Equity Action Lab Planning Worksheet
Version 2.0 - August 2020
For: [insert team/community name]

<mark>**Please Make a Copy of This Worksheet Before Editing it**</mark>

A. Picking a Topic Area

A topic area is a broad domain of health equity that you'd like to work on over the course of your Equity Action Lab. If the Equity Action Lab were a college degree, your topic area would be your major. Examples from past Action Labs that we've worked on include: veteran homelessness, unemployment, better use of community space, increasing food security, better maternal health outcomes, reducing 911 calls for non-emergency needs transportation and public safety. Here are some tips and guiding questions.

1. Take a look at documents that outline your priorities. These can be formal plans, theories of change (such as Driver Diagrams), report recommendations, etc. Which topics in these documents do you think you might like to spend some time working on in an intensive, targeted way?
2. As you've been working over the past several months, what specific disparities/inequities have you uncovered? Who is most affected by these disparities? Which of these might be a good fit for some targeted planning and action?

Use this space to brainstorm some ideas for potential topic areas.

B. Equity Action Lab Planning Timeline

You can use the simple chart below to determine when specific milestones in preparing for your Action Lab (AL) should be completed. The first row (Action Lab) is the date you plan to launch your in-person or virtual AL. The rest of the milestones work back from that date. This example illustrates how to plan an Equity Action Lab in 9 weeks but can be customized based on the time you have. Remember – it is important to get to "action" as soon as feasible because successfully tackling adaptive challenges (like your topic area) require testing and iteration.

Task/Milestone	Days/Weeks before AL	Date
Action Lab (in-person or virtual)	0 days	
Topic Area for AL selected	At least 9 weeks in advance of AL	
Date/Location for AL set	At least 8 weeks in advance of AL	
Invites Out to Leadership Team Members	At least 8 weeks in advance of AL	
Leadership Team First Meeting	At least 6 weeks in advance of AL	
Invites out to Design Team Members	At least 6 weeks in advance of AL	
Invites to AL sent out to others	At least 5 weeks in advance of AL	
Begin gathering additional background data	At least 5 weeks in advance of AL	
Leadership Team and Design Team draft high-level agenda	At least 4 weeks in advance of AL	
Draft Aim Templates completed	At least 3 weeks in advance of AL	

Finish gathering background data	**At least 2 weeks in advance of AL**	
Draft slide-deck for AL completed	**At least 2 weeks in advance of AL**	
Final Slide deck, presenters and facilitators locked down	**At least 1 week in advance of AL**	

C. Picking Your Leadership Team

More than likely, you'll want the members of your organization to serve on either your Leadership Team, or your Design Team, or both! The Leadership team should include high level community leaders with knowledge and expertise in the topic area, who might be able to change policy, make resources available, or otherwise clear the path for the Design Team. The Leadership team should include people with lived experience, especially those who have strong relationships within the community. Additional Members of the leadership team might include representatives from government agencies at the local, state or federal levels, executive directors of local non-profits, or others you feel could respond to the needs and requests of the Design Team.

It's important to note that the Leadership Team does <u>not</u> guide, direct, or administer the work of the initiative. They can have any level of day-to-day involvement with the Design Team (there might even be some overlap between the teams), but their main job is to support, encourage, and clear the path so that the Design Team can test solutions, and do what it takes to achieve the aim. Don't pick Leadership Team members for political or optical reasons. Pick them because you feel they'll support the initiative and serve the Design Team to the best of their abilities. Use the table below to start planning and add additional rows as needed.

D. Picking Your Design Team

The Design Team is responsible for guiding the day-to-day work of the Equity Action Lab. More specifically, the Design Team will be responsible for:
- Leading the Action Planning during the Action Lab (Phase 2).
- Leading the day-to-day work during the Sprint Phase
    - May lead or co-lead a "track" of the work during the spring phase
- Requesting assistance of the Leadership Team as needed during the Sprint Phase to remove barriers.
- Tracking progress during the Sprint Phase.
- Preparing for the Momentum lab.
- Presenting at the Momentum Lab (phase).

