



National **MCH** Workforce  
Development Center  
Advancing Health Transformation

**Operationalizing *With*:**  
**Moving From Plan to Action in Partnership**

Collaboration Tool

National MCH Workforce Development Center

Skills Institute

November 17<sup>th</sup>, 2020

## Purpose

The purpose of this Collaboration Tool is to provide a space to capture thoughts and plans to further your efforts to operationalize your state action plan with partners. You can use this guide both individually and/or together with your state team. Refer to this guide throughout the process of operationalizing your state action plan for ideas and resources to help you align with and incorporate elements of implementation stages and the spectrum of partner collaboration in order to co-create activities with persons with lived experience.

## Contents

- Space to capture notes from session polls and reflections
- Collaboration Time worksheet and guidance
- Additional resources to support implementation and partnership/engagement activities

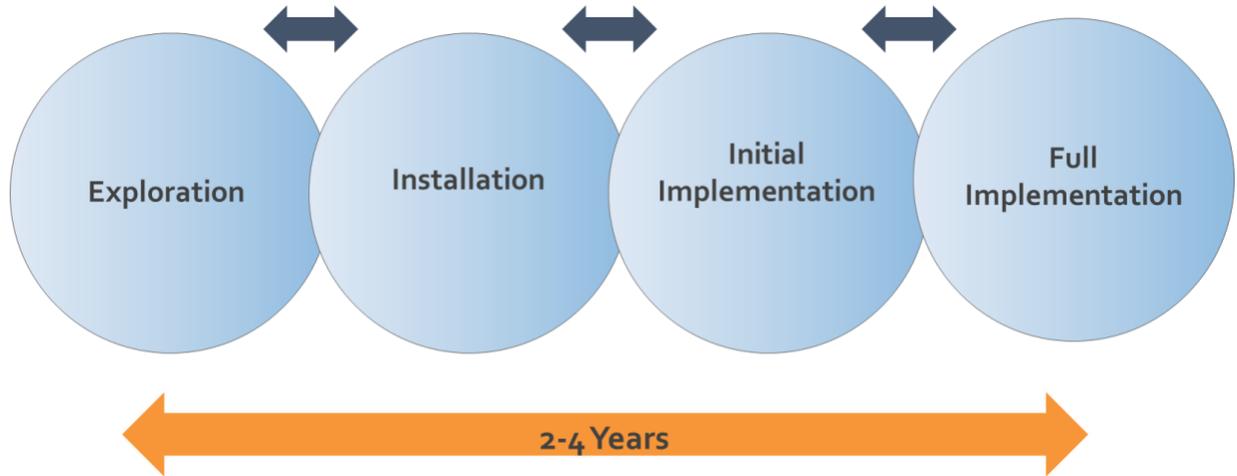
## Setting the “Stage” for Partnership

### ❖ Reflection 1: Expanding Stakeholder Engagement

As you move from *assessment* and *planning* to **action**, how can you continue and expand stakeholder engagement to support implementation of Block Grant strategies?

Current engagement strategy(ies)	How can you expand on existing engagement strategies as you move from planning to action?
New Engagement Strategy(ies) to Try	What would you like to accomplish by using this strategy(ies)?

❖ **Resource: Implementation Stages**



❖ **Annotation Activity: Where are you?**

Response	Description	Notes
<b>Exploration</b>	Involves an assessment of assets and needs of the focus population, fit of the program or practice with those needs and assets and feasibility of implementation.	
<b>Installation</b>	Involves building the infrastructure necessary to implement the program or practice, which includes building practitioner and organizational capacity.	
<b>Initial Implementation</b>	Includes the initial efforts of staff to use the program or practice, with attention to using data for continuous improvement.	
<b>Full Implementation</b>	Occurs as staff use the program or practice successfully, and population-level outcomes are achieved. Efforts shift to sustaining capacity and gains, as well as and scaling (if warranted)	

❖ **Poll 1: Collaboration with Stakeholders**

Thinking about the strategy/issue you selected earlier, **are you working in partnership with diverse stakeholders to plan and carry out the relevant work?**

Response	Notes: Briefly explain answer. What implications are there for action?
Yes, actively	
Sometimes	
No	
Don't know	

