FSG REIMAGINING SOCIAL CHANGE

Sustainability Community of Practice

Launch Session

PREPARED FOR BMS FOUNDATION GRANTEES

APRIL 17, 2019

Agenda

10-10:10 *10 min*	Opening
10:10-10:40 *30 min*	Introduction to Sustainability Concepts and Toolkit
10:40-10:50 *10 min*	COP Overview
10:50-11:30 *40 min*	Identify Focus Areas for Sustainability Planning

WHY PLAN FOR SUSTAINABILITY?

Intentionally building sustainability strategies, activities, and partnerships into your work will help you achieve impact goals and continue your program.

Example: a big sustainability challenge

An organization without a sustainability plan

- Consistently delivered a strong program and **scaled the work to 12 new sites** in multiple states over the course of a 3-year grant
- **Worked towards opportunities for sustainability on an ad-hoc basis**, but primarily focused on delivering the program
- By the end of the grant, they were **unprepared to maintain the program across all sites** and needed additional funding, however they felt unprepared to do so:
  - **Did not have a robust data collection approach** so had **insufficient evidence of impact** relevant to other donors
  - **Had not established among partner sites** that they would share costs for the program beyond the initial grant – so partners were unwilling or unable to pay

WHY PLAN FOR SUSTAINABILITY?

Intentionally building sustainability strategies, activities, and partnerships into your work will help you achieve impact goals and continue your program.

Example: a sustainability success story
Marshall University Appalachian Diabetes Program

- **Expanded the use of community health workers** (CHWs) to improve diabetes care for underserved groups in the Appalachian region
- **Built relationships with target communities** to expand patient involvement in the program and **discussed payment for CHWs with healthcare providers and payers from the outset** resulting in regular meetings with payers
- **Collected clinical and population level data** from the outset to **prove the effectiveness and cost-saving capabilities of the model** which ultimately led to insurance companies offering enhanced reimbursements for CHWs
- **Leveraged innovative funding models**, such as impact investing, to explore avenues that could underwrite the longevity of the program in ways that suited the needs of key partners

Icebreaker!

Going around the room, share your:

- Name
- Organization
- One fun fact about you

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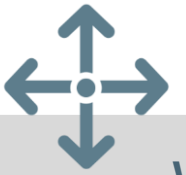
TWO COMPONENTS OF SUSTAINABILITY

Sustaining your work can have two equally important components, and you may aspire to one or both.

Deepen implementation of your program and secure ongoing resources

- Improve the **effectiveness, comprehensiveness, and reach** of your project
- **Institutionalize effective practices/policies** within organizations
- Secure **sustained resources and resources** for the project



Work with others to scale, expand, or replicate your program

- Directly **replicate** the program in new communities and/or **expand** to new disease areas
- Support **dissemination** and **uptake of effective practices** among practitioners or policymakers
- Shift **public policy** to support effective practices

POSSIBLE PATHWAYS FOR SUSTAINABILITY

Pathways for achieving sustainability vary. We will invite you to consider all of the below pathways as potential avenues for sustaining your program.

Sustainability Pathways

1. Building **community and practitioner** buy-in to continue the work
2. Engaging **health systems leaders** to change practices
3. Influencing **organizational or institutional policies**
4. Engaging **health care administrators** to reshape resource allocation and funding flows
5. Securing additional **philanthropic funding**
6. Securing state and / or federal **government** grant funding
7. Conducting and disseminating **research** that captures effectiveness of a new approach
8. Working with **private and / or public payers** to change reimbursement eligibility

PURPOSE OF THE SUSTAINABILITY TOOLKIT

- Support organizations to **build comprehensive programs** that promote **improved health outcomes and equity**
- Help organizations take a **structured approach to developing and sustaining programs** by engaging new and untraditional partners
- For those ***early in their work***, support the development of a **strong plan and approach** for sustainability from the **onset of the project**
- For those ***later in their work***, this toolkit can support **strategy adjustments** and **ongoing efforts** to identify and engage partners

TOOLKIT MODULES

INTRODUCTION
Understand sustainability and how to approach sustainability planning

1 **DEVELOP A SUSTAINABILITY VISION**
Define a long-term vision for your work beyond an individual grant

2 **ESTABLISH SUSTAINABILITY GOALS**
Embed sustainability goals and targets in your project strategy

3 **EXPLORE THE SYSTEM**
Identify and prioritize potential partners for sustainability

4 **PLAN PARTNER ENGAGEMENT**
Develop an action plan to engage high-priority sustainability partners