Design Team members generally need to be able to commit to 3-4 hours a week of work throughout the Sprint Phase. Design Team members are often "closer to the work" than the Leadership Team members and should always include some "front line" staff and people with lived experience of the topic area (e.g. if your Equity Action Lab selects better maternal outcomes as its topic area, pregnant women and women who recently gave birth should be part of your design team). It is also important to focus on Equity, by asking the question "Who isn't doing well (or doing the least well) in our selected topic area?" and finding people that represent the groups/sub-populations you've identified to be members of your design team.

Equity Action Lab Relational Strategies for Potential Leadership Team and Design Team Members

Person/Org.	Potential Role (Leadership Team and/or Design Team)	Potential Value for the Equity Action Lab	WIFM Analysis (What is in it for Them?)	Next Steps to bring this person to the table (including Who will conduct outreach)

E. Planning Your First Leadership and Design Team Meeting

Your first Leadership Team meeting is your opportunity to demonstrate that Equity Action Labs are different than traditional planning and that they have been designed to address adaptive (complex) health equity challenges. Below is a sample agenda for this first meeting. Feel free to modify this for your unique context.
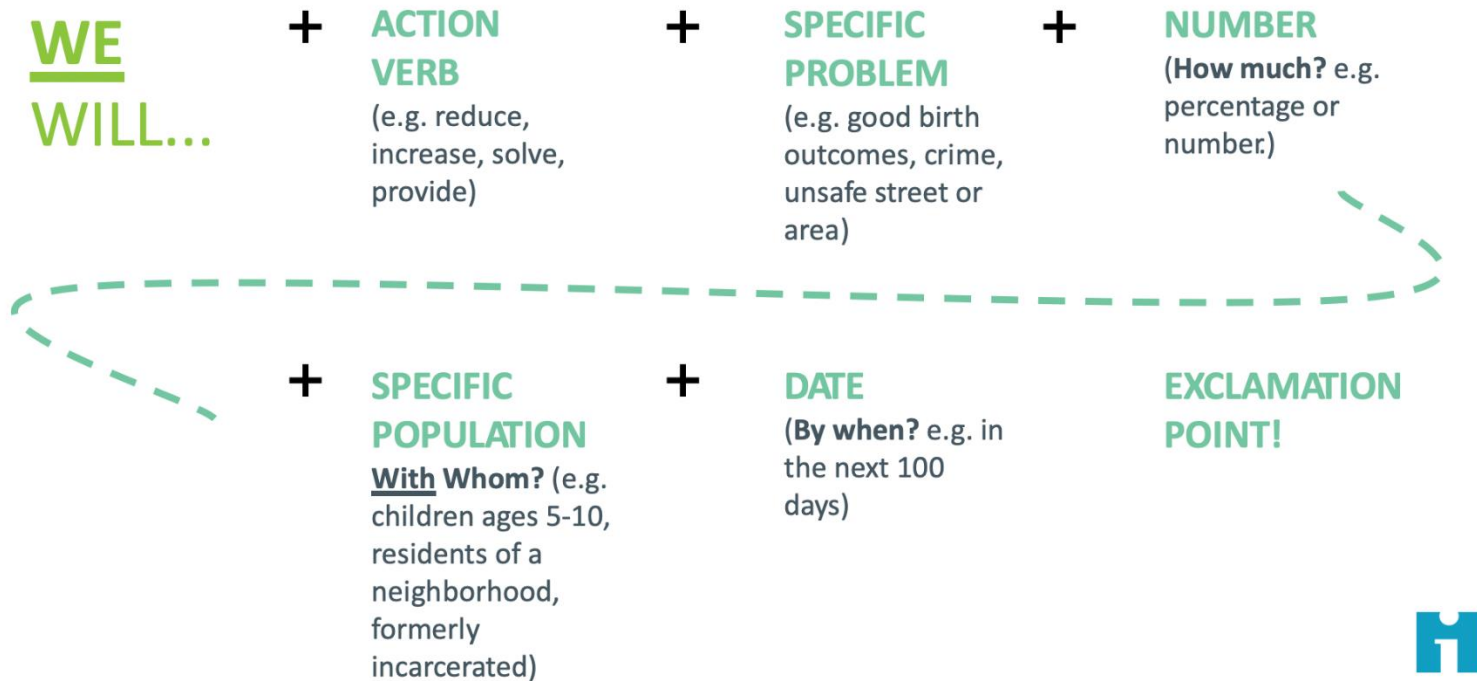
Sample First Leadership Team Meeting Agenda

1) Introduction and Icebreaker - 10 minutes

2) Orientation to Equity Action Lab Model - 30 minutes
    a) Addressing equity and "getting to action" through your Equity Action Lab
    b) Ensuring meaningful roles for people with lived experience and front-line staff in your Equity Action Lab
    c) The 4 Phases of an Equity Action Lab
    d) Leadership Team and Design Team
    e) Topic Area (Introducing the Topic Area for your Equity Action Lab)
    f) Questions?

