

INVEST HEALTH
TEAM SUSTAINABILITY
PLANNING ACTIVITIES

NEW ORLEANS
DECEMBER 2017

SUSTAINABILITY PLANNING ACTIVITIES

Introduction

The New Orleans convening marks 18 months since your Invest Health team set out on your work together, and the closure of the formal grant period. We have seen your teams come together in remarkable ways over the course of this initiative, and we know that you will continue to work together to advance your ambitious projects and collaborations far into the future. The sustainability planning activities described below are intended to help your team think about what your work will look like in the coming year, and develop concrete strategies to achieve success. Specifically, we hope these activities will help you to:

1. Identify common goals for your work moving forward;
2. Discuss strategies and ways of working together that will help you to reach your goals;
3. Lay out concrete actions that you will take to advance your work in the coming months; and
4. Position you to continue your Invest Health work with energy and clarity in 2018 and beyond.

Contents

This packet includes the following activities, with instructions and worksheets for each:

- Activity 1: Team Reflection Point
- Activity 2: 2018 Action Plan
- Activity 3: Advancing your project pipeline

In addition, we have distributed copies of the team sustainability planning activity you completed together at the Phoenix convening. We hope this document will serve as a point of reference and reflection as you move through these activities.

Instructions

- Before starting your work on these activities, please take 5-10 minutes to review and discuss the sustainability planning exercise from the June 2017 convening in Phoenix.
- Subsequently, we suggest that you spend 20-25 minutes on the Team Reflection Point activity. This activity is a good way to establish common ground and set the stage for open reflection in other activities, and for the remainder of the convening.
- Following the Team Reflection Point, please review Activities 2 and 3, and decide as a team which one would be most valuable to work on for the remainder of the session.
- Bennett Midland City Support and Invest Health staff will be available throughout this time. If you have any questions, or would like someone to help guide your conversation, please just raise your hand.

Activity 1: Team Reflection Point

Introduction

This Reflection Point is intended to provide dedicated time for critical discussion and reflection on your work and collaboration as an Invest Health team, including aspects that are most effective, those that are the hardest, and where there is room for helpful changes.

When Invest Health launched, you were challenged to work towards an ambitious goal with a diverse team from different sectors. Eighteen months in, as you prepare to begin the next chapter of your work together, it is an opportune time to reflect on how this endeavor has gone, what you have learned, and what you hope to achieve moving forward. We hope you will use this Reflection Point to consider and honestly discuss these questions as a team to foster transparency and strengthen your teamwork moving forward.

Goals

1. Have an honest discussion about your Invest Health work and reflect on how you might adapt the ways you work together to position the team for continued success after the formal initiative ends.
2. Identify concrete ways you will strengthen your collaboration and work productively together in 2018.

Suggested time

20-25 minutes

Activity 1 worksheet: Team Reflection Point

Instructions

Please take the next 20-25 minutes to consider and discuss each of these questions as a team. In the space below each question, designate one team member to document the main points and key takeaways from your discussion.

1. What has been most effective about how our team works together?

2. What has been most challenging in our work together?

3. What do we want to keep doing in 2018? What do we want to change?

4. Looking ahead to December 2018, what would we be satisfied with having achieved?

Activity 2: 2018 Action Plan

Introduction

In the months and years ahead, you will continue to advance the pipeline of ideas and projects you've created as a team. As Invest Health officially concludes, however, there will be no more formal check-in calls, convenings, or pod gatherings. Setting concrete, actionable goals for 2018, and laying out the specific tasks and work streams that will be required to achieve them, will help build alignment around what your work will look like in this next phase, and keep you from losing momentum in the new year.

Goal(s)

1. Identify your top 3-5 goals for 2018.
2. Develop a plan for how you will work together to achieve each of these goals, including specific action items and persons responsible.

Suggested time

35-40 minutes

Activity 2 worksheet: 2018 Action Plan

Instructions

Goals for 2018

1. Identify your team’s top 3-4 goals for 2018 and write them down in the table below.
 - a. These goals may reflect what was discussed in your Reflection Point, or may focus on other areas of the work.
 - b. For each goal, include a target date by which you hope to achieve it.
 - c. Be concrete in what you want to achieve, make sure it is ambitious, and make sure it is something you can actually achieve!
2. If you are stuck, some questions you might consider include:
 - a. What specifically do we want to accomplish in Q1 2018?
 - b. Who do we want to bring into the work?
 - c. How do we want to stay engaged with the Invest Health network (other teams, experts we’ve met, *etc.*)
 - d. Are there funding deadlines we want to meet in 2018?
 - e. Are there opportunities we feel we missed in 2017 that we don’t want to let slip by this year?

Goal	Target date
1.	
2.	
3.	
4.	

Action planning

1. For each goal identified above, use the template below to document the main actions or work streams that will be required, the person responsible for each, and the stakeholders who will need to be involved (be specific!).

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Action Plan 2018

<i>Goal 1:</i>			<i>Target date:</i>
<i>Task or workstream</i>	<i>Person responsible</i>	<i>Other stakeholders</i>	<i>Target date</i>

<i>Goal 2:</i>			<i>Target date:</i>
<i>Task or workstream</i>	<i>Person responsible</i>	<i>Other stakeholders</i>	<i>Target date</i>

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<i>Goal 3:</i>			<i>Target date:</i>
<i>Task or workstream</i>	<i>Person responsible</i>	<i>Other stakeholders</i>	<i>Target date</i>

<i>Goal 4:</i>			<i>Target date:</i>
<i>Task or workstream</i>	<i>Person responsible</i>	<i>Other stakeholders</i>	<i>Target date</i>

Activity 3: Advancing your project pipeline

Introduction

Invest Health teams are preparing to implement ambitious, impactful projects in your communities—built environment and otherwise. This exercise should help your team take stock of the projects in your pipeline, consider where you are in developing the project and what you need to bring it to completion, and prioritize the team’s work in the months ahead.

In particular, we are asking you to look at the following factors, all of which are necessary for successful implementation:

- Business or project plan: have you developed a document that clearly describes what this project is, why it is important, how it will work, and the impact it will have?
- Budget: have you developed a detailed budget for what it will cost to develop and operate this project?
- Project owner/implementer: have you identified the organization and person who will lead this project?
- Health impact outcomes: have you developed solid metrics and targets that describe the impact this project will have on the health of the community?
- Fundraising: have you identified funding sources for this project, and taken steps towards securing this funding?

Suggested time

35-40 minutes

Activity 3 worksheet: Advancing your project pipeline

Instructions

Taking stock of your projects

1. In the table below, list 3-5 top priority projects in your team’s Invest Health pipeline.
2. For each project, identify the components that you do have, and those that are missing.

Project	Project components				
	<i>Business or project plan</i>	<i>Budget</i>	<i>Project owner / implementer</i>	<i>Health impact outcomes</i>	<i>Fundraising</i>
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Next steps for each project

For each project, list the next steps you will take to ensure you have all necessary components, including a target date for completion.

<i>Action</i>	<i>Target date</i>
<i>Project 1:</i>	
<i>Project 2:</i>	
<i>Project 3:</i>	
<i>Project 4:</i>	
<i>Project 5:</i>	