

**Arc of Learning
Healthy Wisconsin Partnership
Behavior Health Coalition Initiative
May, 2016**

This initiative will include 2 or 3 leaders from each of 10 community coalitions who have been funded to spend the next year building 7-year strategies that will be funded to achieve the following outcomes in their regions:

1. Improved behavioral health
2. Improved health for people with behavioral health issues
3. Improved access in their communities for behavioral health resources

This cohort of 20-30 leaders will convene monthly for 12 months either in person or virtually to build their local strategies to achieve these outcomes and to build their capacity to successfully lead and implement these strategies.

For participants to be successful, they need three factors of success: (1) Improved knowledge of the newest research and data about the challenges and solutions related to improving behavioral health outcomes; (2) Improved ability to create result-based, data-driven, locally-contextualized strategies; and (3) Improved skills for leading inclusive coalitions to develop and implement collective, coordinated strategies to achieve population level results in their communities. Our arc of learning will build on each of these factors during every session.

This learning plan is adapted from the Results-based Leadership and Results-based Facilitation practices developed by the Annie E. Casey Foundation. This work recognizes that clarity about results, factor analysis, and data- or evidence-based strategies that address specific factors allows groups to proceed with more clarity and be more accountable for their work, their collaborative behavior, and their outcomes. This work will be blended with the lead consultant's leadership work, documented in his book "Everyone Leads: Building Leadership from the Community Up," and expanded on through his work as Senior Advisor to The Collective Impact Forum. This work focuses on building individuals' practices related to authentic, inclusive, collaborative, accountable leadership. It has a particular focus on the culture-building and community building for effective collective work.

This blend of leadership development approaches will be recognized at three levels: leader of self (self-awareness/authenticity in order to lead and facilitate), leader of others (collaborative, inclusive), and leader of system (strategic).

This arc has emergent design, recognizing that it will begin more directive in earlier months and become more responsive and iterative as leaders begin applying, testing, and learning from their work in their communities. Participants will also increasingly share facilitation duties for these sessions to practice and strengthen their facilitation skills. This is a working document.

Faculty: Paul Schmitz, CEO of Leading Inside Out, LLC, Innovation Fellow at Georgetown University's Beeck Center for Social Innovation and Impact, and Senior Advisor to The Collective Impact Forum, will serve as lead faculty. Paul will be supported by MCW/HWP staff and the eleventh group which includes the Principal Investigator.

**Session1: Setting the Stage,
Milwaukee: July 14 (830 AM) through July 15 (3 PM)**

Results

- Participants will be welcomed and oriented to the strategy and leadership development lab, the container (i.e., the physical space, culture, and process we use), and the team supporting their work
- Participants will begin reviewing relevant behavioral health data with an eye toward creating result-based strategies
- Participants will build relationships with each other as a learning cohort

Behavioral Health	Strategy Development	Leadership Development
<p>Participants will review data on behavioral health for their regions, the state, and relevant national data curated by MCW and identify what other data will help them develop their results and strategies</p>	<p>Participants will be introduced to results-based accountability, theory of aligned contribution, and collective impact as approaches</p> <p>Participants will practice building a population-result, indicator, and factor analysis</p>	<p>Participants will have a frame for leadership development in this experience</p> <p>Self: Introduce Person, Role, System frame</p> <p>Self: Participants will use Myers-Briggs to understand their types and how they relate to others</p> <p>Self: Participants will understand leadership styles and how multiple styles are necessary for effective teams</p> <p>Self: Participants introduced to Path of Accountability</p> <p>Others: Participants will practice neutral facilitation</p> <p>Others: Participants will participate in community building and multiple group activities with their peers</p> <p>System: Participants will understand mental models as a frame for system thinking</p>

Homework: Teams will draft their local results, indicators, and factor analysis, reflect on leadership, read prep sent out beforehand

Session 2: Defining Results and Personal Leadership Wausau: August 10 (1 day)

Results

- Participants will gain a deeper knowledge of Behavioral Health data and research to inform their result and strategy
- Participants will draft and revise their population result and factor analysis
- Participants will use B/ART as tool to clarify roles and authority within their coalition
- Participants will learn how to use equity mapping and the community engagement spectrum in their coalition planning.
- Participants will articulate their personal purpose, influences, and values as a leader

Behavioral Health	Strategy Development	Leadership Development
<p>Participants will review second round of data curated by MCW and bring data from their communities</p>	<p>Participants will draft a population result and factor analysis for their coalition.</p> <p>Use 5 Whys to analyze key factors</p> <p>Participants will peer review each others' work to receive feedback, learn from each other, and begin revisions</p>	<p>Self: Participants will be introduced to PRS & B/ART and clarify who authorizes their work</p> <p>Self: Participants will articulate their personal purpose, the influences for that purpose, and the values they aspire to practice and be accountable for as leaders</p> <p>Self: Own accountability for action commitments</p> <p>Others: Participants will practice neutral facilitation</p>

