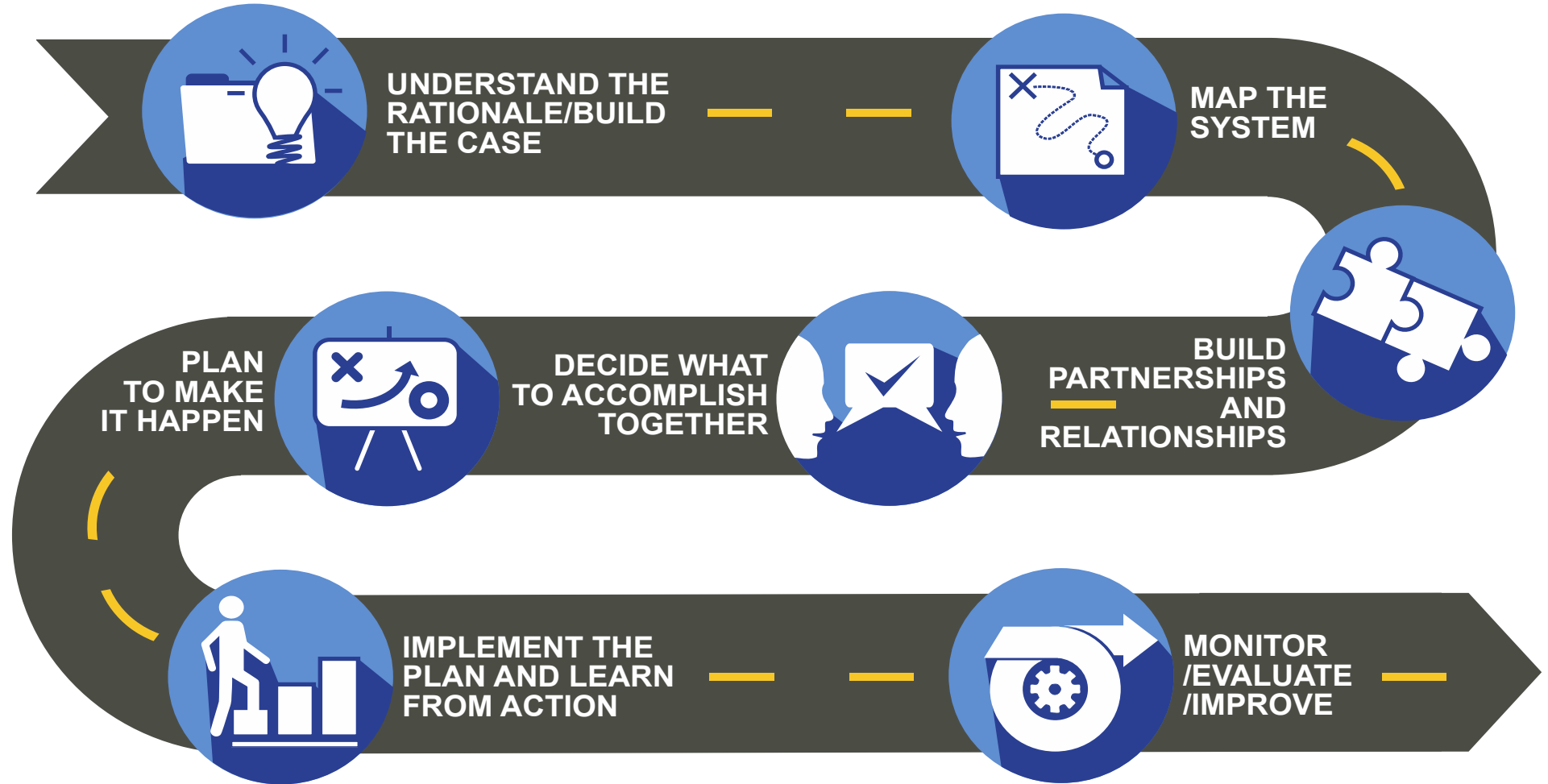# PATH TO SYSTEMS CHANGE

CORE ELEMENTS TO KEEP IN MIND AT EVERY STEP

- Clarify roles
- Commit to shared responsibility
- Leverage resources
- Communicate effectively
- Engage leaders and stakeholders
- Navigate cultural differences
- Implement continuous quality improvement (CQI)
- Maintain relationships to continue momentum
- Share progress with key stakeholders

UNDERSTAND THE RATIONALE/BUILD THE CASE

MAP THE SYSTEM

BUILD PARTNERSHIPS AND RELATIONSHIPS

DECIDE WHAT TO ACCOMPLISH TOGETHER

PLAN TO MAKE IT HAPPEN

IMPLEMENT THE PLAN AND LEARN FROM ACTION

MONITOR /EVALUATE /IMPROVE

Oregon Health Authority

System Change Activities

Understand the Rationale / Build the Case

- Identify the issues by looking at quantitative & qualitative data
- Identify equity gaps
  - How have you examined the data for health disparities?
- Identify related goals / strategies / mandates (state and local)
  - Is your organization operating under any existing laws or mandates impacting this issue?
  - How do other contractual obligations or mandates fit in?
- Ensure alignment with existing goals / strategies
  - How does the issue align with the goals of potential partners?
  - Have you considered competing priorities?
- Understand the organization and community perspective
  - Who will be impacted by this change and how have you gained an understanding of their perspective?

