Welcome back!

Please sit with new people—not your team!

Community Health Improvement Leadership Academy – Day 2

OC health CARE AGENCY

EQUITY IN OC

#EquityinOC #EquityinOurCommunities

Supervisor Doug Chaffee

Orange County Board of Supervisors

Forces of Change Posters

Karin Kalk & Sharon Boles

HCA Office of Project Management & Quality Improvement

Access Yesterday's Slides

#EquityinOC #EquityinOurCommunities

What we'll accomplish today

- Practice testing an idea before you commit to it
- Two rounds of choose-your-own-adventure workshops
- Go deep in collaborative problem-solving mode

Waiting for an EiOC Community Bingo Winner

When you complete your Bingo card, take it to a OPHE or IHI team member to claim your prize!

Today's Schedule

#EquityinOC #EquityinOurCommunities

So, you have an idea… Now what? Let's test it!

Niñon Lewis | Wednesday, May 17, 2023

ochealth CARE AGENCY

Session objectives

Learn about the difference between changes and *testing* changes

Practice rapid-cycle PDSA testing

Understand how theory and prediction help your learning

Demonstrate how to collect real-time data

Deliver on the promise of a life-changing game mentioned in the CHILA 3 reminder email

The #1 job of an improver is to get curious.

The 5 Key Principles for Improvement

Knowing why you need to improve.

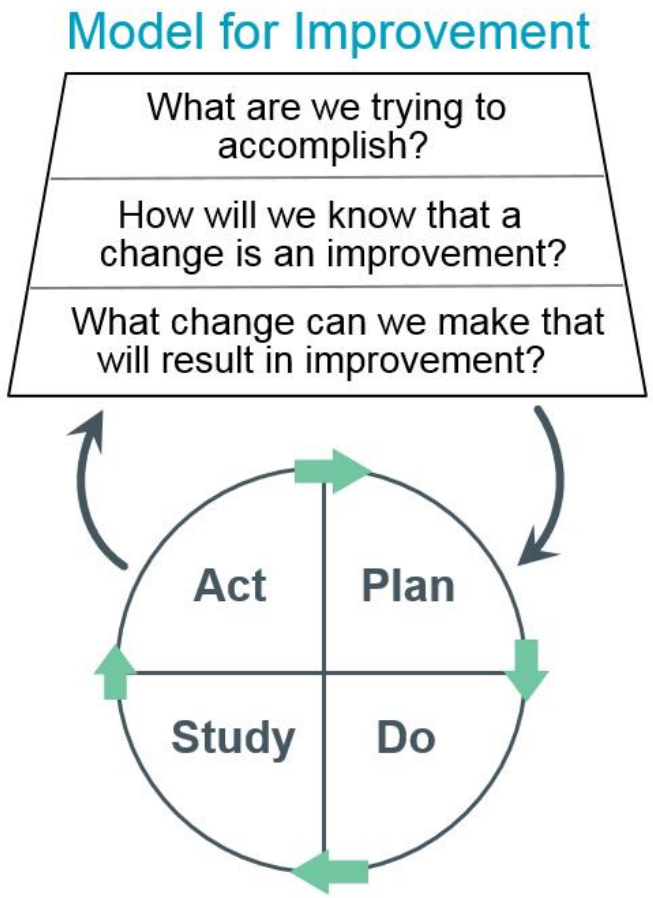
Having a feedback mechanism to know if improvement is happening.

Developing an effective change that will result in improvement.

Testing a change before attempting to implement.

Knowing when and how to make the change permanent.

Institute for Healthcare Improvement



The thinking part

- Setting aims
- Tracking progress toward your goals
- Developing a change to the system to try out in the work

The doing part

Trying out our ideas to see if they lead to improvement…

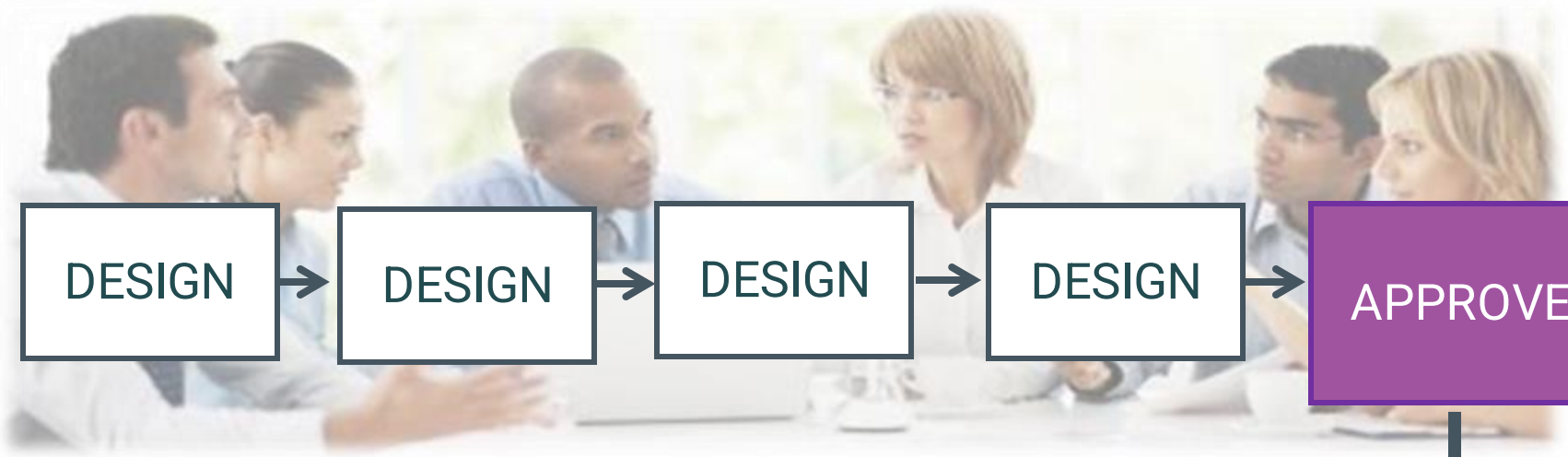
The Model for Improvement was developed by Associates in Process Improvement. [Source: Langley GL, Moen R, Nolan KM, Nolan TW, Norman CL, Provost LP. The Improvement Guide: A Practical Approach to Enhancing Organizational Performance (2nd edition). San Francisco: Jossey-Bass Publishers; 2009.]

Why do we try out our ideas in practice?

Because all improvement will require change, but not all change will result in improvement.

The Typical Approach…

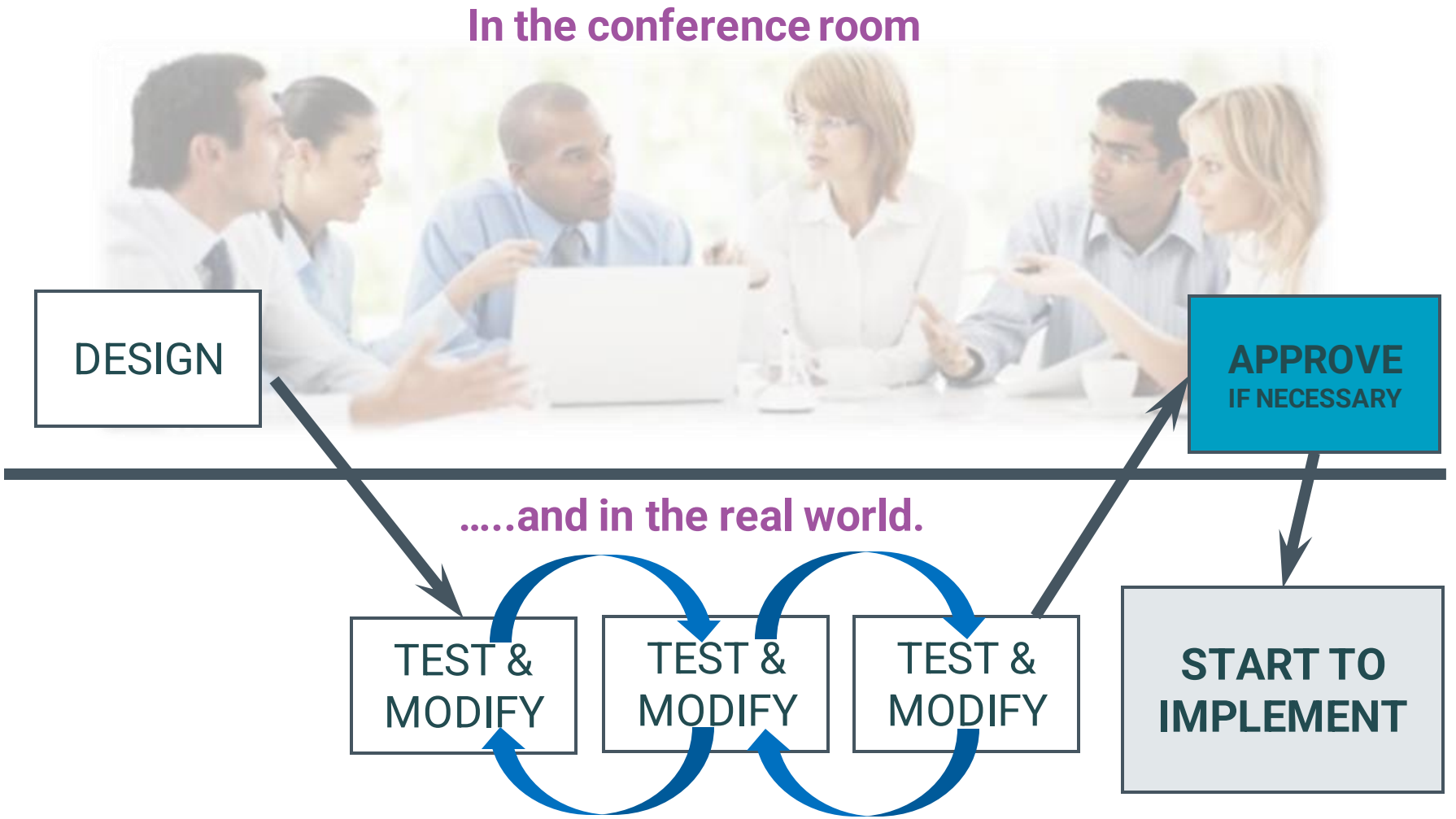
In the conference room



…..and in the real world.

IMPLEMENT

The Quality Improvement Approach



Reactive vs. Fundamental change

Reactive Change (First order change)	Fundamental Change (Second order change)
• Return the system or process to prior condition • Keep the system running • Solve problems or react	• Creates a new system (process, product or service) • Alters how work gets done (process) and what people do (behavior) • Necessary for improvement beyond problems • Changes the system in a visible, measurable way

Source: The Improvement Guide, Chapter 6, p. 111 - 116

Reactive vs. Fundamental change

Fundamental Change
(Second order change)

- Creates a new system (process, product or service)
- Alters how work gets done (process) and what people do (behavior)
- Necessary for improvement beyond problems
- Changes the system in a visible, measurable way

Source: The Improvement Guide, Chapter 6, p. 111 - 116

Reactive Change

More flyers

More training

More resources

More rules

More audits

Finding failures and removing them

Fundamental Change

Process redesign

Altering approach to be more person-centered

Standardization

Hardwiring changes

Changing boundaries of the system

Ideas for improvement?

WHERE CAN WE FIND THEM?

Literature

Evidence

Experience

Successful organizations or practitioners that have solved the problem

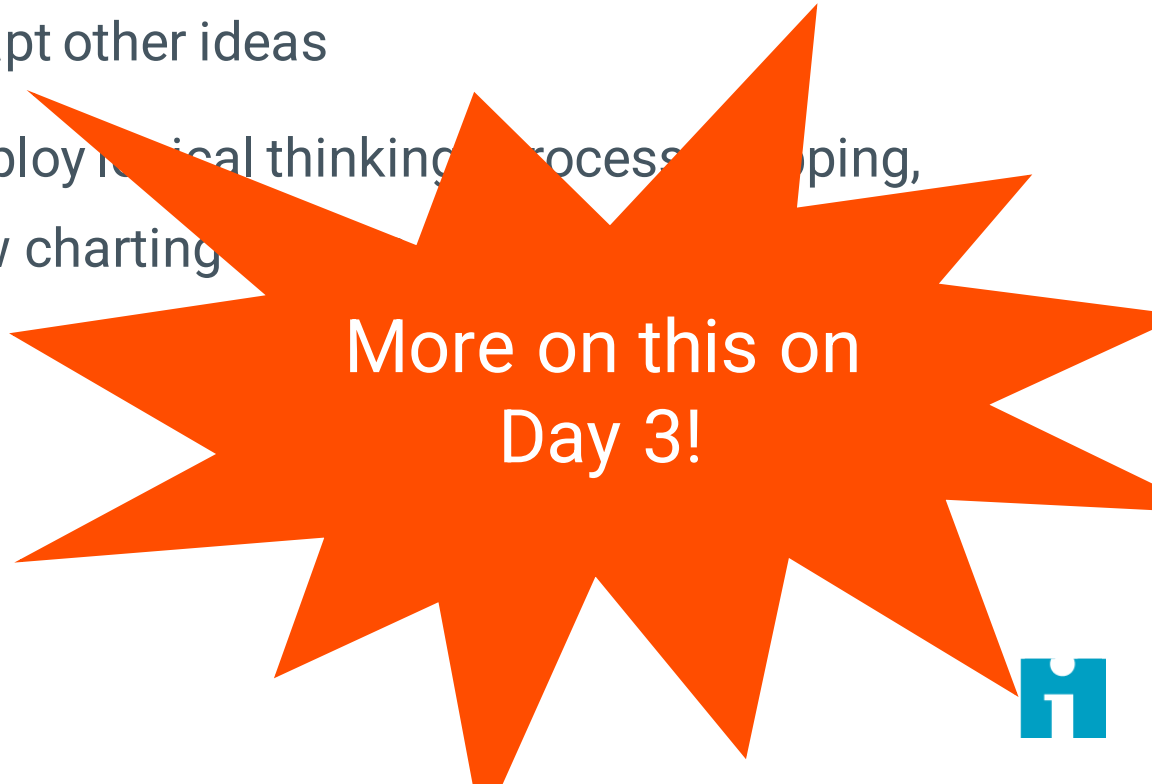
Analogous Observation- places where similar problems have been solved

WHAT IF WE CAN'T FIND THEM?