3) Explanation of the role of the Leadership Team and Design Team - 10 minutes
    a) Leadership Team is not there to direct or guide the work, but to support the work, and clear the path so that the Design Team has freedom to experiment, test solutions, and do the work necessary to achieve the goal.

4) Crafting an Aim Template - 45 minutes
    a) What specific indicators could we focus on related to the topic area that we've chosen.
    b) How can we turn this into a "how much, by when, for whom," goal?

5) Identifying additional stakeholders to bring to the table- 15 minutes

6) Next Steps Data Collection, and Outreach and Invites to Equity Action Lab Participants- 45 minutes

F. Developing Draft Aim Templates

Based on your long-term Aim for this topic area and where you are currently at in this work (just beginning – working on this together for many years), what might be some potential aim templates (think "Mad-Libs") for this topic area?

Try to develop 2-3 draft aim templates for your topic area. Don't worry about getting it exactly right. You will be able to continue refining these templates right through to your Equity Action Lab. The important thing is to develop a few Aim Templates that your team might feel energized to work together on. One or more of these Aim Templates can be used at your Equity Action Lab as participants set their Aim.

Components of a Strong Aim Statement

WE WILL... + **ACTION VERB** (e.g. reduce, increase, solve, provide) + **SPECIFIC PROBLEM** (e.g. good birth outcomes, crime, unsafe street or area) + **NUMBER** (**How much?** e.g. percentage or number.)

+ **SPECIFIC POPULATION** **With** **Whom?** (e.g. children ages 5-10, residents of a neighborhood, formerly incarcerated) + **DATE** (**By when?** e.g. in the next 100 days) **EXCLAMATION POINT!**

DRAFT Aim Templates (include 2-3 potential Aim Templates here):

G. Making a Plan for Data Collection

What are some things that you need to know in order to set an ambitious aim related to your topic area? Think of this information in two categories: 1) existing data that you need to track down, 2) data that you need to collect.

For data that you need to track down:

Curating Existing Data		
Data Source	**Information Requested**	**Person Responsible for Making the Ask**

For data that you need to collect:

Who are your end users? An end user is anyone who would interact with the solutions that you might test and implement. Pay special attention to those with lived experience in your topic area. Also think of those who would be providing or administering the solutions. For each end user, what do you want to learn from them? For each end user, what methods might you use to answer these questions? A challenge: try to think of methods other than surveys or focus groups. What are some fun, creative ways that you could collect information that would give you a detailed picture of the lives and personal contexts of your end users?

Collecting Additional Data		
End User	**Questions that we want to answer**	**Method(s)**

H. Drafting Equity Action Lab Norms (finalized during the Action Lab)

To help ensure that you build psychological safety for Equity Action Lab participants and have an environment where people with lived experience and front- line staff can play an equal role in co-design and co-production, it is critical to set some norms for how you will work together. Pre-existing group norms such as the Touchstones for Collaboration or Habits of the Heart (both available at http://www.couragerenewal.org/) offer a great foundation to get you started and Action Lab participants can add their own. Use the space below to brainstorm ideas for team norms and to discuss how you will practice/model these norms for your Equity Action Lab.

Ideas for Norms

Ideas for How We Will Practice/Use These Norms

I. Drafting Your Action Lab Agenda

While every Action Lab is unique, they generally follow the following general framework:

- Introductions, icebreakers
- Call to Action (why tackling your topic area is so important)
- Overview of the Equity Action Lab Model
- Setting Our Aim
- Understanding Our System(s) – one or more exercises to come to a better understanding of the system(s) involved
- Developing a Theory of Change (often in the form of a Driver Diagram) to meet our aim
- Developing ideas (related to the theory of change) to meet our aim
- Selecting a narrow number of highest leverage ideas to test during the Sprint Phase
- Action Planning (developing iterative work plans, planning first tests, and deciding team logistics during the Sprint Phase).