Map the System

- Identify organizational partners and understand the landscape
  - What organizations and institutions are involved?
  - What is their role?
  - What is their connection to this issue?
  - How do they connect to each other?
  - Is there any opposition?
- Figure out who the relevant points of contact are specific to the issue within the organizations you've identified.
  - Leadership - does this person have decision making power?
  - Doers
  - Internal Influencers specific to the issue
  - Supporters
- Align on who needs to be involved in the change effort, internally and externally
- Identify possible leverage points

Build Partnerships and Relationships

- Connect with key stakeholders
  - Reach out to key stakeholders through 1:1 meetings and informational interviews
  - Connect with key stakeholders through existing meetings (hosted or attend others) or trainings

- Communicate what your organization brings to the table; refine the business case
  - Clarify what you learned from 1:1 meetings and communicate this to potential partners
- Figure out alignment with specific stakeholder goals and values and uncover common intent; make a direct ask
  - Where do you see your organization fitting into this effort?
  - Would your organization be willing to come to the table to work on this effort?
- Identify messages and messengers (leadership, community advocates, etc.)
- Ensure alignment with organizational leadership
  - Who is communicating with leadership?
  - How are they making the case to leadership?
  - Is there leadership buy-in?
- Convene identified stakeholder group
  - Clarify jargon / find common language
  - Identify assets or barriers in prior collaborative projects
  - Assess political context and public support

System Change Activities

Decide What to Accomplish Together

- Identify the problem we are trying to solve
- Identify and align on the system change goal
- Identify and align on a strategy to meet the goal
    - Is there an evidence base supporting your strategy?
- Identify what success will look like
    - How will success be measured?

Plan to Make It Happen

- Further identify and clarify roles specific to the collaboration
- Refine informal / formal agreements
- Discuss funding and resources. What does each organization bring to the table (e.g. staff time, expertise/knowledge, funds, data, existing relationships/partnerships, decision making authority or access to those who do, meeting venues, other).
- Consider sustainability plans
    - What infrastructure and capacity is in place?
    - What else is needed?
- Pick a pilot
- Write a 30-60-90-day plan
- Develop the workflow
- Communicate back to each organization

- Identify a lead to serve as point person on the effort
    - How will leadership be involved/informed?
    - What will be the roles & responsibilities of the lead?
- Prepare all organizations for change.
    - What are the resources readily available for the change? How am I going to utilize them to include and involve everyone that the change will affect?
    - Who are potential supporters of this change? How can their support be leveraged?

Implement the Plan and Learn from Action

- Implement the plan
- Monitor and track progress
    - How will change be measured?
    - What is the plan for maintaining communication w/ partners? Impacted communities?
- Identify roadblocks and make changes (Continuous Quality Improvement)
- Ensure key partners for implementation are engaged and invested
    - How will you know?
- Revisit the power map
- Redefine role and responsibilities and refine to meet goals

- Explore necessary strategies for sustainability
    - Are the partners still relevant? Are there new partners that need to be brought on board?
    - What supports are necessary to ensure sustainability?
- Identify and celebrate accomplishments
- Share success stories

Monitor, Evaluate, Improve

- Gather information (survey, data)
- Evaluate the process, outcomes and determine the cost / benefit
- Determine if objectives were met
- Communicate learnings
- Identify any new opportunities to resource the work
- Determine next steps for scaling / spreading
- Determine the transition and sustainability plans
- Recommit to the effort

Systems Change Tools and Resources

Understand the Rationale / Build the Case

- Qualitative community stories
- Community Health Improvement Plan (CHIP)
- CCO incentive metrics
- County health rankings and road maps
- Population level data
- Grantee work plans
- CCO transformation & policy strategies
- Department strategic plans
- Local strategic plans
- Health burden cost analysis
- Readiness assessment

Map the System

- Power map
- Actors and assets diagram

Build Partnerships and Relationships

- Stakeholder analysis / matrix
- Talking points / messages about big picture / end goal / rationale / strategy
- Role analysis
- Policy Change Model tools
- Network analysis (Rethink health)

- Strategic communication tools
- Host a training or educational event to continue to build new or strengthen existing relationships

Decide What to Accomplish Together

- Appreciative inquiry
- World Café method
- Journey mapping

Plan to Make It Happen

- Role clarification tool
- 30-60-90-day plan
- Organizational mapping
- Aims and drivers diagram

Implement the Plan and Learn from Action

- Tracking / testing tool (Plan-Do-Study-Act tool)
- Community Power Map
- Key informant interviews

Monitor / Evaluate / Improve

- Key informant interviews
- Self evaluation survey
- Oregon Data and Evaluation Reporting System / data reports
- CCO metrics performance reports
- Oregon Public Health Assessment tool
- Director's resource guide

FROM: Interaction Institute for Social Change