Innovation Hub Learning Community (IHLC)

IHLC Webinar Series

- Focuses on skills and strategies you can apply to your work to improve your organizational processes, expand the scope and impact of your practice, and plan for program sustainability
- Open to all, not just Innovation Hub practices

Learning Objectives

Objective 1

Understand the importance and benefit of strategic planning, including defining success and goals.

Objective 2

Practice applying Aim Statements and KPI Trees to support your organization in developing and tracking progress towards strategic goals.

Objective 3

Understand how Key Performance Indicators (KPIs) and Theory of Change can strengthen strategic foundations and define key aspects of your work.
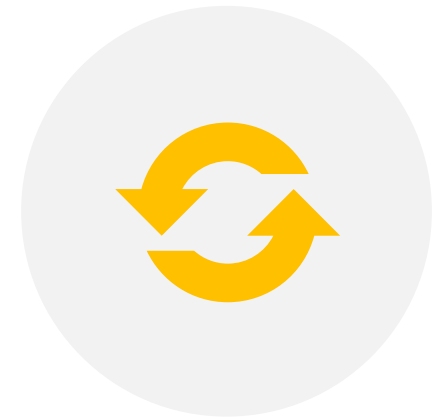
AGENDA

1 Key Performance Indicators & Aim Statements Refresher

20 MINUTES

2 Connecting Key Performance Indicators & Strategic Planning

15 MINUTES

3 Theory of Change

15 MINUTES

4 Q&A

10 MINUTES

AIM STATEMENT → KEY PERFORMANCE INDICATORS → THEORY OF CHANGE

Case Study

You are the Director of Programs at a doula serviced organization tasked with adding a new goal into the five-year strategic plan. The new goal was initially developed to address a concern on low attendance rates of postpartum visits reported by five partnered hospitals. **The goal will focus on identifying how your organization and providers at five hospitals can leverage partnership to increase the number of postpartum visits attended by clients/new parents**.

Your objectives will address how the organization plans to increase the number of postpartum visits clients attend in 2024-2025.
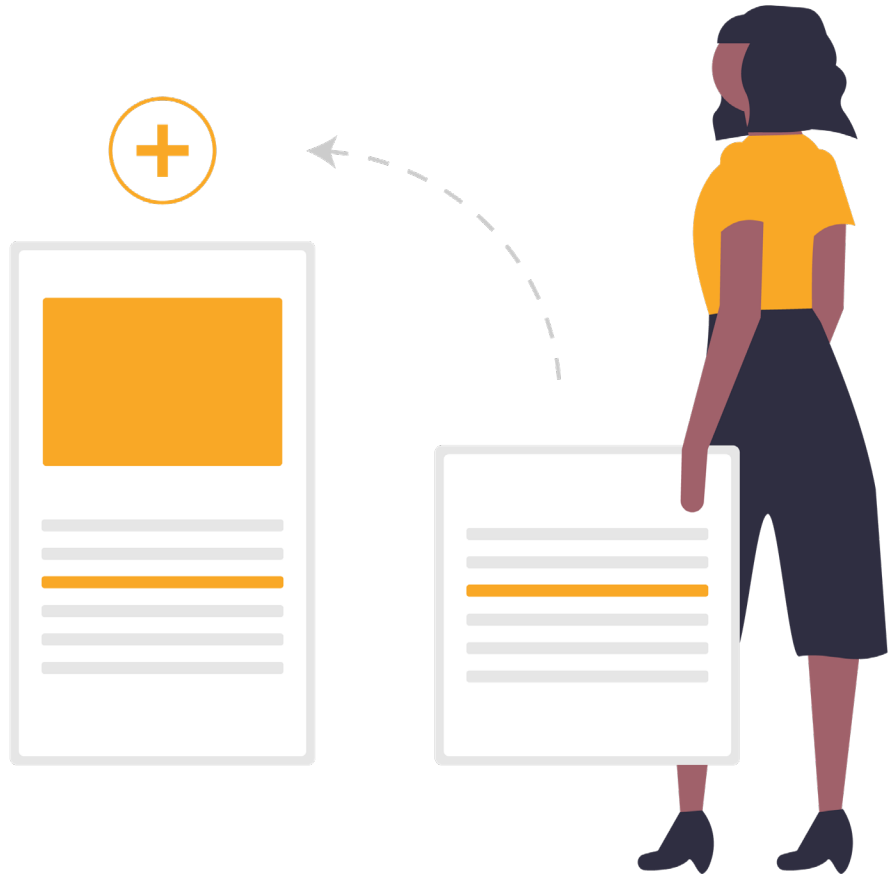
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Aim Statements Refresher

AIM STATEMENTS

An aim statement is a clear, explicit summary of what you hope to achieve over a specific amount of time including the magnitude of change you will achieve.

Aim Statement Template:

We aim to (ACCOMPLISH WHAT) because (WHY IT IS IMPORTANT) with/for (THE COLLABORATOR/ POPULATION YOUR PROGRAM SEEKS TO IMPACT) by (TIME-FRAME FOR THE PROJECT).

Case Study Example Aim Statement

We aim to increase the percentage of clients receiving *postpartum* doula services **because** providers at five partnered hospital sites are reporting low numbers of attendance at postpartum well-visits.

