based on meeting preparation time, actual meeting time, and travel time to and from the meeting. Honorarium reimbursements are taxable; you will need to report these earnings on your income taxes. Additionally, if you receive services from government programs that are based on income eligibility, you need to report the amount of your compensation to your caseworker within 10 days of receipt of the honorarium reimbursement.
- Child care reimbursement is generally available to parent leaders for improvement events in which a parent is participating. Actual child care expenses, up to a maximum of \$X/day, will be reimbursed by _____ (add name). If your child care expenses will exceed the \$X/day limit, contact _____ (add name, phone number, and email address) prior to the event to request an exception.
- Travel reimbursement is generally available to parent leaders for their participation in improvement-related business activities. (Travel reimbursement for special meetings and events must have prior approval by _____ [add name and email address].) Expenses will be reimbursed either (1) at approved government rates or (2) for actual costs (lodging, tolls, parking, other transportation, registration, etc.).
- You can search the per diem lodging, meal and incidentals breakdown in your state here: <https://www.gsa.gov/travel/plan-book/per-diem-rates>.



Meeting time and location

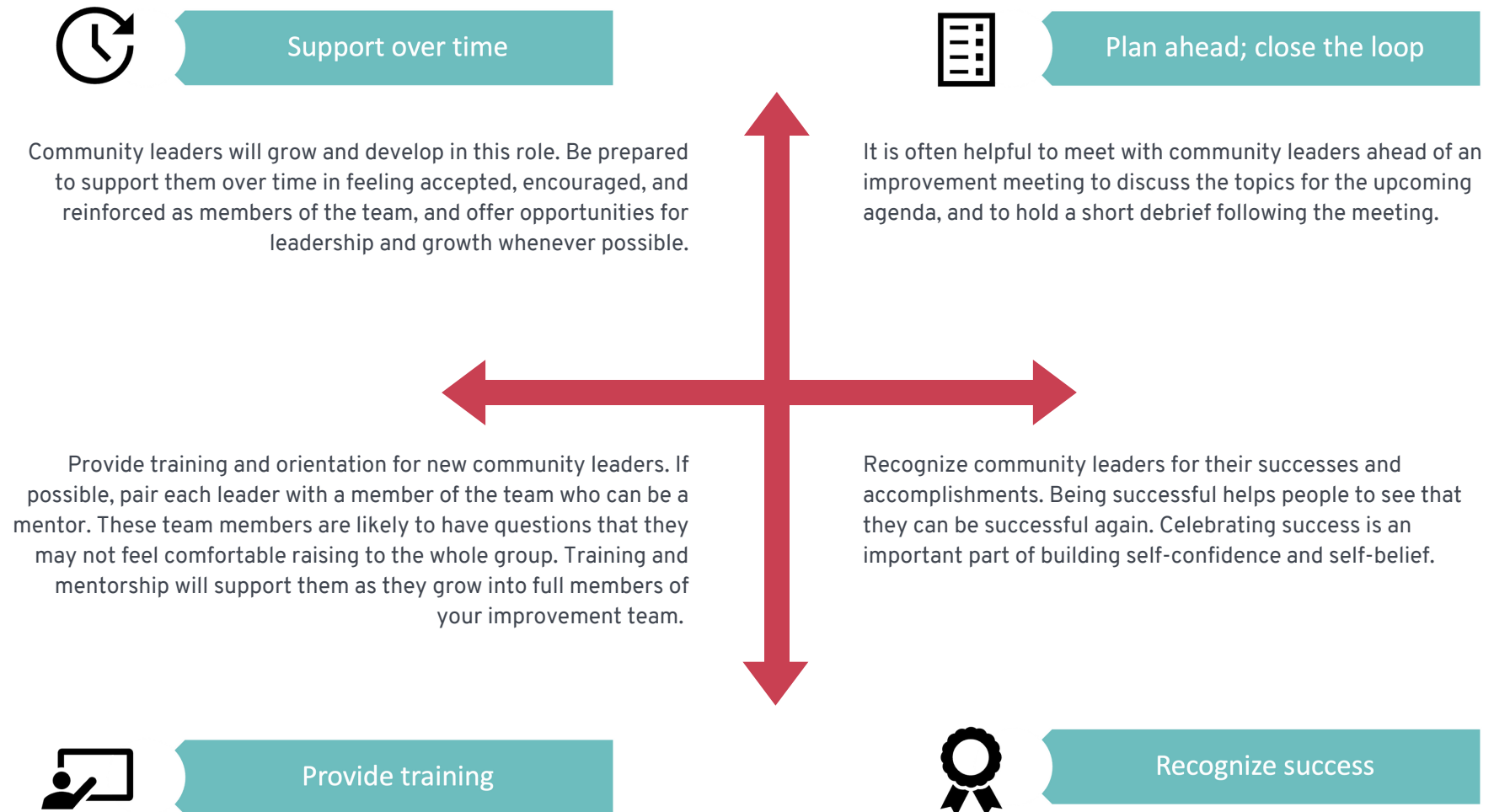
Meet at a time and in a location that best fits your community's needs but can still work for the professional staff members. While virtual meeting options may not build relationships as quickly as in-person meetings, this can make frequent meetings more feasible for off-site team members.



