| Resource | Activities/Notes/Considerations | Related Resources |
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| Slide 1 – session title  Bringing It All together: The PCI Framework | **Introduce session** |  |
| \*Slide 2 - | **Using an Action-Evaluation-Adaption cycle for bringing about systemic change**  • Positioning work within using both results-based management and adaptive management with evaluation embedded  • Link back to the morning discussion  • Refocus on the MAIDAN example of an intermediate outcome that we discussed in regard to CRE and SOE |  |
| Framework Slide (slides 3 &4)  Slide 3 is the table poster  Slide 4 visual is on template | **Presentation and Process**  Provide a *brief* overview of the framework and explain that you will be walking participants through its application using the case study as a model. We’ll begin with the C’s and then move to the P’s.  The I’s visual is on your template as a continual reminder of the relationship of the 3 I’s on the left of the visual to the 4th I on the right (Impact). Impact is your long-term goal (LTG). The other 3 I’s are at the core of the action-evaluation-adaptation cycle that we’ll be working with. The 3 I’s of inform, improve, and influence are enmeshed with the actions and evaluation you undertake connected with your intermediate outcome. We’ll be going into more detail about this later. | Speakers and staff positioned around room to answer questions, help teams get oriented |
| Slide of template (slide 5)  This is the blank template that they’ll all have hard copies of. It has their LTG prepopulated on their team’s version of the template | **Template**  Accompanying the visual is a template we’ll be completing later after we’ve done work with the table poster of the Cs and Ps. I’ll be completing the table poster and then the template using the MAIDAN case. Participants will then complete the same analysis / step using their own information (detailed directions for each segment is provided below).  Direct participant attention to the pre-populated *Impact* box on their template. Link their LTG to the I’s in the framework | Speakers and staff positioned around room to answer questions, help teams get oriented; crucial point to be sure at least most of the team members are clear |
| Slide of MAIDAN template (slide 6) | **MAIDAN template**  The MAIDAN template here has the LTG and intermediate outcome filled in. This is the same intermediate outcome referred to earlier. We’ll continue to use it as an example. Call attention to the I’s portion of the visual at the bottom of the template for reference.  Look at their LTG to be sure they have it well in mind along with their intermediate outcome and actions they plan to undertake to achieve the intermediate outcome.  Now set the template aside as we work on the Table Poster. It will generate info that we’ll later put into the template. |  |
| PC -Table Poster  Slide 7 (blank) | **Presentation and Process for addressing 3 C’s**  **Move from template to Table Poster**  Now go to your table poster that has the PC portion of framework. We will look first at the Cs to get ourselves positioned in the situation.  You’ll be filling in the boxes on the poster as we move through the process. | Goal Template |
| PC-Table poster for MAIDAN with Content filled in (Slide 8) | **Addressing first C: Content**  Direct participant attention to the *Content* box on their table poster. Explain that each group will be choosing an intermediate outcome for their content.  **This is a practice run for you.** You don’t have to decide right now that this is the one you’ll use for your work over the next 18 months but pick one that you can all support even if it’s not your first choice.  **MAIDAN Case Study**  Add intermediate outcome as shown in slide 8  Within 1 year, and with input from a broad array of stakeholders including patients and their families, develop a patient-centered, unified mental health screening and referral data collection system that is better able to identify inequities and suggest action.  **Group Work**   * Each group will select an intermediate outcome and write that outcome in the content box. | Speakers and staff help teams ensure they have an Intermediate outcome identified. Crucial for continuing. It’s a practice run! Continue on through all the Cs.  Goal Template  Deliverables Template |
| PC-Table Poster for MAIDAN with Context filled in (slide 9) | **Address second C: Context**  Direct participant attention to the *Context* box on their table poster. Identify a context within which the intermediate outcome will be addressed: environment, background and situational dynamics. This needs to be a manageable location/situation and one that directly gets at the equity issue of concern.  **MAIDAN Case Study**   * The context for the intermediate outcome chosen would be low income neighborhood within Middletown, the shelter, the SON and SOM, behavioral health providers, and local mental healthcare assets.   Add “low income neighborhood, shelter, SON, SOM, behavioral health providers, and local mental healthcare assets.” to box on slide  **Group Work**   * Each group will discuss and define the context of their intermediate outcome and write it in the box. | Goal template  Subgroups  Stakeholder conversations  CHNA/other reports  Mapping |
