LEADING CARE, PAYMENT, AND SYSTEMS TRANSFORMATION

AHE Technical Assistance Guide

Advancing
Health
Equity

/ Leading care, payment, and systems transformation

About AHE

Advancing Health Equity: Leading Care, Payment, and Systems Transformation is a national program supported by the Robert Wood Johnson Foundation and based at the University of Chicago. AHE's mission is to discover best practices for advancing health equity by fostering payment reform and sustainable care models to eliminate health and healthcare disparities.

Contents

Section 1: Why Technical Assistance?

Technical assistance is a process by which the Advancing Health Equity Program aids Learning Collaborative (LC) teams in:

1. **Creating spaces in which organizations and individuals are held accountable through relationship building and through the application of the Accountable Spaces Framework.**
   a. **Explanation:** In this space, accountability means being mindful of words and actions in our meeting spaces and beyond to promote equitable interaction with others. Specifically, it means taking proactive measures to mitigate harm by asking our peers and colleagues if more can be done to keep the conversation from creating or exacerbating trauma.
   i. **Example:** In an effort to hold all members accountable and to encourage development, if there are offensive words used or actions taken, such as the misuse of power or lack of inclusion in work practices, we should all practice ownership of that impact by recognizing, correcting, and apologizing for our actions.

2. **Facilitating ongoing assessment of TA needs and adaptation to those ever-changing needs.**
   a. **Explanation:** The AHE technical assistance team recognizes that priorities, environments, and team compositions constantly evolve We strive to provide both responsive technical assistance based on needs identified by teams (aka "Pull" TA) as well as TA based on our knowledge of best practices and assessment of trends and needs identified across the LC (aka "Push" TA).
   i. **Example:** "Push" TA needed for partnering with community members with lived expertise followed by "pull" TA needed to troubleshoot challenges in developing partnerships with community-based organizations (CBOs).

3. **Facilitate the process for AHE LC Teams to make concrete service delivery changes to advance health equity and reform payment models to support the delivery changes.**
   a. **Explanation:** Implement policy, process, and practice changes that are intended to reduce and eliminate health and healthcare inequities experienced by Medicaid members.
   i. **Example:** Payment reform and delivery service change related to mental health services to help address the inequities in access to care, differential rates of diagnosis, and treatment.

4. **Creating a healthcare system that meets everyone's needs.**
   a. **Explanation:** Keep health equity advancement front of mind as the AHE Program works with Learning Collaborative teams to meet the goals and objectives of their initiatives and partner with Medicaid members who will be most impacted by AHE's work, and earn the partnership of other stakeholders.
   i. **Example:** TA to successfully partner with providers, individuals with lived experience/ Medicaid members, and CBOs who understand and work to meet the needs of Medicaid members and others living with the inequities, to generate objectives and related activities, and to implement and evaluate the activities.

Section 2:
What is Technical Assistance?

Technical Assistance (TA) is the process of delivering tailored support to each Learning Collaborative (LC) team. To identify support opportunities, the AHE team works collaboratively with LC teams to assess team progress and co-create processes to move toward the end goal of advancing health equity.

▰ It is not meant to be all-encompassing. There may be other areas of focus or need for Learning Collaborative teams for which they could request technical assistance. There are also other tools, resources, and TA services that can be provided, for both the domains listed below as well as those not listed.

▰ It is intended to be used as a source of information and guidance to help Learning Collaborative teams move through **the Roadmap to Advance Health Equity and the development and implementation of AHE health initiatives.**

▰ **Technical assistance will be tailored to each team's needs. Not every part of the Roadmap must be explored during the TA provision process. The AHE team will provide TA services upon request and work to identify state needs and offer TA that may be useful as well.**

▰ **The AHE team encourages all LC teams to use this menu to 1) Generate ideas/ action steps for their teams to develop and implement health equity initiatives and 2) create TA requests.**

Section 2: What is Technical Assistance?