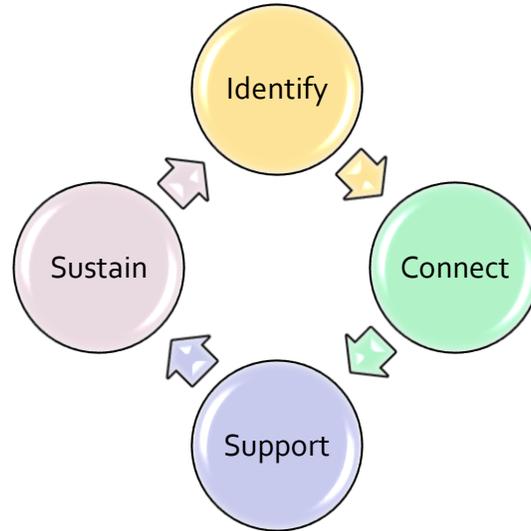
## Scoping the Partnership

❖ **Annotation Activity: How are you feeling about engagement?**

How are you feeling about engagement? Indicate where you are right now. You may have many feelings, some of which are not on this list.

Response	Notes about your feelings about engagement, their source, and any implications for action.
Anxious / Nervous	
Skeptical	
Excited	
Hesitant	
Curious	
Afraid	

❖ **Resource:** Identify, Connect, Support and Sustain Framework



❖ **Annotation Activity: Supporting People with Lived Experience**

Response	Notes	
	What supports are done well in your context?*	What could be improved?
Identify		
Connect		
Support		
Sustain		

\* Your response may vary based on your perspective (e.g. person with lived experience, public health agency staff, policy maker) and the role in promoting maternal and child health.

❖ **Resource:** Categories of Engagement

Strategies	Description	Notes on potential to Expand Engagement
<b>Inform/Educate</b> 	People with lived experience are recipients of information & education. They are informed about the program and activities.	
<b>Gather</b> 	People with lived experience are informers. Their input is solicited through opportunities to provide feedback. Input may not always be incorporated. Typically input is provided through surveys.	
<b>Discuss</b> 	People with lived experience and staff discuss issues. The program provides opportunities for input and programs. The input is used in the program or activities. Typically input is offered through discussions which include give and take with opportunity for clarification.	
<b>Involve</b> 	People with lived experience are advisors to program. They are provided program challenges to problem solve.	
<b>Partner</b> 	People with lived experience are advisors to program. They are provided program challenges to problem solve.	

## Collaboration Time: Operationalizing Partnership

The **three-step activity** outlined below is designed to help users identify partners, clarify the purpose of and approaches to partnership, and plan investments to strengthen partnership to drive desired MCH outcomes. When completed, users will have an operationalized plan to strengthen and sustain effective partnerships in their context.

*Hint: If you completed the **Network Activation Tool** during the Skills Institute Day 2, it can be a resource for step 1 below.*

### ❖ Preparation

- Familiarize yourself with the Collaboration tool.
- For groups, identify a facilitator and a note taker (this will be useful for both Steps 2 & 3).
- Identify any questions from the presentation.
  - **Note:** Participants will have access to Center staff during Collaboration Time. There are also Office Hours on Friday 11/20 from 12-2p.m. Eastern.
- Identify the issue/context for which you want to develop and/or expand partnership. For example, you might choose the strategy you have been focusing on throughout the Skills Institute.

### ❖ Step 1: Identifying Potential Partners

**Guiding Question:** Who are the potential partners?

#### Activity Guidance

- Reflect on the guiding question and capture your ideas in **Table 1**.
- Draw on notes and ideas from Day 2, *Activating your network* exercise.
- For groups, share and consolidate the group's ideas.

### ❖ Step 2: Choosing the Partnership Strategy

**Guiding Question:** What types of partnership do you want to have?

#### Team Guidance

- For each partner identified, indicate how you want to partner with them (See *Resources and References*, Resource 1 below). Capture your ideas in **Table 1**.
  - **Note:** Each category of engagement can be useful, and each has different implications for action (e.g. the amount of time and resources required, staff and partner capacity, etc.).
- For groups, share your responses and reflect on the variety and scope of the selected categories. Were any frequently selected? Are any missing? Why might this be?