| PC-Table Poster for MAIDAN with Connectivity filled in  (Slide 10) | **Address third C: Connectivity**  Direct participant attention to the *Connectivity* box on their table poster. Define connectivity: linkages, interfaces, and interactions. Connections are an essential aspect of systems. They are all too often given insufficient attention. We’ll be emphasizing them in this process.  **MAIDAN Case Study**   * Looking here for what is already known about the general connectivity situation regarding the content (access to mental health care) within the context (neighborhood in Middletown) * Areas of noticeable connectivity (or lack of connectivity) for the intermediate outcome chosen would be related to data, programs, organizations, and provider-client interactions. (These connectivity issues are drawn from the data that MAIDAN has gathered to date as given in the case study.)   Add: Disconnects in (1) data; (2) AHPC and local groups; (3) SON and SOM; (4) organizational missions  Connections: AHPC and UHC  **Group Work**   * Each group will discuss and define the connectivity (or lack of connectivity) that exists in the situation generally that relates to their intermediate goal and write it in the box. | Goal template  Mapping  Subgroups |
| Summary so far  (Slide 11) | **Summary so far**  This slide summarizes where we are so far. When we return after the break, we’ll be moving to the template |  |
| Column 1 of MAIDAN Template (slides 12, 13) | **Move to Template Column 1 (Initial Action Items)**  **(Slide 12 will orient participants to the template)**  You now have the context in which you are going to address your content (intermediate outcome), and you have identified the broad connectivity issues in the situation. Now we are moving to what actions you’re going to take to achieve your intermediate outcome. We will be doing this by working with the template. The first column of the template is the place for you to identify activities that you are thinking of undertaking to address the intermediate outcome. |  |
|  | **MAIDAN (Slide 13)**  MAIDAN has brainstormed 3 possible actions they might take to do this. Slide shows the intermediate outcome filled in and column 1 filled in (the other columns are shaded out at this point). Look at MAIDAN case study to see the criteria they are using. -second page -first two bullets.  **Group Work**  Transfer your intermediate outcome from your poster to the template and then list 1-3 activities you’ve been thinking of doing to bring about the results you desire through your intermediate outcome. Consider criteria that are important to you in determining where to start. |  |
| PC - Table Poster  (slide 14)  Definitions:   * Policies * Programs * Practices | **Focus on 5 P’s -Introduction and first 3P’s**  Now moving to the center of the table poster – the 5 P’s. We’ll work with them in two groups. First the 3 P’s on the left side. Then we’ll move to the 2 P’s on the right side. Look again at your 3 C’s to set some boundaries on your thinking.  Direct participant attention to the *Policies, Programs, and Practices* box on their table poster. Define policies: regulations, legislation, and rules within and across multiple levels and domains (e.g., institutional, local, state, national).  Define programs: interventions designed and implemented for systemic change or to achieve specified outcomes for designated groups. Define practices: patterns of individuals’ behaviors formed and reinforced over time.  Grouped this way because tend to involve different people in terms of who can make a difference. They tend to also be connected to different levels of hierarchical systems.  The focus here is on key interconnections within and among these three that are relevant to the intermediate outcome and the activities you are considering. Tricky balance here of narrowing to things relevant to the potential activities while being open to major rethinking of those activities. | Health Equity Inventory  Stakeholders  Subgroups |
| PC-Table Poster for MAIDAN (slide 15) | **MAIDAN Example of 3 P’s**  Before you discuss your situation, let’s look at MAIDAN  **MAIDAN Case Study**  The poster has a place for listing key points about the interconnections of policy, practice, and programs that are already known from the work so far. This builds on the general work done about connectivity (one of the C’s) but now we are focusing more specifically on these 3 P’s.  Put on table poster in left box:  **Already Know:**  Disconnects  - among data collection and referral systems (data collection process, screening questions, and referral capabilities)  - between AHPC and local groups (disconnect in AHPC’s referral practices and incomplete knowledge of important community partners)  - between SON and SOM (differences in training practices, differences in faculty oversight practices, make referrals to different partners)  - organizational missions (these are a type of high-level policy that is often overlooked but can be very important)  **Need to Learn:**  Policies  - data systems  - roles of community members in research (e.g., in MAIDAN’s case being able to lead focus groups)  - data sharing  Programs  -SON and SOM community programs  Practices  - meetings among people working with data  - Use of data for decision-making  **Group Work**  Respond to the labels on the table poster to brainstorm ideas. Then relate those ideas to the possible activities that they might undertake as shown on the template.  Reminder: Purpose is to find high leverage by attending to places where you can get more movement/change.   * Each group will discuss and identify policies, programs, and practices and their connections within the context and content areas they discussed for the 3 Cs. They write in the box what they need to learn about through the action steps they are planning. |  |
