

# Roundtable on Leveraging Investments

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## Overview, Agenda, and Preparation Checklist

September 8-9, 2014

Chicago O'Hare Airport Hilton (International Room, Arcade Level)

### Purpose

All across the U.S., new health collaboratives are forming and established organizations are broadening their scope to improve health care delivery and to invest in building healthier, more resilient communities. Leaders of these efforts can benefit from closer connections and continued learning with one another, especially to sustain past progress and to steer their systems in profoundly new directions.

This Roundtable is designed to strengthen ties and exchange information among innovators who are who are aligning strategies and leveraging investments to transform health, health care, and community resilience in their regions. Participants will explore pathways, consider pitfalls, and reinforce principles of health system stewardship, strategy, and sustainable financing.

This event is convened by ReThink Health, with support from the Rippel Foundation and the Robert Wood Johnson Foundation. More details about ReThink Health are included below.

### Objectives

- **Network:** Create ties among leaders and explore opportunities for continued connection over time.
- **Learn:** Gather insights based on evidence and experience to enhance your own work as well as to advance frontiers for the field.
- **Exchange Ideas and Resources:** Broaden perspectives and strengthen approaches for long-term system stewardship, strategy, and financing.
- **Plan:** Refine future activities based on feedback from colleagues, as well as through encounters with ReThink Health tools.
- **Communicate:** Sharpen your story; contribute to video products and proceedings.

### Logistics

All activities will take place in the Chicago Hilton O'Hare Airport, in the International Room on the Arcade level, one floor below the lobby. Entrance to the hotel from airport terminals is on this level.

Registration begins at 12:30pm on Monday, September 8th. A light lunch will be available. You are welcome to leave luggage in the meeting room prior to check-in (3:00pm) on Monday or after check-out (12:00pm) on Tuesday. Dress is business casual. Wear something comfortable for both days.

If you need assistance or have questions, please contact Jane Branscomb at [jbranscomb@rethinkhealth.org](mailto:jbranscomb@rethinkhealth.org) or by cell, 404-849-7897.

## Participants

Approximately 25 leaders from 11 multi-stakeholder partnerships in 11 states will gather for this meeting. In addition, several colleagues with a national perspective and diverse organizational connections will also participate. The attached Participant Directory provides brief biographical information and photos of all participants. There are also links to information about each partnership and the selected connector organizations. Please review this material in advance to appreciate the breadth of experience and knowledge in the room and maximize networking and learning opportunities at the meeting.

## Agenda

### Monday, September 8th

TIME	TOPIC
12:30 – 1:00	REGISTRATION AND LUNCH
1:00 – 1:30	<b>Welcome, Introductions, and Quick Orientation</b>
1:30 – 4:30	<b>Rotating Open Space Activities</b> <ul style="list-style-type: none"> <li>• Sharpen the story of your work (developing a compelling narrative)</li> <li>• Discuss the art and science of system change (facilitated group interviews)</li> <li>• Play out scenarios (simulating strategies over time)</li> <li>• Propose pressing topics (to discuss with peers, connectors, and/or ReThinkers)</li> </ul>
4:30 – 5:15	BREAK & NETWORKING RECEPTION
5:15 – 5:30	<b>Why a Roundtable: Roots and Rationale</b>
5:30 – 7:00	<b>Where are you on the Pathway to a Healthy Health System?</b> <ul style="list-style-type: none"> <li>• Origins, progress, pitfalls, and possibilities (11 short stories of grand endeavors)</li> </ul>
7:00 – 7:30	DINNER
7:30 – 8:30	<b>Insights on Leveraging Investments</b> <ul style="list-style-type: none"> <li>• Exploring connections among stewardship, strategy, and sustainable financing</li> </ul>
8:30 – 9:00	<b>Preparing for Day 2</b> <ul style="list-style-type: none"> <li>• What questions and challenges do you hope to explore?</li> <li>• Reflections from Connectors</li> </ul>