TA Topic or Service	Examples of TA & Roadmap Alignment*
Data Review data and facilitate discussion with team to support identifying, analyzing, interpreting and making meaningful use of data	**The AHE team can:** - facilitate discussion to explore data access and usage. - provide high level feedback on data collection and analysis protocols. - provide feedback on defining, operationalizing, and selecting variables, concepts, data metrics, etc. (e.g. REL/SOGI data). - help make connections between data and setting process or outcome objectives. **Roadmap components/areas:** - **Foundational Activities** Charter/Goal setting - **Essential Elements** Anticipate Data Challenges
Consultation Connect teams with Subject Matter Experts (SMEs) to provide specialized information, ideas, and guidance. SMEs may be drawn from: - AHE team members - National advisory committee (NAC) members - External expert(s)	**The AHE team can:** - meet with an LC team to discuss publications that align with its goals and discuss how the LC team might apply the recommendations in the resource. - invite NAC members with expertise in an LC team's goals to a site visit. The NAC members can join the site visit and participate in a working session with the LC team to advance its project. - facilitate a connection between an LC team and its state Medicaid agency to learn about design, implementation, barriers, and facilitators from similar programs implemented in the state. - secure external subject matter experts to advise on design of provider and team-based financial incentives. **Roadmap components/areas:** - **Essential Elements** - **Design Care Delivery Transformation** - **Design Payment Transformation** - **Implement Care and Payment Transformation** - **Culture of Equity**
Identifying resources and research Guide research or literature reviews on current evidence-based practices etc. Share newly published resources, upcoming events, or other resources.	**The AHE team can:** - support an LC team in a literature review on a topic of choice, draft a memo to outline the findings, and discuss it with the LC team. - identify and provide resources to LC teams on areas of interest or need. - schedule time to review and discuss resources shared to process impressions, learnings, and how to apply resources in the LC team's initiative. **Applies to most Roadmap components & areas**
Peer learning with other LC teams Connect teams with peers across the other learning collaborative teams for one-on-one discussions about a specific topic or their experiences.	**The AHE team can:** - facilitate a zoom meeting for multiple LC teams with a shared equity focus, to connect and share project approaches and lessons learned to date. - connect appropriate members of LC teams with a shared equity focus to dialogue about each team's experiences, recommended practices, lessons learned, and opportunities. **Roadmap components/areas:** - **Essential Elements** - **Design Care Delivery Transformation** - **Design Payment Transformation** - **Implement Care and Payment Transformation** - **Culture of Equity**

Section 2: What is Technical Assistance?

TA Topic or Service	Examples of TA & Roadmap Alignment*
Team Dynamics & Function Foster team alignment and cultures of equity within LC team Assess progress through components of the Roadmap	**The AHE team can:** ■ help active LC team members explore new approaches to re-engage the team when experiencing low attendance at meetings, despite having tried various times, agendas, and notification strategies. ■ introduce options for LC team next steps when progress across the multi-step framework is stalled in one or more components and the LC team identifies contributing factors. ■ help assess LC team dynamics and guide actions to address issues of tension and/or disagreement about values, particularly related to applying an equity lens to both team dynamics and approach to area of focus, whether overt or suspected. **Roadmap components/areas:** ■ **Foundational Activities** ■ **Essential Elements**

* Listed are primary areas of alignment, however most TA topics or services can apply to any component of the Roadmap and its surrounding essential elements, foundational activities, and culture of equity.

<div style="border:2px solid teal; padding:1em;">

CALL TO ACTION
Please let us know about TA needs or possibilities not included in this TA menu at info@solvingdisparities.org.

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Section 3: Tools, Templates, and Facilitator Guides

Agenda+Facilitation Notes with New Teams

For new state/district teams that have their team roster mostly set, we recommend starting with the following agenda items:

- Share the model of change, the Roadmap

- Begin to define the working relationship (AHE or organizing program staff x state/district team)

- Program team to share recommendations for next steps, would love to get the state/district team's thoughts and start assembling plan for next meeting

And then checking in with: *How do these goals and objectives feel? Any strong objections?*

Here are some facilitation points for defining the working relationship between program team and state/district team:

- *We do have our model of change, but we know there are pre-existing complex systems and histories. We want to figure out the best way to tailor providing guidance and Technical Assistance (TA) that fits with their unique circumstances or needs.*

