

Equity Action Lab Implementation Guide



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About 100 Million Healthier Lives and the SCALE Series

[100 Million Healthier Lives](#) (100MLives) is an unprecedented collaboration of change agents across sectors who are working to transform the way we think and act to create health, well-being, and equity. As part of 100MLives, the [Robert Wood Johnson Foundation](#) (RWJF) generously funded a program called Spreading Community Accelerators through Learning and Evaluation (SCALE), which began in January 2015 and ended its second iteration in April 2019.

The second iteration of SCALE, SCALE 2.0 (2017 - 2019), included work with more than 200 communities and 500 health care organizations through four core initiatives:

1. SCALE Health & Care (now known as [Pathways to Population Health](#))
2. Regions of Solutions
3. States of Solutions
4. Community Health Accelerators Initiative

The goal of SCALE was to work with communities and health care organizations to accelerate their journeys toward what RWJF refers to as a Culture of Health. In SCALE 2.0, the community coalitions began creating tools, resources, and strategies to adapt improvement science in order to make it more accessible to individuals from all backgrounds. Through these experiences, we captured core models that have proven to be essential in advancing community-based improvement initiatives.

All of this work is built on the [100MLives Core Principles](#). To make this community-based work possible, 100MLives has worked with many partners, each of whom brings their unique expertise and knowledge to make this work a success. These partners include, but are not limited to:

- SCALE Communities
- SCALE-Up Communities
- States of Solutions
- Institute for Healthcare Improvement
- Heluna Health



The Equity Action Lab model, initially developed by [Community Solutions](#) and then adapted by 100 Million Healthier Lives, provides a structure and focus to bring together a diverse team to make meaningful progress on a health equity goal in a short amount of time. The model has been used successfully in thousands of communities addressing hundreds of different social issues. In 2016, as part of the 100 Million Health Lives initiative, 24 communities were introduced to the Equity Action Lab framework, which was adapted to focus on eliminating inequities. Since then, these communities have been testing adaptations designed to emphasize actions in pursuit of equity and integrate the core principles adopted by the 100 Million Healthier Lives network.

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Source: Tenderloin Health Improvement Partnership

What is an Equity Action Lab?

An Equity Action Lab is a flexible and adaptable model that uses a set of activities to bring together a diverse group of community stakeholders to take action in pursuit of equity and community improvement. The model was built using human-centered design principles, which puts the people most affected by the inequities, or the problems in a system, at the center of designing new solutions.

Furthermore, the model includes a critical analysis of data to determine the focus of work and assess progress along the way. This data should include both quantitative information and qualitative stories of people's experiences. In this model, lived experience is given the same value as professional experience. This approach helps to build equitable and unique solutions that fit the needs of the people who will be most affected by them.

The Equity Action Lab model generally comprises four phases.

It begins with a **Prep Phase** in which leaders and changemakers come together to review existing data, refine the topic area to be addressed, and recruit diverse team members who will be involved in the subsequent phases. The leaders involved at this stage clear the path for those who will be doing the work in the next phase.

The next step is the **Action Lab Phase**, which is dedicated to bringing together those who will be doing the work. This "action team" includes those who are most affected by the issue(s) as experts in the co-design of solutions. Participants will set an ambitious goal to be achieved within a brief timeframe (generally about 100 days and never more than six months) and will design a flexible plan to achieve the goals. The plan includes actions/tasks and deadlines for these actions, and it delegates responsibility for completing them. This team holds full decision-making authority. The action team may include and may call on the leaders who were engaged during the Prep Phase to help them bring about their vision.

Immediately following the Action Lab, the **Sprint Phase** begins. In a short time period (generally 100 days, depending on what the community decides), initial theories will be tested and then refined through a series of regular (often weekly) check-ins.

The **Sustain Phase** follows the Sprint. It is the last step and begins with a Momentum Lab where progress and learning are celebrated, and discussions are held about how to maintain and build upon the achievements. The duration of this phase varies widely depending on the topic area and context. Sustaining the results may extend indefinitely.

Equity Action Lab Structure



Figure 1: Equity Action Lab Structure

An Adaptable Model

An Equity Action Lab is a flexible model — no two Equity Action Labs are alike! In this Implementation Guide we offer scenarios, tools, and tips for three types of Equity Action Labs:

- **Equity Action Lab Type 1: Structured and Planned** is designed for those who want to engage in extensive planning before their Equity Action Lab and who want a highly structured experience (Action Lab, Sprint Phase, and Momentum Lab).
- **Equity Action Lab Type 2: Organic and Flexible** is designed for those who prefer minimum planning and maximum nimbleness and flexibility throughout the Action Lab, Sprint Phase, and Momentum Lab.
- **Equity Action Lab Type 3: Adaptive Hybrid** is designed for those who are most comfortable somewhere in between the two ends of the continuum offered in Types 1 and 2, and/or who might want parts of the experience to be highly structured and other parts to be more flexible.

Phase 1: Prep

Timeframe

1-6 months (generally 2-3 months)

Typical tasks in this phase

- Determining if you are ready for an Equity Action Lab
- Collecting and analyzing data on your topic area
- Refining your topic area
- Putting together your team(s)
- Planning operational logistics

Overview

The Prep Phase of the Equity Action Lab is an important time to set the project up for success. It is a time to start the process for supporting quick decision-making, effective group or team planning, and rapid implementation during the subsequent phases. Depending on several factors — including the topic area, whether or not the likely participants in your Equity Action Lab have worked together previously, whether data is readily available, and/or whether you prefer a highly structured or more flexible Equity Action Lab — we recommend devoting from 1-6 months to this phase. It is worth noting that many of us think we have to have everything planned out before starting. Because your Equity Action Lab topic is almost certainly a complex/adaptive challenge (as opposed to a technical one), it is not possible to fully plan in advance. Instead, the goal is to plan enough to get started, and then use testing and iteration to learn your way into solutions. Some key steps of this phase that will support a successful Action Lab are outlined in detail below.

Are We Ready to Plan and Implement an Equity Action Lab?

We are often asked, “Is our team ready to do an Equity Action Lab?” The response to this question varies, but, for the most part, if you are able to get a group of stakeholders together around a common topic area over which they have some influence, an Equity Action Lab might be a good model for you to consider. As mentioned previously, your topic area is likely an adaptive/complex challenge that can only be addressed through iterative action (continued planning at some point becomes counter-productive). So, don’t worry if you don’t fully understand everything there is to know about your chosen topic area. You will learn by doing during the Equity Action Lab!

As mentioned previously, the Equity Action Lab is a flexible model — and each Equity Action Lab is customized for the unique context of its participants. To help you envision what an Equity Action Lab might look like for your community/team, in this Implementation Guide we offer scenarios, tools, tips, and examples for three types of Equity Action Labs.

Though an Equity Action Lab is a flexible model, there are some core elements we believe should be integrated in some form into any experience that is labeled an Equity Action Lab.

Equity Action Lab Core Elements

These core elements are woven throughout this guide, but we call them out here to give you a sense of what an Equity Action Lab is and how it differs from most planning processes.

- A Prep Phase as short as feasible and generally lasting 2-3 months (with emphasis on getting to action after some limited planning, data collection and putting together a strong and diverse team)
- A Sprint Phase of about 100 days (and not longer than six months)
- A concrete short-term aim (generally to be achieved within a period of 100 days, and of no longer than six months) that addresses a health inequity issue (and that explicitly calls out this inequity). Participants can all set a long-term aim for the work (if this hasn't previously been agreed upon).
- A safe environment to involve people with lived experience as full partners in co-design and co-production (in all parts of the work) – this includes making sure that the language and processes used make all participants feel welcomes and valued
- A measurement plan to track progress and guide decision-making (this can be simple); data that informs the strategy development; data collection and analysis that inform quality improvement (note: we are not looking for research-level data here, but rather “good enough” data that can be used for improvement purposes)
- A way to include rapid-cycle tests of change, including using Plan Do Study Action (PDSA) cycles
- A way to report back activities and results to those engaged and other stakeholders (Momentum Lab or other methods)
- A group of willing participants that is prepared to work together in an intensive way for a short period (typically 3-6 months)
- Participants who can fill an array of roles, including:
 - A lead to support and sustain the effort
 - A diverse team (core action team) of participants, always including those most directly affected by your chosen topic area and those working “closest to the ground,” who can meet regularly to *plan* and *execute*
 - Community residents, participants, and/or people with lived experience to help guide, steer, and direct the group to meet the needs of those who are intended to benefit from the Equity Action Lab
 - A measurement lead (or group) to facilitate data collection and analysis efforts

An Equity Action Lab:

- Gets to action quickly — ideally this means that something is tested and improved by including the end-user/people with lived experience throughout the process (and not just in the development of a plan)
- Uses an iterative/adaptive process designed for complex challenges (rather than a fixed process designed for technical challenges)
- Secures funding or in-kind support for basic elements such as materials and refreshments (but don't let lack of funding stop you). We strongly recommend offering stipends for unpaid members of the team (such as residents with lived experience).
- Uses improvement science as part of its approach
- Considers planning for sustainability and/or scale-up of success (this can often be done in conjunction with PDSAs)

Let's get started! Below are key considerations to think through as you plan and implement your Equity Action Lab.