To do this, we will collaborate **with** new parents, postpartum doulas, and providers at five partner hospitals and identify any barriers to care **by** the end of 2025.
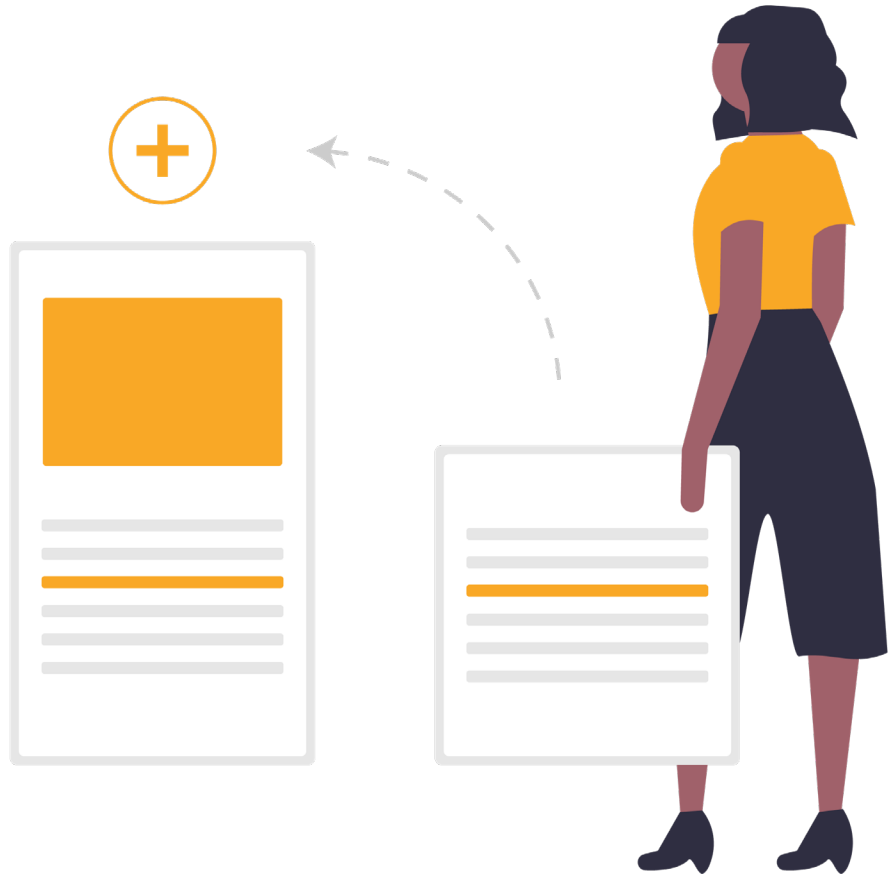
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Key Performance Indicators Refresher

KEY PERFORMANCE INDICATORS

Key performance indicators (KPIs) are qualifiable measures of performance over time for a specific objective.

A KPI should be:

- Aligned
- Actionable
- Realistic
- Measurable

KPIs vs. Metrics

Key Performance Indicator	Metric
• Specific measurable goals • Give holistic view of where you stand related to goals • Timebound • SMART goal	• Way to track progress towards those goals/KPIs • Tied to specific activities • Typically related to ongoing day-to-day processes

Types of KPIs

Process Oriented

Inputs

Results Oriented

Outputs **_and_** related to CSF

Critical Success Factors (CSF)

- Elements necessary for a strategy to be successful

- Reflect the Voice of the Customer

- Improve delivery performance of your organization

CRITICAL SUCCESS FACTOR + **KEY PERFORMANCE INDICATORS** = SUCCESSFUL STRATEGY
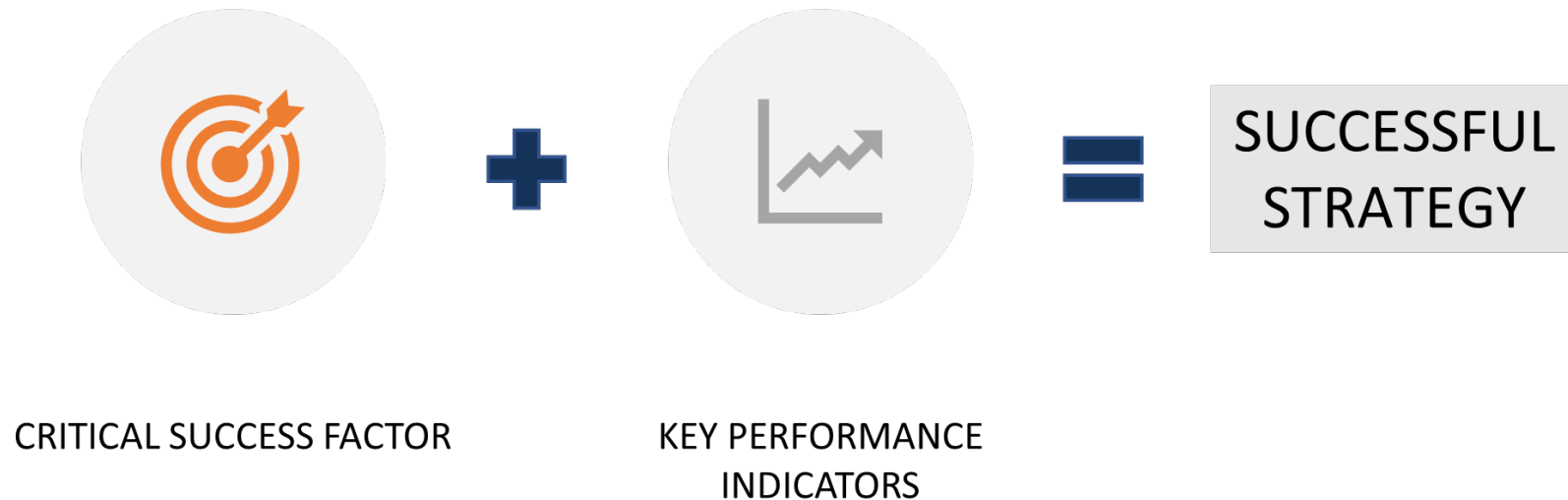
KPI Tree