- *As we're working with you, in addition to helping meet team and project goals, we'll be taking what we know from the roadmap to offer other activities and components of the roadmap. We will offer the pro's and con's of taking on the additional activities or components of the work to help the team decide if they want to pursue those activities. The team is welcome to take up the suggestions or not.*

- *Implementing the roadmap fully definitely adds to the timeline and requires additional resources. There's consistently a tension between slowing down the timeline to get all components in place and wanting to have some fast progress, getting the ball rolling.*

- Question for the team:
  - *What questions do you have? Does that model of working together sound good to you?*

Here are some next steps to suggest:

- Develop a team charter and conduct a SOAR analysis

- Assess status on three essential elements

- Questions for the state/district team:
  - *What other timelines or other contextual factors do we need to keep in mind?*
    - *0I.e. goals imply timelines: what are goals driven by external factors? How will they affect the team's timeline?*
  - *Who would you like to be involved as we devise our immediate short-term plan for jumping in?*
    - *We'd love everyone in the room but does it make sense from a capacity and time standpoint?*
  - *When would you like to meet?*
    - *Happy to meet bi-weekly or monthly for example*

Agenda+Facilitation Notes with New Team Leads

- The goal of the check-in meetings is to identify clear priorities and next steps for the TA and support that the AHE program or organizing program staff can provide. That is not always possible in the full-group meetings because of other pressing agenda items.

- [If on monthly cadence] We have found with other team leads that checking in once a month before monthly meetings is a good way to get on the same page with the great work the team has been doing and co-create an agenda together so we can all be best prepared when entering a monthly meeting.

- It can also be difficult for teams to know how the program can assist them. And sometimes it is not clear to us either because all of the teams are so different. These check-in meetings can go a long way in discovering that together.

- To identify support and TA priorities during these meetings, we typically want to :
  - know what the team has been working on (status update),
  - uplift things that are going well, and
  - address challenges that the team or you all as team leads are facing.

- *Are there other objectives or goals that you have for these meetings?*
  - *[if on monthly cadence] How does a monthly check-in sound?*

- More broadly about TA:
  - *What are your expectations or hopes of us as TA providers?*
  - *What questions do you have about how the program staff can support you, your state/ district team, and your team's work?*

Accountable Space Agreements

Fostering and sustaining accountable team spaces are a consistent part of the TA process. Much of our work happens in collaboration and communication with others, and the accountable space agreements help us build trust, promote healing, and encourage individual and group accountability.

Introduction

At AHE, we believe accountability is directly tied to care for others both in the work we do and the conversations we have. Becoming -- and remaining -- accountable requires embracing uncertainty, asking for clarification rather than resting on our own assumptions, and, importantly, remaining cognizant of how our words and actions impact those around us. In this space, being accountable means taking proactive measures to lessen harm by asking our peers and colleagues what actions they can take to keep discussions from creating or exacerbating trauma. Accountability includes practicing good stewardship and ceding power to make space for others to shine. We center this framework today to help us keep the tenets of accountability at the forefront of our conversations.

AHE's Accountable Spaces Framework

1. **Do not interrupt others.**

2. **Listen actively, instead of waiting to speak.**

3. **Be mindful of your total talk time and resist the urge to add "sprinkles" to a perfectly good conversation sundae.**

4. **Give everyone a chance to speak, without unnecessary pressure.**

5. **Words and tone matter. Be mindful of the impact of your words, not just your intent.**

6. **We are all learning and we will make mistakes from time to time. If you said something offensive or problematic, apologize for your actions or words— not for someone feeling insulted by them.**

7. **Recognize and embrace friction. Constructive conflict can often lead to substantive change.**

8. **Give credit where credit is due. If you are echoing someone's previously stated idea, give them appropriate acknowledgment. If you notice others aren't receiving the credit they are due, speak up and highlight their work.**

9. **Speak for yourself using "I" statements. Do not take ownership of others' lived experiences.**

10. **Create meaningful opportunities for those belonging to communities that have historically been most impacted to share their experiences.**

11. **Address racial inequities head on and call out racism when it happens.**

Adapted from Elise Ahenkorah, Accountable Spaces was first conceptualized by UCLA. The framework above is a modified version specifically tailored for the AHE community.