**Table 1: Identifying Partnership Opportunities**

Selected Issue/Context for Partnership:			
Step 1 (Draw on your Day outputs where possible)			Step 2
Who? (name the person, group, agency)	Why? Note why they would make a good partner	Current Connection? Note an existing relationship or collaboration	Partnership Type (Inform/Educate, Gather, Discuss, Involve, Partner)
<i>EXAMPLE: Youth Action Network</i>	<ul style="list-style-type: none"> <li><i>They represent the end users of the services we provide</i></li> <li><i>There is commonality and shared goals between our two organizations</i></li> </ul>	<i>Currently, members of the Youth Activation Network serve on our Advisory committee – want to strengthen and expand this collaboration</i>	<i>Discuss, Involve</i>

### ❖ Step 3: Building Capacity for Partnership

**Guiding Question:** What support and investments will be needed for effective partnerships?

**Team Guidance**

- For each category of partnership identified in **Table 1**, use **Table 2** to capture your ideas on current capacity for partnership.
- Identify the WHO (e.g. title V agency staff, local public health agency staff, community representatives, etc.) may need capacity building support.
- Next, identify potential capacity building strategies, such as training, coaching, assessment, budget, staff time, policy, etc.
- Finally, consider which next steps are needed to bring these strategies to life.

Table 2: Building Capacity for Partnership				
Category	Actors	Current Capacity	Capacity Building Strategies	Next Steps
<b>Inform/Educate</b> 				
<b>Gather</b> 				
<b>Discuss</b> 				
<b>Involve</b> 	<i>Example: Advisory Committee Members</i>	Basic	Committee has been mainly used as a forum for discussion. To increase involvement in Title V strategy design, the committee could benefit from training and coaching in user centered design (UCD) methods.	Advisory committee co-leads - identify UCD potential training sources, draft timeline.
<b>Partner</b> 				

## Additional Resources and References

### ❖ Resource 1: Engagement Strategies: Example from Presentation

		<b>Inform/Educate</b> 	<b>Gather</b> 	<b>Discuss</b> 	<b>Involve</b> 	<b>Partner</b> 
<b>Strategies</b>	High Touch	<ul style="list-style-type: none"> <li>• Face-to-face education</li> <li>• Newsletter</li> <li>• Brochure</li> <li>• Posters</li> </ul>	<ul style="list-style-type: none"> <li>• Face-to-face inquiries</li> <li>• Suggestion boxes</li> <li>• In-person interview</li> <li>• Shadowing</li> <li>• Mystery shopping</li> </ul>	<ul style="list-style-type: none"> <li>• Targeted meetings to clarify input</li> <li>• Focus group</li> <li>• 1:1 in-person discussion</li> </ul>	<ul style="list-style-type: none"> <li>• On-going feedback panels</li> <li>• People occasionally join program meetings</li> <li>• Town halls</li> <li>• World Café</li> </ul>	<ul style="list-style-type: none"> <li>• Patients join ongoing program meetings</li> <li>• Patients learn content and help decide what changes to make</li> <li>• Retreats</li> </ul>
	High Tech	<ul style="list-style-type: none"> <li>• Website</li> <li>• Mass Media</li> <li>• Email/ Texts</li> <li>• Social Media</li> </ul>	<ul style="list-style-type: none"> <li>• Electronic surveys</li> <li>• Phone interview</li> <li>• Webinars with Q&amp;A</li> </ul>	<ul style="list-style-type: none"> <li>• Google hangouts</li> <li>• 1:1 phone discussion</li> <li>• Online forums</li> </ul>	<ul style="list-style-type: none"> <li>• Virtual town halls</li> <li>• Panels via video conferencing</li> </ul>	<ul style="list-style-type: none"> <li>• Use collaborative documents</li> <li>• Use video conferencing</li> </ul>

## ❖ Resource 2: Sample Strategies/Considerations to Prepare for and Enhance Partnerships

### [From Foundational Practices for Health Equity](#)

- Does our organization partner in a way that intentionally shares power and decision-making?
- Does our organization designate enough time and create avenues for meaningful participation of community partners?
- Are decisions by our organization made in collaboration with community partners?
- Does our organization engage broad stakeholders, including those experiencing health inequity in iterative testing and co-design?
- Does our organization have an evaluation plan of our community engagement efforts to ensure continuous learning and impact of partnering with communities?