- Visualization method that allows an organization's objectives to be broken into granular outcomes and relevant KPIs

- Allow you to visualize complex relationships and interdependencies within an organization

- Highlights intersections
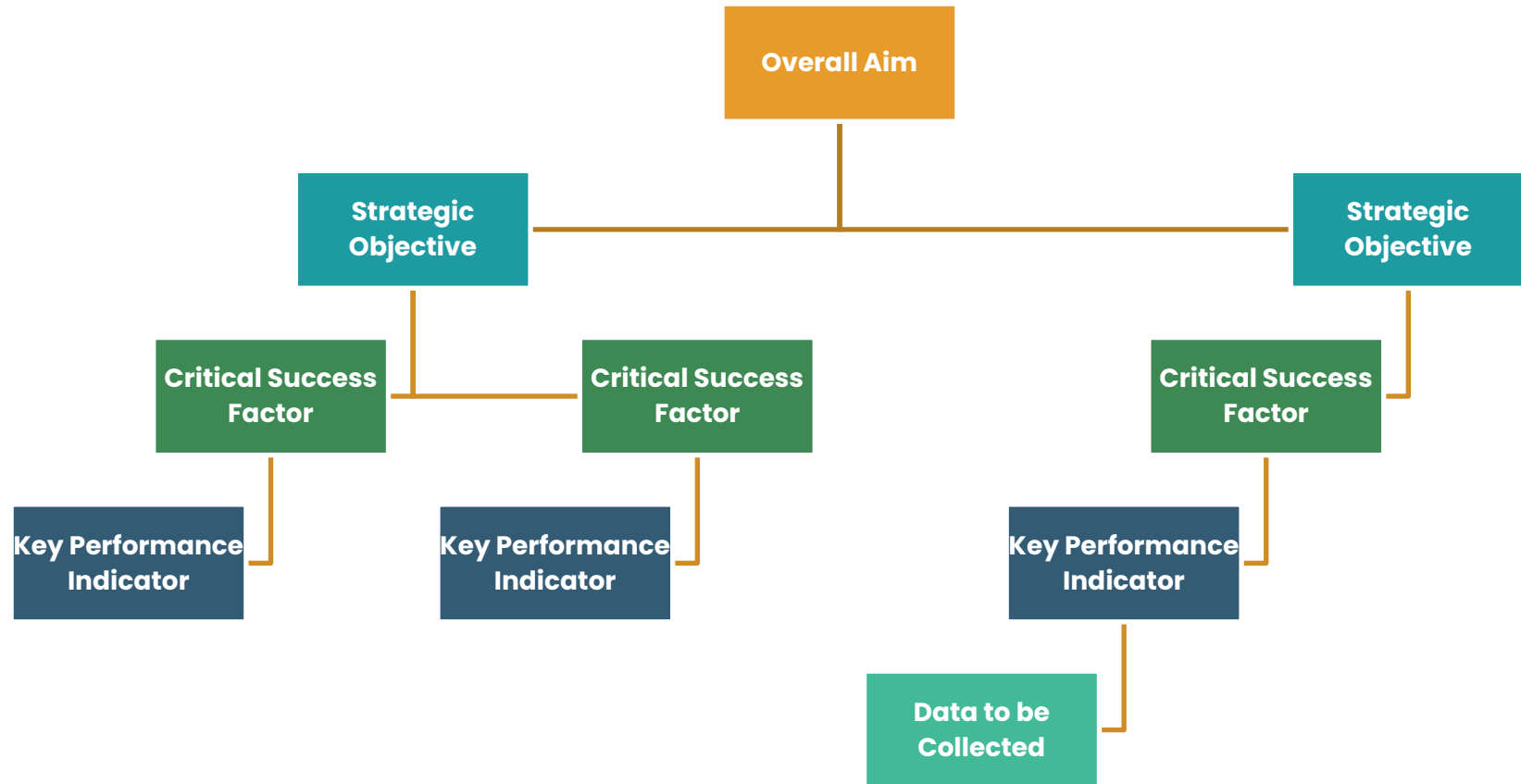
Summary: Tips for Creating KPIs

- **Tie your KPI performance measures to your strategic goals.** You can use the aim statement to help you develop a strategic goal <u>or</u> tie it into one using a strategic goal your organization already has created.

- **Keep them concise, realistic, and clear-cut.** Everyone in your organization should be able to understand the KPI measures, especially if they are apart of the collection process. Data literacy is key here.