Tap into creativity

Adapt other ideas

Employ l ical thinking roces ping, flow charting

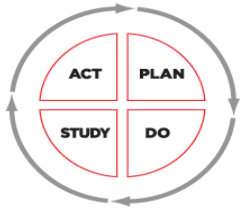


But…a change is different than a test of a change…

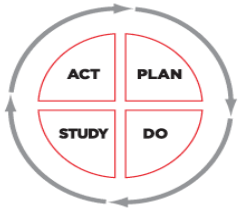
A Change vs. a Test of Change

Change: Placing a salad bar in a cafeteria

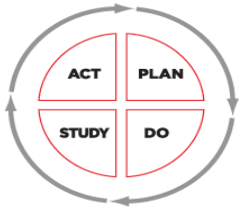
Placement of bar near entrance



Plan a classroom competition of salad consumption



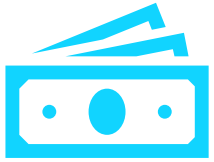
Recruiting students to be initial testers



Awareness signs around school

Placement of salad bar in front of less healthy foods

Why test out your changes?



Use resources wisely

Learn more from doing than planning

Learn about the change:
Cost, How much improvement,
Side effects

Reduce resistance to change

Source: Improvement Guide, 2009, Chapter 7, p. 142

P Please

D Do

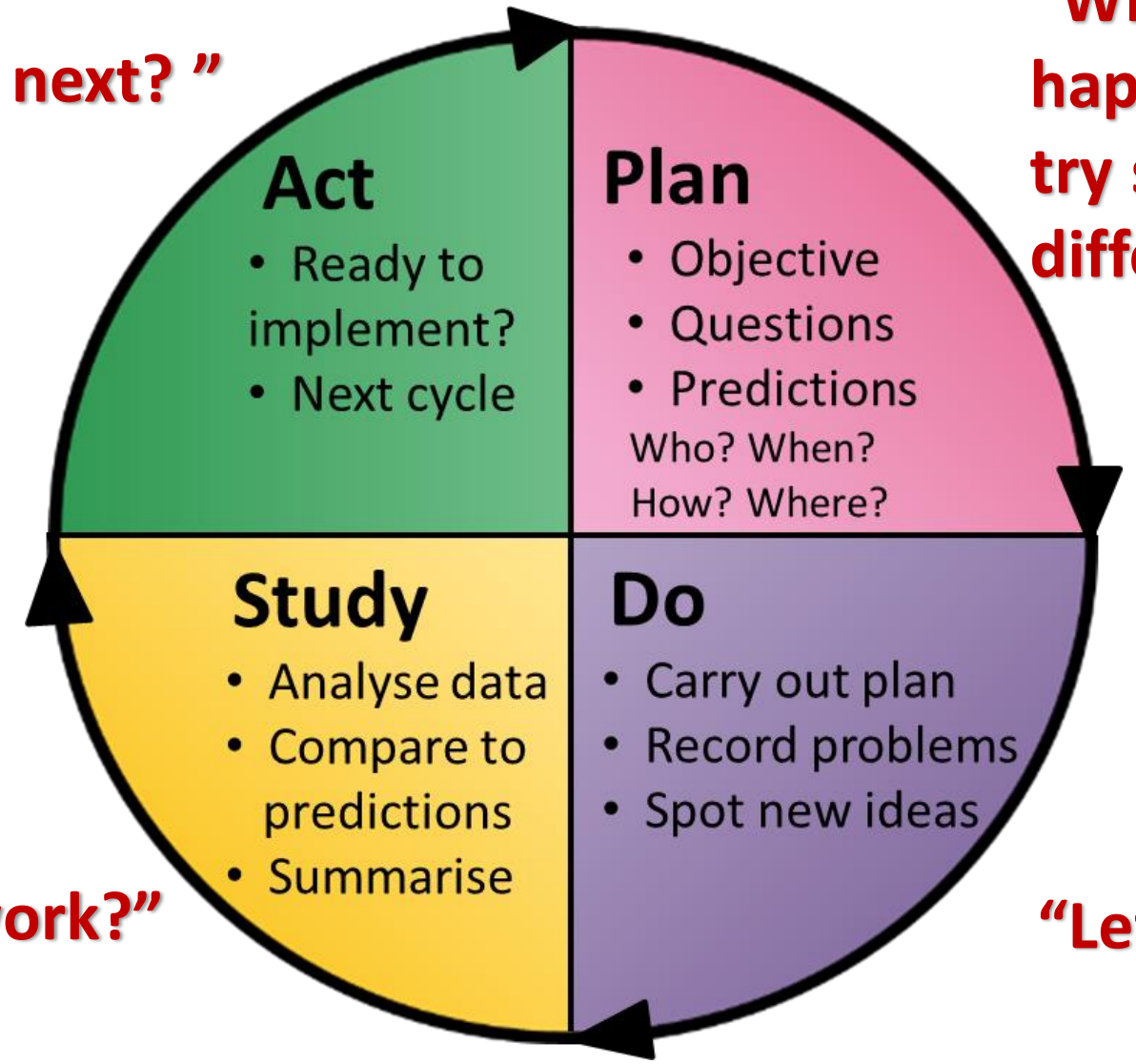
S Something

A Anything!

Plan – Do – Study – Act

You actually do PDSAs every day!

→ Do → Study → Act → Plan → Do → Study → Act



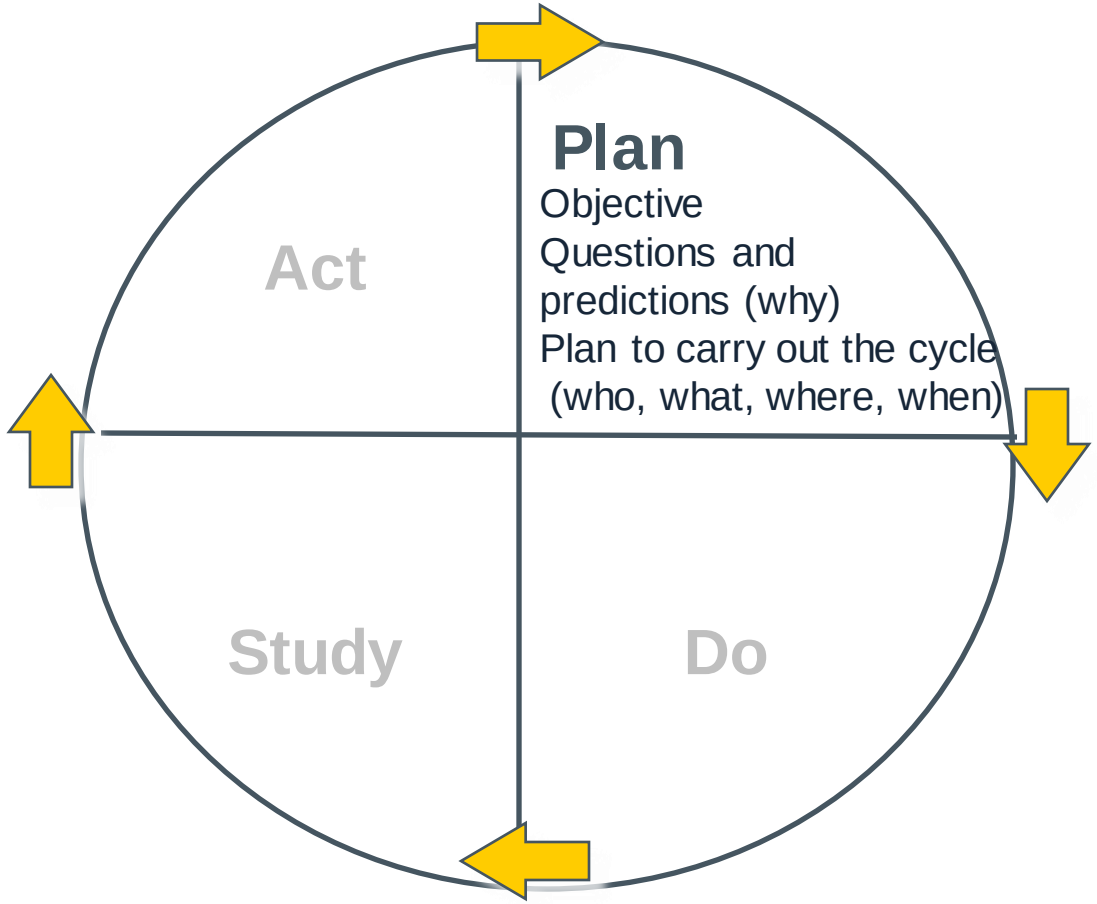
"What's next? "

"What will happen if we try something different?"

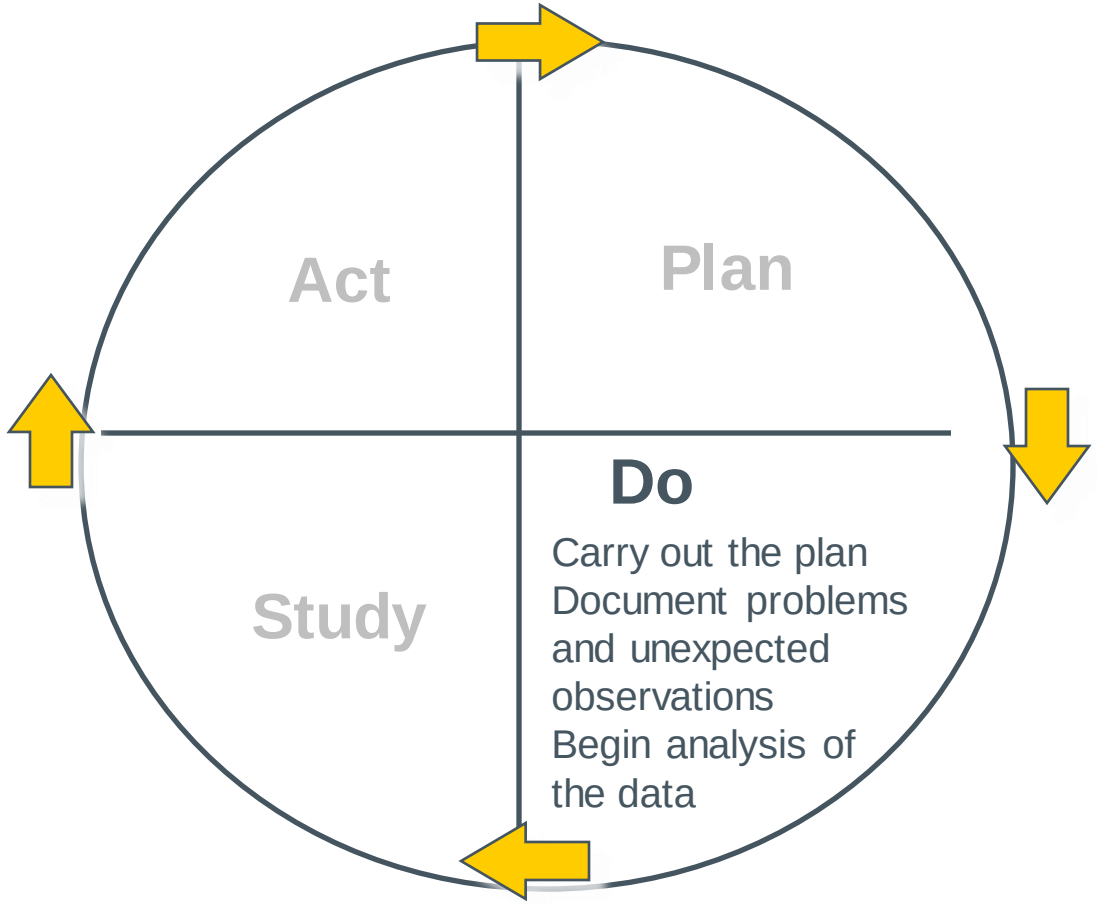
"Did it work?"