More than one community leader

Recruit a bench! Typically, having one community member leader join your team doesn't work in the long run. Your odds will increase if you have at least two community leaders on your team.

Partnership Policies





Collaborate

Distribute leadership, create equal opportunities for partners to lead, sustain authentic partnerships.

Application

Why

To identify interest in partnering with your improvement team

What

These questions provide you with a script and potential content that you can adapt in different ways to reach out to prospective leaders.

Keep in mind that the leaders may not always be the obvious choices due to inequitable opportunities to hold and access to leadership positions in other areas. Take care to give all applicants a fair opportunity and look for skills/strengths outside of the typical (and usually inequity-based) criteria.

Sample Application - Education

Thank you for expressing interest in being a (student/family/caregiver) leader on our improvement team. (Student/family/caregiver) leaders bring a valuable perspective. Your ideas, experience and expertise will help shape every step of our work to improve [include here your improvement team's primary aim/mission], from setting priorities to assessing the impact of our efforts and identifying potential new changes.

Student, family and caregiver leaders will increase our capacity to improve outcomes for students in several ways:

- Collaborating in designing and testing innovations to improve outcomes for students
- Communicating with the community to ensure that students, family and caregiver perspectives are appreciated and will be incorporated into improvement efforts.
- Facilitating outreach and education to students, families and caregivers to increase their involvement in improving outcomes for all students.

Application

Please answer a few questions so we can understand more about your interest in participating on our improvement team as a student (family/caregiver) leader:

Tell us about any experience (paid or unpaid) you have in being a leader on a team.

Give an example of something in your educational/professional/volunteer/community experience that represented an improvement for you and/or others. Why was it an improvement?

Tell us about a time in your educational/professional /volunteer/community experience that you discovered an opportunity for improvement (for example, in a class, with a school/district policy in your community, etc.).

What motivates you to want to join our improvement team?

Give an example of a time when you worked within a group or own your own to solve a problem within an organization or in your community.

Do you see any challenges or barriers to partnering with our team that we should address in advance?

What days of the week are best for you to work with our team?

What times during the week are best for you to have a two-hour meeting with our team?

Contact Information

Name:

Address:

Phone:

Email::

Goal Setting

Why

To center your team on the priorities for coproduction in your improvement work.

What

This process is an opportunity for an improvement team to pause and reflect with all team members on what they believe are the key priorities for developing and sustaining coproduction in improvement.

How

1. Identify the key benefits of leadership in improvement that are important to your system.
2. Use the list of benefits to identify the top two or three team goals for and write a goal statement for each as well as actions necessary to meet the goal.

Example - Education

Benefits of Student & Family Leadership

To the CI Team:

- Understand the complexity of the issues being addressed and identify solutions that can be tested and help accelerate change
- Bring an additional and important perspective to the work
- Help build neighborhood and community connections
- Ensure that materials and messages resonate with students and families
- Support the team in the testing process and help the team study the results

To Students & Families:

- Gain a better understanding of the system
- Being heard and contributing to building a better system that aligns with their values
- Become advocates in their community and ensure that community perspectives are represented in systems improvement
- Learn new skills
- Develop relationships with other team members and build their sense of community
- Provide a critical feedback loop



Goal Setting

	Goals	Actions to meet this goal
Short-Term (right away)		
Medium-Term (6 months)		
Long-Term (1 year)		

Action Plan

Why

Creating a shared action plan ensures that all team members are on the same page regarding the goals for community leadership.

What

An action plan is an opportunity to put your goals into action. It can also help to surface underlying assumptions about the timeline, resources needed, and individuals responsible for moving the work forward. Complete this worksheet for each goal your team identified during the Goal Setting exercise.