Assembling Your Team(s)

Planning and implementing an Equity Action Lab require a range of skills, roles, and abilities. The first component is assembling teams who will move the work forward. Team assembly will depend on your

community's unique factors, such as existing partners, projects, and goals. Feel free to approach the team assembly based on what fits your community.

Some recommended roles and skills include:

Compelling leader: someone who is accountable for moving the work forward and/or facilitating the process.

Design skills: someone who excels at creating visual content and thinking like a designer.

Measurement skills: someone with experience identifying and collecting information to measure and track progress toward your aim(s).

Community engagement skills: someone who can help recruit people with lived experience or bring community members into the process.

Diverse participants: participants with wide-ranging perspectives who can meet regularly to plan and implement the Equity Action Lab.



Source: *Ethnic Community-Based Organization for Refugees*

Diverse Teams

Regardless of style, it is useful to consider how you assemble a team that is diverse in terms of experience, skills, views, cultural and/or racial identities, and perspectives. A key aspect of the SCALE Community of Solutions Framework¹ is sharing vision, leadership, design, and implementation with individuals who have lived experience with the issue you are attempting to address.

Lived experience is the expertise that does not come from education, but rather from knowing what works and what does not from direct personal experience. For more information, visit our [Toolkit for Engaging People with Lived Experience](#). Keep in mind, those working to address an issue are often employed and compensated to work on the project. To achieve equity in sharing leadership and co-designing, it is

¹ Stout S. *Overview of SCALE and a Community of Solutions: SCALE 1.0 Synthesis Report*. Boston: 100 Million Healthier Lives, convened by the Institute for Healthcare Improvement; 2017. (Available at www.ihl.org/100MLives)

critical to look at how individuals with lived experience can be compensated for their time and energy, as most others are.

In addition to people with lived experience, an Equity Action Lab involves staff “closest to the ground” in developing and testing solutions. As an example, an Equity Action Lab working on reducing street homelessness would include outreach workers and housing specialists on the team. A diverse team, including those most affected by an issue and those who can test and implement potential solutions, helps ensure a more representative approach and solution. Without diversity on the team, it is unlikely that you will make meaningful progress toward achieving equity or that you will select approaches that truly meet the needs of those most affected by your chosen topic area.

Assembling Your Team: What’s Your Approach?

Scenario 1: Structured and Planned

A core element of an Equity Action Lab is an action team or teams. In a formal Equity Action Lab, this takes the form of two teams: a Leadership Team and a Design Team.

In this scenario, the **Leadership Team**:

- Decides to use the Equity Action Lab model on a health equity topic important to them
- Reviews data
- Recruits a Design Team
- Refines a topic area
- Identifies possible aim(s)

While their involvement at this stage is important to provide guidance and direction, once the Prep Phase ends, the Leadership Team distributes power to the Design Team (those who will be doing the day-to-day work). The Leadership Team then functions like tools in a toolbox, ready and waiting to be activated if they are needed by the Design Team. Unlike traditional hierarchies of leadership, this Leadership Team retains no approval or veto powers over the decisions the Design Team makes about goals, implementation ideas, or changes to programming and interventions. They can, however, set some parameters (or “guardrails”) for the work, to ensure that it stays focused on the chosen topic area. Some Leadership Team members may join the Design Team, but only if they are able and willing to take on an active role in work during the Sprint Phase.

In this scenario, the **Design Team**:

- Leads the action planning during the Action Lab (Phase 2)
- Leads the day-to-day work during the Sprint Phase
- Requests assistance of the Leadership Team as needed during the Sprint Phase
- Tracks progress during the Sprint Phase
- Prepares for the Momentum Lab
- Presents at the Momentum Lab (at the end of the Sprint Phase)

Scenario 2: Organic and Flexible

In an Equity Action Lab where you plan to adapt as you go, there will be more flexibility in defining teams, roles, and responsibilities. In this scenario, you will work with what you have in whatever situation your community is in. You may not need two separate teams to plan and implement an Equity Action Lab. Instead, simply build a diverse team of partners (including people with lived experience and staff closest to the ground) and get started. Use the available data and experience to inform your goals and aims. This

team may need to recruit additional support to implement the plan, but they can do so after identifying the topic area and aims.

Scenario 3: Adaptive Hybrid

In a less formal Equity Action Lab, roles and responsibilities may be more flexible. To get started, assemble a team to advise or identify a topic area and aim(s), and relevant data sources. This group should include institutional leaders, people with project management skills, and people with lived experience. Operating as an advisory team, this team can make recommendations for the implementation team to adopt or adapt as appropriate. Some advisory team members may also be part of the Design Team as they may want to take an active role in the work.

Getting Stakeholders to Join the Effort

If you are using the Structured and Planned approach, you'll likely want the members of your organization to serve on your Leadership Team, your Design Team, or both! The Leadership team should include high-level leaders with knowledge and expertise in the topic area, who might be able to change policy, make resources available, or otherwise clear the path for the Design Team. The Leadership team should include people with lived experience, especially those who have strong relationships within the community. Additional members of the Leadership Team might include representatives from government agencies at the local, state, or federal levels, executive directors of local nonprofits, or others you feel could respond to the needs and requests of the Design Team.

It's important to note that the Leadership Team does not guide, direct, or administer the work of the initiative. They can have any level of day-to-day involvement with the Design Team (there might even be some overlap between the teams), but their main job is to support, encourage, and clear the path so that the Design Team can test solutions and do what it takes to achieve the aim. Don't pick Leadership Team members for political or optical reasons. Pick them because you feel they'll support the initiative and serve the Design Team to the best of their abilities.

The Design Team is responsible for guiding the day-to-day work of the Equity Action Lab. Design Team members generally need to be able to commit to 3-4 hours a week of work throughout the Sprint Phase. Design Team members are often "closer to the work" than the Leadership Team members and should always include some "frontline" staff and people with lived experience of the topic area (e.g., if your Equity Action Lab selects better maternal outcomes as its topic area, pregnant women and women who recently gave birth should be part of your Design Team). It is also important to focus on equity, by asking the question, "Who isn't doing well (or is doing the least well) in our selected topic area?" and finding people that represent the groups/subpopulations you've identified to be members of your Design Team.

After you've selected your approach and established an understanding of the roles of the Leadership and Design Teams (or a single Design or "Action" Team if you choose that approach), it's now time to start developing a list of who you might invite to join.

Using a process outlined in the sample chart below, you can identify potential team members, briefly articulate the value each of them might bring to the team, use a modified "What's in It for Me" (WIFM) analysis to describe why they would want to join the effort and briefly plan next steps for engaging that person to join the team.

Person/Title	Potential Role (Leadership Team and/or Design Team)	Potential Value for the Equity Action Lab	WIFM Analysis (What's in It for Them?)	Next Steps to bring this person to the table (including who will conduct outreach)
Minnie Mouse/ Commissioner of Human Services	Leadership Team	She can bring the network of providers to the table, influence policies and procedures.	She is passionate about this issue and will like that we are focus on action.	Tom and Jerry will reach out to her when they meet in person next week.
Donald Duck/Person with Lived Experience and Activist	Leadership Team (and Design Team, if possible)	He has deep connections to other people with lived experience and providers and knowledge of all aspects of the system.	While he is busy, knowing that as a member of the Leadership Team he can help influence policy will be a selling point.	Daffy will arrange a time to talk with him next week to first get his ideas and then invite him to join.
Goofy/Case Worker	Design Team	Goofy understands the day-to-day work very well and has strong relationships with other providers.	Goofy has been trying to get uptake for some of his ideas for years, and this is an opportunity to test some of those.	Scooby will email him to see if he is willing to explore joining this effort and then set up a meeting to discuss details.