"Let's try it…"

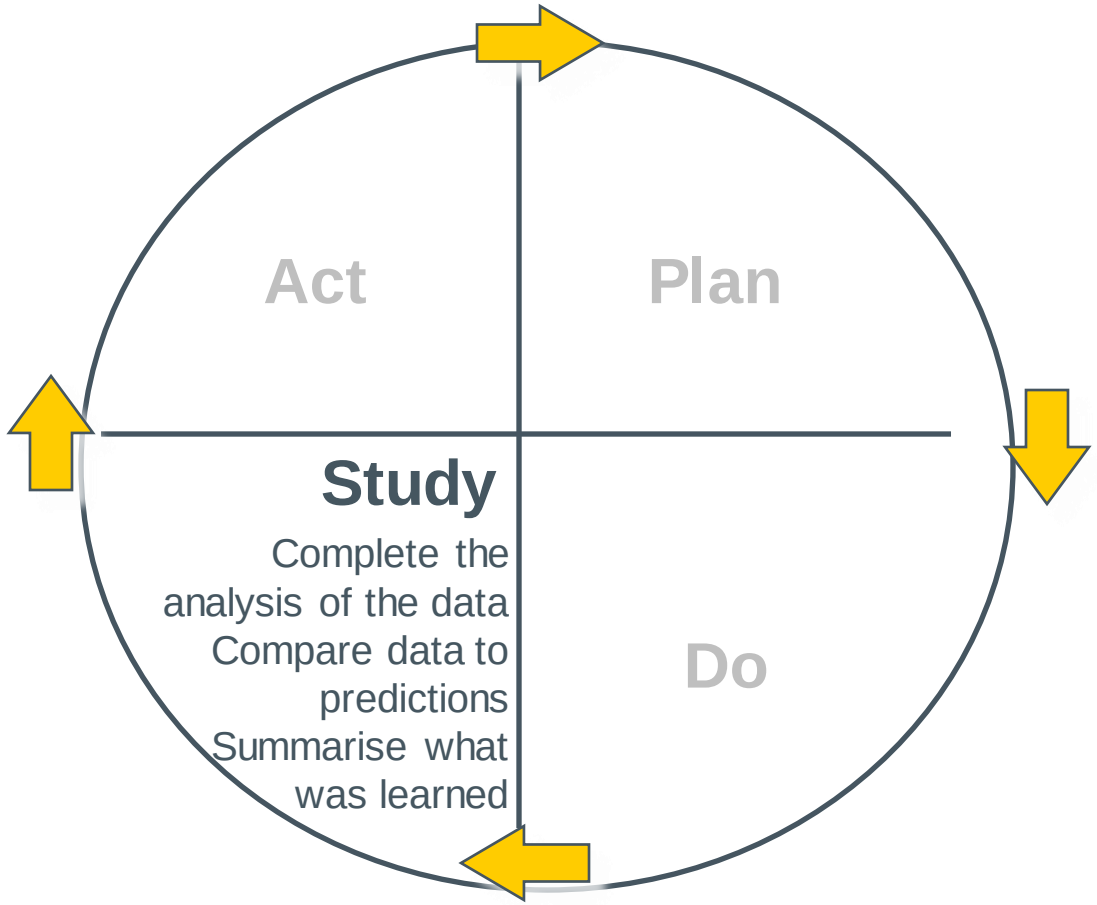
Plan, Do, Study, Act Cycle



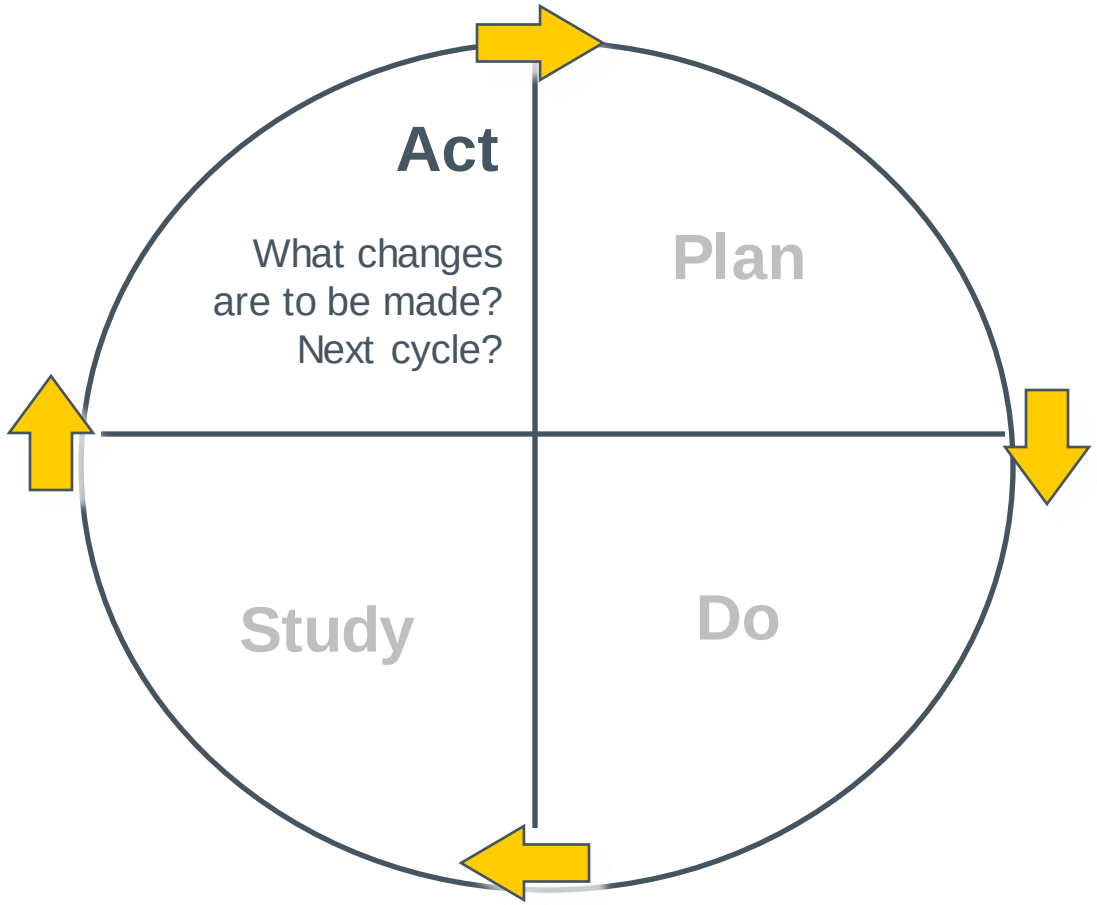
Plan, **Do,** Study, Act Cycle



Plan, Do, **Study**, Act Cycle



Plan, Do, Study, **Act** Cycle



On the basis of what is learned from any cycle, a change might be:

Implemented as is (adopt)

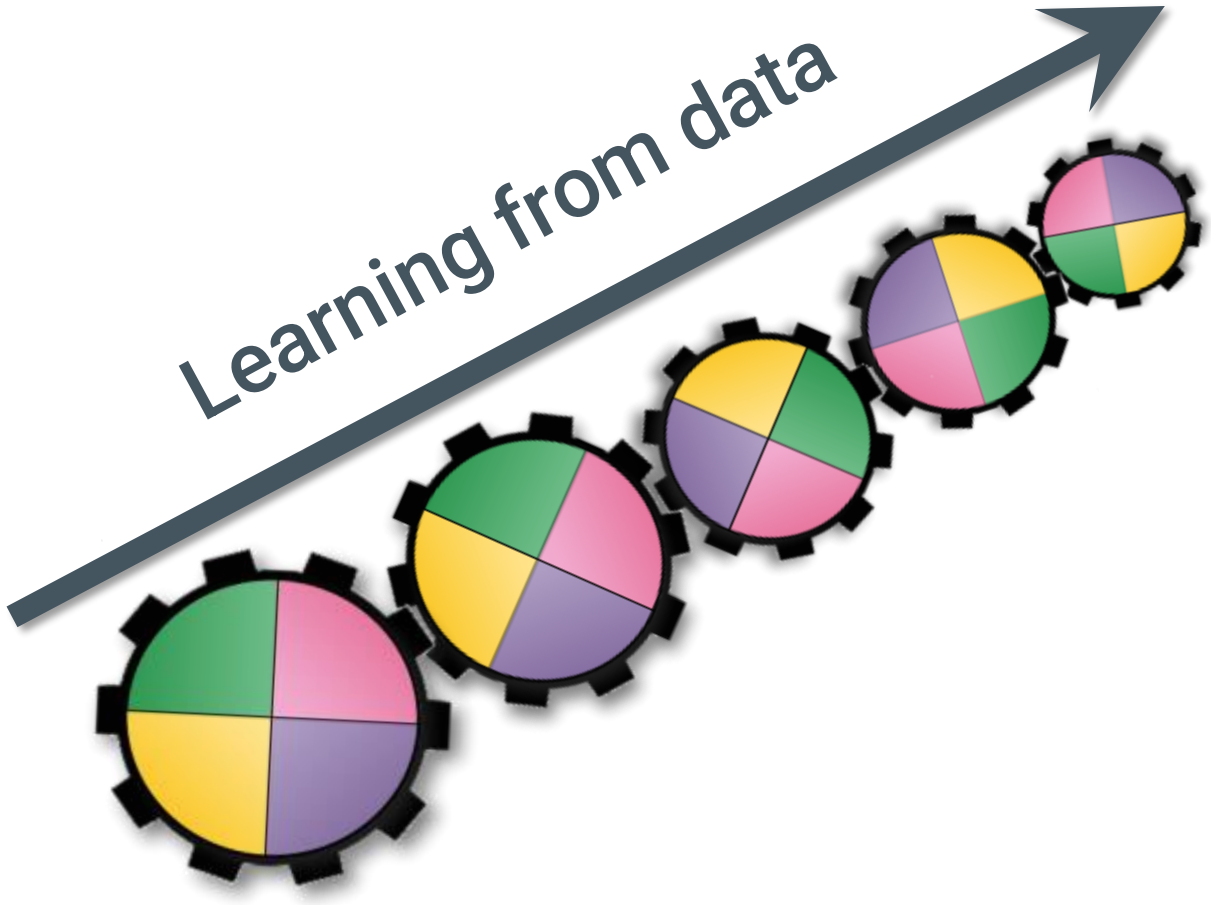
Dropped (abandon)

Modified (adapt)

Increased in scope (expand)

Test under other conditions

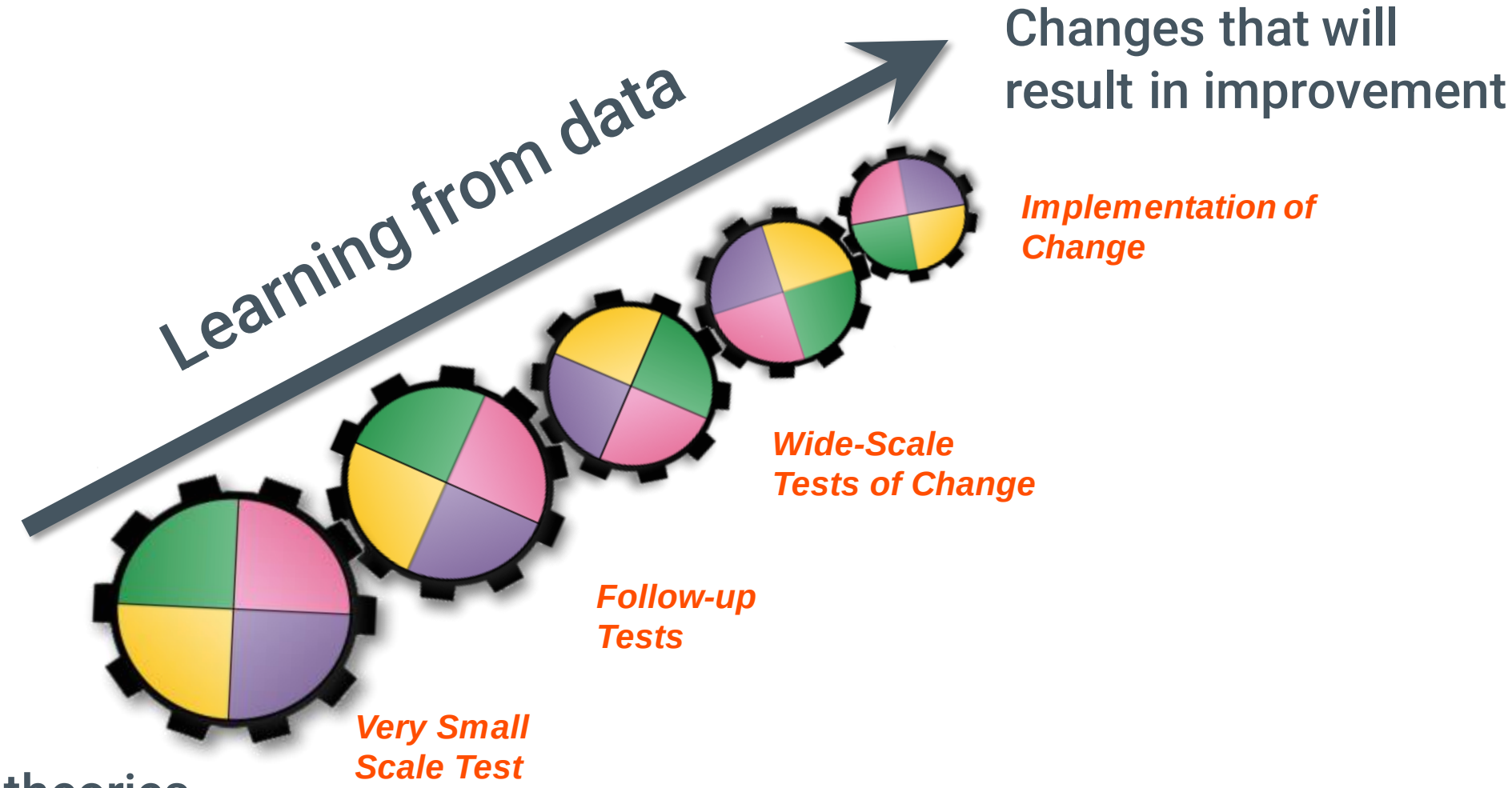
Cycles of Tests Build Knowledge and Confidence