Homework: (1) Revise their results and factor analysis (and whether additional indicator(s) needed; (2) Begin drafting strategies that target specific factors; (3) Conduct an activity with coalition members/partners to deepen understanding of person/role/system;

Session 3: Advancing Strategy and Equity 1 Milwaukee: September (2 days)

Results

- Participants will understand behavioral health within health equity and social determinants frames
- Participants will revise their results and begin identifying “strategies that address driving factors” within their factor analysis
- Participants will create first map of the system necessary to advance their result
- Participants will explore how racial equity, equity, and community engagement are frameworks and tools for stronger coalitions and strategies

Behavioral Health	Strategy Development	Leadership Development
<p>Participants will understand healthy equity and social determinants frameworks and how they apply to behavioral health in their communities and in state.</p>	<p>Participants will revise factor analysis and identify “driving factors” or points of leverage where there is alignment of coalition influence on that factor and impact of that factor on result</p> <p>Participants will map the system of actors necessary to influence their result</p>	<p>Self: Own accountability for action commitments</p> <p>Other: Participants will build awareness of equity, racial equity, and implicit bias as factors in their result, strategies, and communities</p> <p>Other: Participants will map equity within their coalitions, identifying blind spots and strategies to correct them</p> <p>System: Participants will define the community engagement approach they aspire to use and strategies for advancing engagement.</p> <p>System: Participants will learn Asset-Based Community Development approach and apply to their work</p>

Homework: Revise result, factor analysis, actor map; Reflect on B/ART during the month; Report on progress on equity and community engagement

Session 4: Advancing Strategy and Equity 2
Wausau: October (1 day)

Results

- Participants will gain awareness about evidence-based policies and practices that address their driving factors
- Participants will draft strategies that address their factor analyses
- Participants will revise their system of actors map of who is needed to achieve their result
- Participants will advance their work applying equity and community engagement practices to their coalition work

Behavioral Health	Strategy Development	Leadership Development
<p>Participants will learn about evidence-based programs and practices related to the driving factors they identified in their first session</p> <p>Participants will be introduced and begin working on the evaluation framework</p>	<p>Participants will begin drafting strategies that could move their driving factors</p> <p>Participants will revise their map the system of actors necessary to influence their result</p>	<p>Self: Own accountability for action commitments</p> <p>Other: Participants will identify coalition sticking points</p> <p>System: Participants will check in on how they have applied equity and community engagement strategies</p>

Homework: Participants will revise result, factor analysis, and strategies; develop their evaluation framework

**Session 5: Testing Result/Strategy and Facilitation Deep Dive
Milwaukee: November (2 days)**

Results

- Participants will gain awareness about evidence-based policies and practices that address their driving factors
- Participants will draft strategies that address their factor analyses

Behavioral Health	Strategy Development	Leadership Development
<p>MCW will work with participants to aggregate their hypotheses and strategies and share with a noted expert for feedback and interaction with cohort (CDC leader?)</p>	<p>Participants will revise Result, Indicators, Factor Analysis and Strategies using a strategic review process</p> <p>Participants will use High Action/High Alignment tool</p> <p>Participants will explore differences, insights among their Result, Indicators, Factor Analyses, and Strategies through all-peer reviews</p>	<p>Self: Own accountability for action commitments</p> <p>Other: RBF 101 skills include neutral facilitation, trust building, interest negotiation, conflict resolution, preventing work avoidance</p>

Homework: Participants will revise result, factors, and strategies; participants will test and report back on use of facilitation skills; complete survey for mid-year review

Session 6: First Half Review Virtual Meeting (3 hours)

Results

- Participants will evaluate the process so far and identify growth needs for second half of program

Behavioral Health	Strategy Development	Leadership Development
MCW team will share their insights, lessons, and recommendations	Participants will share updates on their strategy development responding to specific questions and framework created by faculty	Self: Own accountability for action commitments Other: Identify learning objectives for second half of program

Homework: Light (holiday break); Focus on identifying what they will need to implement their strategies locally

Session 7: Our Common Agenda, System Thinking and Evaluation Milwaukee: January (2 days)

Results

- Participants will test their strategies with MCW experts
- Participants will receive information and training responding to their needs
- Participants will advance facilitation skills
- Participants will build capabilities in adaptive leadership and evaluation