### [Is My Implementation Practice Culturally Responsive?](#)

- I assess the extent to which community stakeholders were actively involved in the planning and implementation of program activities.
- I engage community members, consumers, and stakeholders in:
  - needs assessment and implementation planning to support equitable outcomes.
  - identifying appropriate practices that will address equity
  - creating and/or tailoring culturally responsive interventions and activities (i.e., programs, practices, and supports) focused on equity.
  - identifying appropriate supports and resources to accomplish equity goals.
  - conducting interviews, surveys, and other primary data collection activities that support ongoing improvement in service to positive outcomes for the community.
  - defining criteria for “success.”
  - interpreting ongoing improvement data and informing analysis that supports equitable decision making.
  - disseminating and applying findings to the community to ensure equitable practice for all.

### [Annie E Casey Foundation - Race Equity and Inclusion Action Guide](#)

- How can engagement be inclusive, representative and authentic?
- How will stakeholders exercise real leadership and power?

❖ **Resource 3: Contracting and Technical Assistance Strategies to Strengthen Stakeholder Engagement**

<b>Contracting for Partnership</b>	
<b>Title V Agency</b>	<b>MCH Partner Agencies</b>
<ul style="list-style-type: none"> <li>• Clarify Title V expectations for partnership in funding announcements</li> <li>• Require defined and feasible partnership strategies</li> <li>• Integrate partnership performance measures in contract               <ul style="list-style-type: none"> <li>○ E.g. Require stakeholder inclusion on implementation support teams.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Align partnership strategies with prioritized needs</li> <li>• Build in time for outreach and relationship development</li> <li>• Ensure resources support stakeholder participation</li> </ul>

<b>Technical Assistance for Partnership</b>	
<b>Title V Agency</b>	<b>MCH Partner Agencies</b>
<ul style="list-style-type: none"> <li>• Build expectations for participation in technical assistance activities (TA) into contracts</li> <li>• Identify and engage TA providers with contextual knowledge               <ul style="list-style-type: none"> <li>○ Draw on local, state, and national resources</li> </ul> </li> <li>• Tailor TA investments to local needs</li> <li>• Involve stakeholder representatives in TA planning and evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• Protect time and budget for technical assistance with agency staff and partners</li> <li>• Recognize and resource stakeholder participation</li> <li>• Involve local stakeholders in planning and evaluation of technical assistance activities</li> <li>• Use participant feedback and evaluation data to improve technical assistance</li> </ul>

❖ **Resource 4: Implementation Resources**

1. **Active Implementation Hub, Implementation Stages Overview**

- **Link:** <https://nirn.fpg.unc.edu/module-4>

2. **The Implementation Stages Planning Tool**

- Facilitates assessment of stage-based activities
- Supports stage implementation planning and improvement
- Identifies specific outcomes
- Can be used at any stage
- **Link:** Implementation Stages Planning Tool - <https://nirn.fpg.unc.edu/resources/stages-implementation-analysis-where-are-we>

❖ **Resource 5: Family Engagement Resources; Sarah Dunne, MN Department of Health**

Resource	URL
Principles of Community Engagement: Second Edition	<a href="https://www.atsdr.cdc.gov/communityengagement/index.html">https://www.atsdr.cdc.gov/communityengagement/index.html</a>
MDH Community Engagement Plan	<a href="https://www.health.state.mn.us/communities/practice/equityengage/community/docs/ce-plan.pdf">https://www.health.state.mn.us/communities/practice/equityengage/community/docs/ce-plan.pdf</a>
MDH Principles of Authentic Community Engagement	<a href="https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/docs/AuthenticPrinciplesCommEng.pdf">https://www.health.state.mn.us/communities/practice/resources/phqitoolbox/docs/AuthenticPrinciplesCommEng.pdf</a>
Washington State Department of Health Community Engagement Guide	<a href="https://www.doh.wa.gov/Portals/1/Documents/1000/CommunityEngageGuide.pdf">https://www.doh.wa.gov/Portals/1/Documents/1000/CommunityEngageGuide.pdf</a>
World Health Organization's Community Engagement Framework For Quality, People-Centered and Resilient Health Services	<a href="https://apps.who.int/iris/bitstream/handle/10665/259280/WHO-HIS-SDS-2017.15-eng.pdf?sequence=1">https://apps.who.int/iris/bitstream/handle/10665/259280/WHO-HIS-SDS-2017.15-eng.pdf?sequence=1</a>