

# **Equity Action Labs**

#### Session Learning Objectives

By the end of this session, participants will:

- Have a general understanding of the Equity Action Lab Model
- Understand how the Community of Solutions skills can be used in an Equity Action Lab
- Begin thinking how an Equity Action Lab might advance your Improvement Project

#### **Experiential Objectives**

By the end of this session, participants will:

- Feel an Equity Action Lab could be a good way to advance some aspects of their Improvement Project
- Feel excited to begin planning and implementing an Equity Action Lab during this Action Period!





# What are We Trying to Accomplish Here?

- What we are learning during the CHILAs is great, but we don't know how we
  would use them in our day-to-day work
- Planning around equity takes time and we aren't far enough along to start acting yet
- To make a dent on equity we need to involve players not yet at the table
- We've had trouble moving our plans into action
- We have challenges finding roles for people with lived experience
- We have systems silos and other systems issues beyond our control that need to be addressed
- While stakeholders have the same equity goals, we have different ideas about how to get there
- Our project is so broad and complex, we don't even know where to start!



Ok, the Equity Action Lab sounds great!

But what exactly is an Equity Action Lab?



# An Equity Action Lab is...



A way to get to action and results on any adaptive challenge

A set of structured activities to bring together community stakeholders, including people with lived experience (multistakeholder and multisector)

A model for setting an ambitious goal, quickly designing an iterative plan to achieve it and taking action over a 100-day period to reach this goal.

Source: Tenderloin Health Improvement Partnership



# An Equity Action Lab is...



Source; Health Improvement Partnership of Maricopa County



A proven method for **co-designing** with people with lived experience (clients, residents, students, etc.) and front-line staff



A highly adaptable model that uses proven strategies from the Community of Solutions
Framework and the Model for Improvement



A way to use virtually everything you've learned during CHILA 1 and CHILA 2 with your team and others!



# 4 Equity Action Lab Examples

01

Develop a coordinated (multi-agency) response to reduce non-emergency 911 calls from a vulnerable population of high utilizers

02

Develop a maternal and infant health system designed for black mothers and their babies

03

Develop shareduse projects at 6 project sites used by 1,250 community members 04

Have 500 high school students consume "grab n' go" salads and other healthy options each day at 3 local schools



# 4 More Equity Action Lab Examples!

01

Develop and begin implementation of a minority male leadership program at Mary E. Phillips High School 02

Have residents save \$1,000+ a year each by ensuring that residents receive the full range of benefits they are eligible for 03

Establish a mobile market to increase access to healthy, fresh, affordable foods in areas of food insecurity.

04

Reduce the time to move a veteran experiencing homelessness into permanent housing from 300 days to 60 days

#### **Equity Action Lab Structure**

Prep Phase (2-3 months)

#### Data collection

- Needs
- Interventions and ideas

Team formation

Narrowing the focus

#### **Action Lab!**

(1.5-2 days)

Set ambitious goal (aim)

Develop potential solutions (ideas to test)

Develop action plan

Sprint Phase (approx. 100 days)

Implement plan (test ideas)

Adapt (change plan) as needed to achieve goal

Weekly team meetings

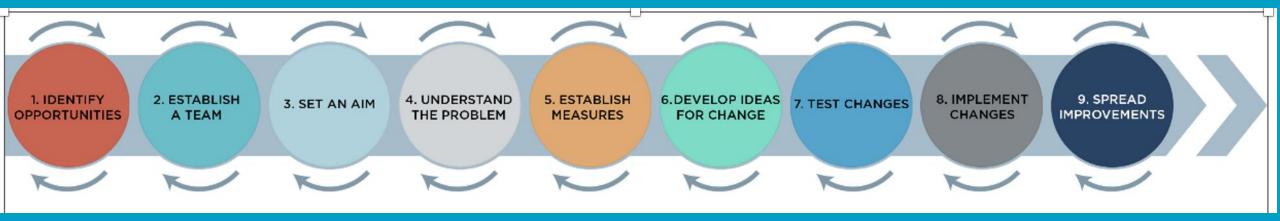
Sustain, improve or scale

Goal achieved!

Momentum Lab (1 day) Solidify gains Set new goals



# **Improvement Journey**





#### How we will spend our time today



Going Over the Phases 1 and 2 of an Equity Action Lab (and 3 and 4, if time) 2

Reviewing how what you have learned to date can be integrated into each of the phases

3

Answering your questions about EALs)

4

Reviewing the components of a 2 Day Action Lab



#### **Some Overall Notes**



Source: Tenderloin Health Improvement Partnership

There is no way to completely plan for your Equity Action Lab – you will go into it with some unknowns AND need to iterate throughout the 4 phases

This is a very adaptable model and allows you to use everything you have learned during CHILAs 1 and 2!



#### Measuring the success of your Equity Action Lab:













Did
participants
believe they
made more
progress in
100 days
then they
would have
with business
as usual?