To Cite: Principles and Values (ucla.edu)

"Safe and Brave Spaces Don't Work (and What You Can Do Instead)" | by Elise Ahenkorah (she/her) | Medium

Standardized TA Agenda

State team:

Date:

Time:

Attendees:

Provider Org(s):	State Medicaid:	Advancing Health Equity
☐	☐	☐
☐	☐	☐
☐	MCO(s):	☐
☐	☐	☐
☐	☐	☐
Community Partner(s):	☐	
☐	☐	
☐	☐	

Resources/Pre-Work:
- ▪

Accountable Space Agreements:
- ▪

TIME	TOPIC		FACILITATOR
10 minutes	Check-in (relationship-building)		
35 minutes	-Discussion Item -Discussion Item -Discussion Item		
5 minutes	Action Item ▪	Person Responsible ▪	

Next monthly call:
Date
Time

Standardized TA Agenda Facilitator Guide

State team:

Date:

Time:

Attendees: Enter invitees, check off attendees

Provider Org(s):	State Medicaid:	Advancing Health Equity
☐	☐	☐
☐	☐	☐
☐	MCO(s):	☐
☐	☐	☐
☐	☐	☐
Community Partner(s):	☐	
☐	☐	
☐	☐	

Resources/Pre-Work:
▪ This is a space to provide a listing and links to curriculum resources, articles, other follow up from last time or other resources that would be helpful for attendees to look at prior to the meeting.

Accountable Space Agreements:
▪ Include accountable space agreements

Section 3: Tools, Templates, and Facilitator Guide

TIME	TOPIC		FACILITATOR
10 minutes	As people enter the meeting, consider having upbeat music playing to welcome everyone to the space. Check-in (relationship-building) - Use check-in prompts or icebreakers to build community, to hear everyone's voice, and to create space for relationship building. Depending on the complexity of the question, leave at least 1 minute for each attendee. If there are >10 attendees, or if the question is more complex, add time to this section. During transition to the discussion, consider sharing accountable space agreements the team has created/adapted in the chat.		Enter facilitator for each section in this column.
35 minutes	Discussion Item Discussion Item Discussion Item As a general guideline, allot 30-35 minutes to discussion of new items. If you'd like to hear everyone's thoughts on something, allot 3-5 minutes per attendee.		
5 minutes	Action Item End with review of action items for the short-term and specify who is responsible for each action item on either the LC participants or AHE team.	Person Responsible	

Next monthly call:
Date
Time

Facilitator Guide for AHE TA Emergent Strategy Agenda Meeting

Background

The use of a nonlinear agenda provides a way for groups to engage in a facilitated conversation that can be actively shaped by the people present in order to generate new ideas, engage in necessary conversation, and/or build on relationships between team members, tasks, or project workstreams. The AHE program is experimenting with adapting nonlinear agendas from the work of adrienne maree brown (amb) in Emergent Strategy: Shaping Change, Changing Worlds for use in Learning Collaborative team meetings. A team could choose to use a nonlinear agenda when they would like to create space that supports gathering the input, concerns, and needs of all team members. For example, if a team finds that they frequently have multiple attendees who do not participate, a nonlinear agenda conversation could help uncover topics of importance to those team members, and create a forum for learning about their perspectives.

Teams could also choose to use a nonlinear agenda when they need to come together and generate connection in their workstreams. For example, if team members have been working on separate tasks and are coming back together after not talking for a time, it might be helpful to use a living or circular agenda to allow team members to update each other, while finding connections between their work. Facilitators of a nonlinear agenda conversation can learn about amb's work using the links above, and (link to blog on new AHE site) to become familiar with concepts and use in AHE.

