
INVITING CLIENTS INTO OUR TENT:

HOW TO PREPARE AND LEAD A STRATEGIC DEBRIEF

Carolyn Cohen

Cohen Research & Evaluation, LLC



Kathy Burgoyne

Comprehensive Health Education Foundation



THE COMMUNITY HEALTH ADVOCATE PROJECT



ALIGNMENT OF STRATEGIC LEARNING APPROACH WITH C.H.E.F. NEEDS

- New to the work – both evaluation and placed based health. Required:
 - Working through internal resistance
 - Establishing trust: within the team, with the evaluator, and with the community
 - Learning as we go. Building a bridge between evidence based practice and community wisdom

THE PREFACE: ESTABLISHING THE RELATIONSHIP

- Start with Appreciative Inquiry
- Articulate Underlying Assumptions
- Develop a Theory of Change

START WITH APPRECIATIVE INQUIRY

- INQUIRE
- IMAGINE
- INNOVATE
- IMPLEMENT

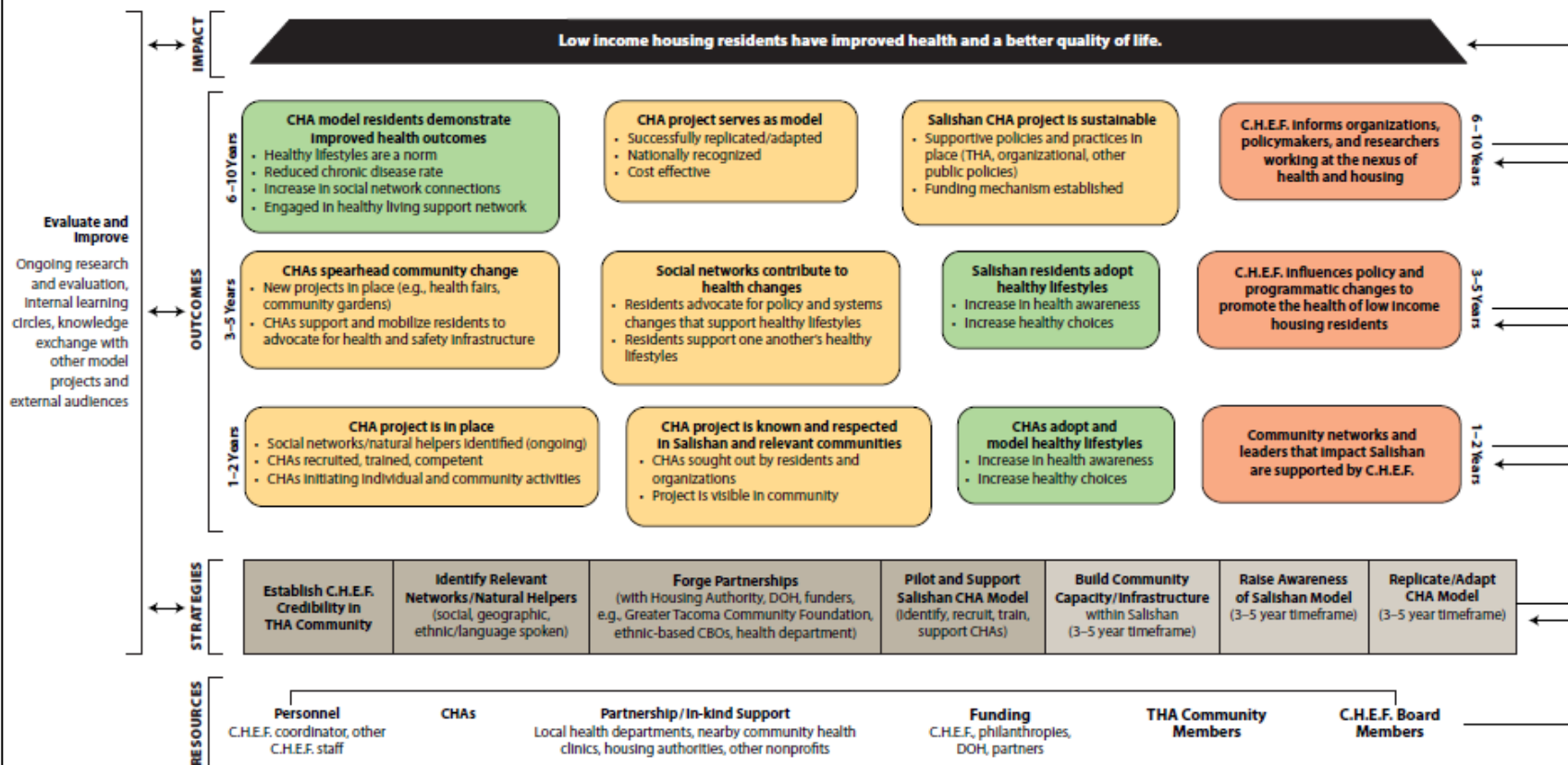
DEVELOP UNDERLYING ASSUMPTIONS



DEVELOP A THEORY OF CHANGE:



Community Health Advocate Theory of Change



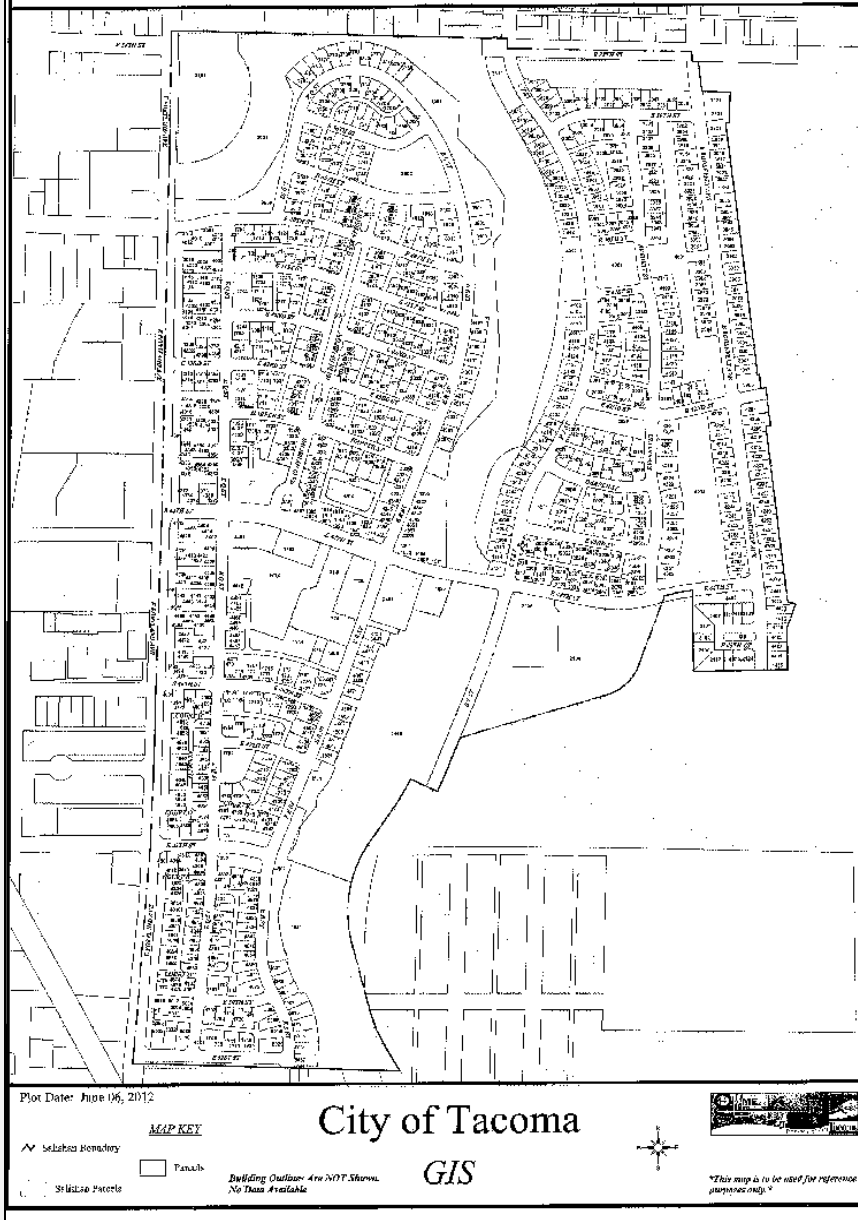
CONVENING AND HOLDING THE LEARNING CIRCLE

- What happens in advance of the Learning Circle
- What happens at the Learning Circle