Did you bring together multiple stakeholders/ sectors including frontline staff and people with lived experience in authentic coproduction?

Did you get to test potential solutions (not just plan to test them)? Did you work to improve one or more systems?

To what extent did you achieve or make progress on your 100-day aim?

Were participants (and others) wanting to set a new, ambitious 100-day aim?



# Before we Go Any Further...

- We are asking that each Improvement Team plans and implements an Equity
   Action Lab during the next Action Period
- You will find copies of the Equity Action Lab Planning Worksheet at Your Tables
- Throughout this session, we will provide you with some time to begin filling in your Planning Worksheet
- We will get through reviewing the Prep Phase and Action Lab today. If time allows we will review the Sprint Phase and the Momentum Lab
- Your team will also have 45 minutes after this session to continue planning



# Phase 1: Prep (generally 2-3 months)



#### **Equity Action Lab Structure**

Prep Phase (2-3 months)

Data collection

- Needs
- Interventions and ideas

Team formation

Narrowing the focus

**Action Lab!** 

(1.5-2 days)

Set ambitious goal (aim)

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Develop action plan

Sprint Phase (approx. 100 days)

Implement plan (test ideas)

Adapt (change plan) as needed to achieve goal

Weekly team meetings

Sustain, improve or scale

Goal achieved!

Momentum Lab

(1 day) Solidify gains Set new goals

We are Here!



#### Picking Your 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.
- Your Improvement Project OR <u>a part of your Improvement</u>
   Project can be your topic area!



#### Cleola's Topic Area

Cleola is planning an Equity Action Lab focused on this topic area:

#### **Water Consumption**

Cleola – tell us a bit about your topic area and why you chose it



## Your Turn – Thinking Through Your Topic Area

- Take 5 minutes at your table to put down your team's ideas for the topic of your Equity Action Lab
- You can write down your thoughts under Section A. Picking a
   Topic Area in your Equity Action Lab Planning Worksheet
- Remember this can be your Improvement Project's topic are or a sub-topic within your broader topic area



# Sample Timeline for a November Action Lab

Task/Milestone	Days/Weeks before AL	Example
Action Lab	0 days	November 10th and 11th
Date/Location for Action Lab set	At least 8 weeks in advance of AL	September 15th
Invites Out to Leadership Team Members	At least 8 weeks in advance of AL	September 15th
Leadership Team First Meeting	At least 6 weeks in advance of AL	September 29th
Invites out to Design Team Members	At least 6 weeks in advance of AL	September 29th
Invites to Action Lab sent out to others	At least 5 weeks in advance of AL	October 6th
Begin gathering additional background data	At least 5 weeks in advance of AL	October 6th
Leadership Team and Design Team draft high-level agenda	At least 4 weeks in advance of AL	October 13
Finish gathering background data	At least 2 weeks in advance of AL	October 27th
Draft slide-deck for Action Lab completed	At least 2 weeks in advance of AL	October 27th
Final Slide deck, presenters and facilitators locked down	At least 1 week in advance of AL	November 3rd



Cleola's Proposed Timeline for a January 2023 Equity Action Lab

Task/Milestone	Days/Weeks before AL	Date
Action Lab (in-person or virtual)	0 days	1/15/2023
Topic Area for AL selected	At least 9 weeks in advance of AL	11/13/2022
Date/Location for AL set	At least 8 weeks in advance of AL	11/20/2022
Invites Out to Leadership Team Members	At least 8 weeks in advance of AL	11/20/2022
Leadership Team First Meeting	At least 6 weeks in advance of AL	12/4/2022
Invites out to Design Team Members	At least 6 weeks in advance of AL	12/4/2022
Invites to AL sent out to others	At least 5 weeks in advance of AL	12/11/2022
Begin gathering additional background data	At least 5 weeks in advance of AL	12/11/2022
Leadership Team and Design Team draft high-level agenda	At least 4 weeks in advance of AL	12/18/2022
Draft Aim Templates completed	At least 3 weeks in advance of AL	12/25/2022



#### Your Turn - Developing a Potential Timeline

- Take 5 minutes as a team to start thinking through your timeline
- Come up with a target date for your 1.5 2 Day Action Lab (likely in January or early February 2023)
- Then working back from that date, start filling in the dates for the actions to be completed before your Action Lab in Section B.