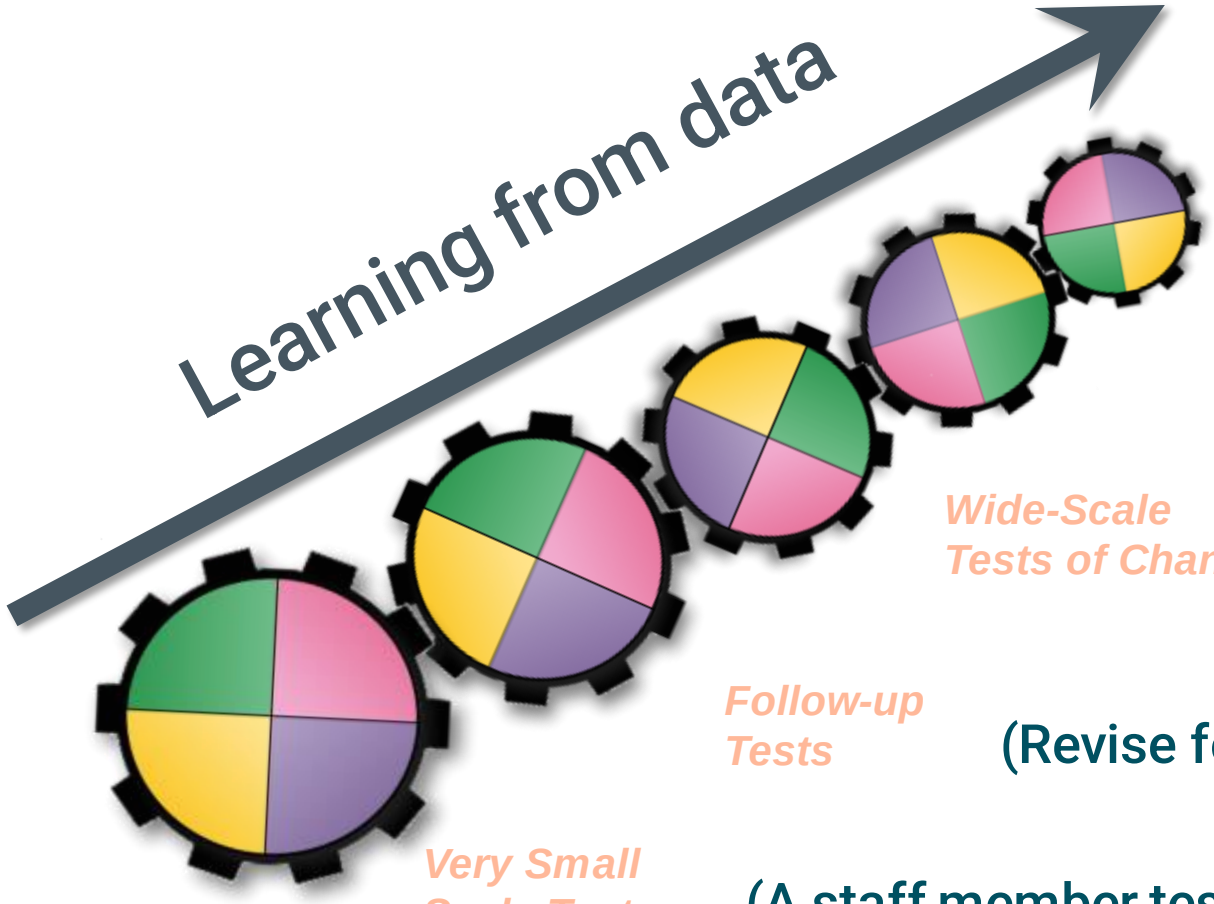
Changes that will result in improvement

Proposals, theories, hunches, intuition

Cycles of Tests Build Knowledge and Confidence



Cycles of Tests Build Knowledge and Confidence



Implementation of Change

Wide-Scale Tests of Change

(Form tested by additional staff members with clients)

Follow-up Tests

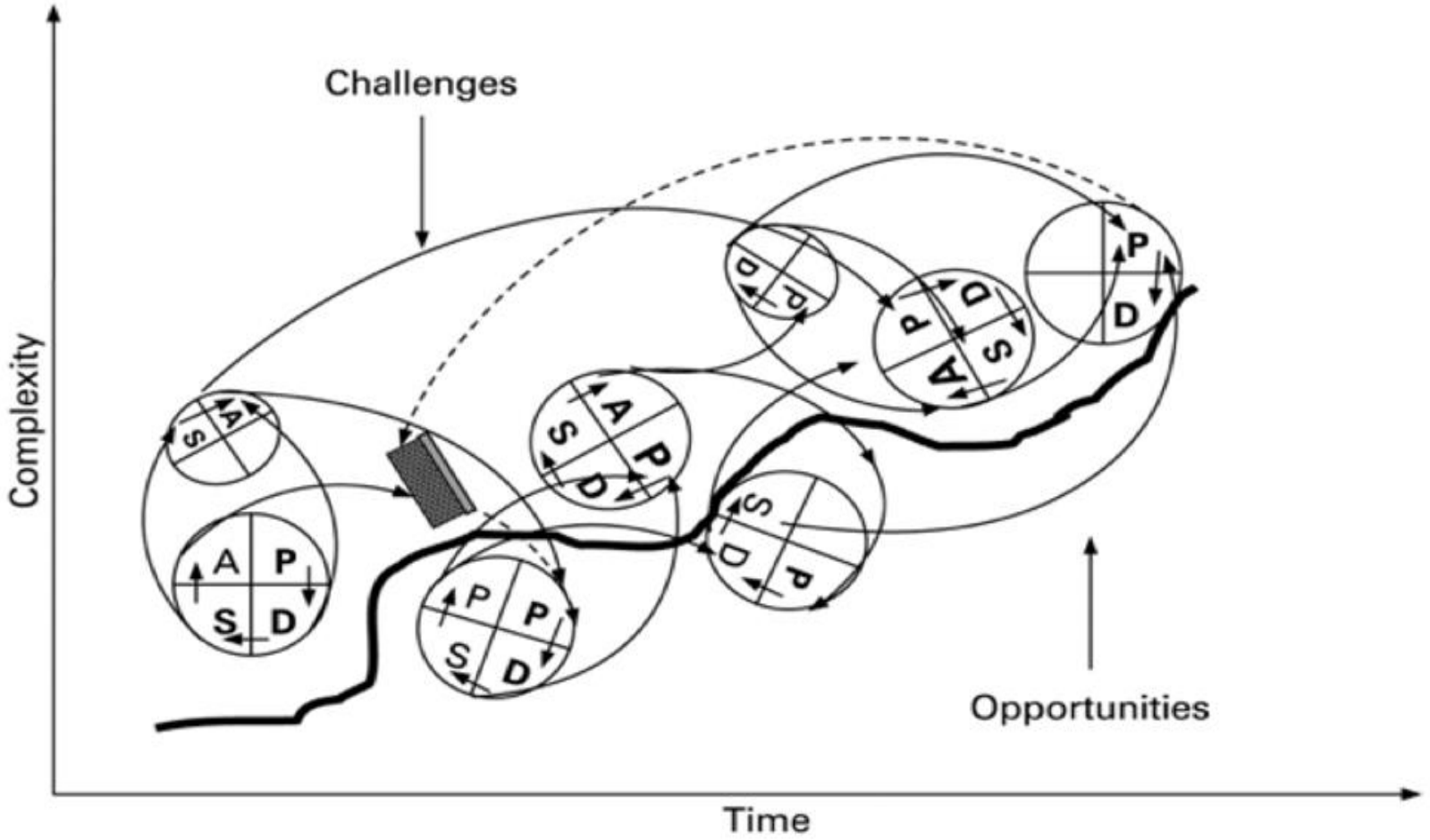
(Revise form and test with next 5 clients)

Very Small Scale Test

(A staff member tests new enrollment form with 5 clients)

The world always looks better in PowerPoint.

Early PDSA tests (adopt, adapt, abandon)



Source: A case study of translating ACGME, to a comprehensive curriculum improvement projects as the key component requirements into reality: systems quality practice-based learning and improvement, A M Tomolo, R H Lawrence and D C Aron, *Qual Saf Health Care*2009 18: 217-224

Guidance for Testing a Change

A test of change should answer a specific question!

A test of change requires a theory and a prediction!

Test on a small scale and collect data over time.

Build knowledge sequentially with multiple PDSA cycles for each change idea.

Include a wide range of conditions in the sequence of tests.

Don't confuse a task with a test!

Activity ≠ Change

Is *NOT* a change:

(but may be a necessary preliminary task however)

- Planning
- Having a meeting
- Educating staff
- Creating a protocol
- Assigning responsibility

Is a change:

Use a new form

Run a case conferencing meeting

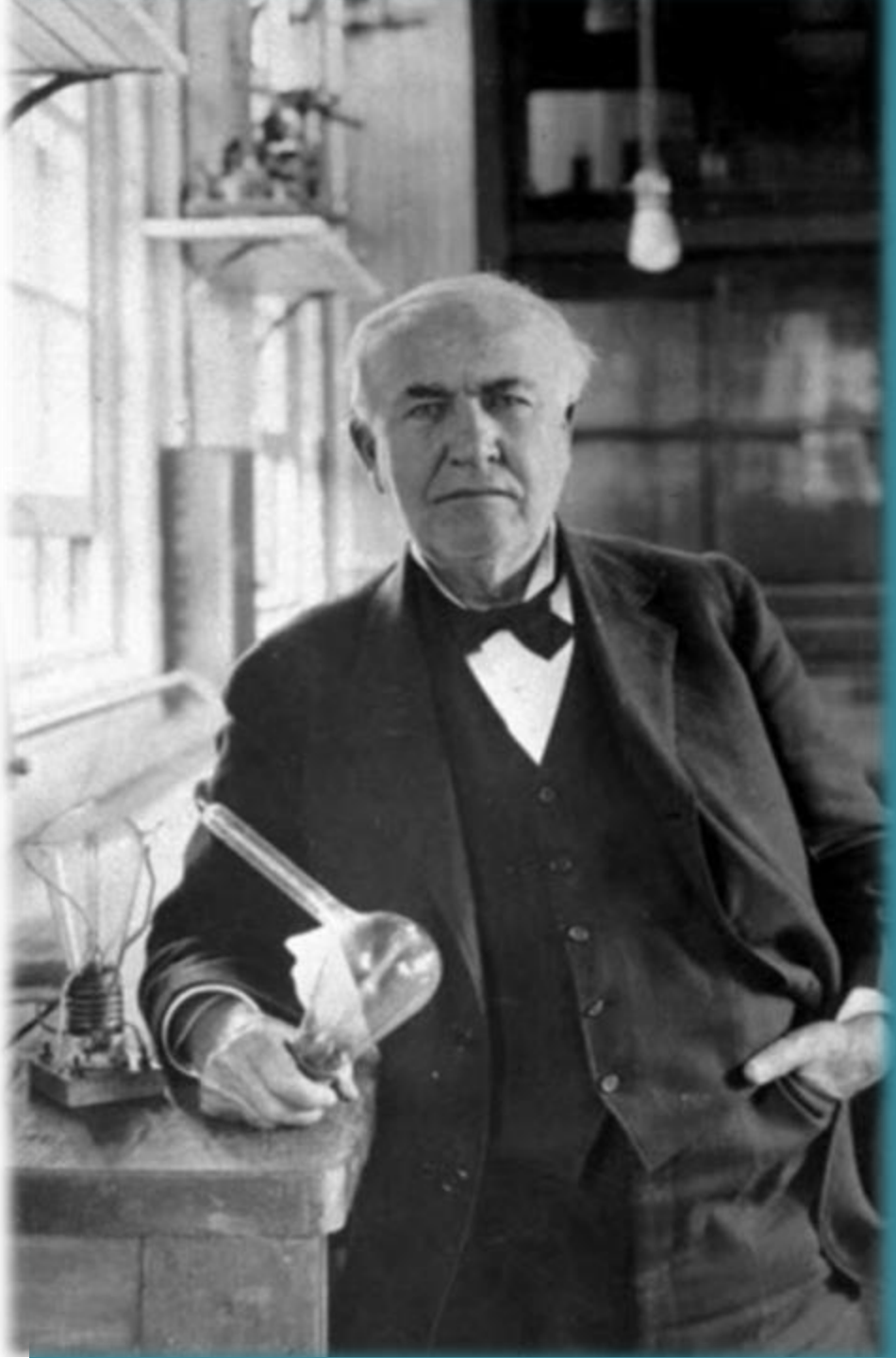
Use the form on the next 10 cases

New outreach process

For each change idea, you should have an explicit prediction of how it will impact the outcome.

To Be Considered a Real Test…

- ❑ The test was planned, including a plan for collecting qualitative or quantitative data.
- ❑ The plan was carried out and the data were collected.
- ❑ Time was set aside to analyze the data and study the results.
- ❑ Action was based on what was learned.



“I did not fail one thousand times; I have found one thousand ways that won’t work.”

Thomas Edison

Tips

Focus on learning and build on that learning with each test

Your prediction and theory are key to your learning

Honor the documentation

Consider team dynamics

Harness creativity

You do not need consensus to run a PDSA

Avoid analysis paralysis

But where is the game?

They said there would be a game.