Behavioral Health	Strategy Development	Leadership Development
<p>MCW will invite expert speaker, panel to review and provide feedback to collective lessons and insights of group</p> <p>MCW staff will curate information responsive to identified cohort needs</p> <p>MCW will provide evaluation framework for their strategy development</p>	<p>Participants will bring revised result, indicators, factors, strategies</p> <p>Participants discuss differences in their plans and implications for learning and development</p> <p>Participants will share work plan for coalition building and activity development</p>	<p>Self: Own accountability for action commitments</p> <p>Other: responsive to lessons from December meeting</p> <p>Other: Participants provide most of meeting facilitation with faculty coaching</p> <p>System: System thinking and Adaptive Leadership</p> <p>System: Build skills in evaluation design and development</p>

Homework: Revise their result, factors, strategies and strategic analysis; participants will analyze adaptive challenges in their effort;

Session 8: Evaluation
Wausau: February (1 day)

Results

- Participants will review and peer review strategic progress
- Participants will advance facilitation skills
- Participants will receive information and training responding to their needs
- Participants will share and peer review evaluation plans

Behavioral Health	Strategy Development	Leadership Development
MCW work focuses on evaluation	Participants will bring revised result, indicators, factors, strategies Participants will share work plan for coalition building and activity development Participants will bring evaluation plan for peer and faculty review	Self: Own accountability for action commitments Other: responsive to lessons from December meeting Other: Participants provide most of meeting facilitation with faculty coaching System: Deeper dive in evaluation skills

Homework: Homework responsive to needs; Identify public policy and communications needs to advance their strategies

Session 9: System Leadership: Public Will and Public Policy 1 Milwaukee: March (2 days)

Results

- Participants will review and peer review strategic progress
- Participants will advance facilitation skills
- Participants will receive information and training responding to their needs
- Participants will gain skills and tools for advancing public awareness, public will, and public policy

Behavioral Health	Strategy Development	Leadership Development
<p>Behavioral Health advocates or elected officials on relevant committees?</p> <p>Communications expertise</p>	<p>Participants will bring revised result, indicators, factors, strategies</p> <p>Participants will share work plan for coalition building and activity development</p> <p>Participants will finalize evaluation plans</p> <p>Participants will identify how public will and public policy are needed to advance their agenda</p>	<p>Self: Own accountability for action commitments</p> <p>Other: responsive to lessons from December meeting</p> <p>Other: Participants provide most of meeting facilitation with faculty coaching</p> <p>System: Participants will gain tools and identify strategies to advance public will and public policy</p>

Homework: Homework responsive to needs; Participants build public policy and communications strategies into their plans

**Session 10: System Leadership: Sustainability
Wausau: April (1 day)**

Results

- Participants will review and peer review strategic progress
- Participants will advance facilitation skills
- Participants will receive information and training responding to their needs
- Participants will complete strategies for advancing communications and advocacy in support of their result

Behavioral Health	Strategy Development	Leadership Development
<p>MCW support responsive to last session</p>	<p>Participants will bring revised result, indicators, factors, strategies</p> <p>Participants will share work plan for coalition building and activity development</p> <p>Participants will finalize evaluation plans</p> <p>Participants will share communications and advocacy plans</p> <p>Participants will focus on sustainability</p>	<p>Self: Own accountability for action commitments</p> <p>Other: responsive to lessons from December meeting</p> <p>Other: Participants provide most of meeting facilitation with faculty coaching</p> <p>System: Participants will further advance their communications and public policy skills</p> <p>System: Participants will strengthen skills and tools for sustaining their projects with additional resources</p>

Homework: Homework responsive to needs; Sustainability planning; Create final presentation

**Session 11: Adding it all Up
Milwaukee: May (2 days)**

Results

- Participants will review and peer review strategic progress
- Participants will advance facilitation skills
- Participants will present their final proposals to the group
- Participants will design their learning community process for maintaining learning and collaboration across communiites

Behavioral Health	Strategy Development	Leadership Development
MCW will provide feedback	Participants will present their proposals to the group for MCW faculty, MCW expert, and peer feedback	Self: Own accountability for action commitments Other: Participants provide most of meeting facilitation with faculty coaching System: Participants will demonstrate mastery of building a comprehensive coalition strategy to achieve their result

Homework: Participants will complete proposals, participate in evaluation

**Session 12: Closing the Lab, Advancing the Work
June: Wausau (1 day)**

Results

- Participants will review and peer review strategic progress
- Participants will advance facilitation skills
- Participants will present what they learned from the experience and how those lessons advanced their leadership and strategy
- Participants will evaluate the lab and plan for the next stage of learning and evaluation

Behavioral Health	Strategy Development	Leadership Development
	Participants will evaluate the lab and identify next steps for advancing their work	<p>Self: Own accountability for action commitments</p> <p>Self: Participants will share a Presentation of learning: ow their work advanced through the process and how they will apply lessons going forward</p> <p>Other: Participants provide most of meeting facilitation with faculty coaching</p> <p>System: Participants will demonstrate mastery of building a comprehensive coalition strategy to achieve their result</p>

Homework: Go!