Facilitator Steps

1. **Prepare:**

   a. Learn more about amb's work by exploring the links provided above.

   b. When the team identifies a need for a facilitated conversation to generate new ideas, engage in necessary conversations, and/or build on relationships between team members, tasks or workstreams, discuss the potential use of a nonlinear agenda meeting with the state project team. Assess whether the team would like to engage in a meeting that has preset goals/intentions and/or discussion items, or a meeting with no preset items that will be more exploratory in nature.

   c. Design the meeting based on the team needs identified. Two potential design features based on Emergent Strategy are explained briefly below. Note: they are not mutually exclusive.
      - **Living Agenda:** to be used when a group needs facilitated discussion to explore team member needs and perspectives. It is created by participants in the room during the meeting. Once agenda items are suggested, they can be ordered linearly, in a circle (see below) or in another shape. An advantage of a living agenda created by a group process is that it can be flexible and may be used over the course of multiple meetings, revisited and changed as needed by the group.
      - **Circular Agenda:** to be used when a group needs a facilitated discussion to explore team member needs and perspectives with a structured conversation and a suggested order. It can be created by participants in the room during the meeting, or it can be created ahead of time by the facilitator. The advantage of a circular agenda versus a linear agenda is that the circle communicates a sense of time, expansiveness, and connection. Topics can be placed around the circle and given larger or smaller arcs/wedges based on the time expected to cover them. Topics can be arranged based on their relationship to each other.

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d. If the team chooses a meeting with preset goals/intentions or discussion items, meet briefly with each participant ahead of time to get a sense of their goals/intentions. Plan for a 5-15 minute check-in with each participant to ask open-ended questions, provide active listening and confirm your understanding.

> Tips for assessing team member's goals/intentions:
> - Ask open-ended prompts such as:
>   - *What would you like to get out of this meeting?*
>   - *What do you need to move forward with your work?*
>   - *What do you most need to discuss with this group?*
> - Take notes during these check-ins that you can use to find themes and commonalities, as well as divergence and contradiction.
> - Focus on active listening, reflect what you're hearing and confirm with the participant that you understood. Remember, this is not the time for problem-solving, the goal of these check-ins is to uncover the conversation topics.
>
> After these check-ins, review your notes and identify shared goals and intentions, and places where discussion is needed for alignment.

e. Create the circular agenda with the topics discovered through conversation with each participant. Allot more space/time on the circle to the areas identified where more discussion is needed.

f. Set a date and time for the meeting. The time allotted should include 1-3 minutes per participant for introductions and at least 5 minutes per participant for each discussion item.

2. Open the Meeting

a. Welcome folks to the space. Consider having calming or uplifting music playing when folks enter the space.

b. Consider the use of a check-in, ice-breaker, or other opening exercise to bring every voice into the room if there is time in the meeting. If participants do not know each other well, ensure there is time for this check-in. Depending on the complexity of the exercise, allot 1-3 minutes per participant.

c. Share accountable space agreements (link to AHE Accountable Space Agreements document)

d. Introduce the purpose and design of the meeting, incorporating Emergent Strategy concepts as helpful, giving credit to adrienne maree brown.

3. Facilitate

a. Provide an opening prompt and method for participant contribution. The use of a virtual whiteboard is very helpful for the conversation (Jamboard example).
   - Potential opening prompts:
     - What is on your mind for this project?
     - What discussion would you like to have with this group today?

b. Guide the conversation through topics, looking for connections between workstreams and people in the room.

c. Look for ways to help people talk directly to each other and deepen their relationships. For example, encourage people to ask each other for clarification when needed, express interest and curiosity in each other's perspectives or work, and lift up each other's ideas and accomplishments.

Tips for when the conversation gets stuck:
- Take a break. Give participants a chance to stretch or take a deep breath.
- Affirm. Offer an affirming observation about the conversation, the passion people are demonstrating for their work, or the investment that people have in their team and each other.
- Zoom out. Highlight or revisit that the goal of the meeting is collaboration– what can this group of people do together at this time?

   d. Look for ways to make room and be flexible for the conversations that need to happen, focusing on the work that only this group can do and the areas of aligned intentions.

   e. For a meeting with preset topics - check off topics as the group progresses.

   f. Close with a recognition of the work that's been done by the group. Consider closing with a gratitude practice such as giving each participant the opportunity to reflect on something they learned, express appreciation for a colleague, or lift up something about the work they are excited about.

4. Follow-up

   a. Make a plan to revisit items that are not able to be discussed so that group members will know how their concerns will be addressed.

Relational-Cultural Theory Polls

Relational-Cultural Theory is one of AHE's critical theories. The theory posits that people "grow through and toward connection" throughout their lives; and that connections and relationships "both represent and reproduce the culture in which they are embedded".