Gather Background Information

An important preparatory step in determining the topic area for your Equity Action Lab is to consult and review background information. What information has already been collected? Where have plans already been made or assessments conducted that your team can consult for context? What data shows where inequities exist in your community? What might people be excited about addressing?

For example, in SCALE, teams developed driver diagrams to help map their unique systems and develop plans to address weaker components. Many communities used their driver diagrams to prioritize potential areas of focus for their Equity Action Lab. For more information on driver diagrams, read our driver diagrams Implementation Guide.²

We often think of data as numbers and charts, but data can also include qualitative information, such as personal stories, interviews, focus groups, photographs, or responses to open-ended survey questions. When possible, use information that highlights differences by race, ethnicity, income, geography, or other demographic factors. The intention is to identify and focus on those groups of people who are not thriving in the topic area you are examining.

Gather and review relevant information and use it to help clarify the focus or even to develop an aim. Sometimes this process of information-gathering can be overwhelming, but try not to let it slow you down. Others may insist that you cannot act yet because you don't fully understand the issue/topic area. But because your topic area is likely a complex problem, it is impossible to use data to completely understand it and develop a solution. Solutions to complex/adaptive problems always require testing and iteration. That is why Equity Action Labs emphasize getting to action as soon as is feasible. Remember, the key is action — so you want to identify a topic and understand it enough that it will motivate your Equity Action Lab participants to take action. If you are working with a separate information-gathering team, make sure everyone has access to the same background information; it helps transfer knowledge between teams.

What are some things that you need to know in order to set an ambitious aim related to your topic area? Think of this information in two categories:

- 1) **Existing data that you need to track down**
- 2) **Data that you need to collect**

For existing data that you need to track down, consider completing the table in the Equity Action Lab Planning Worksheet titled **Curating Existing Data**.

For data that you need to collect, ask yourself, Who are your end users? An end user is anyone who would interact with the solutions that you might test and implement. Pay special attention to those with lived experience in your topic area. Also think of those who would be providing or administering the solutions. For each end user, what do you want to learn from them? For each end user, what methods might you use to answer the questions you need to ask them? A challenge: try to think of methods other than surveys or focus groups. What are some fun, creative ways that you could collect information that would give you a detailed picture of the lives and personal contexts of your end users? Consider these questions as you complete the table in the Equity Action Lab Planning Worksheet titled **Collecting Additional Data**.

² Hayes H, Howard P, Schall M, et al. *Teaching driver diagrams to Advance the Work of Community-based Collaboratives*. Boston: 100 Million Healthier Lives, convened by the Institute for Healthcare Improvement; 2019. (Available at www.ihl.org/100MLives)

Refining Your Topic Area and Developing Aim Templates

A clear description of the topic to be addressed is usually developed during the Prep Phase. Ideally, this description should include a broad problem or opportunity statement, identify a focus population, and acknowledge any helpful context and boundaries (guardrails). The description should not prescribe a specific goal, a specific solution, or instructions on how the work should be done. All of these steps will happen later, during the Action Lab Phase. The process of refining your topic area may depend on the type of Equity Action Lab you prefer. Using the Structured and Planned type, you would almost certainly refine your topic area in advance of the Equity Action Lab. For the other two types (Organic and Flexible or Adaptive Hybrid), refining your topic area will occur when it is most relevant to you, possibly during the Prep Phase or at your Action Lab (Phase 2). See **Figure 2** below for an example.

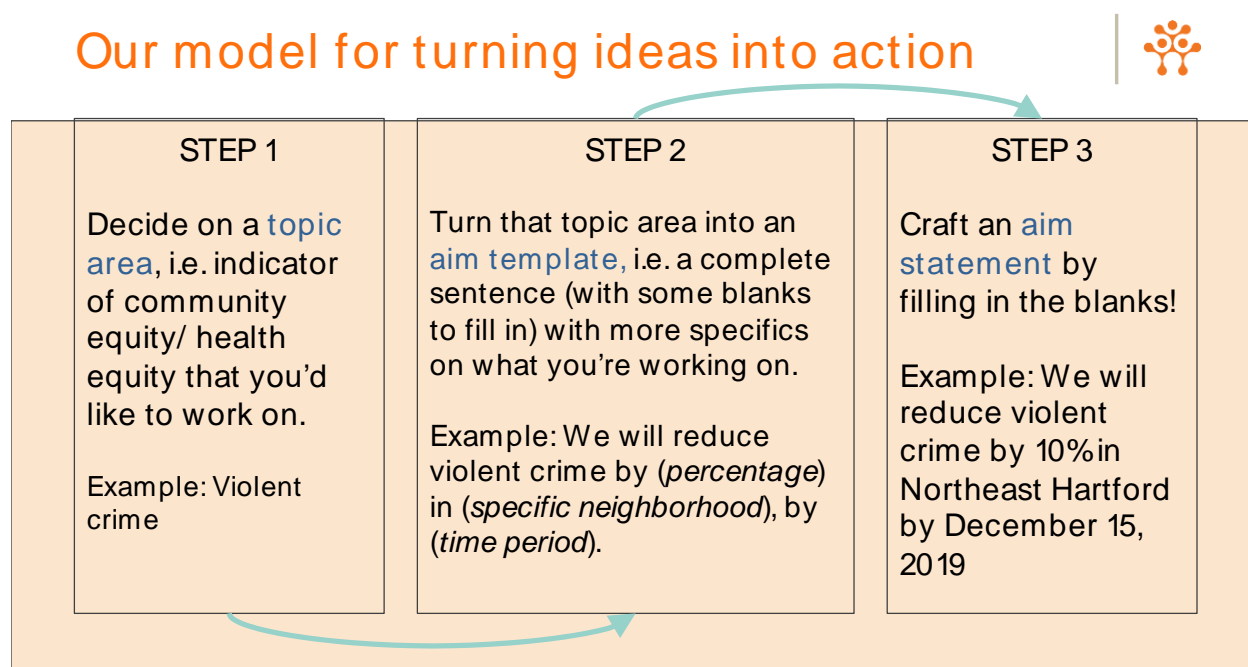


Figure 2: Our model for turning ideas into action

A **topic area** is a broad domain of health equity that you would like to work on over the course of your Equity Action Lab. If the Equity Action Lab were a college degree, your topic area would be your major. Examples from past Equity Action Labs include:

- Maternal morbidity and infant mortality
- Veterans' homelessness
- Unemployment/workforce development
- Food security
- Use of community space
- Use of 911 calls for non-emergency needs
- Public transportation
- Public safety
- Managing diabetes

Choosing Your Broad Topic Area

Here are some guiding questions to help you choose your topic area.

1. Take a look at what your organization, team, and/or community collaborative has officially set as your priorities (e.g., your strategic plan, your team's Theory of Change or driver diagram, your community health plan, and/or other community documents that outline your priorities). Which topic areas in these documents do you think you might like to spend some time working on in an intensive, targeted way?
2. As you have been working over the past several months, what specific inequities have you uncovered? Who is most affected by these inequities? Which of these might be a good fit for some targeted planning and action?
3. Which challenges have you been working on for a while now, without making measurable progress (i.e., it is a priority, there is energy behind this topic, you meet to discuss the topic, but nothing has actually been accomplished)?
4. What are some priorities for your team that you know you need to bring other stakeholders to the table to effectively tackle? Is there one (or more) of these priorities that you feel confident you could bring the needed stakeholders together to address?

Refining Your Topic Area

Once you have your broad topic area, you will likely need to refine it further, to make it appropriate for an Equity Action Lab. This means ensuring that it is broad enough to have numerous potential solutions and narrow enough that you can make measurable progress in about 100 days. We also recommend that your topic area (and the aim template that builds off of it) should have the potential to improve a system.

Often, refining your topic area involves narrowing the focus. You can do this through any/all of the following steps (using the topic "food security" as an example):

- Selecting a subtopic within the broad topic area (availability of healthy food)
- Selecting a specific subpopulation to work with (people experiencing housing insecurity)
- Limiting the geographic scope of your efforts (Eastside city residents)
- Otherwise scaling back to develop a right-sized topic area for your specific Equity Action Lab (farmer's markets, reducing food waste, elementary schools)

In some cases, you may need to broaden your topic. If it leads to just one or two potential solutions, or if it can be done without bringing any additional stakeholders to the table, you may want to consider a broader topic. You will want to broaden the topic area so that you can easily identify numerous potential solutions to test and so that other stakeholders would be interested in joining your efforts.