| PC-Table Poster  (Slide 16)  Definitions:   * People * Power   PC-Table Poster for MAIDAN (slide 17) | **Presentation and Process**  Direct participant attention to the *People and Power* boxes on their table poster. **(Slide 16)**  **MAIDAN Case Study (Slide 17)**   * Describe power/people dynamics in what has been learned so far - large organizations seem to be taking from the community and not giving back adequately * Need to learn how to get that relationship back on track   **Already Know:**  - community has little power in AHPC, UHC decision making  - police power over homeless  - Power dynamics between SON and SOM  - “Competition between CBOs for resources  **Need to Learn:**  - who are informal opinion leaders in all organizations  - who controls data access, use  **Group Work**  Each group will discuss and respond to questions on table poster. | Stakeholders  Subgroups |
| Initial Action Ideas MAIDAN Action Selection  (Slide 18) | **Presentation and Process**  MAIDAN reviews their Initial Action Items in light of the work on the 3 C’s and the 5 P’s – MAIDEN decides to take the first Action Idea – Conduct a Focus Group (Click to animate their choice)  **Group Work**  Groups should decide on which intermediate outcome they should focus on for the rest of this activity |  |
| Template (slide 19)  MAIDAN examples for:   * 3 P’s column 2 * 2 P’s column 3   (slide 20) | **Presentation and Process**  **Move to Template Columns 1 - 3**  **(Slide 19 orients participants to the template and MAIDAN Action Selection)**  Prepare to make the transfer of P’s to template specifically related to the initial activities. This is the time to look at each of the possible activities MAIDAN is considering (column 1) and discuss align of items from table poster with these activities. This may be a place for considerable discussion if quite new ideas are coming up for the P’s discussions or may be fairly clear. After discussion, MAIDAN selected the first activity. They thought it would best engage the full partnership and what they can do (see criteria that MAIDAN had)  **Transfer P’s to Template (Slide 20)**  Relate ideas from poster discussion to template narrowing down from what was in the table poster to those that connect to the action idea that they have selected in column 1    MAIDAN created a consolidated statement about the 3P’s that zeroes in on what they most want to address (column 2). It was something that can have a significant ripple effect through the systems involved.  Then they did the same for the 2 P’s.  **Group Work**  Complete columns 2 and 3 for **one** of the activities you have in column 1. (Feel free to make adjustments in your activities in column 1 if you want to. This is all about gradually enriching your ideas before taking action)  (Note: We are doing both columns 2 &3 at this point rather than transferring from table to template earlier, first for 3 Ps and then 2 Ps.) |  |
| MAIDAN Template  (Slide 21) | **Reorient to full template**  Full MAIDAN template, this time with only last three columns darkened – Ready to move on to Revised Actions and Success)) |  |
| MAIDAN Template  (Slide 22, 23) | **Completing Column 4 and 5 (Revised Actions, Success) of Template**  **MAIDAN example**  Building on how you sharpened your thinking about systemic effects, interconnections among policies, practices, and programs as well as thoughts about power and people, restate your action given in column 1. Put this in Column 4  In Column 5 (Success) fill in Success – this is what you hope will be the result of engaging in the revised activity, in this case the enriched focus group. This Success measure needs to be anchored in the Intermediate Outcome as well as appropriate to the action selected (for MAIDAN, the focus group)  **Group Work**  Do same activity as MAIDAN did (complete columns 4 and 5). |  |
| MAIDAN Template  (slide 24) | **Summary Reference point**  Look at full template and see that we’ve filled in columns 1-5 and now ready to move to the 3 I’s. Before doing that let’s look at the relationship among these 3I’s and the Success measure |  |
| Visual Display of 4I’s  (slides 25) | **Relationship of 3 I’s**  Slide 25 recall the relationship we had among the three I’s on the left side of the I display on your template. We are now going to progressively fill these in on the template but first I’ll show a nonlinear display of these so you have this in mind along with the general intention of each of these I’s.  I’ll show these so you get the feel for how this works  Describe relationship among these  **Inform** – here is what you hope to be informed of through the activity and what you will inform others (in this case the focus group participants) of based on knowledge you have from your previous work and that they need in order to give you useful input  **Influence** –how you hope the “inform” exchange will influence others to take action that will amplify the systemic change that you are seeking to enhance equity  **Improve** –how might those involved in the “inform” exchange improve the functioning of existing systems that they are responsible for that relate to your intermediate outcome.  These 3 I’s are anchored in the Success metric that we have for this activity (i.e., Focus group for MAIDAN) |  |