#### **Equity Action Lab Planning Timeline**

 You will not be held to these dates! This is just to get you thinking about the timeline



#### **Assembling Your Team**

#### **Leadership Team**

- Government representatives, funders, directors from organizations (people who can influence and change policy, processes and resources)
  - People with lived experience

#### **Design Team**

- Overlap from Leadership Team
- People with lived experience (of the topic area)
- Front line staff from organizations who are usually responsible for implementing policies, programs and services

Sometimes an Improvement Team decides to just have one team (the Design Team) – In this case, you will want a mix of people on the team that can serves as both the Leadership Team and Design Team (more on the next slides)



#### Typical Role of the Leadership Team

Agrees to support the initiative, including trying new things

Helps pick members of the Design Team and helps ensure that members of the Design Team have their time freed up during the 100 Days to actively participate

Helps to design the Equity Action Lab, including ensuring that relevant stakeholders are at the table

Helps select the goal(s) for the Equity Action Lab

"Clears the Path" for the Design Team

Works to address any systemic barriers identified by the design team during the Sprint Period



#### Typical Role of the Design Team

- Helps select the goal(s) of the Equity Action Lab
- Helps come up with change ideas to test to meet the Action Lab Goal(s)
- Responsible for the day-to-day work (implementation) during the Sprint Period
  - Attend weekly meetings during the Sprint Period (generally 1-2 hours per week)
  - 3-4 hours of additional work per week during the Sprint Period May lead or co-lead a "track" during the Sprint Period



## Cleola's Team

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

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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)
Public Health	Leadership	Stats Data Resource - power	Better health outcomes Less ER visits	Cleola Inc. along with Coalition for Seniors and Community Members
Coalition for Seniors	Leadership	Lived Experience Firsthand knowledge Drafting language and design	Healthy community Strong support network	Cleola Inc.
Grocery Stores (for access to water, etc.)	Leadership	Access to food and other supplies that can prevent heat stroke	Safer community Healthy community	Cleola Inc. along with Coalition for Seniors and Community Members
Community Residents	Leadership and Design	Lived Experience Firsthand knowledge Drafting language and design People power	Less ER visits Lower medical costs Healthy community Good Community impact Health awareness	Cleola Inc.
Cleola Inc.	Leadership and Design	Nonprofit leading the work	Health Awareness More projects opportunities that impact positive change	
Senior Centers	Design Team	These centers already work with our target population of seniors	Another way for them to help keep seniors healthy	The Coalition for Seniors can reach out to the local Senior Centers



# Your Turn – Thinking About Who Will Be on Your Leadership and Design Teams

- Take 10 minutes as a team to start thinking about who would be good to have on your Leadership Team and/or Design Team
- Put your thoughts in the table (just after sections C and D) titled Equity Action
   Lab Relational Strategies for Potential Leadership Team and Design Team
   Members



#### Beyond Your Leadership and Design Team



Who else can you invite to participate in your Equity Action Lab?



Often Equity Action Labs have 30-100+ people



Based on your topic area, who else do you need to invite?



Are there other Improvement Teams or Individuals here that you could invite?



## **Setting an Aim**

- Present the 2-3 Aim Templates developed during the Prep Phase
- It is often useful to also provide a few parameters about the aim. This might include:
  - The aim should require that we change the system or systems (can't just be achieved by working harder)
  - It is people focused (people's lives will be improved) and explicitly addresses equity
  - Any parameters (e.g. zip codes served, special areas of focus, etc.)
- The "date" within the Aim is generally about 100 days after the AL (but never more than 4 months after)
- If you do not have a long-term aim for the topic area, consider setting this first



#### **Components of a Strong Aim Statement**

+ ACTION VERB

(e.g. reduce, increase, solve, provide)

SPECIFIC PROBLEM

(e.g. truancy, violent crime, unsafe street or area)

**NUMBER** 

(How much?

e.g. percentage or number.)

+ SPECIFIC POPULATION

(**For whom?** e.g. children ages 5-10, residents of a neighborhood, formerly incarcerated)

**DATE** 

(**By when?** e.g. 100 days from your Equity Action Lab)

EXCLAMATION POINT!