As an effort to check-in with individuals and the team, we used RCT's <u>Five Essential Attributes or Good Things</u> of growth-fostering relationships as a starting point to create short poll questions.

These can be inputted into Zoom's polling feature to check-in with team members and are meant to be added to team agendas for transparency and prior thinking before meetings begin. They are meant to be quick and anonymous. Additionally, they are currently designed to be launched at the end of meetings.

After launching a poll, feel free to open the floor by asking "Would anyone like to share what they were feeling or thinking when considering this question?"

Energy

How energized do you feel after our meeting today?
- Not energized at all
- Slightly energized
- Moderately energized
- Very energized
- Extremely energized

Additional questions to ask:
- *What are the earmarks of a meeting where you leave feeling energized or motivated?*
- *Reflecting on meetings or gatherings when you felt energized—what made them energizing?*
- *What does feeling energized mean to you? What does it tell you about the meeting, team dynamics, the facilitator, or the project/topic?*

Sense of worth

My perspective was valued in our meeting today.
- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Additional questions to ask:
- *What makes you feel like your perspective is valuable? What does that look like?*
- *What makes you feel like your perspective is not valued? What does that look like?*
- *What actions or words from the facilitator show that your perspective is important?*
- *What actions or words from your team members make you feel like your perspective is important?*
- *What strategies or intentions should we set to make sure that everyone's perspective is valued?*

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Clarity

I feel increased clarity on the project, our team, and/or my role after our meeting today.
- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

The next steps for me and our team are clear after our meeting today.
- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Additional questions to ask:
- *Individually, what does clarity for a project or your role look like?*
- *Reflecting on the past when you've felt the next steps in a project or role in a project were very clear - what made that project or role clear?*
- *What are some strategies we can use or actions we should take to help increase clarity around the project, team, and roles?*

Productivity

How much capacity do you have to take the next steps in the project?
- No capacity at all
- A little capacity
- Some capacity
- A lot of capacity

How motivated do you feel to take the next steps on the project?
- Not motivated at all
- Somewhat motivated
- Moderately motivated
- Very motivated
- Extremely motivated

Additional questions to ask:
- *What is inhibiting your motivation? What typically helps motivate you?*
- *What factors are contributing to your feeling of motivation? Is it the project itself, is it the environment, stress, burnout?*

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Desire for more connection

I would like more opportunities to connect with my team members in the future.
- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

Responding to Critical Feedback
1. Appreciation
2. Acknowledge
3. Summarize
4. Provide options / Make a plan for accountability

   - Team member: "I feel like it's really hard to feel like my perspective is valued when there's so many people in this space and higher leadership is always given priority to speak."

   1. "Thank you so much for sharing."
   2. "I just want to acknowledge that speaking up, especially about what and whose perspective we value, can be vulnerable."
   3. "It sounds like it's hard to feel your perspective is valued right now and that it's because of the number of people in the room and because those in higher positions of power get more space to speak."

   PAUSE. Can check in - "does that sound accurate?"
   4. "While there are a few things that we can brainstorm to do differently at our future meetings that may help shift this dynamic, I don't want to jump to problem solving if that's not what feels best right now."
      - "What feels best to you at this point in time?"
         - *Can list options* i.e. we can discuss as a group now or next meeting, we can meet individually outside of this conversation, can share via feedback form or email asynchronously, can pause and follow-up in a week, etc.

OR "I think this is really important to address. Our team will brainstorm how we can do things differently to help shift this dynamic at our next meeting and follow-up on how we will do this via email in a week or two. If you are willing to be part of these conversations, we would certainly appreciate your partnership on this but also no obligation or pressure. Thank you so much again for sharing."

   - Options for internal team debrief
      - Can take this to DEI response for more debrief if it is more DEI related
      - TA team to craft a few action items to address what was raised + bring to the Wednesday meeting if necessary
         - Depending on if the individual is open to follow-up, can run these actions by them

Contact Us

Contact us at **info@solvingdisparities.org** with any questions, comments or concerns.

Visit our website at **advancinghealthequity.org** for more information on the Advancing Health Equity (AHE) program, Roadmap resources, and more.

//AHE Advancing Health Equity

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