Aim: Test to spin a U.S. coin for the longest amount of time in 15 minutes

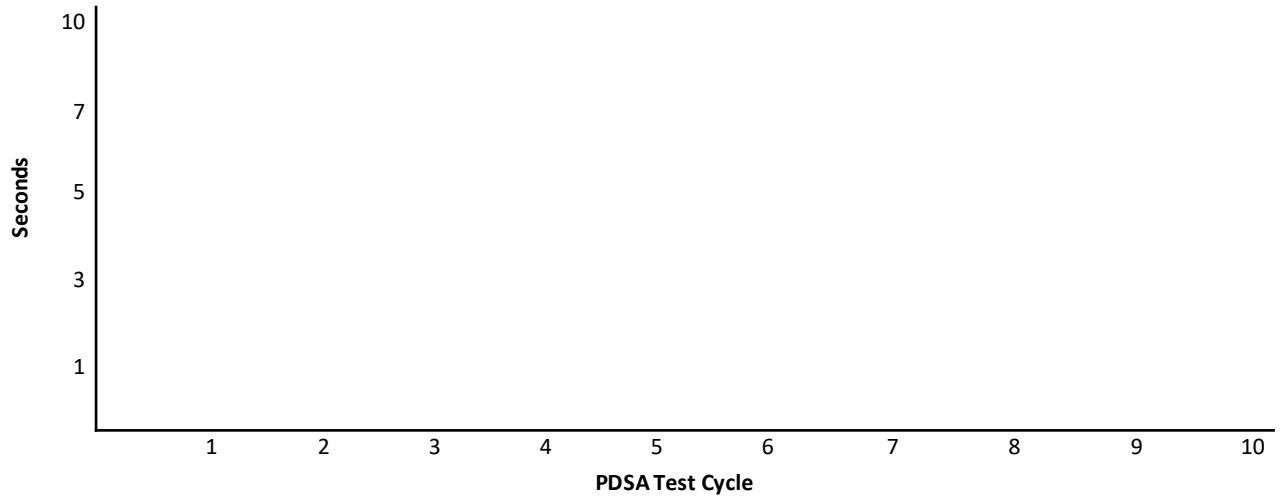
Test: Best technique, best surface, best conditions.

- Appoint a spinner
- Appoint a timekeeper (use the stopwatch on your phone)
- Appoint a recorder
- Document PDSAs on worksheet
- Plot the time of each spin onto the run chart
- Complete 10 cycles or more!

PDSA Tracker

#	Plan		Do	Study	Act
#	What questions? Theories?	Prediction	What do you see? How Long?	How did what you see match prediction?	What now? Adopt, adopt, abandon?
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

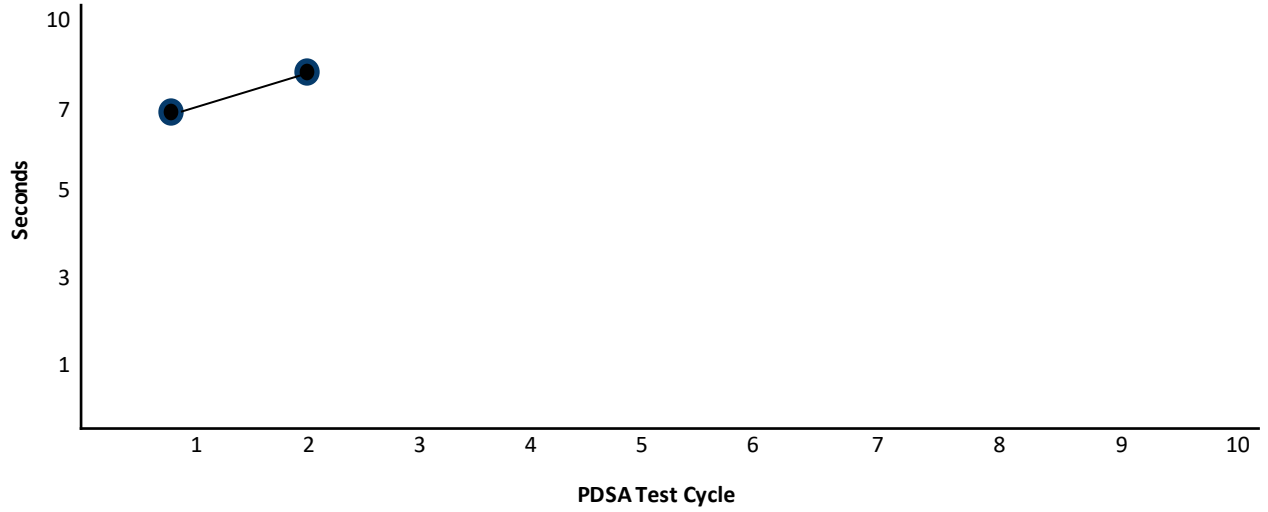
Data Collection on a Run Chart



PDSA Tracker

#	Plan		Do	Study	Act
#	What questions? Theories?	Prediction	What do you see? How Long?	How did what you see match prediction?	What now? Adopt, adopt, abandon?
1	Large coins last longer	Nickle = 10 seconds	Started to wobble. Time = 7	No, Three seconds short. Large Size/weight	Adapt - Test Quarter
2	Bigger quarter will spin longer	Quarter = 10 seconds	Started to lose spin fast. Time = 8	Two seconds short. Size may be more important	Adapt?
3					
4					
5					
6					
7					
8					
9					
10					

Data Collection on a Run Chart

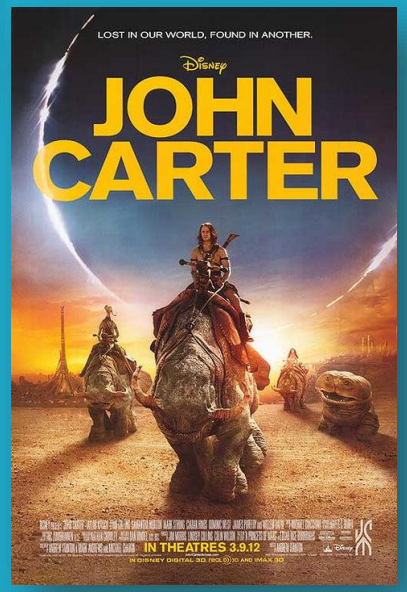


Let’s debrief.

PDSAs – KEY POINTS

- Cannot be too small
- One PDSA will almost always lead to another
- Help you to be thorough & systematic
- Help you learn from your work
- Can produce rapid results

But what if my test fails?



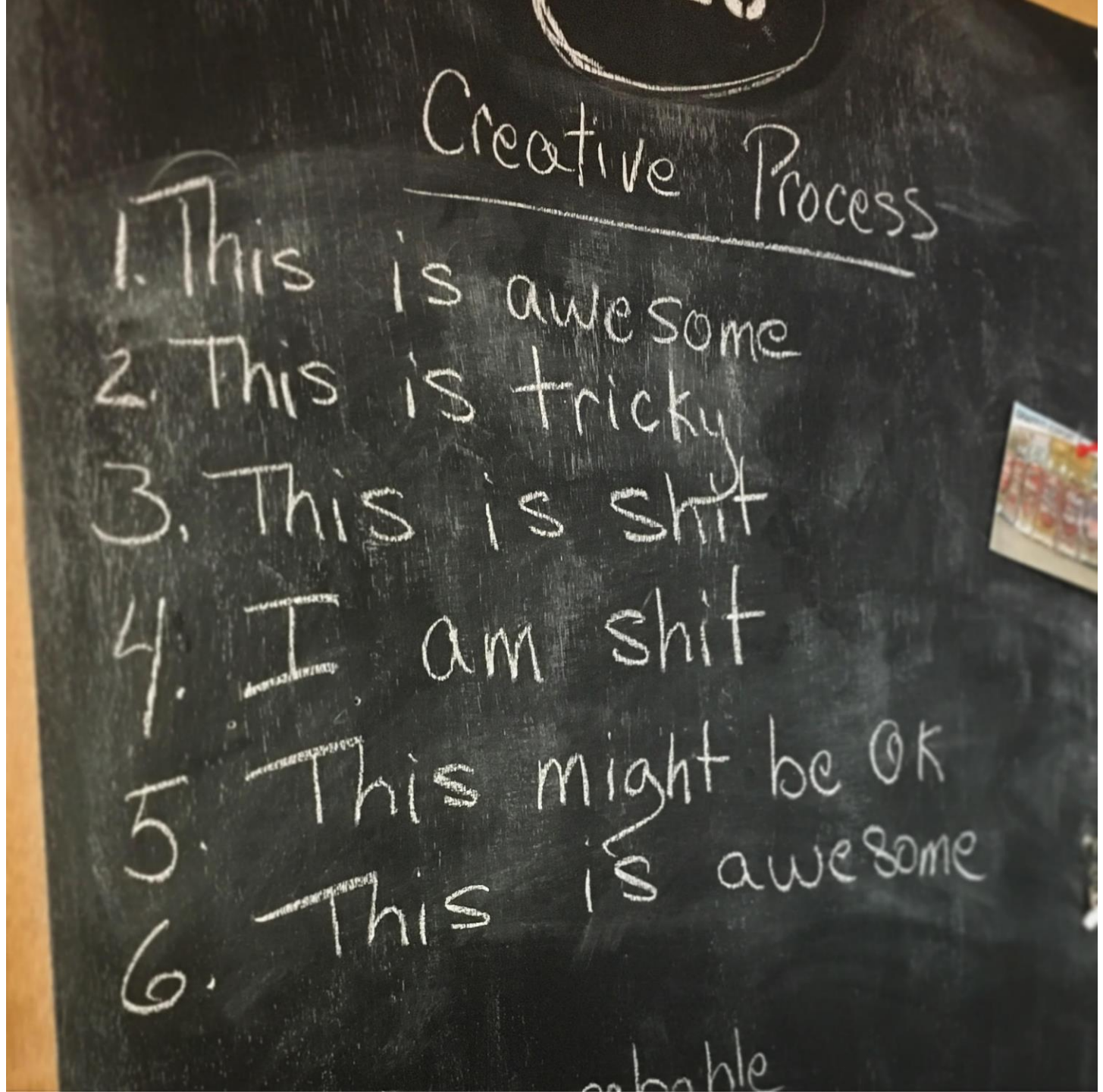
Failed Test…Now What?

Be sure to distinguish the reason:

- Change was not executed
- Change was executed, but not effective

If the prediction was wrong – not a failure!

- Change was executed but did not result in improvement
- Local improvement did not impact the secondary driver or outcome
- In either case, we've improved our understanding of the system!


Creative Process
1. This is awesome
2. This is tricky
3. This is shit
4. I am shit
5. This might be OK
6. This is awesome

It took 40 attempts to create WD-40

The 40th time was the charm for the blue canister that boasts more than 2,000 uses.

In 1953, chemist Norm Larsen finally created on his 40th try, a formula to stop corrosion by displacing moisture (hence the name “Water Displacement , 40th attempt).

Embracing Failing Forward

Characteristic	Failing	Failing Forward
Motto	Get it Right the First Time	Test hypothesis, fail (quickly) and improve
World View	Solving Problems is liking baking bread	Solving Problems is like raising a child
Beginning Premise	If we plan enough, we can get it right	We can figure it out over time if we have a way to test hypothesis and improve
Implementation Protocol	Follow implementation Plan	Test hypothesis, iterate as needed, chart new course if called for
Use of Data	Data used to report on past activities	Data used to test assumptions, guide current activities and inform decisions
When things go wrong…	Hide mistakes and/or apportion blame	Share mistakes, analyze and refine hypothesis and/or form new ones
Follow-up from mistakes	Increase intensity, continue doing exact same thing or stop doing it	Next step is dependent on lessons learned

Source: Community Solutions

Testing v. Implementation

Testing

Trying and adapting existing knowledge on small scale. Learning what works in your system.

Implementation

Making this change a part of the day-to-day operation of the system

Would the change persist even if its champion were to leave the organization?

Are you ready to Implement a new idea?

Current Situation		Resistant	Indifferent	Ready
Low Confidence that current change idea will lead to Improvement	Cost of failure large	Very Small Scale Test	Very Small Scale Test	Very Small Scale Test
	Cost of failure small	Very Small Scale Test	Very Small Scale Test	Small Scale Test
High Confidence that current change idea will lead to Improvement	Cost of failure large	Very Small Scale Test	Small Scale Test	Large Scale Test
	Cost of failure small	Small Scale Test	Large Scale Test	*Implement*

Source: Improvement Guide, pg. 146

Some life lessons of an improver

- The #1 job of an improver is to get curious.
- All improvement will require change, but not all change will result in improvement.
- A change is different than a test of a change.
- The world always looks better in PowerPoint. It will get messy and that's okay.
- Don't be afraid to play and be creative.
- Expect to fail forward.
- It feels powerful to know you're moving toward your goal because you're taking action and documenting the data.

Institute for Healthcare Improvement

Thank you & some parting gifts

Coin spinning instructions & debrief videos on YouTube so you can run this exercise with your team.

Please evaluate this session!

Session Title:

So You Have an Idea: Now What? Let's Test It!