Refining Your Topic Area - Scenario 1: Structured and Planned

- A community with a broad topic area (e.g., maternal morbidity and infant mortality) might be concerned that they would not be able to make headway on this topic unless they refined it further.
- They could refine their topic area by:
 - Focusing on Black mothers and their children (this group had been historically marginalized, resulting in significantly worse birth outcomes than other groups)
 - Limiting their focus to mothers-to-be in the first trimester of their pregnancies

- Focusing on three zip codes and the health care systems and other providers serving these zip codes

Case Study: A Structured and Planned Equity Action Lab

The 2017 Community Health Assessment for Maricopa County, Arizona identified access to healthy food as a top priority for local community health improvement work. In consulting with subject matter experts on a meaningful long-term goal that would support sustainable change in this area, the Health Improvement Partnership of Maricopa County (HIPMC) set a five-year goal to help 100 food outlets located in low-food-access areas to begin distributing local produce.

When it came time to home in on a topic area for the Equity Action Lab to kick off this work, the Leadership Team considered many aspects of this goal that could be prioritized, including: increasing demand for affordable, locally grown produce; improving the capacity of individuals to grow produce in urban areas; and supporting local farmers. In the end, the topic area was described as: *Increasing access to healthy food by connecting residents of South Phoenix with an emergency need for food to locally grown produce from urban farms.*



Source: Health Improvement Partnership of Maricopa County

This description clearly identified the problem (limited access to healthy food) and a target population (residents of South Phoenix with an emergency need for food). It also defined some boundaries for the scope (working with urban farms instead of trying to source produce from anywhere). This allowed for targeted recruitment. It is also important to note that this description did not set a specific target for improvement, give instruction as to how the residents would be connected to the urban farms, or specify how they would receive the food. These decisions about goals, strategy, and tasks are the responsibility and privilege of the Design Team during the Action Lab and Sprint Phases.

Case Study: Organic and Flexible

The Tenderloin Health Improvement Partnership decided to hold an organic and flexible Equity Action Lab. This community chose a broad topic area of community safety, and decided to start with ensuring that all community and park visitors felt safe and welcome to use three urban parks.

- Existing partners had been discussing park issues and wanted to focus on providing programs in park spaces to help enliven them during the daytime:
 - As partners were already meeting to discuss these issues, the Equity Action Lab process was a way to experiment with a mix of programs, operations, policies, and collaboration designed to improve park spaces even before renovations were completed.
 - The group developed aims and a driver diagram to build a plan for improvements with lots of change ideas.
 - The aim and specific drivers developed during that process helped the group refine the topic so that it would be suitable for an Equity Action Lab.

- Without a lot of existing data or leadership, community and partners began meeting regularly and conducted most of the activities in the Prep and Action Lab phases, expanding the team during implementation.
- A flexible Equity Action Lab approach provided this community with a galvanizing opportunity to work together on a meaningful project, improving collaboration and relationships along the way.

Potential Scenario: Organic Hybrid

If you decide to use an organic hybrid, your community would have the opportunity to refine your topic area during the Prep Phase or onsite during your Action Lab (Phase II). Generally, some refining occurs during the Prep Phase to make sure the people participating in the Action Lab are the people who can move the ideas quickly to action during the short Sprint Phase.

There are benefits and challenges to further refining your topic area in advance of the Action Lab. Some of the benefits are:

- It helps you recruit participants who can quickly get to action following the Action Lab.
- Refining the topic area is a concrete and also complex activity that allows your team to practice working together and build cohesion in advance of the Action Lab.
- Refining before the Action Lab allows more time for setting goals, generating ideas to advance the goal, and action planning.

Among the potential downsides of refining your topic area in advance of the Action Lab are the following:

- The group refining the goal assumes too much control and could exclude some participants, which could affect buy-in.
- A smaller group makes a key decision, so you run the risk of having a limited view of the topic.
- It may be more difficult to change topics at the Action Lab if there is significant energy among participants to focus on a different area.

Developing Strong Aim Templates

Once a focused topic area is identified, your team can develop a set of aim templates to provide some guidance to the Design Team (or Implementation Team) on potential ways to measure success. An aim template identifies a timeframe and metric for measuring improvement but does not identify a specific target. There are many ways to measure change, so aim templates can be used during the Action Lab to focus the discussion with the Design Team about what type of goal may feel most meaningful.

Developing a few aim templates in advance of the Action Lab (i.e., during the Prep Phase) can save some time and result in stronger aim statements (see **Figure 3** for elements of a strong aim statement). This option often strikes the correct balance between having participants start from scratch to develop a strong aim statement (which can take hours and requires expert facilitation) and entering the Action Lab already having decided on your aim (which can make it difficult to create buy-in from participants).

Sometimes, you may want to forgo creating aim templates in advance of the Action Lab and spend a bit more time developing your aim statement onsite during the Action Lab Phase. This option is likely the most appropriate when you have more time, such as two full days, to conduct your Action Lab and have a broad group of stakeholders whom you want to get to know each other better in the process. Just be sure to allow more time for this part of the Action Lab if you go this route — getting a group to agree to (and feel energized by) one aim statement takes time!

In other cases, it makes more sense to come to the Action Lab Phase with a draft aim or even a final aim. This may be a good option for you if you have a relatively long planning phase and a relatively brief Action Lab (e.g., 7 hours instead of 10-14). Or, this could be appropriate because your team has already set a strong long-term aim on the topic area, and you will use your Action Lab Phase as your method for taking action toward that aim. It might also be appropriate if you first need to set a concrete goal in order to get other stakeholders to the table. That is often the case in a topic area where everyone agrees on the issue and yet there has been no noticeable progress in your community after significant planning.

As previously stated, if your group already has a long-term aim for your topic area (e.g., We will decrease inequitable outcomes for Black mothers in these three zip codes by 90 percent by December 31, 2025) your Action Lab aim (100-day aim) can accelerate your work toward this destination. If you do not yet have a long-term aim for the topic area, you should consider setting a long-term aim either during the Prep Phase or the Action Lab Phase. This will help ensure that your Equity Action Lab aim is embedded into the longer-term work on your topic area.

Components of a Strong Aim Statement

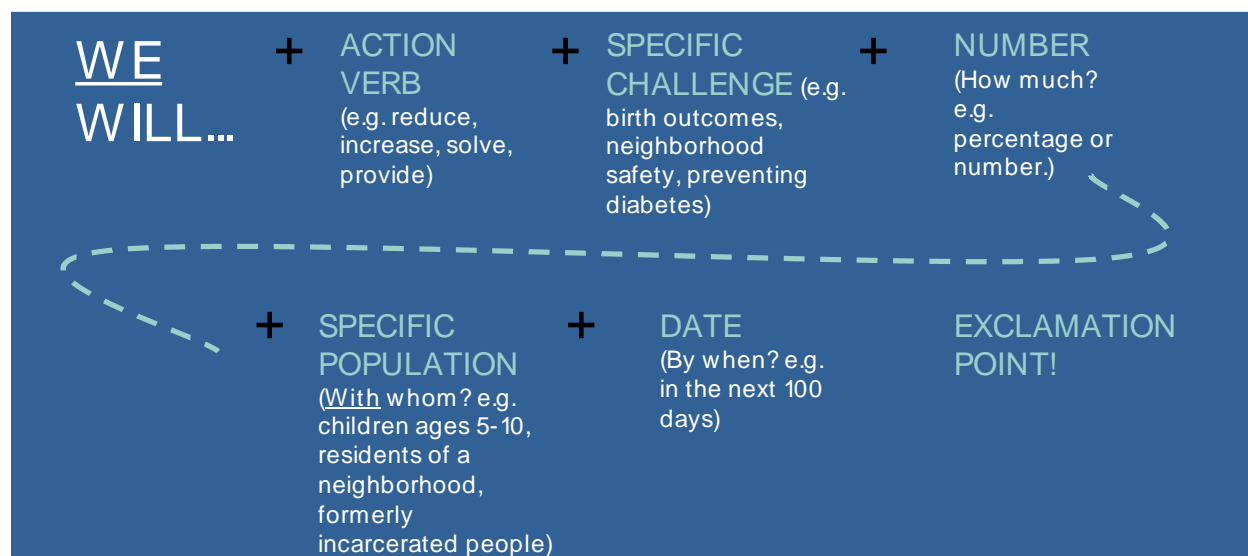


Figure 3: Components of a strong aim statement

Considerations When Developing Your Aim Statement

- Have you been working on this topic area together for a while? (In this case, you can likely set an aim that really improves the lives of some of the people affected by the inequity.) OR is this your first time working together on this topic? (In this case, putting in place the infrastructure and a functioning system might be a great aim for your first Equity Action Lab as long as you are developing and testing this infrastructure and/or system with the people most affected by it as well as the staff “closest to the ground” on this topic area.)
- Is there general agreement about the challenges and potential solutions, OR are there different schools of thought and a need to test several potential solutions?
- How large is your Design Team and how much time will they actually have each week to work toward meeting the aim?
- Use the “Champagne Test”: Would your aim, if achieved, be a cause for celebration?