- **Avoid KPI Overload.** KPI overload can be avoided in the initial planning stages during your strategic planning. Sometimes this could be a good place to see where staff roles or current measures may intersect/interact in your organization. Are many teams collecting similar pieces of information?
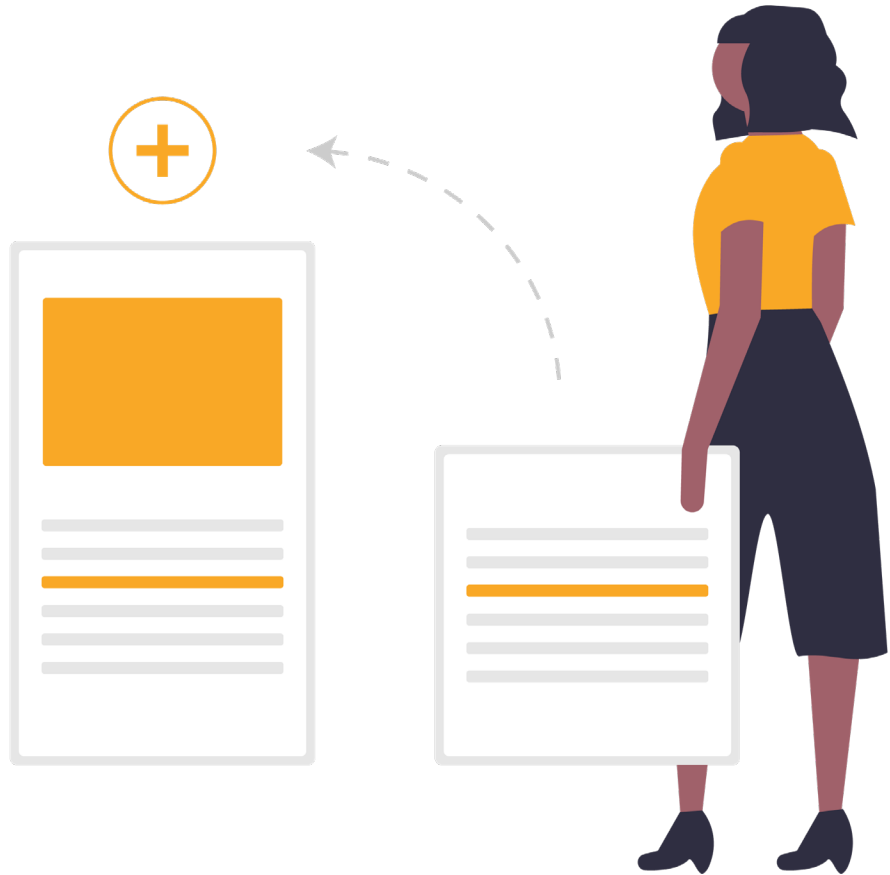
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Connecting Key Performance Indicators to Strategic Planning

STRATEGIC PRIORITY

Racial and Health Equity

OBJECTIVE 1

Transform systems, structures, and policies that create health inequities and structural racism.

Strategy 1.1: Develop a racial health equity workplan to highlight the root causes of unequal health outcomes and promote the value of racial equity.

Strategy 1.2: Collaborate with partners to identify and address racially unfair conditions.

Strategy 1.3: Guide Departmental operations to proactively consider race and health impacts across policies, programs and services.

OBJECTIVE 2

Collaborate with partners to strengthen community engagement practices that promote racial equity, justice, and fairness in mutually beneficial ways.

Strategy 2.1: With community partners, co-develop guiding principles that prepare Public Health employees to conduct meaningful community engagement.

Strategy 2.2: Expand the number of Department programs that implement community engagement guiding principles.

Strategy 2.3: Uplift community voices in all decision-making that directly impacts them.

OBJECTIVE 3

Enhance Departmental capacity and advance racial and health equity.

Strategy 3.1: Improve data quality, analysis, publication, and communication to inform Department priorities on health.

Strategy 3.2: Organize Department to address race and health impacts across programs, and services.

Strategy 3.3: Build capacity among staff to apply racial and health equity into their work.

Strategy 3.4: Embed cultural humility and healing-centered practices into

COUNTY OF SANTA CLARA PUBLIC HEALTH DEPARTMENT | 2023-2026 STRATEGIC PLAN

WHAT DO THESE STRATEGIC PLANS HAVE IN COMMON?

MATERNAL & CHILD HEALTH TALENT

Goals

1. Foster trauma-informed, equity-centered, and whole-person-focused workplaces internally and with members.

2. Internally develop and apply a standard and unified MCH workforce development and capacity-building nomenclature. AMCHP will share this language with major workforce centers, partners, and members.

3. Support a diverse (with respect to race, ethnicity, gender, educational background, and other aspects of identity) MCH workforce and sustain this workforce by fostering a pipeline of professionals into the workforce.

4. Support members to reduce burnout, reduce their own staff turnover, and grow their talent and improve job satisfaction through diversity, equity, and inclusion principles.

5. Coordinate and align with partners to ensure that Title V programs and individual staff have equitable, consistent access to capacity-building opportunities that align with their changing priorities.

AMCHP

SisterWeb Goal 1

Goal 1 - SisterWeb nurtures a skilled workforce of Community Doulas who see birth work as a viable profession.

Strategies Contributing to Goal 1 and Metrics to Monitor Progress and Impact

Goal 1 | **Strategy 1A** - Increase the overall number of BIPOC doulas qualified to work for SisterWeb

Goal 1 | # of community members trained as new doulas

Goal 1 | **Strategy 1B** - Expand professional + workforce development opportunities for BIPOC doulas

Strategic Plan Examples

Critical Success Factors

Let's use an example from AMCHP's Strategic Plan.

COMMUNICATIONS & BRANDING

Goals

1. Expand AMCHP's brand and work recognition in the maternal and child health field so that our organization is known beyond our members, partners, and collaborators and ensure that our communications reach audiences across a variety of sectors.