Here is a generic Action Lab Agenda for a 2-day in-person event.   How might your agenda look? What might you change or improve on for your purposes?

Use the space below to put down your ideas.

J. Planning Weekly Meetings (Sprint Phase)

Perhaps the biggest determinant of success of your Equity Action Lab is the extent to which you have weekly meetings throughout the Sprint Phase. Teams that meet weekly (virtually or in-person), provide updates on their progress, lift up barriers to success and plan their next week activities always make progress toward achieving their Equity Action Lab aim.   These meetings are attended by Design Team members (and others, as they are able), generally last an hour for the first few weeks but can often be done in 30 minutes after week four.

The Spring Weekly Meetings generally follow the following template:
  – 5 minutes – settling in and icebreaker
  – 45 minutes - Review Action Plan - For each task / strategy represented on the Action Plan:
      – Is it working? (Is it moving us forward?)
      – How do you know?
      – What should we do next? (e.g., try again, move onto the next step, replicate this strategy, try something new, ask for resources from the Leadership Team, etc.)
  – 10 minutes - Confirm next steps, confirm date of next Team Meeting

Use the space below to note your ideas about the following:
  • How will you increase the likelihood that your team(s) will meet weekly during the Sprint Phrase?
  • How and where will you document your work so that all team members can see and add to it?
  • What will you do if some participants aren't able to routinely attend weekly meetings?

K. Planning Your Mid-Point Meeting (Sprint Phase)

Approximately halfway through your Sprint Phase (e.g., Day 50 of a 100-day Spring Phrase) the Mid-Point Meeting is a crucial activity to celebrate success, reinvigorate the effort and remove barriers to success. The Mid-Point Meeting includes Design Team Members and Leadership Team members.

The Mid-Point Meeting generally following the following template:
– 10 minutes – Introductions and icebreaker
– 10 minutes - Review aim and Driver Diagram
– 10 minutes - Successes and Accomplishments so far
– 10 minutes - Struggles and Barriers
– 10 minutes - Asks for the Leadership Team
– 10 minutes - Confirm Next Steps

Use the space below to note your ideas about the following:
- How will you increase the likelihood that all members of the Leadership Team will participate in the Mid-Point Meeting?
- How and where will you document and present your successes, accomplishments, struggles and barriers?
- How will you use this meeting to reinvigorate the work and/or accelerate the effort moving forward?

L. Planning Your Momentum Lab

As the name suggested, the Momentum Lab is a crucial part of the Equity Action Lab and is instrumental as you work to grow and sustain your efforts on your chosen topic area. No two Momentum Labs are the same, but they generally follow the following high-level agenda:
- 30 minutes - Introductions / Icebreaker
- 60 minutes - Presentation on the work accomplished during the Sprint Phase
    - Successes and Barriers
    - Lessons learned (failing forward)
- 90 minutes - Sustain and Improve
    - What gains do you want to sustain?
    - What aspects of the new systems you created do you want to improve?
- LUNCH
- 60 minutes - Setting the aim for your next Sprint cycle (or otherwise growing and sustaining the work_
- 60 minutes - Developing and selecting new ideas to test
- 60 minutes - Action planning for your next cycle
- 30 minutes - Wrap up and celebration!

The Equity Action Lab Guide provides framing and considerations for 4 scenarios:
- The team(s) achieved (or exceeded) their Equity Action Lab aim
- The team(s) came close to achieving their Equity Action Lab aim
- The team(s) made some measurable progress but didn't achieve their Equity Action Lab aim
- The team(s) didn't make any measurable progress during the Sprint Phase.

Use the space on the following page to write down your ideas for your Momentum Lab, including answering the following questions:
- Which of the 4 scenarios is closest to your experience?
- Do you want to go through another process of setting a short-term aim, selecting new ideas to test and action planning?
    - If yes, how can you improve on your Equity Action Lab?
    - If no, How will you increase the likelihood that these efforts are sustainable and that you increase your impact/reach?
- How will you make your momentum lab a joyous, celebratory experience?
- Who else should you invite to the Momentum Lab?

Momentum Lab Ideas