## Tuesday, September 9th

TIME	TOPICS
8:00 – 8:30	BREAKFAST
8:30 – 9:00	<b>Welcome Back</b> <ul style="list-style-type: none"> <li>Overnight Insights</li> </ul>
9:00 – 10:30	<b>Panel 1: Stewardship</b> (i.e., multi-sector leadership, engagement, governance) <ul style="list-style-type: none"> <li>Opening remarks from partnerships (10 minutes each; see tips below)</li> <li>Small-group dialogues</li> <li>Large-group sensemaking</li> </ul>
	<u>Panelists</u> <ul style="list-style-type: none"> <li>Pueblo Triple Aim Corporation</li> <li>Partners for a Healthier Community</li> <li>Healthy Monadnock 2020</li> <li>Bexar County Health Collaborative</li> </ul>
10:30 – 10:45	BREAK
10:45 – 12:15	<b>Panel 2: Strategy</b> (i.e. setting priorities, identifying leverage, avoiding pitfalls) <ul style="list-style-type: none"> <li>Opening remarks from partnerships (10 minutes each; see tips below)</li> <li>Small-group dialogues</li> <li>Large-group sensemaking</li> </ul>
	<u>Panelists</u> <ul style="list-style-type: none"> <li>Partnership for a Healthy Durham</li> <li>Atlanta Regional Collaborative for Health Improvement</li> <li>Sonoma Health Action</li> </ul>
12:15 – 1:00	LUNCH
1:00 – 2:30	<b>Panel 3: Investment/Financing</b> (i.e., aligning incentives and assuring sustainable resources for infrastructure and initiatives) <ul style="list-style-type: none"> <li>Opening remarks from four partnerships (10 minutes each; see tips below)</li> <li>Small-group dialogues</li> <li>Large-group sensemaking</li> </ul>
	<u>Panelists</u> <ul style="list-style-type: none"> <li>Health Improvement Organization</li> <li>Reach Healthy Communities</li> <li>Hospital Council of NW Ohio</li> <li>Iowa Healthiest State Initiative</li> </ul>
2:30 – 3:00	<b>BREAK AND SITE HUDDLES</b> <ul style="list-style-type: none"> <li>New insights?</li> <li>Next steps?</li> </ul>
3:00 – 3:30	<b>Reflections from Connectors</b> <ul style="list-style-type: none"> <li>Insights for pioneers?</li> <li>Frontiers for the field?</li> </ul>
3:30 – 4:00	<b>Feedback, Next Steps, &amp; Closing</b> <ul style="list-style-type: none"> <li>Opportunities to continue and expand this work, both online and in-person</li> </ul>

## Mutual Commitments

1. We provide a safe place for each other to explore conundrums and tough issues.
2. We hold in confidence any remarks made “off the record” or in small groups.
3. We participate in ways to maximize learning.
4. We listen and speak respectfully.





- 5. We honor other requests, as determined.

## Recording

This Roundtable is a small, select gathering designed to surface some of the most advanced thinking and progressive work on regional health system reform. Such stories are typically told by observers or intermediaries, if they are ever told at all. But we are committed to letting the storytellers speak for themselves. We aspire to develop multi-media products that will bring new, diverse voices to a wider audience of peers and allies across the field.

Therefore we plan to videotape most parts of the Roundtable, including all large-group conversations as well as individual and group interviews. Small-group dialogues and informal conversations will not be recorded. We will also adhere strictly to any requests to keep certain comments in confidence or to designate particular passages as “off the record.”

Given these purposes and provisions, each participant will be asked to sign a release form at registration (attached here). If you have questions or concerns, please contact Jane Branscomb at [jbranscomb@rethinkhealth.org](mailto:jbranscomb@rethinkhealth.org).

## Panel Assignments

On Day 2, the agenda features three panels on pivotal areas where multi-sector partnerships must excel: *stewardship, strategy, and sustainable investment/financing*.

Each panel will begin with brief opening remarks from a few groups (approximately 10 minutes each), followed by almost an hour for further development in small and large groups. These opening comments need not be exhaustive, but rather serve as provocative springboards for deeper dialogue.

We propose the following panel assignments, knowing that everyone has important stories to tell about each topic.

Panel 1: Stewardship	Panel 2: Strategy	Panel 3: Investment/Financing
<b>Themes</b> Multi-sector leadership, engagement, governance, etc.	<b>Themes</b> Setting priorities, identifying leverage, avoiding pitfalls, etc.	<b>Themes</b> Aligning incentives, assuring sustainable resources for infrastructure and initiatives, etc.
<b>Opening Remarks (10 min each)</b> <ul style="list-style-type: none"> <li>• Pueblo Triple Aim Coalition</li> <li>• Partners for a Healthier Community</li> <li>• Healthy Monadnock 2020</li> <li>• Bexar County Health Collaborative</li> </ul>	<b>Opening Remarks (10 min each)</b> <ul style="list-style-type: none"> <li>• Partnership for a Healthy Durham</li> <li>• Atlanta Regional Collaborative for Health Improvement</li> <li>• Sonoma Health Action</li> </ul>	<b>Opening Remarks (10 min each)</b> <ul style="list-style-type: none"> <li>• Health Improvement Organization</li> <li>• Reach Healthy Communities</li> <li>• Hospital Council of NW Ohio</li> <li>• Iowa Healthiest State Initiative</li> </ul>



## Preparation Tips

Below are some questions to help you prepare your opening remarks. Feel free to incorporate or modify those points that are most relevant to your situation. Please bring a 1- 3-page handout with your key points for your colleagues (40 copies). Let us know if you would like to share a few slides or if you have other questions: contact Laurie Stillman at [lstillman@rethinkhealth.org](mailto:lstillman@rethinkhealth.org).