Case Study: Developing an Aim

In the fall of 2016, an Equity Action Lab was convened in Maricopa County, Arizona that focused on implementation of shared-use initiatives as a strategy to increase physical activity. Shared use is a practice wherein government entities or private or nonprofit organizations agree to open or broaden access to their facilities for community use. In preparation for the Action Lab, the Design Team drafted a few aim templates, highlighting how the group could set a 100-day goal that they could measure: the number of sites implementing shared use, the number of hours facilities were now accessible for public use, the percentage of structured versus unstructured activities during shared-use hours, or the number of residents utilizing facilities during shared-use hours. Having these aim templates prepared allowed the group to review them and quickly determine that measuring individuals utilizing the space felt like the most meaningful measure of success for their 100-day Sprint Phase.

Operational Logistics

While the Equity Action Lab model provides a useful framework for designing and making changes, operationalizing this effort requires some additional decision making and attention to detail. Key questions to consider during the Prep Phase include:

- Is our timeline realistic?
- How does the Equity Action Lab process fit into our overall goals and strategy for long-term change?
- What key concepts need to be taught before or during the Action Lab Phase to provide a solid foundation for meaningful engagement of participants (e.g., Plan, Do, Study, Act (PDSA) cycles, group decision-making processes, design thinking and co-design)?
- Who will manage invitations?
- How will we set up the room to allow for presentations/work with all Action Lab participants AND breakouts into smaller groups?
- Who will facilitate each of the Equity Action Lab activities/sessions? How do we help ensure that we are distributing power?
- How will we help ensure psychological safety and an environment of co-production?
- How will we make decisions during the Action Lab?
- Who will schedule and lead/facilitate check-in meetings during the Sprint Phase (decided during the Action Lab)?
- How will we document our decisions, progress, and results?
- How will we intentionally build joy, trust, and sustainable relationships throughout the process?
- What resources (people, funding, etc.) are available to sustain and grow this work?
- How can we ensure that we are meaningfully including people with lived experience throughout the entire process?



Source: Health Improvement Partnership of Maricopa County

Case Study: Operational Logistics

When the Health Improvement Partnership of Maricopa County (HIPMC) decided to use the Equity Action Lab model to kickstart their 2018-2023 Community Health Improvement Plan, they convened a core planning team to oversee the operational details. Participants included the Strategic Initiatives Coordinator who oversees HIPMC's backbone operations, a quality improvement and evaluation specialist, a Centers for Disease Control and Prevention (CDC) fellow assigned to the local health department, and a student intern. Together, this team engaged in regular planning meetings throughout the process, in which they made logistical decisions (timeline, meeting details, record-keeping, procurement processes, etc.). Additionally, this core planning group took the lead on designing the agendas and activities for the various in-person meetings and recruiting and training additional facilitators as needed. They worked with the Design Team to provide appropriate record-keeping templates and materials to ensure that the process and learnings were appropriately documented. These team members also took an active role in the facilitation of the Action Lab Phase, the Midpoint Meeting (which occurs during the Sprint Phase), and Momentum Lab, and also supported the weekly check-in calls with the Design Teams throughout the Sprint Phase. This level of backbone support created the infrastructure for a highly structured process.

Phase 2: Action Lab

Timeframe

1-2 days (typically) - can be spread out over several days as needed (this is particularly useful when the Equity Action Lab will be virtual)

Typical tasks in this phase

- Setting a goal
- Understanding the data (related to topic area)
- Introducing “Continue Improvement” concepts and tools, including the difference between technical and adaptive (complex) challenges
- Developing a Theory of Change
- Action planning, including developing ideas to test, dividing up into sub-teams/different work streams, and designing the “plan” for the first PDSAs and an iterative work plan
- Launch celebration

Overview

The Action Lab is the grand opening of the Equity Action Lab process. While plenty of preparation work has been done prior to this date, it is during the Action Lab that the Design Team gathers to establish a project goal and an action plan for the Sprint Phase. This is a time for a new group to develop relationships with one another and start to see themselves as a team with a clear vision and plan for what they will achieve together. If your team has worked together before, this time can be used to remind them how to apply quality improvement tools, design thinking, and co-design, and/or to chart a new path. If your team has effectively applied quality improvement tools in the past, the Action Lab can be used to focus on simply setting an ambitious aim and planning for action (see “Developing Strong Aim Statement Templates” above).

Below are some recommendations for how to design and implement the Action Lab Phase. Based on your team’s style, you can use these as recommendations to design a meaningful Action Lab. For example, if your community approach tends to be similar to Scenario 1: Structured and Planned, you may find the recommendations for a two-day Action Lab to be most useful. However, if your community approach tends to be similar to Scenario 2: Organic and Flexible, you may choose to consolidate the important ideas into a single meeting or spread these ideas out over a series of meetings.

The overall goal of this phase is to get to an actionable plan that includes testing new ideas, with clear roles that will help you achieve your aim in about 100 days.

Scheduling

While a two-day Action Lab may be best for a new team working together, the schedule can be adapted to be shorter or longer depending on the needs of your team. Some questions to consider in determining the length and content of the Action Lab include:

- What context is the Equity Action Lab process operating in (e.g., is this work part of an existing project or will it kick off a new project or new project phase)?
- How well do team members already know one another?
- What history do they have of working together?
- What type of ground rules, team guidelines, and decision-making protocols, if any, already exist?
- Has the team worked together to set measurable, ambitious, and short-term goals before?

- How well do the Equity Action Lab process and its key principles match the recent culture of the team?

Existing teams with clearly defined team guidelines and decision-making protocols or a long history of working together may need fewer activities to build trust and relationships, whereas newly forming teams or teams that have had recent issues working together may need more time in the Action Lab Phase for activities that build cohesiveness and trust. Regardless of time together or history, an important first step is to establish consensus about how decisions will be made.

The Action Lab Phase requires participants to engage in presentations, discussions, and decision making throughout. It can be intense and can also lead to fatigue if it is too condensed without periodic breaks. Plan appropriate accommodations for breaks and meals throughout the Action Lab. As a general rule, consider giving adult learners at least a 15-minute break every 50-90 minutes, depending on the content. Lunch break can be a bit longer.

One approach is to have the Action Lab Phase span two consecutive days (for example, a Thursday and Friday) so that participants are ready to jump back into the content and planning on the second day, without needing a long refresher of the previous day's decisions. A different community, however, may choose to spread the event out over more days in different weeks. When to schedule the Action Lab Phase will depend on what works best for your team.

When selecting a venue for the Action Lab Phase, consider the size of the group, ease of travel, location of nearby food outlets (if meals will not be provided), and the spatial facilitation needs for various activities. Depending on the style of Action Lab meeting, we recommend reserving the venue and recruiting participants several weeks (or even months) in advance to facilitate participation.

If you are considering a virtual Equity Action Lab, make sure you are using an online platform that all the participants can access (such as Zoom, Web-Ex, MS Teams, etc.) and be sure to provide a brief tutorial on the platform's core features near the beginning of the Action Lab.

Developing the Agenda

The Action Lab Phase is a crucial event in the Equity Action Lab process, and it is important to develop the agenda with the audience in mind. There is no one right way to conduct an Action Lab. Each team may need a different mix of learning activities, breaks, and discussion. Several key components to consider are described below.



Source: Tenderloin Health Improvement Partnership

Registration

You can document participation using sign-in sheets and consider providing name tags. Name tags provide the opportunity for people to address each other by name, even if they have not worked together before. To help ensure that people with lived experience and staff closest to the ground feel that it is a safe space for their ideas to be heard, consider asking participants not to list their titles or organizational affiliations and just use their first names. The sign-in sheets should include contact information, so it is easy to follow up with participants throughout the Equity Action Lab process. Registration time can usually be paired with an opportunity for participants to mingle and enjoy refreshments (if available), or even to review relevant data displays in an unstructured way.