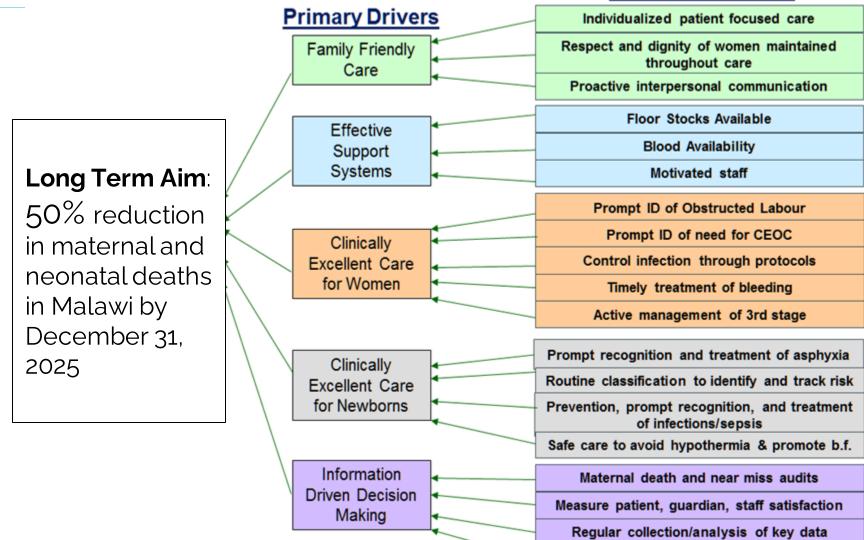


#### **Option for Your Aim (not exhaustive)**

Malawi – Maternal Mortality

**Secondary Drivers** 

Accurate and complete patient records







#### **Option 1: Incremental**

Malawi – Maternal Mortality **Secondary Drivers Primary Drivers** Individualized patient focused care Respect and dignity of women maintained Family Friendly throughout care Care Proactive interpersonal communication Floor Stocks Available Effective **Long Term Aim**: **Blood Availability** Support Systems Motivated staff 50% reduction Prompt ID of Obstructed Labour in maternal and Prompt ID of need for CEOC Clinically neonatal deaths **Excellent Care** Control infection through protocols for Women Timely treatment of bleeding Active management of 3rd stage Prompt recognition and treatment of asphyxia Clinically Routine classification to identify and track risk **Excellent Care** for Newborns Prevention, prompt recognition, and treatment of infections/sepsis Safe care to avoid hypothermia & promote b.f. Information Maternal death and near miss audits Driven Decision Measure patient, guardian, staff satisfaction Making Regular collection/analysis of key data Accurate and complete patient records





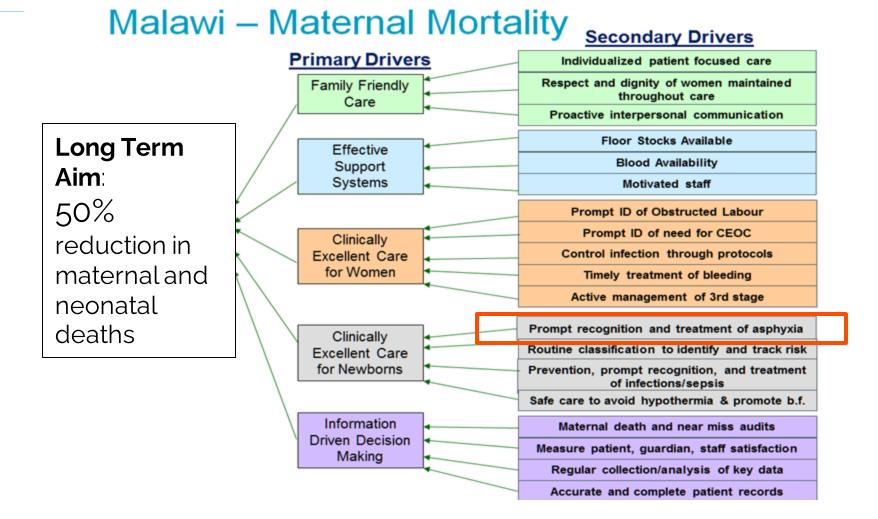
#### **Option 1: Incremental**

Malawi – Maternal Mortality **Secondary Drivers Primary Drivers** Individualized patient focused care Respect and dignity of women maintained Family Friendly throughout care Care Proactive interpersonal communication 100 Day Aim: Floor Stocks Available Effective 2% **Blood Availability** Support Systems Motivated staff reduction in Prompt ID of Obstructed Labour maternal and Prompt ID of need for CEOC Clinically neonatal **Excellent Care** Control infection through protocols for Women Timely treatment of bleeding deaths by Active management of 3rd stage April 15, 2023 Prompt recognition and treatment of asphyxia Clinically **Excellent Care** Routine classification to identify and track risk for Newborns Prevention, prompt recognition, and treatment of infections/sepsis Safe care to avoid hypothermia & promote b.f. Information Maternal death and near miss audits **Driven Decision** Measure patient, guardian, staff satisfaction Making Regular collection/analysis of key data Accurate and complete patient records