Skill-Building Workshops 11:00 am-12:15 pm

Facilitation Skills to Build Consensus & Take Action
Main Room / Breakout A

Going Deeper on Switch Thinking & Change Management
Catalina Room / Breakout B

Demystifying Measurement for Improvement
Avalon Room / Breakout C

Sustainability Workshops 2:30-3:50 pm

Leading for Sustainable Change
Main Room / Breakout A

Telling Your Story with Data—Or When You Don't Have Data Yet
Catalina Room / Breakout B

Advocacy to Drive Change
Avalon Room / Breakout C

EQUITY IN OC

Break

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OC health CARE AGENCY

Institute for Healthcare Improvement

Facilitation Tools for Building Consensus and Moving to Action

Eddie Turner, Senior Director, IHI

Equity in OC CHILA — May 2023

What We'll Cover

- Decide what to accomplish in a meeting
- Ask a good question
- Evaluate if the meeting was successful—so you can improve it next time

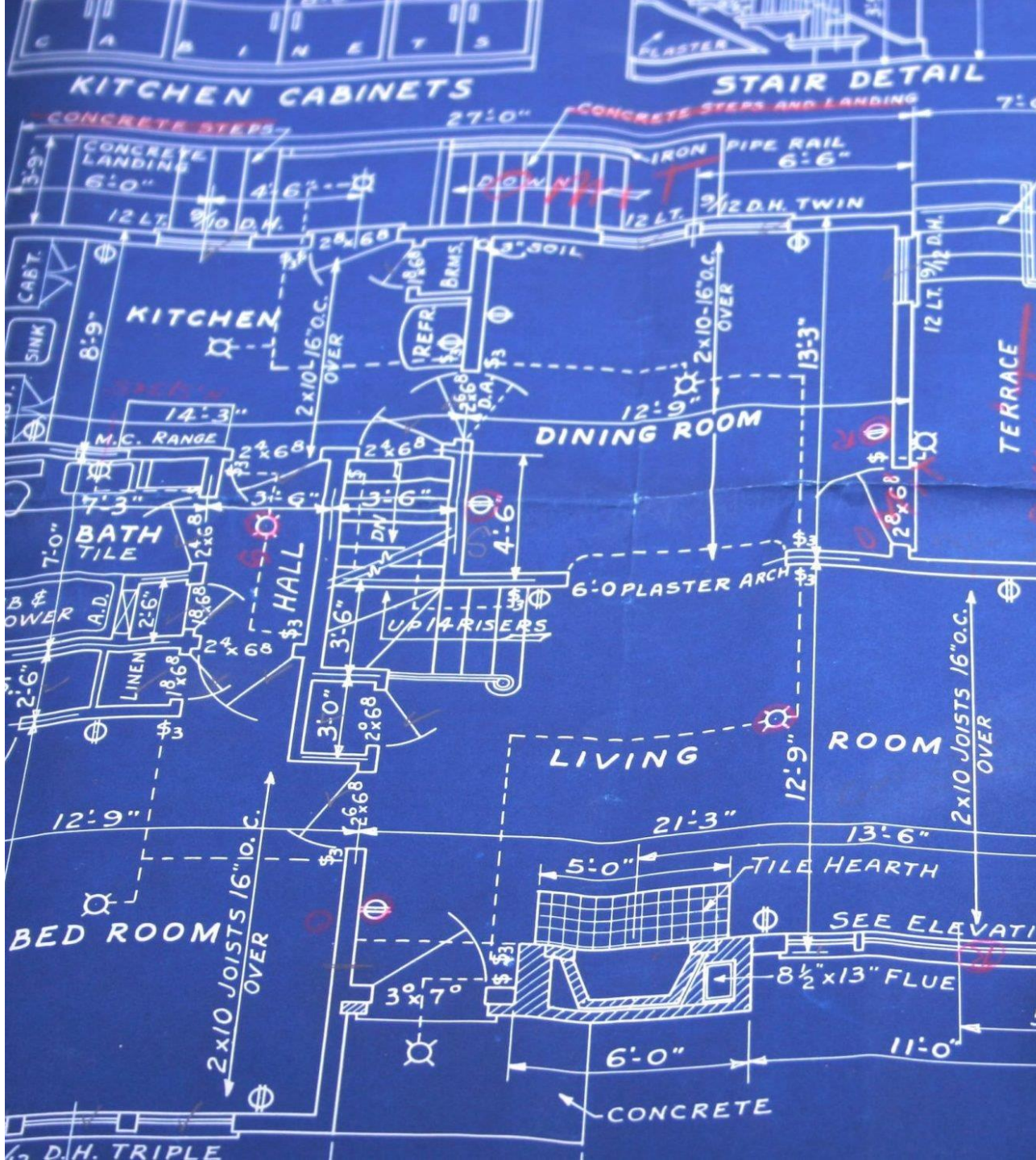
What are you facilitating?

A Facilitator Has Many Jobs

- Move the group to action
- Bring forth peoples' best contributions
- Create a space where people feel important to the effort
- Build clarity
- Lead the group to take a step toward the shared aim

Facilitation Tool #1:

Meeting Objectives



Two Types of Meeting Objectives

Rational Objectives

What you want to achieve
by the end of the meeting

Experiential Objectives

How you want them to feel
by the end of the meeting

Sample Rational Objectives

Framing: By the end of this meeting, participants will…

- Revise work plan for June
- Interpret survey data
- Decide on three candidates to interview
- Design a PDSA cycle
- Prioritize problems to solve in Q2

Sample Experiential Objectives

Framing: During this meeting, participants will…

- Feel safe sharing feedback
- Grow confidence in the team's plan
- Leave with clarity about their individual action steps
- Focus on what's important—not what's urgent
- Stoke urgency about the goal

Preparing Meeting Objectives

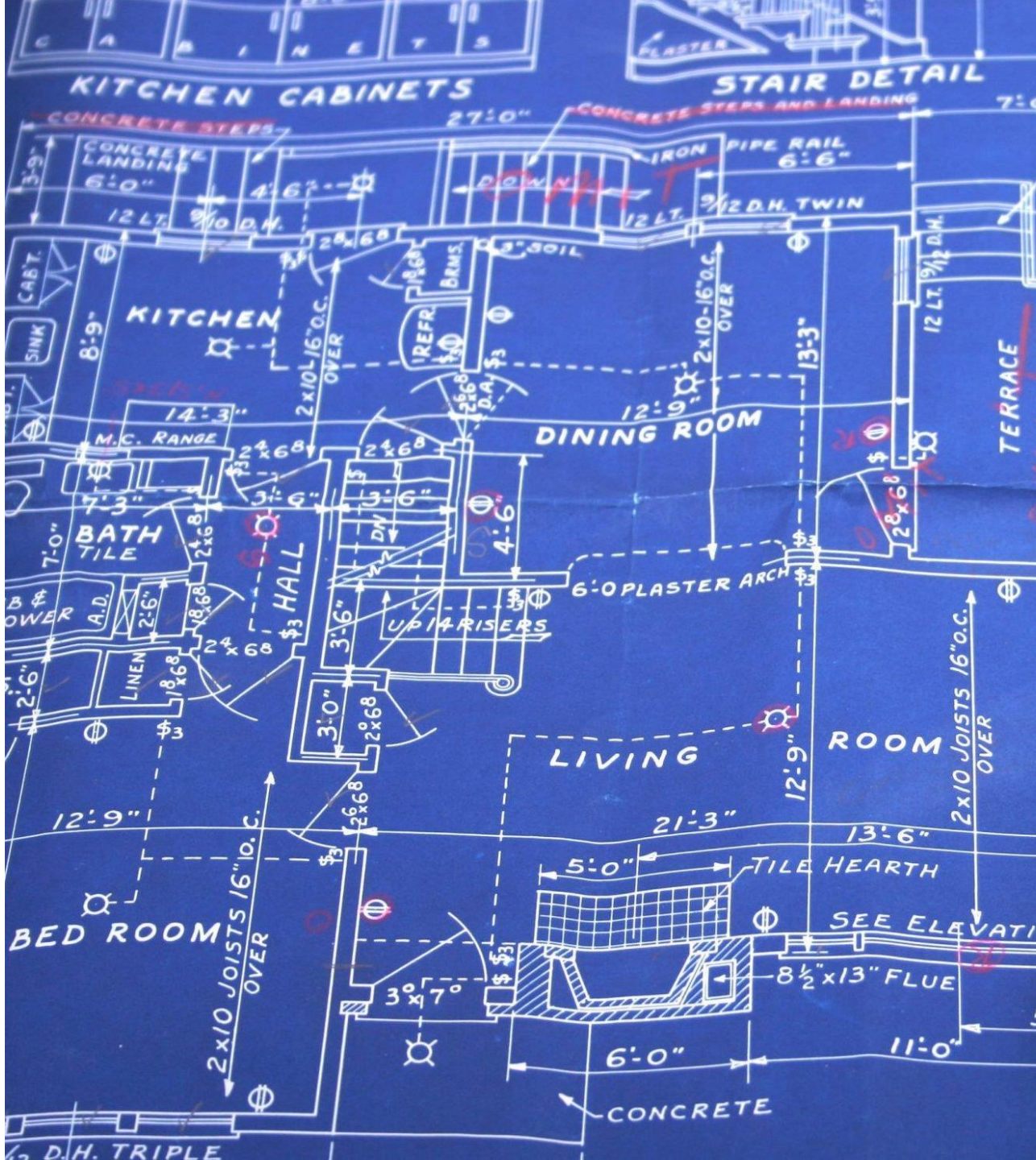
- You’re unlikely to accomplish more than 2-3 rational objectives

  If you have more than 3, do you need multiple meetings? Can you cover some pieces asynchronously?

- Rule of thumb: 1 minute of meeting time = 1 minute of prep time
- Fewer people makes for faster decisions. Refine your invitation list. Is everyone there poised to take action?

Capture your thinking

For your next meeting,
jot down a rational objective and an experiential objective



Facilitation Tool #2:

Focused Questions

Magic Trick for Leading a Conversation

- O
- R
- I
- D

Magic Trick for Leading a Conversation

- **O**bserve
- **R**espond
- **I**nterpret
- **D**ecide

ORID: Observe

- What was one detail—an image, a word—that jumped out?
- How would you summarize it?
- What were the main points you heard?

Don’t rush to “make meaning”—we’ll get there!

ORID: Respond

- How do you feel about it?
- What was the high point? The low point?
- Does it remind you of anything?
- How did the team react?

Invite people to share their personal connections

ORID: Interpret

- What can we learn from it?
- What is the most important part?
- What root causes are operating underneath what we're seeing?
- What data or analysis would help us understand it better?

Connect dots between concepts

ORID: Decide

- What can we test by Tuesday?
- What's the most obvious action we should take?
- How is this changing your thinking?
- Who can help us take action—and who will reach out to them?

End with actions, or else it's all theoretical! Encourage specificity

Try it with a partner

Partner 1: Use the ORID sequence to ask four questions about the CHILA

Partner 2: Give feedback on how well the questions fit the ORID framework

Then switch

Facilitation Tool #3:

Measure Your Effectiveness

I
SURVIVED
ANOTHER
MEETING
THAT
SHOULD
HAVE
BEEN AN
EMAIL

email
I SURVIVED
ANOTHER
MEETING
THAT SHOULD
HAVE BEEN
AN EMAIL.

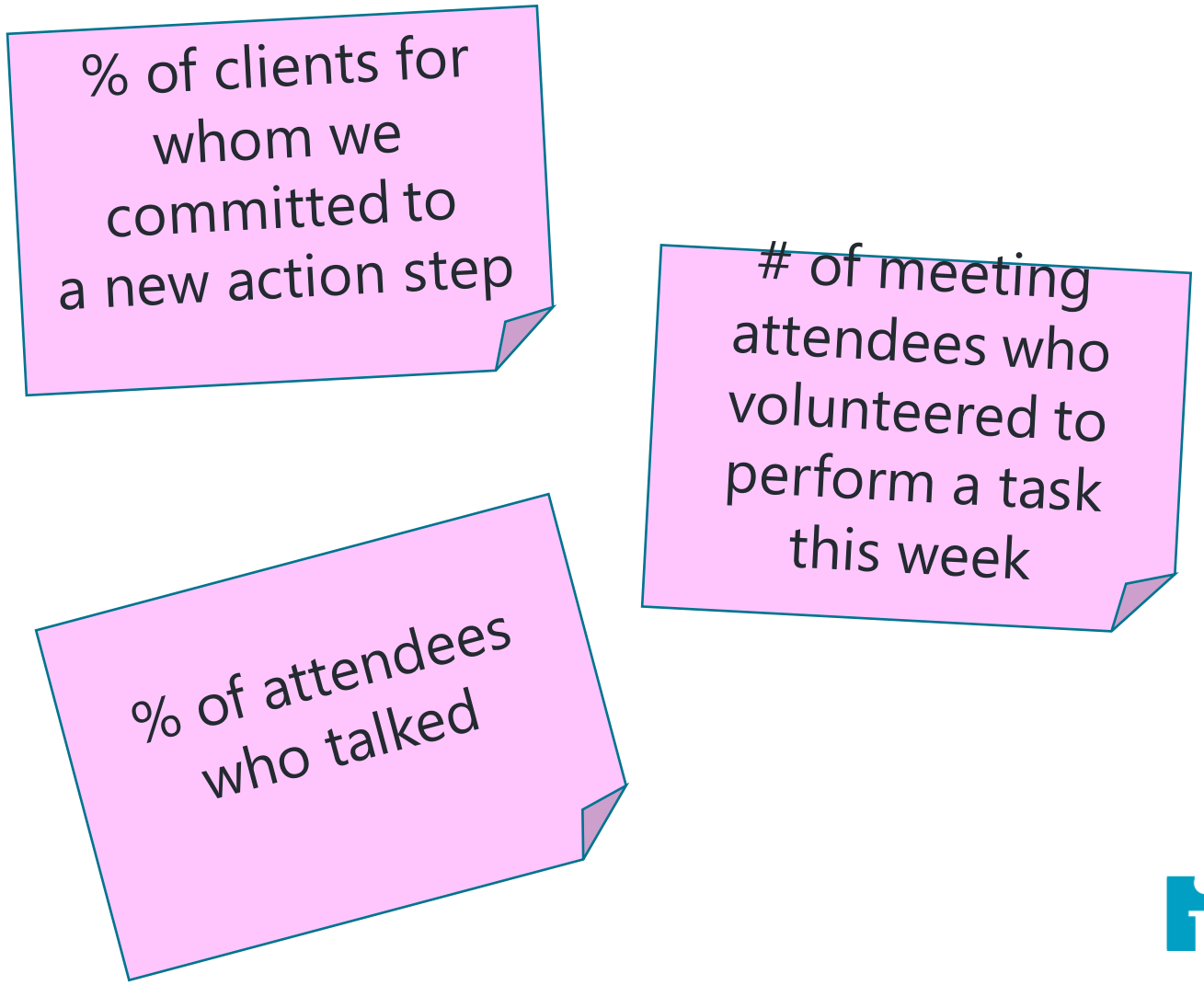
Meetings should *produce something*

Decide what your meeting should produce, then count it

Sample Measures for a Meeting

Objectives

- Decide action steps for clients
- Increase number of providers who participate
- Improve coordination between providers