IN ADVANCE OF LEARNING CIRCLE

1. Choose the strategic question
2. Prepare agenda
3. Assign tasks to team members
4. Collect data
5. Consultant/staff prepare findings

Salishan Community Alliance



I. Choose the Strategic Question

2. PREPARE AGENDA

Agenda Item	Facilitator	Time	Notes
1. Set & review expectations for session.	CC	9:30-9:40	Annual review and update of ToC. CHA leadership development implications for sustainability and replication.
2. Progress towards outcomes.	CC, GH,KB, JP	9:40-10:05	GH, KB, JP, CC, report in on specific outcome areas (As per advance assignments)
3. Learnings and issues re CHA leadership development.	GH, KB	10:05-10:55	KB and GH report to group on salient issues; successes and challenges. Group discussion on implications for strategic decision making both within project, and C.H.E.F. wide.
4. New findings on CHA as trusted communicators.	CC	10:55-11:10	Update on case narrative. Trusted communicator interviews and findings to date.
5. ToC changes. What new areas do we need to find a place for in the ToC? What should be changed?	CC	11:10-11:25	Consider changes including incorporation of language re trusted communicator and leadership development.
6. Dissemination; Bike rack items.	CC and All	11:25-11:30	2 proposals accepted for AEA Other report-ins

3. ASSIGN DATA REPORTING TASKS

Julie,

As you will see by the ELC agenda, I have you as one of the presenters on item #2. Would you please come with a couple of examples for the “C.H.E.F. capacity” outcome bubbles? Based on our interview, I think you might have examples for both the 1-2 year, and 3-5 year outcome bubble. Thank you.