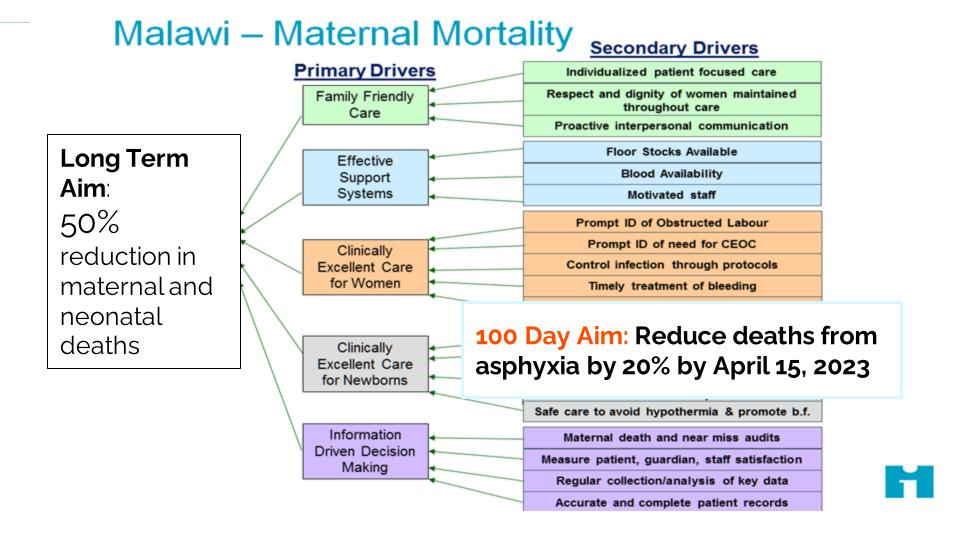
#### **Option 2: Pick a Driver**







### **Option 2: Pick a Driver**





### **Option 3: Create a New System**

Malawi – Maternal Mortality **Secondary Drivers Primary Drivers** Individualized patient focused care Respect and dignity of women maintained Family Friendly throughout care Care Proactive interpersonal communication Floor Stocks Available **Long Term** Effective **Blood Availability** Support Aim: Systems Motivated staff 50% Prompt ID of Obstructed Labour Prompt ID of need for CEOC Clinically reduction in **Excellent Care** Control infection through protocols maternal and for Women Timely treatment of bleeding Active management of 3rd stage neonatal Prompt recognition and treatment of asphyxia deaths Clinically Routine classification to identify and track risk **Excellent Care** for Newborns Prevention, prompt recognition, and treatment of infections/sepsis Safe care to avoid hypothermia & promote b.f. Information Maternal death and near miss audits Driven Decision Measure patient, guardian, staff satisfaction Making Regular collection/analysis of key data Accurate and complete patient records



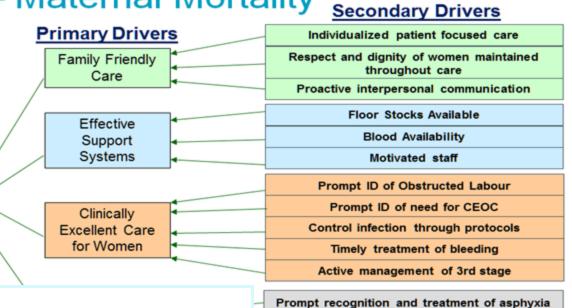


### **Option 3: Create a New System**

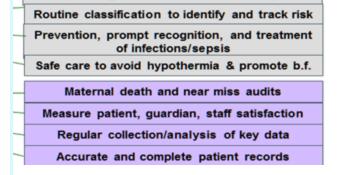
Malawi - Maternal Mortality

Long Term Aim:

50% reduction in maternal and neonatal deaths



100 Day Aim: build a system for information driven decision making in maternal and neonatal health, and test that system for 100 patients by 4/15/23







### **Option 4: Combination**

Malawi – Maternal Mortality **Secondary Drivers Primary Drivers** Individualized patient focused care Respect and dignity of women maintained Family Friendly throughout care Care Proactive interpersonal communication **Long Term** Floor Stocks Available Effective **Blood Availability** Support Aim: Systems Motivated staff 50% Prompt ID of Obstructed Labour Prompt ID of need for CEOC Clinically reduction in Control infection through protocols **Excellent Care** maternal and for Women Timely treatment of bleeding Active management of 3rd stage neonatal Prompt recognition and treatment of asphyxia deaths Clinically Routine classification to identify and track risk **Excellent Care** for Newborns Prevention, prompt recognition, and treatment of infections/sepsis Safe care to avoid hypothermia & promote b.f. Information Maternal death and near miss audits Driven Decision Measure patient, guardian, staff satisfaction Making Regular collection/analysis of key data Accurate and complete patient records





### **Option 4: Combination**

Malawi - Maternal Mortality Secondary Drivers

Long Term Aim:

50% reduction in maternal and neonatal deaths

Family Friendly
Care

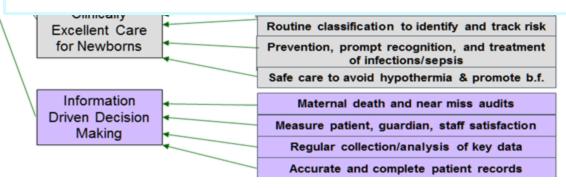
Individualized patient focused care

Respect and dignity of women maintained throughout care

Proactive interpersonal communication

Floor Stocks Available

100 Day Aim: By 4/15/23 reduce maternal and neonatal deaths by 2% by creating a new system for information driven decision making and testing that system on 100 patients, with a particular focus on recognition and treatment of asphyxia.







### Cleola's Initial Aim for her Equity Action Lab

No one has unsafe drinking water, no one doesn't have enough drinking water



### Narrowing Cleola's Aim for a 100 Day Project

No one in New Orleans, LA suffers from a heat stroke because of dehydration.