How

	GOAL	SPECIFIC STRATEGIES OR ACTIVITIES TO ACHIEVE THIS GOAL	TIMELINE RESOURCES NEEDED	MEASURES OF SUCCESS	PERSON(S) RESPONSIBLE
1					
2					
3					
4					

Equity Intention

An equity intention refers to a way of analyzing the adverse impact of systems on different groups of stakeholders, especially those who have been historically marginalized, to identify and remove obstacles.

At Shift, applying an equity commitment is one practice within our broader commitment to empowering communities and working toward systemic justice. In the improvement process, truly seeing the system can only be achieved with intentional examination of structural elements that result in disparity and how they may impact people differently.

As your team probes the systems that you seek to improve, we encourage you to set goals with a reflection and commitment as to which intention each person will hold to:

- Notice and recognize bias and inequity
- Inquire and seek to understand the experience of those close to the issue you seek to improve
- Use the learning to act
- Facilitate justice by identifying opportunities to avoid recreating inequities

Peer Support Networks

Why

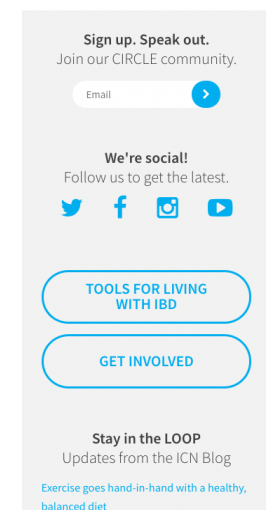
A dedicated support network allows common groups to share strategies and successes, combine knowledge from multiple areas, and ultimately improve their work.

What

Peer support networks are effective because people learn best when they can compare their own experiences and work to what others are doing in a respectful, trusting environment. Community leaders crave opportunities to learn from their peers, both within and across communities. It encourages sharing what is or is not working well in a way that supports the development of new ideas and strategies. Instead of getting stuck on problems that need to be fixed, network members work together to easily and quickly develop options for action.

Example - Healthcare

The Patient Advisory Council (PAC) is a group of young (14 +), passionate and motivated patients with Crohn's disease and ulcerative colitis (also known as Inflammatory Bowel Disease, or IBD). Together, the PAC is a voice for all patients receiving care at ImproveCareNow Centers. PAC members contribute to research studies and the development of health care innovations; they share valuable experience and insights with healthcare professionals, researchers and others; and they raise awareness of IBD and ImproveCareNow. In this post, PAC members have answered questions they are frequently asked, about what the PAC is, how to connect patients with the PAC and how to support the PAC in reaching their goals.



Partnership Assessment

Why

To assess how well a team is partnering with the community in their continuous improvement work.

What

The Partnership Assessment allows people with professional expertise and those with lived experience expertise to compare their different perspectives about team functioning and to focus their ongoing efforts to strengthen the partnership. The idea is not to look for any single person to blame, but rather to identify any actual or potential misalignment between these different groups. Teams can use the results to discuss changes or growth as well as areas for strengthening. Strategies can be integrated into a plan or ongoing dialogue within team meetings.

How

<u>People with Professionals Expertise</u>	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>	<u>People with Lived Experience Expertise</u>
Do I believe that people with lived experience bring unique expertise to our relationship?					Do I feel respected for the unique expertise I bring to our relationship?
Do I believe in the importance of participation by people with lived experience expertise in decision-making at the program and policy levels?					Do I feel supported and encouraged to participate in decision-making at the program and policy levels?
Do I believe that people with lived experience perspectives and opinions are as important as those of professional expertise?					Do I feel like my perspectives and opinions are considered as important as those with professional expertise?
Do I believe that people with lived experience bring a critical element to the team that no one else can provide?					Do I feel like I bring a critical element to the team that no one else can provide?
Do I consistently let others know that I value the insights of people with lived experience?					Do I feel confident sharing my insights and the insights of others with lived experience?

Stay In Touch!



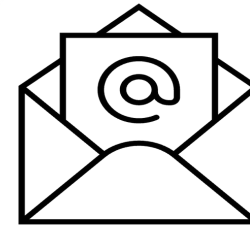
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Acknowledgements

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- The Institute for Healthcare Improvement
- CatalystEd
- Cincinnati Children's Hospital Medical Center
- Home Visiting Collaborative Improvement and Innovation Network
- Facilitating Power
- Improvement Networks for Equity
- Impact Strategy Group

Part of our own improvement journey is inviting feedback on what we put into the world - how it is working for you, how it isn't, and what we can do to improve it. If you have thoughts to share on this toolkit, visit <https://www.surveymonkey.com/r/Feedback4Shift>. Thank you!