### Panel 1: Stewardship

1. **How are you developing multi-sector leadership, engagement, and governance?**
  - a. What are the key elements and processes? What has worked well? What have you learned and how has your approach changed (if at all)?
2. **What are your plans going forward and what challenges do you anticipate?**
  - a. What conditions (both in your region and beyond) might enable or inhibit progress?
  - b. What might it take to gain greater legitimacy or authority for leading system-wide change? Do you plan to further formalize governance?
  - c. How could you strengthen engagement among missing voices, as well as connections both at the grass roots and grass tops? How are you poised to handle changes in leadership?
  - d. How do you distinguish and manage the role of the backbone organization versus other contributors to the effort?
3. **How are stewardship structures affected by decisions regarding strategy and financing?**

### Panel 2: Strategy

1. **How are you developing a shared regional strategy to transform health, health care, and community resilience over time?**
  - a. What are the key elements and processes? What has worked well? What have you learned and how has your approach changed (if at all)?
2. **What are your plans going forward and what challenges do you anticipate?**
  - a. What conditions (both in your region and beyond) might enable or inhibit progress?
  - b. What can be done to heighten urgency? Are there specific new strategies to pursue?
  - c. How could your strategy anticipate pitfalls and balance trade-offs?
  - d. How is the process for formulating strategy linked to implementation, measurement, and ongoing refinement?
3. **How are strategic choices affected by decisions regarding stewardship and financing?**

### Panel 3: Investment/Financing

1. **How are you developing sustainable financing to invest in infrastructure and initiatives, as well as to align incentives with your strategy?**
  - a. What are the key elements and processes? What has worked well? What have you learned and how has your approach changed (if at all)?
2. **What are your plans going forward and what challenges do you anticipate?**
  - a. What conditions (both in your region and beyond) might enable or inhibit progress?
  - b. Are there specific new investors/mechanisms that you plan to pursue?
  - c. How might you secure and solidify financing for different functions, such as
    - i. Collaborative organization/infrastructure?
    - ii. Early-stage innovation?
    - iii. Later-stage efforts to sustain, scale, and spread effective efforts?
    - iv. Structures that enable diverse stakeholders to share gain/pain?
3. **How are investment/financing options affected by decisions regarding stewardship and strategy?**

## Options for Open Space Activities

At registration, you can sign up for rotating Open Space activities on Monday afternoon. After general introductions and an overview of the entire meeting, we will move quickly into these brief small-group sessions, which provide a quick way to interact around topics of special interest before we reconvene as full group for the evening session.

There are four options in each of the three Open Space blocks (at 1:45, 2:45, and 3:45).

- **Discuss the Art and Science of Health System Change**  
What does it *really* take to catalyze change in a regional health system? Participants in these focused, interactive dialogues will exchange ideas on questions of common interest. In each round, one representative from each of 3-4 groups will share perspectives in conversations moderated by Laurie Stillman and Teri Larson. These sessions will also be recorded by videographer Hannah Cross so that a wider audience of colleagues may benefit from hearing directly from your experience. For maximum diversity, just one member of the partnership team should participate in this session.
- **Hone a Compelling Narrative for Your Multi-sector Effort**  
Everyone at the Roundtable has a story to tell of challenge, courage, and choice in the face of uncertainty. Effectively narrating the urgency of your story—and the hopeful vision for your partnership—is a critical leadership skill. In this session, Ella Auchincloss will facilitate a quick practicum on telling your public story in ways that inspire others and motivate action among funders and other stakeholders.
- **Play Out Health System Strategies Over Time**  
Where is the greatest leverage for improving local health system performance? What trade-offs may arise and what pitfalls threaten to undermine your influence? These questions can be explored interactively using the ReThink Health Dynamics Model. This tool helps groups take a wide-angle view of their health system and understand what it may take to achieve measurable, long-term impact. Leaders can test scenarios involving dozens of initiatives, financing schemes, and investment strategies, and then compare the likely effects over time using a gallery of measures including health, care, cost, equity, productivity, return-on-investment, and more. Bobby Milstein will facilitate a quick introduction and interactive experience with this tool.
- **Propose Other Timely Topics**  
Are you in the midst of a pressing predicament? Or are there certain issues that you are eager to explore? Feel free to propose other timely topics that you would like to discuss with peers, connectors, and/or ReThinkers. Sherry Immediato and Ruth Wageman will facilitate ad hoc conversations on a wide range of topics related to health system stewardship, strategy, and/or financing.



## Preparation Checklist

To make the most of our limited time together, there are a few tasks that we request in advance.

- Review the participant directory** to increase networking opportunities during the meeting.
- Summarize highlights of your group's origins, progress, pitfalls and possibilities, and prepare brief opening remarks for your particular panel on Day 2.**

Please bring a 1- to 3-page handout with your key points to share with colleagues (40 copies). If it is important to share a few slides, please let us know.

## Questions?

Please contact Jane Branscomb at [JBranscomb@rethinkhealth.org](mailto:JBranscomb@rethinkhealth.org) \