### **Further Narrowing Cleola's Aim**

People over 65 years old in New Orleans will have access to reliable drinking water to prevent heat stroke.



### Settling in on a potential 100-Day Aim

By March 2023, 75% of people over 65+ living in New Orleans downtown/ East of Elysian Fields Ave. will know the importance of drinking water each day and have access to water to prevent heat stroke in the summer months.



### Considerations When Developing Your Aim Statement

- Have you been working on this topic area together for a while (in which
  case you can likely set an Aim that really improves the lives of some of the
  people affected by the inequity)?
- Or is this your first time working together on this (in which case putting in place the infrastructure and a functioning system might be a great aim for your first Equity Action Lab)?
- Is their general agreement about the challenges and potential solutions or are there different schools of thought and a need to test several solutions?
- How large is your Design Team and how much time will they actually have each week to work toward meeting the aim?
- Do you know about the "Champagne Test"? Would your Aim if accomplished in 100 days be cause for celebration?



### Your Turn - Developing a Potential 100-Day Aim

- Working as a team, take 10 minutes start thinking about a potential 100-day Aim for your Improvement Team. If you have the longer-term Aim for your project, how can you use that to develop an aim for what you can accomplish in 100 days?
- Write down your thoughts in Section F: DRAFT Aim Templates



# Questions?



# Take a Break!

You Deserve It!



# Phase 1: Prep (continued)



### **Equity Action Lab Structure**

Prep Phase (2-3 months)

Data collection

- Needs
- Interventions and ideas

Team formation

Narrowing the focus

**Action Lab!** 

(1.5-2 days)

Set ambitious goal (aim)

Develop potential solutions (ideas to test)

Develop action plan

Sprint Phase (approx. 100 days)

Implement plan (test ideas)

Adapt (change plan) as needed to achieve goal

Weekly team meetings

Sustain, improve or scale

Goal achieved!

**Momentum Lab** 

(1 day) Solidify gains Set new goals

We are Here!



### **Gathering Background Information**

#### Two Categories:

- Existing Data that you want to curate (don't forget Advance OC!)
  - New Data that you want to collect

This is <u>NOT</u> about ensuring that you know everything about the topic area (that isn't possible)

This is about developing a foundational understanding of inequities, pain points, opportunities and assets

- Mapping Actors and Assets (included in the Equity Action Lab Planning Worksheet)
- Using Data for Improvement (the Model for Improvement)
- Using Design Thinking (going beyond surveys and focus groups)
- Developing 1-3 Public Narratives as part of the "Call to Action" at the Action Lab

See Making a Plan for Data Collection in the Equity Action Lab Planning Worksheet



### **Cleola's Existing Data to Curate**

#### For data that you need to track down:

Curating Existing Data		
Data Source	Information Requested	Person Responsible for Making the Ask
Public Health Agency	Number of people who die from Heat Stroke Number of people who arrive at ER who need IV	Community and Cleola Inc.
Residents knowledge of heat stroke and systems	Warning signs of a heat stroke	Improvement Team
Community Residents	How much is a healthy consumption of water a day?	Community and Cleola Inc.
Public Health Agency Elderly Coalition	Survey of 30 elderly adults and 30 people who have service work outside?	Improvement Team



### Cleola's Data to Collect Before the Equity Action Lab

- We will go to three local senior centers and interview seniors at these centers to find out:
  - How much water they drink on an average day
  - What they know about preventing dehydration and heat stroke
  - Reasons for not drinking more water
  - Their ideas for helping seniors access and drink more water



### Your Turn – Data for your Equity Action Lab

- Working as a team, take 10 minutes to start thinking of existing data you can
  use (don't forget Advance OC!), as well as additional data you can collect
  prior to your Action Lab
- Write down your thoughts in Section G. Making a Plan for Data Collection



### **Operational Logistics**

Among the questions to answer are:

- Who will manage invites?
- How will we set up the room to allow for presentations/work with all Action Lab Participants AND breakouts into smaller groups?
- Who will facilitate each of the Equity Action Lab activities/sessions? How do we help ensure we are distributing power?
- How will help ensure psychological safety and an environment of coproduction?



### **Operational Logistics**

Among the questions to answer are:

- How will we make decisions during the Action Lab?
- Who will schedule, lead/facilitate check-in meetings during the Sprint Phase (decided during AL)?
- How will we document our decisions, progress, and results?
- How will we intentionally build joy, trust, and sustainable relationships throughout the process?



# Questions?



# Phase 2: Action Lab



### **Equity Action Lab Structure**

Prep Phase (2-3 months)

#### Data collection

- Needs
- Interventions and ideas

Team formation

Narrowing the focus

#### **Action Lab!**

(1.5-2 days)

Set ambitious goal (aim)

Develop potential solutions (ideas to test)

Develop action plan

Sprint Phase (approx. 100 days)

Implement plan (test ideas)

Adapt (change plan) as needed to achieve goal

Weekly team meetings

Sustain, improve or scale

Goal achieved!