Welcome, Equity Action Lab Overview, and a Call to Action

This is an opportunity to welcome participants, demonstrate how the Equity Action Lab model is different, and lay the groundwork for authentic co-design and production. This generally includes an energizing icebreaker and explicitly noting the “ground rules” for the work together using the Touchstones for Collaboration and/or developing the rules from scratch on the spot.

This activity also includes an overview of the full Equity Action Lab model, including briefly describing what has already happened during the Prep Phase and setting expectations for the Action Lab Phase. It should be clearly communicated that for most team members, participation extends beyond the Action Lab Phase, through the Sprint Phase, and into the Sustain Phase. Key events like the Midpoint Meeting and Momentum Lab may also be mentioned, to help participants understand the process. It can be

helpful to present a few examples of successful projects, an icebreaker activity, and any kind of team guidelines the group wants to implement, including introducing any mechanisms that will be used for soliciting feedback throughout the process. It is important to note that the entire process will be iterative and that participants will make changes as they learn (this could include making changes during the Action Lab itself and throughout the Sprint Period).

This is a great opportunity to inspire participants and to convey that change is both necessary and possible. The call to action can include presentations from experts and personal narratives from people with lived experience, and it should be designed to help motivate participants to act. Rather than being grounded just in quantitative data, this call to action ideally uses qualitative data and stories to foster a sense of urgency and community.

Suggested activities

- [Center for Courage and Renewal Circle of Trust Touchstones](#)
- [Rapid Cycle feedback form](#)³
- [Public Narrative participant guide](#)

Introduction to Quality Improvement

Before entering the Sprint Phase, it is important that participants understand a core component of the Equity Action Lab model: rapid-cycle testing. The first two questions in the Model for Improvement⁴ guide teams to create specific, measurable aims, while the third question asks teams to create a change idea that can be tested. The team can then *plan* their change, *do* the change, *study* the results, and *act* to modify the change or permanently implement it if it is successful.

It is important to review the Model for Improvement and facilitate one or more activities that allow participants to practice the model during the Action Lab Phase. This will allow teams to experience planning, implementing, studying, and modifying a change idea, while also promoting teamwork and collaboration — which will be important during the Sprint Phase.

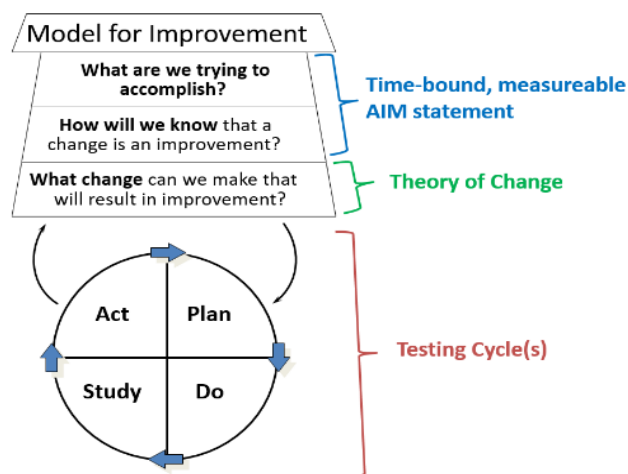


Figure 4: Model for Improvement

Recommendation: It can be useful to have a person involved who is comfortable leading people through quality improvement projects to translate the concepts and apply them to the actual work.

Suggested activities

- [Tennis ball exercise](#)
- [Mr. Potato Head activity](#)

³ Hayes H, Scott V, Abraczinskas M, et al. A formative multi-method approach to evaluating training. *Evaluation and Program Planning*. 2016;58:199-207.

⁴ Langley, GJ, Moen R, Nolan KM, et al. *The Improvement Guide: A Practical Approach to Enhancing Organizational Performance*. Hoboken, New Jersey: John Wiley & Sons, Inc; 2009.

Topic Area Review

Before embarking on goal setting or action planning, it is helpful to start with a brief review of the topic area to be addressed. Using data compiled during the Prep Phase, members of the Leadership Team and/or Design Team, including people with lived experience, may discuss the current state, clearly define the scope of the problem, and delineate the proposed parameters (guardrails) of your work together over the next 100 (or so) days. Graphic display tools such as PowerPoint slides, data dashboards, posters, or handouts may be useful to illustrate the data and to facilitate this discussion. In some instances, process mapping of the current system may help team members to understand what is currently happening.

Additionally, Design Team members should be encouraged to share their individual backgrounds, insights, and areas of expertise as they relate to the topic area. This discussion can help to determine the strengths and gaps in the room and will provide additional context for creating a project goal and assigning tasks later on.

Suggested Activities

- [Data Walk](#)
- [SWOT analysis](#)

Understanding Your System(s)

Most Equity Action Labs also include a group exercise to better understand the system or systems most closely related to the topic area. Many potential exercises and techniques are available, such as journey mapping, process mapping, systems mapping, or asset mapping. It is often useful to break participants up into teams of 8-10 people to work on either different parts of the system or to have each team complete the same exercise separately and then incorporate the resulting drafts into a single document.

Suggested Activities

- [Process mapping](#)
- [Mapping the process from the perspective of the end user](#)
- [Journey mapping](#)
- [Asset mapping](#)

Setting an Aim

Once the Design Team members have familiarized themselves with data related to the topic area, the next step is to set a short-term aim (typically 100 days). This goal — often referred to as an aim statement — should be ambitious but achievable. It should focus on desired outcomes instead of merely creating infrastructure to later achieve a desired goal. To streamline this process, you might consider aim templates (discussed in the Prep Phase section) before adding additional options. See the section “Refining Your Topic Area and Aim Templates” above for more detail. If you do not yet have a long-term aim for the topic area, you might consider setting a long-term aim before you set a 100-day aim.

Key questions to answer when crafting an aim statement or short-term goal include:

- What are we trying to accomplish (improve)? (Not, “What do we want to do?”)
- What system(s) are we trying to improve?
- Who are we improving the system(s) for?
- How could we measure that improvement?

- How much/many could we potentially do/reach/achieve in 100 days?
- How do we set a goal that is ambitious and spurs creativity without being so audacious that participants risk burnout?
- How can we make sure we are testing potential solutions with people with lived experience as soon as possible and not just planning throughout the 100 days?

When facilitating this discussion, you may benefit from using tools such as flipcharts or a sticky wall with repositionable notes to keep the group focused while different aim options are considered and discarded. It may be helpful to designate a note taker to document the discussion and decisions about why different options were not selected in addition to recording the goal that is ultimately selected.

Once a single aim statement is decided on, it should be clearly written out and posted in a visible place for the duration of the Action Lab. At this time, the team may add a simple timeline and a few critical milestones, if appropriate. Every decision made after this point should include consideration of how different actions may help or hinder the team's progress toward the aim. If your group is having difficulty deciding on the exact wording of the aim, consider forming a small group tasked with finalizing the aim within the first two weeks of the Sprint Period (rather than spending hours “wordsmithing”).

Suggested activities

- [Setting an aim](#)⁵

Developing a Theory of Change

After finalizing a goal, and before a detailed action planning process, it is important for the Design Team to identify their overall Theory of Change. Visuals such as a driver diagram do a good job of focusing team discussion on theories and assumptions before getting caught up in the details of action planning. A driver diagram can also help ensure that the team is both working to improve one or more systems and is focused on equity. Identifying a change theory also provides guidance for what process measures and potential PDSA cycles might be prioritized for action. Referencing this Theory of Change during the subsequent phases will focus decision making and accelerate learning. Remember, this is just a theory and can be updated and improved as you learn more.

If there isn't yet a driver diagram that articulates the theory for how to achieve the long-term aim for work in this topic area, you might consider developing a driver diagram at this level (with the long-term aim for this work going into the aim section of the driver diagram). This option may make sense if you want to help ensure that participants generally agree on the drivers of the work and/or if you want to show how the work of the various sectors/systems (including each of the Action Lab participants) can contribute to meeting the long-term aim.

A second option would be to create a driver diagram based on the short-term aim (generally intended to be achieved in about 100 days). This option is useful if you want to be laser-focused on the short-term aim or if you want to make sure that the ideas you develop to test will be feasible and actionable during your Sprint Phase. In most cases, the results of the “Understanding Your System” exercise can be useful in developing a driver diagram, and it is often helpful to explicitly make this connection for participants.