Aim

Implement Communications Goals by 2027

Communications Goal #1

Strategic Objective

Increase followers by 20% on all social media platforms to increase AMCHP's brand awareness

Critical Success Factor

# of current followers on LinkedIn, Instagram, and Twitter pages

Key Performance Indicator
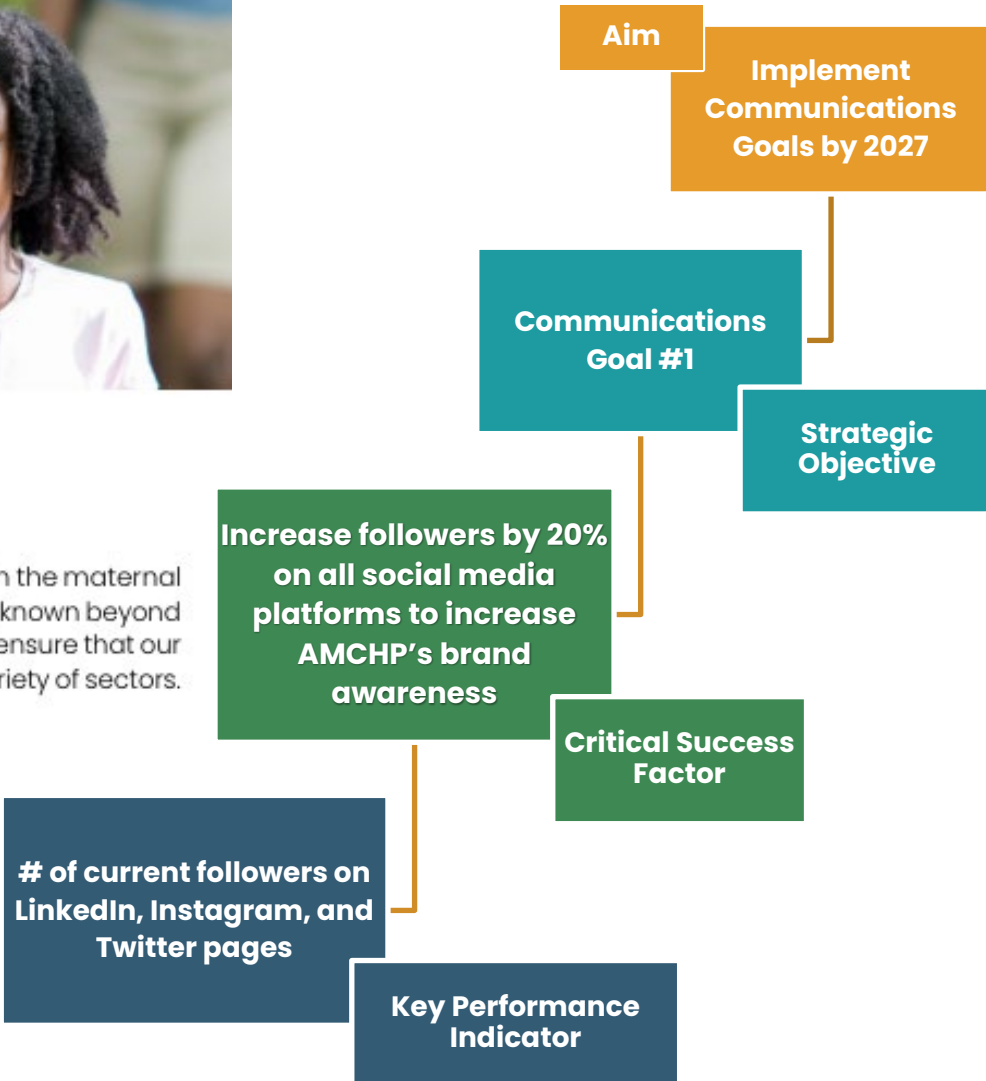
Case Study Application

We aim to **_increase the percentage of clients receiving postpartum doula services_** because providers **_at five partnered hospital sites are reporting low numbers of attendance at postpartum well-visits_**. To do this, we will collaborate with new parents, postpartum doulas, and providers at five partner hospitals and identify any barriers to care by the end of 2025**.**

Case Study Example

Overall Aim: **All clients receiving care at the five hospital sites receive a postpartum well visit three weeks after birth.**

Strategic Objectives

All clients attend and receive their postpartum visit in the 2024-25 year.

- **CSF**: All clients have a postpartum doula.
  ◦ KPI: % of clients scheduled for a well-visit 3 weeks after birth.

- **CSF**: Timely rescheduling of no-shows
  ◦ KPI: % of no-show appointments rescheduled within 72 hours by the provider
  ◦ KPI: % of no-show clients contacted within 72 hours by the postpartum doula

All providers must receive training on your organization's partnership with the hospital and the role of postpartum doulas during well-visits.

- **CSF**: At <u>least</u> 60% of postpartum doulas have been trained to educate providers.
  ◦ KPI: % of postpartum doulas trained to teach providers
  ◦ KPI: % of postpartum doulas opt out of training

- **CSF**: All providers partnered with the organization have been trained at <u>least 2 weeks</u> prior to scheduled well-visit with patient.
  ◦ KPI: # of providers trained by well-visit date
  ◦ KPI: # of partners untrained by well-visit date
  ◦ KPI: # of providers attend well-visit training
  ◦ KPI: # of providers never attend training before