**Momentum Lab** 

(1 day) Solidify gains Set new goals

We are Here!



### Welcome and Icebreaker

This sets the stage for demonstrating that the Equity Action Lab Model is different (and can have different results)

Consider having this facilitated or co-facilitated by one or more members of your Design Team, including a person with lived experience

Make sure that your icebreaker:

- Is an opportunity for participants to get to know each other better
- Promotes an even playing field where people with lived experience and front-line staff will feel comfortable
- Is fun, engaging and energizing!

This usually includes a brief overview of the day's agenda and a teaser for how you will make decisions as a group



## Call to Action (Framing the Challenge/Issue)

This often includes a mix of quantitative and qualitative data

Assuming you have 30 minutes for this, the content might look like:

- Framing the topic area (10 minutes):
  - The problem (using local, state and/or federal data)
  - The inequities (and the systems/root causes of these)
  - The opportunities (including a few Bright Spots) with (10 minutes)
- Call to Action using Public Narrative from three experts:
  - A local, state or national leader on the topic (5 minutes)
  - A staff member working directly "in the trenches" on the topic area (5 minutes)
  - A person directly affected by the topic area (5 minutes)



### **Equity Action Lab Overview**

Brief Overview of the Model, including the 4 phases and the work done to date

A brief overview of adaptive challenges (vs. technical ones) and the mindsets needed to successfully tackle these

A reminder that the Topic Area for the Equity Action Lab is an adaptive challenge so this EAL will adapt in action throughout the 2 days (and throughout the Sprint Phase)

A brief overview of how participants will have an equal voice in:

- Finalizing the Aim
- Developing a Theory of Change
- Developing a list of possible ideas to test
- Selecting a sub-set of ideas to start testing during the Sprint Period



### **Understanding Your Systems**

Most EALs have at least one exercise to better understand the system or systems that the EAL is trying to improve

The goal of the exercise is that participants have a common understanding of the processes/systems and can identify some paint points (places where improvement is needed)

### Example of activities include:

- Upstream, Midstream, Downstream Exercise
- Mapping the process (and/or systems) from beginning to end for the perspective of the end user/person with lived experience
- Empathy Maps and Journey Maps



### Introduction to Quality Improvement

Some time during the EAL should be dedicated toward a practical overview:

- What Are We Trying to Accomplish?
  - Aims
- How will we Know that a Change is an Improvement?
  - Measures
- What Change(s) can we Make that Will Result in Improvement?
  - Theory of Change (in the form of a Driver Diagram)
  - PDSAs (ideas that you will test during your 100 Day Sprint)



### **Developing a Theory of Change**

Generally builds from or is connected to your Understanding Your System Exercise

Option 1: A Driver Diagram articulating your theory of the drivers of meeting your long-term aim (if you don't already have this)

Option 2: A Driver Diagram articulating your theory of the drivers of meeting your short-term (100-day) aim

Don't worry about getting the Driver Diagram perfect. It is just a theory and will be improved upon once you learn more



### **Action Planning**

Generally includes the following activities:

- Developing a draft team (or sub-team) work plan
- Planning first PDSA (s)
- Confirming measurement strategy (how will we know that a change is an improvement?)
- Determining How, When, Where team/sub-team will meet and other logistics
- Team Contract (commitments of time, ideas and willingness to test new ways of being and doing)



### **Launch Celebration**

- Include time at the end of the Action Lab to celebrate your new way of working
  together, your collective aim and your iterative plan(s) for achieving your aim
- Often includes public narrative and similar techniques to remind people the importance of this work, to instill confidence and bolster the sense of community
- Often includes reminders that this work involves tackling a complex/adaptive challenge and will require new ways of being and doing
- Often includes some remarks from the leadership team that restates their willingness to try new things and to help remove barriers that the Design Team encounters

Always acknowledges/thanks members of the Design Team, Leadership Team and other participants of the Action Lab



# A Sample 2-Day Agenda is in the Equity Action Lab Guide



# **Questions?**



# Phase 3: Sprint



### **Equity Action Lab Structure**

Prep Phase (2-3 months)

#### Data collection

- Needs
- Interventions and ideas

Team formation

Narrowing the focus

#### **Action Lab!**

(1.5-2 days)

Set ambitious goal (aim)

Develop potential solutions (ideas to test)

Develop action plan

Sprint Phase (approx. 100 days)

Implement plan (test ideas)

Adapt (change plan) as needed to achieve goal

Weekly team meetings

Sustain, improve or scale

Goal achieved!

Momentum Lab

(1 day) Solidify gains Set new goals

We are Here!