5 **CRAFT A DATA-DRIVEN PITCH**
Develop compelling messages and use evidence to attract partners

STRUCTURE OF EACH MODULE

Each module is organized into **four sections** to guide your team through each step in the sustainability planning process

CONTENT	**INTRODUCTION**	Context for how the module's contents and tools can support your team's work on sustainability
ACTIVITIES & TOOLS	**EXERCISE**	Guidance on how to use a relevant tool to facilitate reflection and planning for your team
	EXAMPLE	An example of completed versions of the tool from other health equity projects
	TEMPLATE	A blank tool template for your team to complete

GUIDANCE FOR USING THE TOOLKIT

- These tools are intended to support iterative planning over time. We encourage you to **re-visit the modules and tools to refine your thinking** as your project progresses

- The tools are **best used with a group**

- We encourage you to **set aside enough time** for the tools; they take ~1.5 hours to complete an exercise and hold an accompanying discussion

- We invite you to use the tools **in the order that is most relevant to you** (though, they build on one another, so it might be helpful to use them in sequence)

MODULE 1

Develop a sustainability vision

Define a long-term vision for your work beyond an individual grant

INTRODUCTION

DEVELOPING A SUSTAINABILITY VISION

A vision for sustainability articulates the ideal change you hope to achieve to ensure sustained impact and where, how, and for whom this will take place.

This module will help you to:

- **Guide your work** during and after the grant period
- Ensure that sustainability is top of mind for your project team and a part of your project's **planned activities and measured outcomes**
- Keep **internal stakeholders** on the same page about what the program is aiming to achieve – not only during the grant period, but also in the long-term
- Communicate the value of your work to **potential partners and funders** and help them understand how they fit into your overarching goals

EXERCISE
VISIONING (1/3)

An activity (based on a method called Appreciative Inquiry) can help your team expand its vision to include long-term impact and sustainability.

Guidance on using the tool

1. Meet with your project team.

2. **Reflect on the prompt** and consider the questions individually. Provide the "sustainability pathways" list (slide 10) as a helpful thought starter. (*10 min*)

3. Ask people to **share individual reflections**. When sharing reflections, it is important that **participants speak in the present tense** as if the future was now. (*30 min*)

4. **Discuss shared themes** across the reflections and **synthesize the key points** into a 1-2 sentence, guiding vision for sustainability. *(30 min)*

   If there are divergent points of view, consider which pathways seem the most viable given your internal or external context (e.g., existing networks, opportunities to build on your assets and expertise, influence of state healthcare policy environment)

EXERCISE
VISIONING (2/3)

Prompts: Visioning "Situation"

Imagine that **it is the year 2025** and you have just been delivered **the latest issue of *Health Affairs*.**

You see that the **cover story is celebrating your work** for **improving patient outcomes** by **eliminating socio-economic, geographic, racial, and/or ethnic disparities in healthcare** for serious, complex diseases.

On your way into work, you run into your coworker who mentions the *Health Affairs* cover story and you begin to talk about why you and your partners were so successful and **how you were able to sustain and scale the program's impact** beyond the first grant.

EXERCISE
VISIONING (3/3)

Prompts: Reflection Questions

Your coworker asks you several questions:

- What were the **most significant changes that enabled you to continue delivering your program** (e.g., changes in health systems, the types of reimbursements available to cover services, policy changes, greater community buy-in)?

- What contributed to **so many people being impacted and helped** by the solution that you were implementing? How did you achieve that?

- **Who** was critical to achieving sustainability of the program? What helped you be **effective** in engaging these partners (e.g., alignment on common goals, shared resources, data that "made the case" for the intervention, publishing research that demonstrated results)?

EXAMPLE
VISION THAT INCORPORATES SUSTAINABILITY

Example: A health system working to improve vulnerable populations' access to specialty care for cardiovascular disease in Camden, New Jersey.

Vision

All Camden, NJ residents with cardiovascular disease, especially those that are low income and vulnerable, will have **health outcomes equal to or better** than patients receiving specialty care in surrounding region.