	May 1	May 8	May 15
% of clients with an action step			
# of meeting attendees w/a task			
% of meeting attendees who talked			

Use simple data collection

	May 1	May 8	May 15
% of clients with an action step	4	5	10
# of meeting attendees w/a task	5	5	9
% of meeting attendees who talked	40	50	50

	May 1	May 8	May 15
% of clients with an action step	4	5	10
# of meeting attendees w/a task	5	5	9
% of meeting attendees who talked	40	50	50
# of clients rehoused	2	3	2

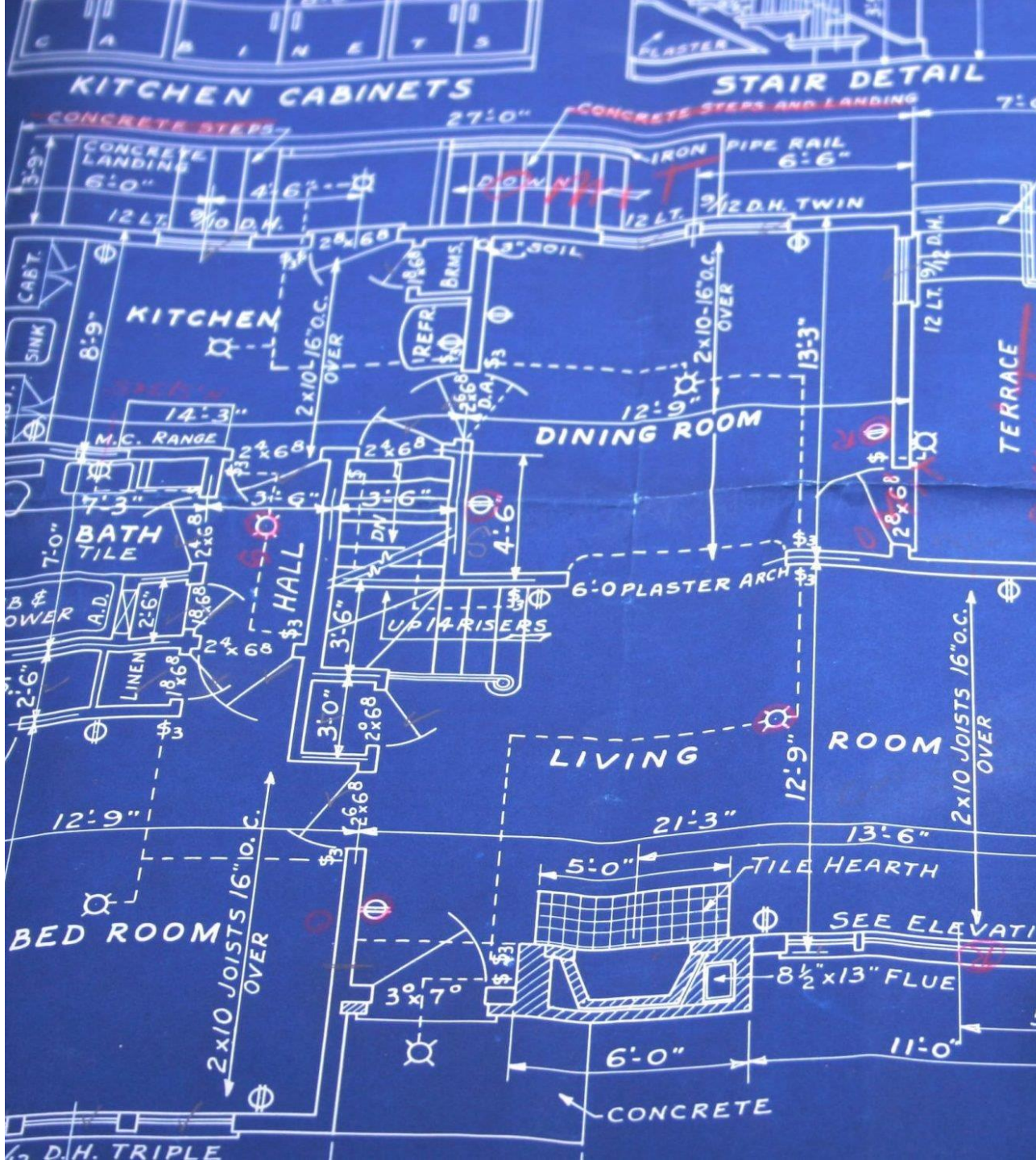
Compare process measures to results

What will you count to measure your meeting's success?

- Write 2-3 measures for your meeting
- Refer back at your objectives

Capture your thinking

For your next meeting,
jot down a rational objective and an experiential objective



Please evaluate your breakout session!

Session Titles:

- ***Facilitation Skills to Build Consensus & Take Action***
- ***Going Deeper on Switch Thinking***
- ***Demystifying Measurement for Improvement***

Lunch
12:15-1:15pm

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UFO Exercise: Cross-team Problem Solving

Session Objectives

- Rational: Participants will receive feedback and advice on a barrier or problem their team is experiencing in their work.
- Experiential: Participants will feel a sense of ownership over other teams' barriers.

3 minutes - Pick a problem or barrier

- Discuss with your team:
  - What's an issue your team is struggling with or trying to address?
  - Agree on **one** issue that you'd like to workshop with another team.

3 minutes - Find another team

- Pair up with another team sitting at another table. Your teams will be working together for the rest of the hour.
- Congregate around one table, or rearrange chairs so that you can all see and hear each other.

Exercise

- One team presents an important issue their team/organization is trying to address and feeling stuck on. Be as specific as you can. (5 minutes)

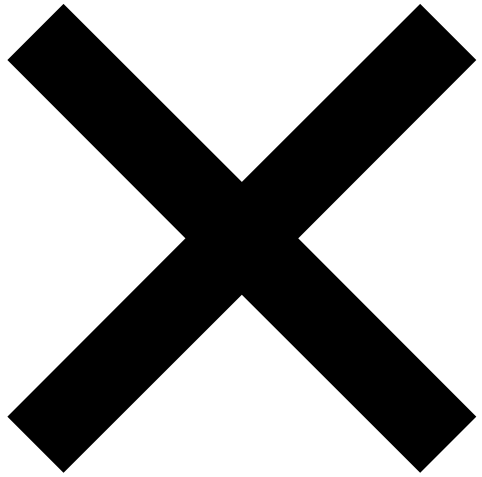
- The second team asks clarifying questions. If you can, make your questions open ended, i.e. not answerable with a yes or no, or other single word answer. (5 minutes)

Exercise

- Now, pretend the first team (the team who presented their problem) has been abducted by a UFO. They can see and hear everything that's going on, and they can take notes, but they can't participate in the discussion.

- The problem or issue presented by the first team now **belongs to the second team.** They should treat it as if they are primarily responsible for solving it. They now have 10 minutes to brainstorm potential solutions. These could include actual technical solutions, partners they could reach out to for advice, research they could conduct, changes they could make to their process, data they could collect, etc.

Exercise



To the group sharing their problem, remember, **no talking.** Even if they go in a wacky direction, miss an important piece of context, or start workshopping a solution you've already tried.

Exercise

Remember that **inspiration is non-linear.** Sometimes a solution that initially seems unworkable might provoke an insight that eventually solves the problem. Trust the process.

Exercise

- After 10 minutes, the first team will be re-deposited on the Earth. Discuss for 5 minutes. To the first team, what aspects of the conversation were most intriguing to you? Did any ideas come up that you'd like to act on? To the second team, what questions continue to linger?

- Then you'll switch teams. The other team will present their problem, and repeat the process.

Exercise

- 5 minutes - First team presents their problem or issue.
- 5 minutes - Second team asks clarifying questions.

✨🌀Alien abduction🌀✨

- 10 minutes - Second team assumes responsibility for the problem.
- 5 minutes - Discuss

🔀 🔁 Switch teams and start over 🔀 🔁

Quick Debrief

- How did it go?
- What was it like to listen to others talking about your barrier?
- What was it like to problem-solve someone else's barrier?
- What's a solution you're looking forward to implementing?

Opportunities for Action

- Use this exercise in team meetings to workshop different barriers that your different team members might be encountering.
- Engage with other teams and organizations with generosity, here and back at your desk. Give them the benefit of your wisdom and experience.

Please evaluate this session!

Session Title:
UFO Exercise: Cross-Team Problem Solving

Sustainability Workshops 2:30-3:50 pm

Leading for Sustainable Change
Main Room / Breakout A

Telling Your Story with Data—Or When You Don't Have Data Yet
Catalina Room / Breakout B

Advocacy to Drive Change
Avalon Room / Breakout C

Leading Sustainable Change

Niñon Lewis | Wednesday, May 17, 2023

OC health CARE AGENCY

Session objectives

- Understand the difference between static and generative sustainability
- Understand and reflect on their role as an "abundant leader"
- Explore four domains that contribute to generative sustainability that need to be planned or accounted for (resources, environment, people, change process)

The Choluteca Bridge, Honduras

Munster, B. “Why A Honduran Bridge Is A Perfect Metaphor For Disruption”

https://medium.com/road-less-ventured/why-an-honduran-bridge-is-a-perfect-metaphor-for-disruption-2a2d7c910535

Choluteca Bridge, Honduras

Choluteca Bridge, Honduras

Static Sustainability

Maintaining systems, programs, policies, and practices as they are

Generative Sustainability: Creating Abundance

- Dynamic
- Sustains the change process
- Allows for adaptation based on changing conditions
- Allows programs, systems, policies and practices that are no longer relevant to be phased out and new programs to take their place
- Invites planning for scaling of programs, systems, policies and practices that are relevant

"**Abundance** does not happen automatically. It is created when we have the sense to choose community, to come together to celebrate and share our common store. Whether the scarce resource is money or love or power or words, the true law of life is that we generate more of whatever seems scarce by trusting its supply and passing it around. Authentic abundance does not lie in secured stockpiles of food or cash or influence or affection but in belonging to a community where we can give those goods to others who need them—and receive them from others when we are in need."

--Parker Palmer, "Let Your Life Speak"

The 4 Habits of Abundant Leaders

1. Move from pathology to vision; create processes that engage others in growing and developing the vision
2. Choose and grow an abundance mindset in themselves and others
3. Release the trapped and untapped potential in people, organizations, and communities
4. Plan for lasting and generative change from the beginning

Reflecting on your EiOC Journey…

People

From “me” to “we”

From isolation to interconnectedness

From people and communities in poverty to people and places of trapped and untapped potential

The Change Process

From having answers to asking questions

From perfect planning to learning and failing forward

Resources

From pathology to vision

From scarcity to abundance

Environment

Embracing system transformation in practical ways

4 Domains of Planning For Generative Sustainability

A framework developed by100 Million Healthier Lives/IHI with participating communities

Based on Stout S, Anderson J, Brooks K, Munene E, Knox P and Schall M. *Leading for Abundance: Approach to Generative Sustainability*. SCALE 1.0 Synthesis Reports. Cambridge, Massachusetts: Institute for Healthcare Improvement; 2017.

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Resource Sustainability

Two Kinds of Resources to Plan For

Intrinsic Resources

- "Intangible" resources like joy, meaning, hope, energy
- Profoundly influence people's motivation and are part of who they are and how they relate to a project or process

Extrinsic Resources

- "Tangible" financial and nonfinancial assets (e.g., money, supplies, education, opportunity, as well as shared and in-kind assets)
- Can be used to sustain a program, policy or process

Relationships bridge intrinsic and extrinsic resources and also relate to people resources

Intrinsic resources

Build motivation to create the change without paying them

- Joy
- Meaning and purpose
- Energy
- Motivation
- Hope

Are often more powerful and durable in the long run—more sustainable—because it becomes part of who they are

Great intrinsic resource users: Babies!

- Do not give you anything for decades
- Keep you awake for months
- Require lots of resources from you throughout their entire lives
- Adds responsibilities for you for most of their life
- You keep them because they add joy, purpose, a sense of continuity
- Most of the world's population chooses to invest in more than one of them!