#### Implementing Your Action Plan

- The most critical factor in determining the success of the EAL is that the Design Team meets weekly throughout the Sprint Phase
- Meetings can be virtual and are used to track progress, problem-solve and plan next steps
- Depending on your set-up, the Design Team can meet as a single team or split into sub-teams (with a Design Team members as the leader) that also incorporates other EAL participants
- Work is generally done between meetings (3-4 hours of work per Design Team Member per week)
- Emphasis placed on testing (continually asking "What can we test before our meeting next week?)
- Action Plan can (and often should) change substantially as the Design Team learns what is and isn't working



#### Check-In Meetings (ideally weekly)

Can be Full Design Team and/or Sub-Teams (Design Team members + others) - often virtual

Generally an hour but can be done in ½ hour after the first few weeks

#### Sample Agenda

- 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



#### **Mid-Point Meeting**

Generally near the midpoint of the sprint (e.g. for a 100-day Sprint, Day 50 would be the mid-point)

Leadership Team and Design Team participate (often virtual)

#### Sample Agenda

- 10 minutes Introductions and icebreaker
- 10 minutes Review aim and Driver Diagram
- 10 minutes Successes and Accomplishments so far
- 10 minutes Challenges and Barriers
- 10 minutes Asks for the Leadership Team
- 10 minutes Confirm Next Steps



## **Questions?**



## Phase 4: Sustain



#### **Equity Action Lab Structure**



Develop action

plan

needed to achieve goal

Weekly team meetin

We are Here!

Team formation

Narrowing the focus



Sustain,

Goal achievedi



#### Preparing for the Momentum Lab

Attempt to have the date for this set by the end of the Action Lab (I.e. tell people the date and location of the Momentum Lab at your Action Lab)

Planning for this generally starts 2-4 weeks in advance of the Momentum Lab

Additional people likely joined your effort during the Sprint Phase – be sure to invite them (as well as everyone who attended the Action Lab)



#### **Holding the Momentum Lab**

- Generally one full day and held within a week of ending the Sprint Phrase
- Purpose is to review progress/results, plan for the future and celebrate!



### Presenting the Results and Progress Made

The 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.



#### **Designing for the Future**

Three potential strategies to move forward:

- Sustain gains by implementing a monitoring system (less than 10% of EALs choose this option)
- Build upon success and scale up one or more of the change ideas you tested (about 20% of EALs choose this option)
- Set a new short-term Aim, develop new ideas to test and begin scaling ideas already tested (about 70-75% of EALs choose this option)



#### Sample Momentum Lab Agenda

30 minutes - Introductions / Icebreaker

60 minutes - Presentation on the work accomplished during the Sprint

- 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

60 minutes - Developing and selecting new ideas to test

60 minutes - Action planning for your next cycle

30 minutes - Wrap up and celebration!



### **Questions?**



# Putting it All Together: A Brief Recap



#### An Equity Action Lab always includes:

- A Prep Phase as short as feasible and generally lasting 2-3 months (emphasis on getting to action)
- A Sprint Phase of about 100 days (but not longer than 4ish months)
- A concrete, short-term aim (generally 100 days, but not longer than 4ish months)
   that addresses a health inequity
- A safe environment to involve people with lived experience as full partners in codesign/co-production (in all parts of the work)
- A measurement plan to track progress and guide decision making
- A way to include rapid-cycle tests of change, including using Plan Do Study Action (PDSA) cycles
- A way to report back activities and results to those engaged and other stakeholders (Momentum Lab or other methods)
- A group of willing participants that is prepared to work together in an intensive way for a short period (typically 3-6 months)



#### An Equity Action Lab always includes:

- A commitment to **get to action quickly** ideally this means something is tested and improved by including the enduser/people with lived experience throughout the process (and not just the development of a plan)
- Uses an iterative/adaptive process designed for complex challenges (rather than a fixed process designed for technical ones)
- Uses Improvement science as part of its approach
- Considers planning for sustainability and/or scale-up of success (this can often be done in conjunction with PDSAs)



#### An Equity Action Lab always includes:

Participants that can fill an array of roles, including:

- A lead to support and sustain efforts
- A diverse team (core action team) of participants, always including those most directly affected by your chosen topic area and those working "closest to the ground", that can meet regularly to plan and execute
- Community residents, participants, and/or people with lived experience to help guide, steer, and direct the group to meet the needs of those who are intended to benefit from the Equity Action Lab
- A measurement lead (or group) to facilitate data collection and analysis efforts



#### Support as You Plan & Implement an Equity Action Lab

- Your Coaches (all of whom have planned and implemented an Equity Action Lab)
- Monthly All Teams Calls
- Your Equity Action Lab Planning Worksheet (you will be sent an electronic version)
- The Equity Action Lab Guide (you will be sent a PDF of this stepby-step guide)



## Questions?





# Please evaluate this session: Equity Action Labs

Aim your phone's camera at the screen, click this QR code, and a short survey will open. Thanks for helping us improve.