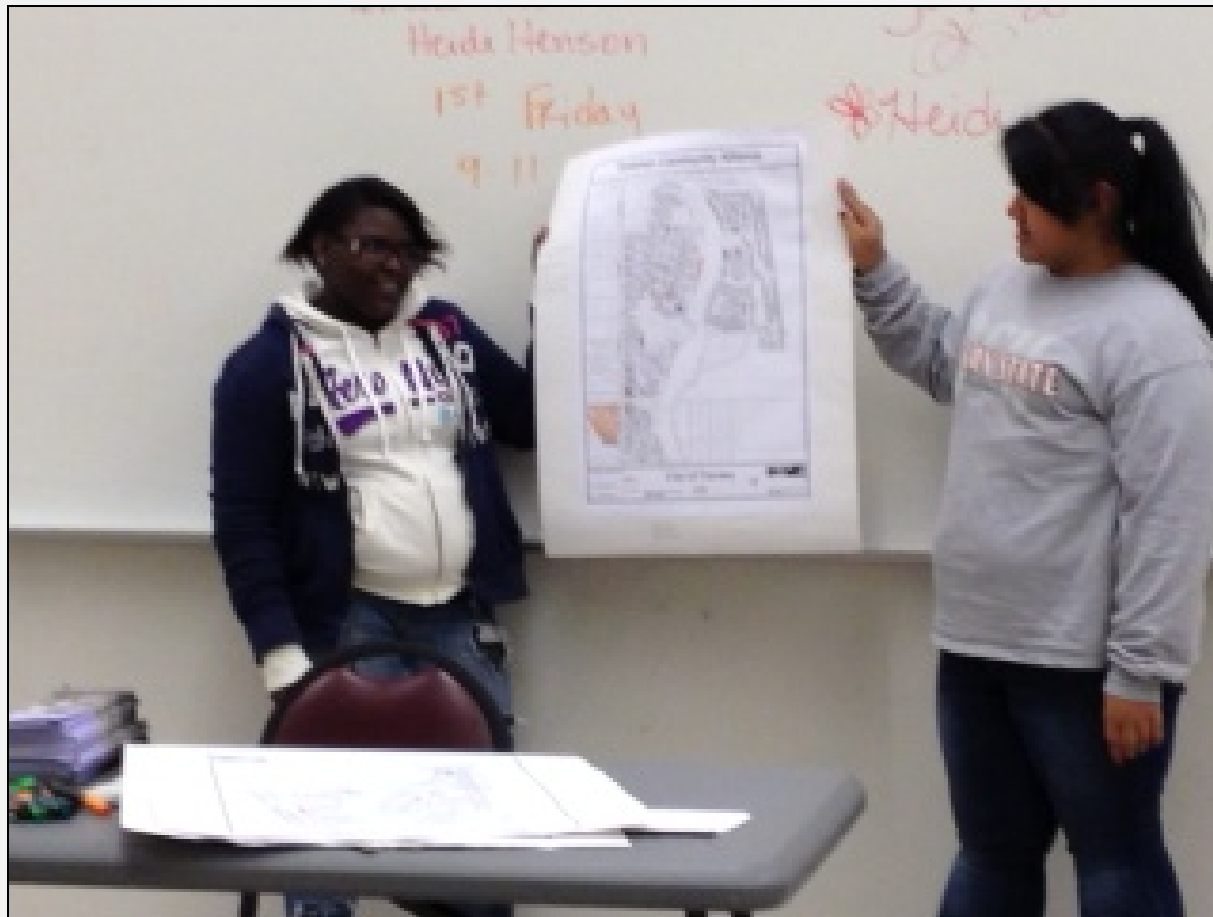
4. PREPARE FINDINGS

Data Collection Notes

The following quotes are culled from initial interviews for a monograph, “Activating the Advocate Network”.

The paper seeks to examine the role of the CHAs as “trusted communicators” in conveying health-related information to fellow residents, and in bringing resident voice to the various external organizations serving Salishan residents.