A definition of the scale and scope of the problem that you are trying to solve

An ambitious goal requiring greater action beyond an individual program or initiative

TEMPLATE
VISION

Vision

A definition of the scale and scope of the problem that you are trying to solve

An ambitious goal requiring greater action beyond an individual program or initiative

Between today and the first CoP session in May, we suggest that you complete the visioning exercise with your team

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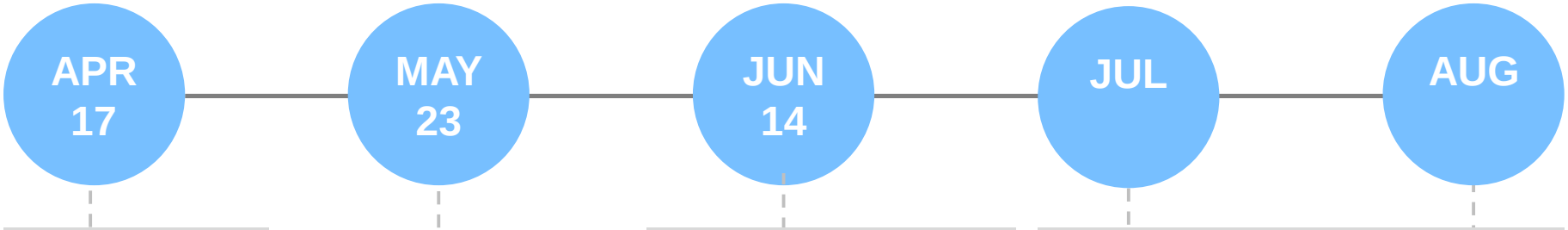
Community of Practice Purpose and Format

PURPOSE	Provide **tools** and **resources**, **customized support**, and **opportunities to learn from others**, to aid you in sustaining and/or scaling your work
FORMAT	One COP session each month + virtual connections
PARTICIPANTS	• A **dedicated sustainability leader** and **1-2 supporting colleagues** • We encourage you to select representatives that: – Bring a **diversity of perspectives** and perform **diverse functions** – Have the **capacities to carry forward lessons learned** from the CoP into your work (e.g., access to data; decision making control; frontline responsibilities for program delivery)
TIME COMMITMENT	• **CoP Participants: ~4-6 hours per month** • **Other team members/partners: ~1-2 hours per month**

Community of Practice Session Plan



Launch CoP

90-minute virtual session

- Discuss sustainability pathways being pursued by the cohort
- Share examples of first module – *Developing a Sustainability Vision*
- Introduce next two modules – *Establishing Sustainability Goals* and *Exploring the System*

90-minute virtual session

- Share examples from using the three modules; discuss insights and questions
- Identify topics for optional sessions

60-minute virtual sessions

- COP members choose one session to attend, among a few options
- Sessions will be organized around specific areas of interest

Monthly email recap of key questions, insights and examples across BMSF grantees

Participating Organizations

1	CancerCare
2	Harvard Law School's Center for Health Law and Policy Innovation
3	Georgia Cancer Center at Augusta University
4	Johns Hopkins Center for American Indian Health
5	Patient Advocate Foundation
6	University of Illinois Cancer Center
7	University of Kentucky College of Medicine
8	University of South Carolina College of Nursing
9	West Virginia University Cancer Institute

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Activity: Focus Areas for Sustainability Planning

- **Individual reflection (5 min):** Complete a brief self-assessment of your readiness to pursue project sustainability
- **Discuss with others (15 min):** Get into small groups and discuss the results of the self-assessment:
  - *Where are you most equipped to pursue project sustainability?*
  - *Where do you anticipate the biggest challenges for which your team would benefit from additional planning and support?*

Activity: Needs and Aspirations for the CoP

- **Small Group Discussion (10 min):** Get into new groups and discuss the below prompts:
  - *How could the community of practice be most helpful to you?*
  - *What, if any, worries do you have about participating?*

- **Share out (10 min):** Each group will report key points from their discussion and FSG will synthesize

- **Exit ticket (1 min):**
  - Take a moment to review the main challenges and hopes for the COP
  - Write on a post-it any areas where you could contribute
  - As you're leaving, place the post-it next to the relevant point

Next Steps

BMS Foundation Grantees

- **Send the names, positions, and emails of your CoP participants** to Andria Seneviratne (Andria.Seneviratne@fsg.org) *[Note: We will also email this request]*
- **Gather key internal documents and data** that will be relevant for CoP sessions (e.g., theory of change / logic model, strategic plan, outcomes data, partnership strategy)
- **Complete *Module 1: Visioning*** with your team
- **Familiarize yourselves with the rest of the toolkit**, and feel free to begin using it!

FSG

- **Begin designing CoP sessions** using today's discussions
- **Send participants calendar invitations** for CoP sessions, the full Sustainability Toolkit, and **invitations to shared folders** for any documents you would like us to review

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