Case Study KPI Tree
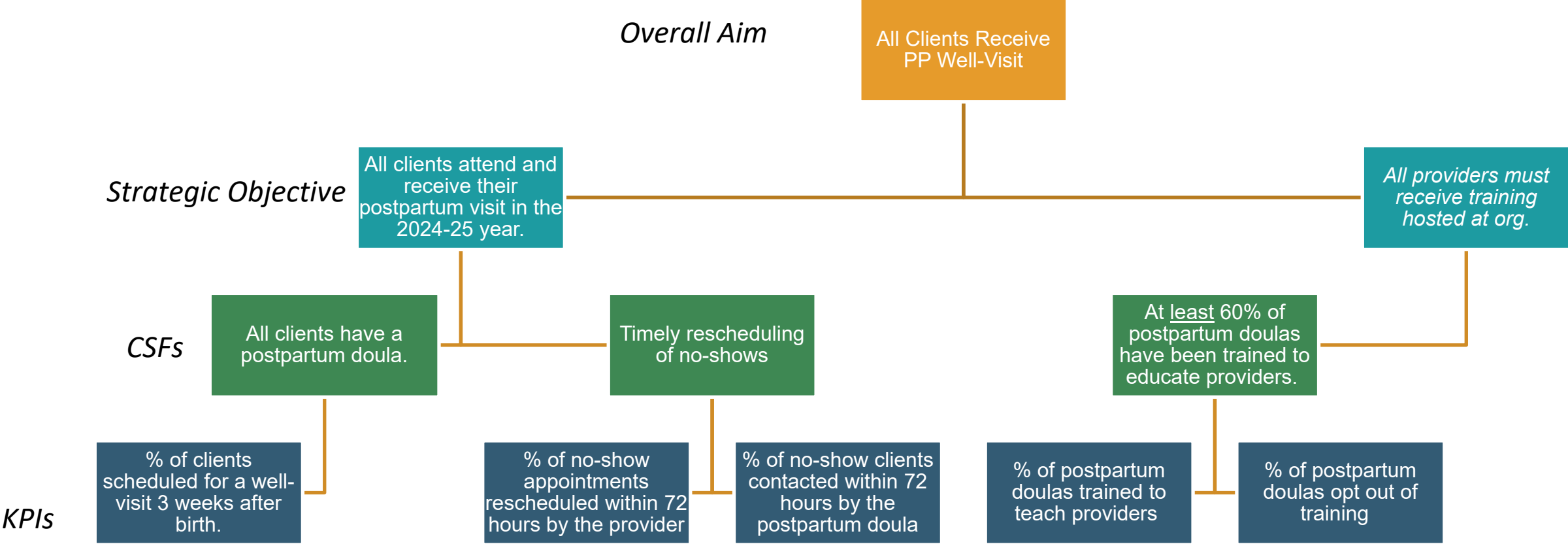
Now you try!

After speaking with your client, you realize **parents are attending their visit, but not being seen and instead asked to reschedule because appointments were double booked on the provider side.**

Your team decides to go back and add a new critical success factor into your strategic plan to address how and why provider offices are double booking clients.

- ✓ What **Critical Success Factor** might you create to track this issue?
- ✓ What **Key Performance Indicator** will you use to measure your CSF?

CSF: All clients report that they were seen by provider on their appointment date.
KPI: % of clients report not being seen by provider on appt date
KPI: % of clients provider reschedules on appointment date
KPI: % of clients never rescheduled
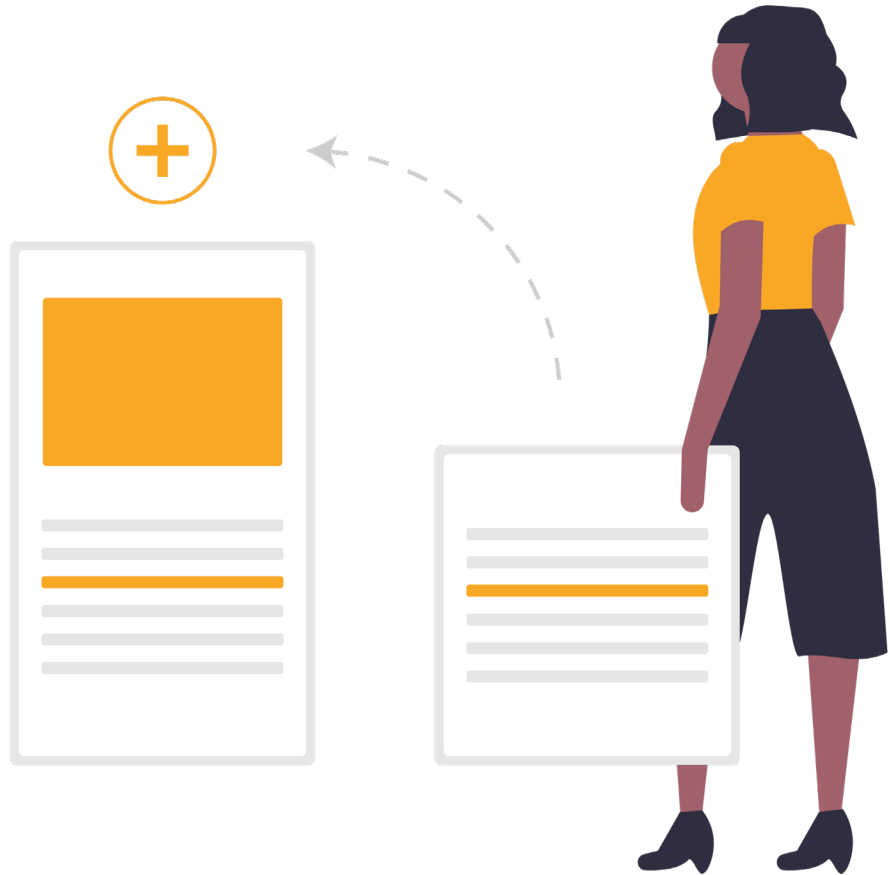
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Theory of Change

Theory of Change

What is it?

- Comprehensive description and illustration of how and why a desired change is expected to happen in a particular context
- Charts out the work ahead, what success looks like and how to get there

Why is it important for strategic planning?