⁵ Langley GJ, Moen R, Nolan KM, et al. *The Improvement Guide: A Practical Approach to Enhancing Organizational Performance*. Hoboken, New Jersey: John Wiley & Sons, Inc; 2009.

Suggested activities

- [Driver diagram](#)⁶⁷
- [5 Whys](#)

Deciding on Change Ideas to Test

Using the driver diagram as an anchor and, more specifically, working off the secondary drivers, the next step in the Action Lab involves developing a list of potential change ideas. Team members will develop a



Source: *Tenderloin Health Improvement Partnership*

list of change ideas that will contribute to moving drivers identified on their driver diagram or that will break down critical milestones into more defined actions.

In generating ideas to test, methods such as brainstorming and jazz-storming can be used (links to detailed instructions are provided below). Once participants have generated a good list of potential change ideas, the ideas can be divided by theme, curated, and combined into a single list. There are often too many ideas to test during a 100-day Sprint Period, so many Action Labs use processes such as Nominal Group Technique, Dot-Voting, Rank Order Voting, and the Effort Impact Matrix. These processes can help participants select a core group of change ideas to test.

Suggested activities

- [Brainstorming](#)
- [Brainwriting](#)
- [Jazz-storming](#)
- [Group decision-making process](#)
- [Team decision-making tools](#)

⁶ Driver Diagrams. Institute for Healthcare Improvement. <http://www.ihl.org/education/IHIOpenSchool/resources/Pages/AudioandVideo/Whiteboard9.aspx>.

⁷ Hayes H, Howard P, Schall M, et al. *Teaching driver diagrams to Advance the Work of Community-Based Collaboratives*. Boston: 100 Million Healthier Lives, convened by the Institute for Healthcare Improvement; 2019. (Available at www.ihl.org/100MLives)

Action Planning

After the Design Team has settled on a motivating aim, discussed their Theory of Change, and decided on a few ideas to test, the next task is to begin action planning. Depending on the size of the overall team and the number of ideas you have decided to test, the full team might do this activity or might divide into sub-teams or workstreams.

The plan will likely change along the way, based on what is learned. Action planning is more about choosing where to start testing the Theory of Change. Regardless of how the team identifies change ideas to test, the team should formalize their plan by producing a detailed outline of potential tasks and assignments, including the “plan” part of one or more PDSA cycles. To get to testing right away, consider asking that they include the plan to test at least one PDSA “by the following Tuesday.” Action planning generally also includes confirming how the team/sub-team will measure progress and working out the logistics for implementing a simple measurement plan. A Gantt chart (see below for a definition) may be useful to start organizing these tasks.

During the action planning block of the Action Lab Phase, the Design Team (or sub-teams/workstreams) should also come to a consensus on the time and frequency of regular check-ins during the Sprint Phase. It is recommended that check-ins be held at least weekly for 20-30 minutes, although the time and mechanisms may be adapted to suit the needs of the group. Due to the speed at which testing and learning occur, it is not recommended that more than two weeks pass without a check-in. The team should be engaging in rapid-cycle testing and progress reporting during the Sprint Phase, which will require regular and frequent communication.

Remember, progress toward the aim is the goal, so it is OK to figure it out along the way!

Suggested activities:

- [Gantt chart](#)
- Plan Do Study Act (PDSA cycles)⁸

Launch Celebration

Toward the end of the Action Lab Phase is the Launch Celebration. This is a time for the Design Team to share their project aim, action plan, and driver diagram with other community stakeholders. It is a motivational celebration of the start of the team’s work. This is a good time to acknowledge stakeholders (i.e., Leadership Team members) who can remove obstacles as the Action Team implements their plan. It may also be helpful to clarify the authority and scope of each stakeholder, being careful to remind everyone that the Action Team has full control of the Sprint Phase. Others do not have veto power over what the Action Team does, but they are ready to be activated by the Action Team as needed. The tone of this event should be celebratory, and we suggest that the group share what excites them about their project and the Equity Action Lab process. Be sure to clarify when the group will reconvene for the Momentum Lab, which closes the Sprint Phase.

⁸ Hayes H, Howard P, Schall M, et al. *Using PDSA Cycles in Community-Based Collaboratives*. Boston: 100 Million Healthier Lives, convened by the Institute for Healthcare Improvement; 2019. (Available at www.ihl.org/100MLives)

Recommendation: If the Action Lab Phase is broken up into two or more days, at the end of each day, be sure to include a wrap-up section and prepare participants for the next day. When you reconvene, include a review of what was previously accomplished and what the group hopes to accomplish in their time together in the coming day. An icebreaker activity can re-energize the group and help build relationships.

Suggested activities:

- [5x5 Presentations](#)
- [Photo Card Reflections](#)



Source: Health Improvement Partnership of Maricopa County

Phase 3: Sprint

Timeframe

Typically 90-100 days (and not longer than 6 months)

Typical tasks in this phase

- Implementing the action plan (modifying and refining as needed)
- Testing new ideas
- Gathering additional information and using it to guide improvement
- Check-in meetings
- Midpoint Meeting (recommended)

Overview

During the Sprint Phase, your team will be implementing, testing, and learning from the planning that has been accomplished up to this point. The goal of this period is to quickly put your ideas into action, and in a short amount of time, find out what works and what does not. Typically, the Sprint Phase lasts about 100 days, and should not last longer than six months. This relatively short amount of time helps create incentives to quickly take action and build momentum. It is recommended that you adapt the timeframe to meet the needs of your community or project but remember that the goal is ACTION!

During the 100-day Sprint Phase, you will be working on the implementation of your plans and vision to reach your aim. To do that, you will constantly collect relevant information and use it to adjust your plans, as needed.

How to Move from Planning to Action

- Action plan implementation
- Gathering and using information
- Check-in meetings

Action Plan Implementation

Implementing your plan means having a clear vision, goals, or aim statement, and a list of tasks and ideas to work on, ideally developed during the Action Lab Phase. By assigning roles and tasks to members of the Design Team, people are held accountable and work can move forward. Above all, movement will depend on the trust that exists (or is built) between people. Implementation may require bringing new people into the process, which can take time and require context. Remember, your aim can be the glue that binds people together and helps you to identify and align partners. Trust that your aim will be the unifying force.

In some cases, this period means testing your theories using the PDSA approach, collecting feedback and information, and making changes accordingly. It is helpful to have at least two PDSA cycles identified and planned. This will ensure that more than one approach or change is tested. In many instances, and depending on the project and length of a cycle, there will be many more than two PDSA cycles during the Sprint Phase.



Source: *Health Improvement Partnership of Maricopa County*

work plan during the Sprint Phase to track progress. They might set a goal of developing meaningful partnerships with five additional systems (housing/homelessness, transportation, workforce development, etc.), develop an objective measure for “meaningful partnership,” and then develop an action plan (including a detailed plan of outreach to each of these systems). They could track progress on implementing this action plan and refine/adjust it as needed throughout the Sprint Phase.

Gathering and Using Information

Gathering relevant and useful information during the Sprint Phase is critical. Information (or data) can help the team understand if positive and meaningful changes are taking place. With some projects, a measurement lead may be helpful in ensuring that there is a plan for collecting, sorting, and learning from the relevant information and data. The measurement lead can guide the group through this process in tandem with the action plan implementation to help strengthen the process.



Source: *Tenderloin Health Improvement Partnership*

Using the PDSA approach means collecting information that can help your group decide which improvements to try, determine which are successful or unsuccessful, and recommend changes as you go. Even if you are not using a PDSA approach, there is value in collecting data and understanding what is working and what is not, so everyone can learn as you go. By the end of the Sprint Phase, you will have a broader understanding of how close or far you are from your aim or goals, and what might help to get you there.

Information gathering is often viewed as a separate process, but it can be helpful to try to integrate it into your work as you go. Data collection does not have to mean collecting survey responses. It can also be counting people, counting votes, conducting formal or informal interviews. You can measure anything, as

In other cases, this period involves a focused approach to changing a system or trying out a new approach. In this case, it is still important to have clear objectives and tasks and to identify clear measures to understand if progress is being made.