5. EXTERNAL DATA COLLECTION



AT THE LEARNING CIRCLE

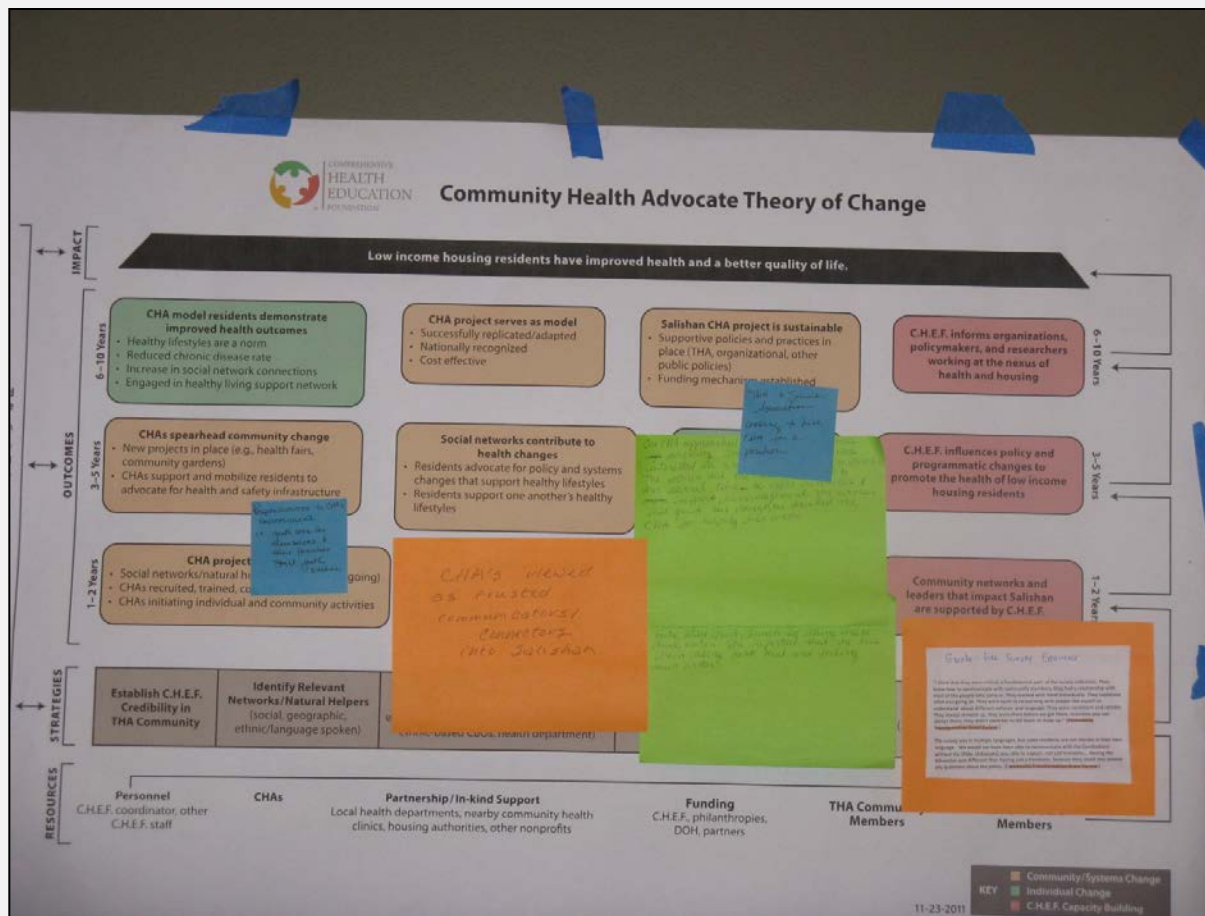
1. Set the stage for reflection
2. Review progress towards outcomes
3. Review new data
4. Discuss strategic implications
5. Identify action steps

I. SET THE STAGE

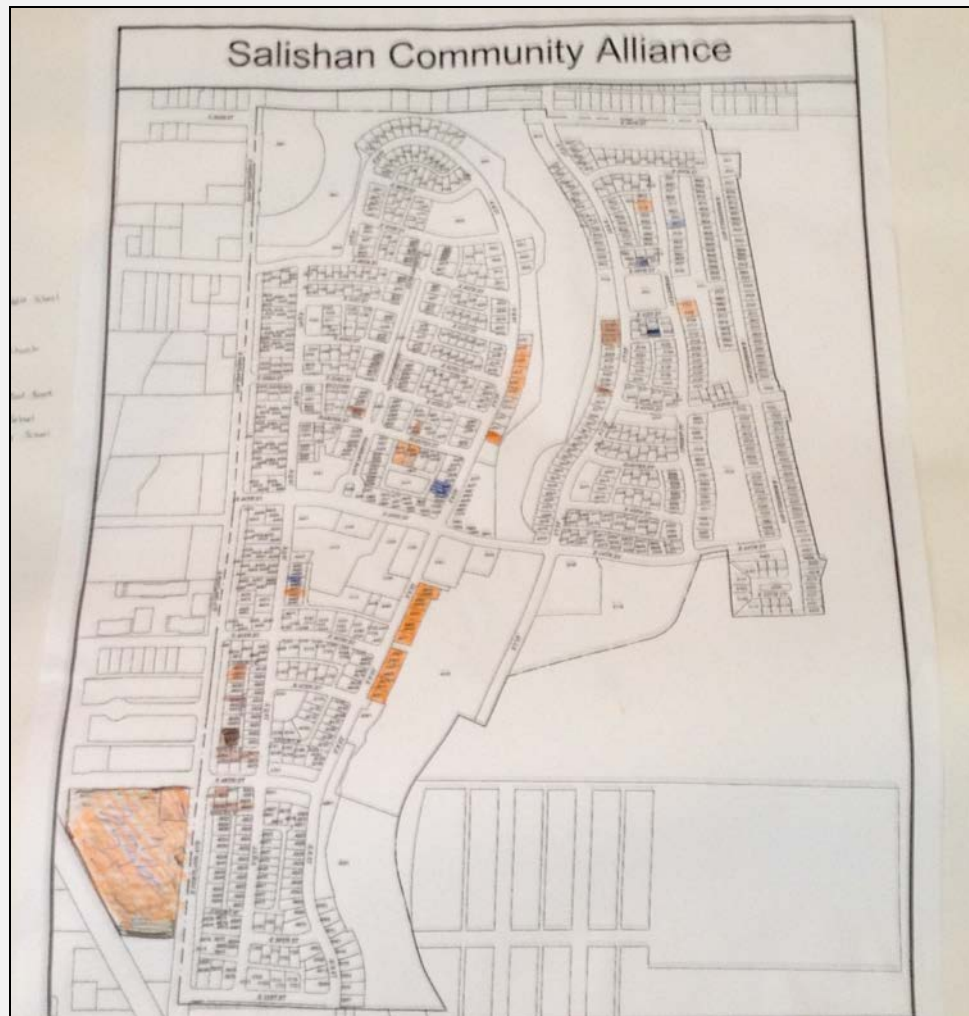
My personal rule in measurement is to spend 30% collecting and organizing data and 70% thinking about what it means.