- Basis for measurement, experimentation and learning
- Help teams test assumptions related to adapting and implementing strategies and clarify complicated pathways to change
- Helpful for complex systems change
- Serves as a compass, illuminating the desired goals, informing adaptations and identifying opportunities for meaningful measurement

Theory of Change Components

Aim Statement

Guiding Foundations/Principles

Working Assumptions

Strategies/Activities

Outcomes (Short & Long term)

Goals/Impact

Example Theory of Change

WHAT WE DO

Infrastructure development private sector engagement and roll out of Social Enterprise models for spectacles and assistive technology supplies

Community Mobilisation: demand generation for appropriate eye health care

Advocacy of eye health policy and support for implementation

Building human resource for eye health capacity and development through formal and informal training

SHORT TERM OUTCOMES

Eye health facilities constructed and equipped with robust and affordable glasses and assistive technology, with supply chains in place

Development of SBCC strategies, that raise awareness of the need for routine eye testing, treatment and wearing glasses

Government commitment to eye health. Eye health staff trained and assigned to health facilities. Governments allocating funds for eye health in SHPs and outreach services

LONG TERM OUTCOMES

Improved availability, access and use of eye health services and products.

Improved knowledge and practice of good eye health in schools and communities

Equal distribution of eye health medicine equipment and staff, especially to the currently underserved or geographically isolated

Eye health is effectively integrated at all levels of the health system, and supported in policy and budgets. Eye health staff employed and paid by government.

IMPACT

Strengthened Eye Health System

Reduction in prevalence of URE in all age groups

Improved eyesight

Improved school performance

Improved health and well-being

Improved socio-econimic development

Improved productivity of workforce

FOUNDATIONS

GENDER EQUALITY · SOCIAL INCLUSION · ACCOUNTABILITY · HEALTH SYSTEM

VALUE FOR MONEY · SUSTAINABILITY · SAFEGUARDING · STRENGTHENING

https://www.visionaction.org.uk/about-us/theory-of-change/

Example Theory of Change

Theory of Change | *Outcomes We Expect to See*

Radically Engaging Residents of Affordable Housing in All Aspects of Our Work

Strategies	Short-Term Outcomes	Intermediate Outcomes	Long-Term Outcomes	Vision
Springboard to Learning - Ensures children and their families can achieve their educational goals and develop big, bold visions for their future	**Children & Families** - Increased engagement of parents/families in their children's learning - Improved future outlook for children and families	**Children & Families** - Improved academic self-efficacy among children - Improved school performance among children	**Children & Families** - Improved ability of children to achieve academic goals - Improved ability of children to achieve life goals	**Affordable Housing Residents**
Springboard to Success - Supports adult residents in reaching their goals in school, work, and life	**Adult Residents** - Adult residents gain knowledge and skills related to education, financial security, and career readiness - Improved future outlook among adult residents		**Adult Residents** - Improved ability of adult residents to achieve self-defined goals (e.g., academic, financial, career)	*Affordable housing coupled with supportive services is a **springboard** that disrupts the intergenerational cycle of poverty*
Springboard to Community - Provides immediate stability and promotes social connections among resident families	**Families** - Residents feel like there are systems and services in place to meet their needs - Reduced sense of fear/worry about life situations	**Families** - Increased sense of community and social connection among resident families - Increased confidence of residents to use their voice to communicate community needs - Increased engagement of residents in shaping and advocating for administrative and federal policies that benefit their community		

Example Theory of Change

Example Theory of Change

Example Theory of Change

We envision:
'āina momona.
Abundant and healthy ecological systems in Hawai'i that contribute to community well-being.

This will take: Powerful and connected communities stewarding Hawaiian lands, waters and culture (community-based natural resource management).

We'll know this has happened when the following conditions are a broad-based reality in Hawaii:

Communities are decision-makers
- # of communities participating in decision-making processes
- % decisions that go the way communities want them to go

Community practitioners are resource managers
- area under active community management
- #educated by communities
- % decrease in threats to resources
- #new management approaches
- %increase in biomass

Sustainable community-based organizations
- # nonprofit BMPs utilized
- mix of fundraising strategies utilized

Communities adapt to changing conditions
- # communities doing monitoring & evaluation

We will achieve these conditions through these activities:

gatherings
- # communities at gathering
- # people at gatherings
- % attending who apply learning at home
- # new biocultural management tools used in communities

training and tools
- # people attending trainings
- # of people using/ requesting tools
- %increase in knowledge
- %satisfied that training increased their level of knowlege
- % communities trained who are implementing training within one year

facilitation, consultation and technical assistance
- # communities who perceive that they are reaching goals, making progress
- $ brought to communities
- # new biocultural management tools used in communities

network building
- # incidences of skill exchanges
- # links made between communities and resource agencies/ partners
- # new biocultural management tools used in communities
- #/$ resources received and utilized through networking

advocacy
- # positive mentions
- # new regulations that contribute to improved biocultural management
- # agencies seeking input from KUA

backbone support organization
- %increase in non-profit health scorecard score
- mix of fundraising strategies utilized
- ratio funding from grants vs individuals
- $ of operating reserves
- %perceive values alignment

We work on these activities with and for:
Communities who invite our support, and who have an active committment to restoring and protecting the natural and cultural resources of their place

Because we believe:
Communities have a traditional and sacred role and responsibility for the lands and waters their places.

Communities rely on ecological health for physical, cultural, and spiritual sustenance.

Communities have knowledge, practice and relationships critical for successful resource management.