Ways to Build Intrinsic Resources Sustainably in Creating Change

Make sure you have co-developed the "why" together with those you are creating change with and why it matters to them

Go back to this throughout your change process

Take time to celebrate the small wins along the way

Build relationships as part of creating change

"Story of me, story of us, story of now"

Field of community organizing builds these into core processes

Tapping Intrinsic Motivation: Passion for Life Program – Jonkoping, Sweden

- Gather in “cafes” and explore the “wheel of life”
- Identify areas of their lives they want to improve, think about what their patterns are, identify ideas, and create tests of change and plans to try it out
- Come together to share progress, reflect, and plan additional PDSAs

Building Intrinsic Motivation (cont'd)

- Can be leveraged and combined with structure to create larger and larger, sustainable networks of motivation – snowflake model
- Can be used to create sustainable change
- Example: has been used to win Presidential elections and to pass major laws

Image from https://mobilisationlab.org/engagement-organising-winning-campaigns/

Extrinsic Resources

- Tangible things that are needed if a process is going to sustain or scale
- Can be less durable but are often necessary to go to scale
- Categories of extrinsic resources are often helpful to think through: supplies, education, money, opportunity, assets, relationships

Extrinsic

- Supplies
- Education
- Money
- Opportunity
- Assets
- Relationships

Key Principles For Extrinsic Resource Development

ACTION

Leverage intrinsic resources as much as possible and use extrinsic resources only as needed

Plan ahead for how much you will need by when

Use intrinsic methods to gain commitment from extrinsic resource holders – e.g., shared vision, relationships

Show people the value that is created by the change

Build in resource planning so that the change you are creating generates the resources that are needed for its goals (sustain, scale) even if it is not 1:1

Calculating total return on investment

Total return on investment includes benefits created and costs avoided

Formula: $\frac{\text{Total benefits created + total harms avoided – cost of investment}}{\text{Cost of investment}}$

To calculate total return on investment

- What is the total benefit in terms of improvement in health, wellbeing and equity for different stakeholders (minus any cost in these areas)?
- What harms are avoided (eg, increased joy in work leads to better employee retention which can lead to better customer retention and lower costs of hiring and onboarding)?
- Are there inadvertent harms created whose impact should be subtracted out?
- What were the costs?

Let’s Discuss

- What about this new definition of “resources” feels new to you?
- What leadership questions does it bring up for you?
- In what ways can you build intrinsic motivation in your improvement work in the Action & Learning Community?

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Environmental Sustainability

Incorporating Environment Sustainability Into Your Planning

At two stages

- **Design stage** – assessing the environment to design your program to fit

- **Scaling and sustaining stage** – developing or changing the environment to support sustainability and scale

Five Domains of Environment Sustainability

Physical

Political

Social/Cultural

Economic

Technological/Innovation

If environmental sustainability is high:

- Supports incremental change
- Supports program, outcome and process sustainability
- Resources more predictable
- Can have an ordered long-range strategy because you have a better likelihood of being able to predict what the world will be like

If environmental sustainability is low, it:

- Creates anxiety AND possibility
- Creates opportunity for transformational change
  - Easier to create will for change – the status quo is already at risk for being disrupted
  - New ideas, new leaders, new systems
- Limits sustainability of programs “as they are”

If environmental sustainability is low

- Emergent strategy works much better
- Agility, adaptability, failing forward is a strategic advantage
- Networks, small groups, do better than monoliths

Key Skills:

- Shift from pathology → vision
- Shift from scarcity to abundance
- Rapid learning, failing forward, adapting
- Constant scanning for opportunities and threats
- Managing anxiety, creating stability within constant change, developing confidence and competence

Let’s Discuss

- In what ways are you considering physical, political, social, and technology/innovation in your work?
- What new questions does this framing of environmental sustainability bring up for you in your leadership and/or your work?

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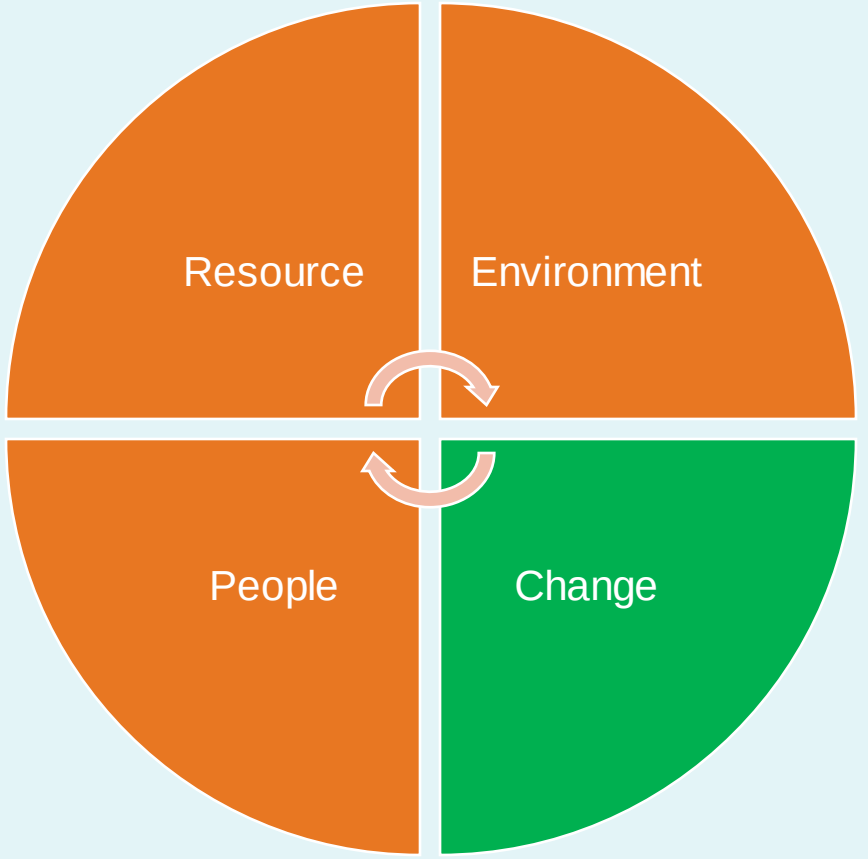
Change Sustainability



Change Sustainability

- Program
- Outcome
- Process

Program Sustainability

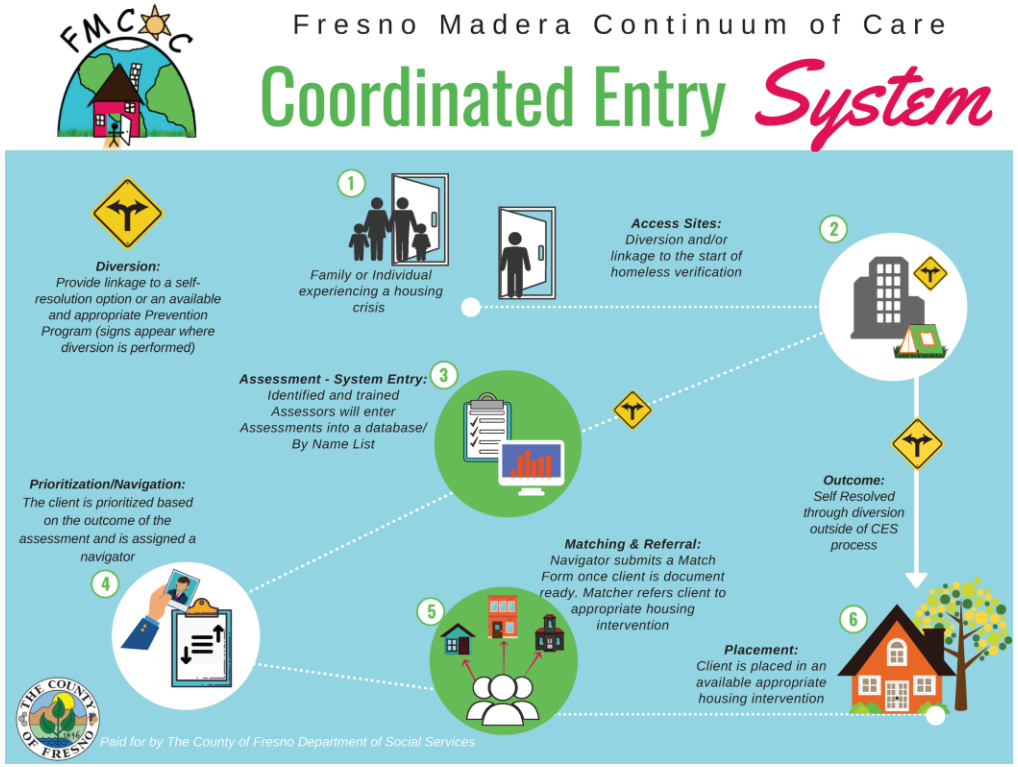
- Ability to continue a program as it is with incremental improvement/ adaptation
- Can be scaled (with adaptation)
- Tasks:
  - ❑Determine key elements (pillars)
  - ❑Assure sustainability of resources (intrinsic and extrinsic)
  - ❑Shift the landscape to anchor key elements (policy, systems, environmental change)
  - ❑Assure buy-in
  - ❑Improve and adapt as you scale

Outcome Sustainability

- Assures that an outcome continues
- Requires resources and systems in place for improvement, measurement, and scaling
- Requires processes in place to understand what the key drivers of outcomes
- Has processes for adaptation to new environments during replication and spread
- Policy, systems, environmental change supports to the change during scale-up

Process Sustainability

- Sustaining the process of change itself.
- Acknowledges that the goals of change in a transformation process will change at different stages of the journey



Key Features of Process Sustainability

- Continually build and GROW readiness/capability
  - General capacity
  - Innovation capacity
  - Motivation
- Develop ability to listen deeply, scan the environment, hold tension
- Develop organizational capacity, culture and practice to self-assess and change direction
- Develop ability to sustain the energy of the change process itself

Let’s Discuss

- Out of Program, Outcome, and Process sustainability, which one do you feel most comfort with? Why?
- Which aspects are newer to you? Why?
- What leadership questions does this bring up for you?

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People Sustainability

People Sustainability

Leadership

Workforce

Relationships

Energy

Growing Leadership

- Leadership as a verb, not a position
- Grow leadership across the network of your organization or community
  - Map influencers at every level – Ask “Who can help influence the adoption of this change? Who can grow others? Who can help improve this?”
- Leadership development can be informal or formal, but needs to be structured, regular and meaningful

Growing Leadership

- Are you growing leadership at multiple levels, including of people with lived experience? What are your plans to sustain this leadership?
- Do you have processes to flatten hierarchy so that ideas and insights can come from multiple sources?
- How deep is the bench?
- How are the leaders growing their capacity to lead change?
- Succession planning

Workforce

- What skills need to be acquired by whom for your change to be effective and sustained?
- What system do you have in place for building capacity in these skills?
- How will you help your community workforce to own the vision and the mission?
- How can you foster the development of a network of interconnected self-governing teams?

Relationships

- How are you growing trust and relationship?
- How are you building in principles for collaborative action?
- How are you building in processes for constructive conflict and resolution?
- How are you mapping out and strategically pursuing the development of the relationships that are needed to accomplish the work?
- How are you assessing the relationships and growing them?

Energy

- How are you sustaining the energy of the change process?
- How are you enhancing motivation, joy and meaning?
- How are you making the path easier?
- How are you finding opportunities for reflection and celebration?
- How are you building on strength?

Let’s Discuss

- How are you growing leadership in your team and in yourself in this work?
- How are you mapping out and strategically pursuing the development of the relationships that are needed to accomplish the work?
- What leadership questions does this bring up for you?

4 Domains of Planning for Generative Sustainability

- Intrinsic Resources (motivation, joy, agency, hope)
- Extrinsic Resources (financial, assets)

- Physical
- Political
- Social/cultural
- Financial
- Technology/ Innovation

- Leadership
- Workforce
- Relationships
- Insights

- Program
- Outcome
- Process

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Thank you!

Please evaluate your breakout session!

Session Titles:

- *Leading for Sustainable Change*
- *Telling Your Story with Data of When You Don't Have Data Yet*
- *Advocacy to Drive Change*

Break

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Let's Close Day 2

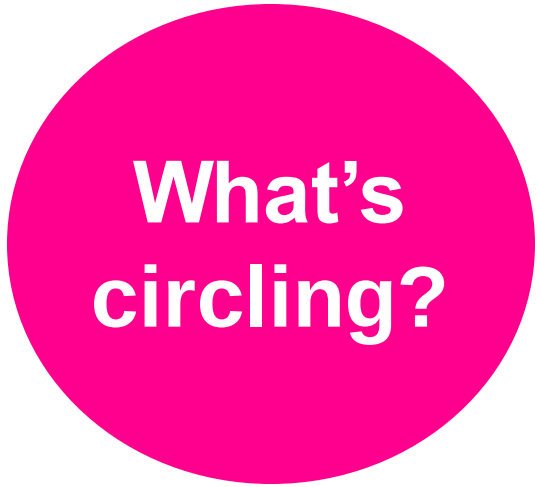
OC health CARE AGENCY

What we set out to accomplish today

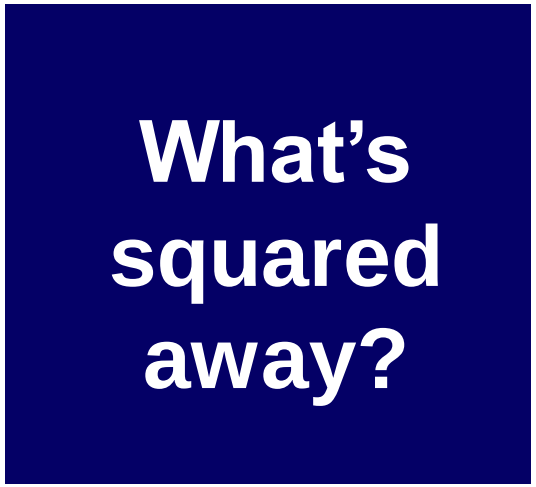
- Practice testing an idea before you commit to it
- Two rounds of choose-your-own-adventure workshops
- Go deep in collaborative problem-solving mode

Appreciations

Let's Check In



What one or two questions are still circling in your head?



What concepts from today are squared away in your mind?

What are 3 significant ideas you took away from today?

Tomorrow

- Think on the systems level
- Learn the Model for Improvement
- Adopt skills to lead for—and with—equity
- Continue building relationships and personal leadership skills

See you tomorrow at 9:00 am!

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