Beth's Blog, Beth Kantor, March 4, 2013

2. REVIEW PROGRESS TOWARDS OUTCOMES



3. REVIEW NEW DATA



4. DISCUSS STRATEGIC IMPLICATIONS



5. CAPTURE ACTION ITEMS

Agenda Item	Summary	Action Steps
Social Marketing	<ul style="list-style-type: none">CC and GH shared maps completed by the Advocates on 2/11, which illustrate current “reach” within the community. The team discussed new ways to reach out to Salishan residents who have not engaged with the CHA projects to date. Engaging tactics such as getting cute T-shirts were noted.	<ol style="list-style-type: none">Melanie will raise this issue with the new social media person at Pyramid, and the social networking researcher at UW, and investigate seeking resources for new marketing strategies.It will be important for the team to identify clear goals for the marketing efforts

ALIGN INTERNAL REPORTING WITH OUTCOME AREAS

INDIVIDUAL CHANGE	COMMUNITY/ SYSTEM CHANGE	CAPACITY BUILDING
<p>Two CHAs, after being involved as assistants in the Community Kitchen for over a year, finally agreed to be Kitchen Leaders. They were signed up for one kitchen each. The Kitchen Coordinator was thrilled because she loves having them involved and has been asking them for months to agree. They were actually proud and excited about the idea, a little nervous too.</p>	<p>Three of the CHAs helped the Coordinator gather statements from the gardeners in the “R” Street Garden and the Roosevelt Garden about a THA resident who is harassing them. THA asked for a written statement. The CHAs did gather some statements and the letter was sent with the hopes that this person can be asked to leave the garden and that there will be no retaliation.</p>	<p>Tacoma Housing Authority and Salishan Association are working on creating a position-Community Builder. CHEF was asked to participate from conception and they were specifically asked if there were any CHAs who would be good candidates for the position.</p>

POST LEARNING CIRCLE

- Follow up with team
 - Incorporated into weekly supervision with project coordinator and CHAs
 - Incorporated into work with Fellows
- Applying data to strategy
 - What to continue and what to cut?
 - Training opportunities

COMMUNITY GARDEN



IN-PERSON ASSISTERS



SUMMER LUNCH



YOUTH ADVOCATES



PRESENTER CONTACT INFO

COHEN | RESEARCH &
EVALUATION, LLC

Carolyn Cohen, MEd
Cohen Research & Evaluation, LLC
206.523.9296
cohenevaluation@seanet.com
www.cohenevaluation.org



COMPREHENSIVE
HEALTH
EDUCATION
FOUNDATION

Kathy Burgoyne, PhD
Senior Director of Applied Research
Comprehensive Health Education Foundation
206.498.2993
kathyb@chef.org
www.chef.org