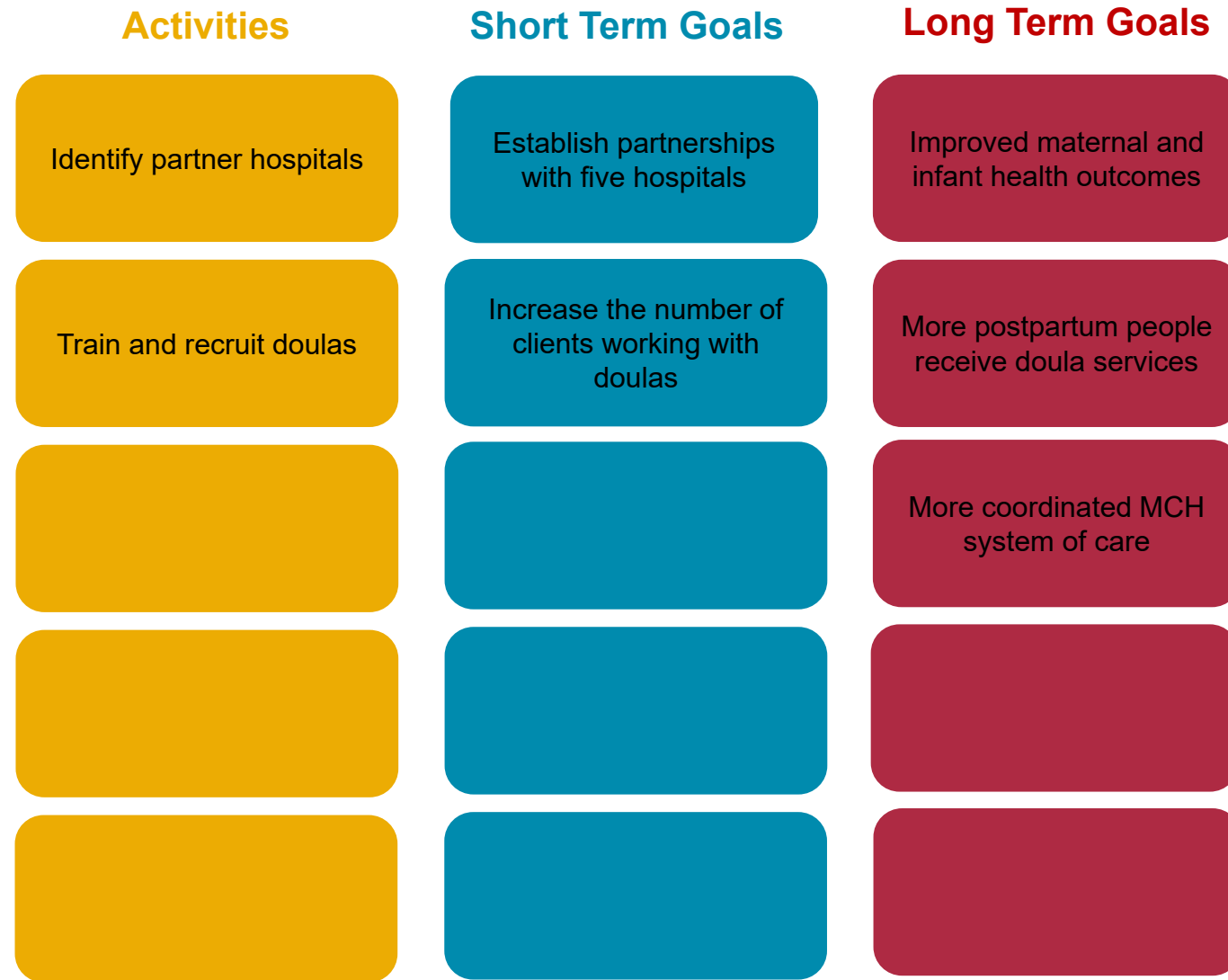learn more at kuahawaii.org

KUA'ĀINA ULU 'AUAMO

Case Study

You are the Director of Programs at a doula serviced organization tasked with adding a new goal into the five-year strategic plan. The new goal was initially developed to address a concern on low attendance rates of postpartum visits reported by five partnered hospitals. **The goal will focus on identifying how your organization and providers at five hospitals can leverage partnership to increase the number of postpartum visits attended by clients/new parents**.

Your objectives will address how the organization plans to increase the number of postpartum visits clients attend in 2024-2025.

Activities

- Identify partner hospitals
- Train and recruit doulas

Short Term Goals

- Establish partnerships with five hospitals
- Increase the number of clients working with doulas

Long Term Goals

- Improved maternal and infant health outcomes
- More postpartum people receive doula services
- More coordinated MCH system of care

Aim Statement

We aim to increase the percentage of clients receiving *postpartum* doula services **because** providers at five partnered hospital sites are reporting low numbers of attendance at postpartum well-visits. To do this, we will collaborate **with** new parents, postpartum doulas, and providers at five partner hospitals and identify any barriers to care **by** the end of 2025.

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Guiding Principles

- Health Equity
- Guided by Lived Experience
- Racial Justice
- Reproductive freedom
- Human Centered
- Collaboration
- Shared Decision Making

IHLC Opportunities

Quarterly Webinars on topics related to strengthening practice implementation and evaluation activities

Collaborative Circle to dig deeper into programmatic experiences, challenges, and learn from other IHLC members

JUNE 18th @ 3-4 pm EST

QUESTIONS?

2024 Webinar Calendar

March 14, 2024
3:00 PM EST

Who's at Your Table?
Power Sharing and
Asset Framing

May 30, 2024
3:00 PM EST

Stop Building the
Plane as We Fly It:
Being Intentional w/
Strategic Planning

August 29, 2024
3:00 PM EST

"Say More About That":
Qualitive Research and
Interviewing
Considerations

November 21, 2024
3:00 PM EST

TBA: This session topic
will be created based
on participant's
feedback.

Register at: bit.ly/IHLCwebinar

innovation hub
AMCHP | Explore. Build. Share.

Thank you!