| MAIDAN Template (slide 26 - 28) | **Complete Columns 6-8 of template**  **Slide 26-** **Inform** – here is what you hope to be informed of through the activity and what you will inform others (in this case the focus group participants) of based on knowledge you have from your previous work and that they need to give you useful input  **Slide 27- Influence** – fill in how you hope the “inform” exchange will influence others to take action that will amplify the systemic change that you are seeking to enhance equity  **Slide 28- Improve** – fill in who involved in the activity that you expect the “inform” exchange will stimulate them to take actions on their own/with their own organization to improve the functioning of the existing systems that they are responsible for.  **Group Work**  Each team now fills in columns 6-8 for the revised action they have in column 4 and the success given in column 5 that they hope to achieve.  (Seek to have each team get some notes down in those columns) |  |
| AEA Loop – Evaluation Metrics (Slides 29 - 32)  Page 3 of MAIDAN template | **Looking at MAIDAN’s** first 3 I’s, we are going to quickly take a look at some possible evaluation metrics that they could use to evaluation and adjust their progress in the near term.  We’ll start first with their INFORM metrics (Slide 29)   * Ask the group to suggest a few reasonable metrics * Show the metrics you have developed   Now we’ll look at their INFLUENCE metrics (Slides 30 and 31)   * Ask the group to suggest a few reasonable metrics * Show the metrics you have developed   Lastly, we’ll look at their IMPROVE metrics (Slide 32)   * Ask the group to suggest a few reasonable metrics * Show the metrics you have developed   As you can see, the first 3 I’s give us a way to assess and continuously improve upon our actions. This is just one small adaptation loop, in reality, you will conduct many of these as you drive toward IMPACT. |  |
| AEA Loop – The 3 I’s 🡪 SUCCESS (Slide 33)  AEA Loop – The 3 I’s 🡪 IMPACT (Slide 34) | **Looking at what we have accomplished so far,** we have completed one AEA feedback loop (INFORM, INFLUENCE, AND IMPROVE) to drive us toward Interim Success – an adaptive approach. We need to make sure that we are also results-based and so we now need to take a look at the evaluation that is embedded in this model.  **Summary of Whole Template (Previous notes for review)**  Look at completed template and reflect on how we have moved from their LTG to an intermediate outcome and then to specific activities to achieve the outcome. Those activities were done in light of what they considered about a specific context and with attention to connectivity. Then you went on to consider 5 Ps that are very important when thinking systemically. You went through a winnowing process to get to a set that can give you good information to achieve your intermediate outcome while also influencing others in ways that you hope will support this. You also hope that some who are involved have the positional power to actually make some improvements in existing systems.  You are now positioned to undertake an activity that you get a high degree of benefit from in terms of your intermediate outcome AND you have hopefully stimulated others to make changes (through the influence and improve aspects) to build systemic changes that move you toward your LTG (impact) |  |
| Expanded view (Slide 35) | **Backing up from this one adaptation loop,** we can see that your work over the next 18 months and many years will be a series of adaptations that will change the direction of your work while continuously moving you toward your long-term goal ….  **AEA cycle expressed in terms of the I’s and adds in the Evaluation portion (Previous notes for review)**  Let’s now loop back to our earlier conversation about the overall Action-Evaluation-Adaptation cycle that we discussed at the beginning of the afternoon.  Slide 29 –This slide shows the MAIDAN example with the 3 I’s that relate to the intermediate outcome that they are working on right now.  The wavy lines show that there is still along path to the Impact but hopefully they have stimulated something that has a long of systemic connections that will move in that direction.  Slide 30 – At some point, you’ll also undertake some evaluation activities that will look to see what actually happened. Did the focus group work do the things that MAIDAN had in their template as their expectations? (columns 5-8). They will undertake some data gathering activities to see what has happened. From there they will set up another intermediate outcome, define possible activities, narrow down to one that is especially likely to have the systemic ripple effects that will generate energy toward the LTG without overwhelming the partnership and the partners. |  |
| End of session | **Wrap up** |  |