Example:

An Equity Action Lab focused on improving outcomes for Black mothers before, during, and following pregnancy might decide that they need to develop partnerships with other systems to achieve one of the goals they set during the Equity Action Lab. While they might use a PDSA cycle to test and refine their message to these other systems, they could use a simple, detailed

long as you identify how to collect meaningful data. The key to information gathering is to document it so it can be shared. Then, it can help you make important decisions along the way. It will also be useful to reflect on the information to determine what worked, what did not work, and what you learned during the implementation process.

Examples of Information Gathering

Two of the SCALE communities, ECOR and Tenderloin Health Improvement Partnership (HIP), used paper-based surveys collected during events to understand participant data. Both communities collected qualitative and quantitative measures with the surveys. The ECOR team wanted to know what a target population's engagement with primary care physicians looked like, and what could help prevent unnecessary emergency department visits for the target population. Tenderloin HIP partners wanted to know how safe park users felt, whether existing programs and activities had helped build a sense of place and belonging, and what other programs and activities park users wanted to utilize. By collecting survey data in Microsoft Excel and SPSS (a statistical software platform) respectively, both communities used their findings to inform future PDSAs, make simple improvements, identify new change ideas, and inform broader strategies to help them meet their aims. Below, you can take a closer look at the example of ECOR's data collection.

Case Study: Information Gathering

The ECOR community used several methods to collect data during their Equity Action Lab. Some methods were formal, while others were informal. For example, during the first week of the Sprint Phase, they relied on head counts to keep track of how many attendees were present at a health fair. During subsequent health fairs, they expanded on the data collection method by adding a short participation survey. Attendees were asked to record their names (first name only), age (optional), and zip code. They were asked to record the number of health booths visited and how they would rate their experience at the booths. In cases where attendees could not read the survey questions, a research assistant read them aloud and the answers were recorded.

The ECOR team's data was amenable to analysis using Microsoft Excel and a run chart, and they conducted descriptive analysis using SPSS. They were interested in identifying patterns of health fair attendance, so they collected data by age group, gender, and zip code. They found most health fair attendees were women, age 25 and above. There were no significant findings related to zip codes.

ECOR's Tools for the Sprint Phase

- [Run chart](#)
- [PDSA worksheet](#)
- Google Drive
- Google Charts
- Microsoft Excel / SPSS

Check-in Meetings

It is helpful to have ongoing and regularly scheduled check-ins throughout the Sprint Phase, in order to ensure constant communication, and to review planning, implementation, and the data that is useful for understanding where you are in relation to your action plan and overall Equity Action Lab aim.

As mentioned in the Action Lab Phase section, the group should decide on a frequency, format, and duration of meetings that suits their style and approach. Scheduled recurring meetings are recommended

at least every other week, or even weekly, to maintain momentum. More frequent meetings may be necessary leading up to or following a major milestone.

Check-in meetings will look different for each community. Some of the SCALE communities met in person during the Sprint Phase because it was convenient, and they determined it to be helpful to ensure alignment among all parties. Other communities found it useful to use conference calls and/or virtual meeting tools (such as Zoom) to meet regularly.

Recommendation: When working with a diverse team, participants may not all have the same access to technological tools or transportation. Be sure to factor these considerations into the discussion about the frequency and format of your check-in meetings.

It is useful to designate a meeting facilitator who will guide the team through the implementation of PDSA cycles. The PDSA model helps focus attention on specific change ideas and to determine which changes result in improvements to the process or system, getting you closer to your Equity Action Lab aim.

During the Sprint Phase check-ins, consider the following activities:

- Remind the team of the aim
- Review progress on reaching the short-term goal
- Deliver updates on the status of individual tasks and/or results of PDSAs
- Decide to adapt, adopt, or abandon the change
- Set a prediction for the next PDSA
- Review the Theory of Change and identify additional PDSAs to implement
- Update the action plan with personalized assignments for the coming week
- Get group feedback or troubleshoot problems as they arise



Source: Tenderloin Health Improvement Partnership

An agreed-upon communication platform helps organize and communicate information between meetings. Something as simple as email distribution list or a shared Google folder may be used. To maintain clear communication, the facilitator or another designated team member should be responsible for recording attendance, creating meeting notes, documenting PDSA cycles, and tracking progress toward the 100-day goal. The documentation can then be made available to participants so they may reference the information throughout the Sprint Phase.

Case Study: Check-in Meetings

From the start, the ECOR team formed a Design Team (they referred to it as an Action Team) comprising people with lived experience, research assistants, a project manager, and an Improvement Advisor. The Action Team oversaw all aspects of the Equity Action Lab, from preparation to design to implementation. The Action Team was also responsible for mobilizing the community and gathering relevant information about community events (health fairs).

For the first 30 days of the Sprint Phase, the ECOR Action Team scheduled check-ins twice per week, while many participants were familiarizing themselves with the details of the Equity Action Lab framework. For example, they used this time to decide how data would be collected and how the outcomes would be measured.

After the first 30 days, the Action Team decided to reduce the frequency of the meetings to once per week. Members of the Action Team also provided frequent updates via email and phone to the designated Improvement Advisor. The Improvement Advisor would also initiate communication as needed. To keep up the momentum, the weekly meetings and frequent updates continued until the end of the Sprint Phase.

This approach worked well for the ECOR community because it was easy to convene the Action Team quickly since the team was already working together on other SCALE initiatives. In addition, the greater community was meeting on a monthly basis for general updates. This schedule made it straightforward to introduce the Equity Action Lab framework to them.

Midpoint Meeting

An optional component of the Equity Action Lab framework that your team should consider is the Midpoint Meeting, occurring roughly halfway through the Sprint Phase. Some communities find it valuable to have a Midpoint Meeting that brings participants back together in person and provides an opportunity to reflect on the work that has been accomplished. Although similar functions may happen in a regular check-in meeting, the Midpoint Meeting can be a meaningful moment to reflect and to consider any pivots that should be made to move closer to the aim.

While this milestone is completely optional, it can be a good opportunity to make adjustments and changes to the team's approach, ensuring that the team makes the most of the remainder of the Sprint Phase.



Source: Tenderloin Health Improvement Partnership

Phase 4: Sustain

Timeframe

Varies (includes a one-day Momentum Lab)

Typical tasks in this phase

- Preparing for the Momentum Lab
- Holding a Momentum Lab
- Presenting results and progress made during the Sprint Phase
- Designing for the future

Overview

The Sustain Phase is the final part of the Equity Action Lab framework. It begins with a Momentum Lab designed to help participants reflect on the work done during the Sprint Phase and acknowledge progress, solidify the gains made, and determine how best to continue making progress. After the Momentum Lab, the Sustain Phase may take many forms. The team may choose to go immediately into another Sprint Phase or may make plans to monitor and sustain gains achieved with limited future interactions. The Design Team may restructure, or even disband altogether, and transition to an alternative leadership structure. Regardless of the structure, efforts to sustain the work should build upon the lessons learned and goals achieved during the Sprint Phase. Participants should leave the Momentum Lab feeling good about the work accomplished and prepared for the work ahead.

Preparing for the Momentum Lab

The Momentum Lab is both a bookend to the Equity Action Lab and a bridge to future work, so a well-designed day customized for your unique context is important. Whether your community prefers a thoroughly planned and structured Momentum Lab, a nimble, lightly structured and flexible Momentum Lab, or something in between, you will want to begin planning 2-4 weeks in advance, though ideally the date and venue should be set no later than halfway through the Sprint Phase (Midpoint Meeting).

Momentum Lab Logistics

Many of the logistical considerations of planning the Action Lab Phase also apply to your Momentum Lab. When developing the agenda, remember to consider your community and how you want to present your results. Be sure to consider the needs of people with lived experience to ensure their participation. To make sustainable gains beyond the Sprint Phase, you should ensure that those most affected by the work continue to be an integral part of designing, implementing, and evaluating the solutions.

Holding the Momentum Lab

As with the other events throughout the Equity Action Lab process, arrangements for the Momentum Lab, including venue, staffing, and refreshments (if provided), should be made in advance, even before the Action Lab Phase takes place, if possible. A crucial part of the Momentum Lab is determining how to continue work into the future, so consideration should be given to how new infrastructure will be sustained or how teams can plug into previously existing structures as the Sprint Phase comes to an end. An agenda for the Momentum Lab may vary depending on the context each team is working in and what

other infrastructure for workgroups currently exists. The two main goals of the day are: 1) to recognize the work that has been accomplished; and 2) to create strategies for continuing work into the future.

Inviting Participants and Stakeholders

You should generally plan to invite any formal team members and anyone who participated in your Equity Action Lab to your Momentum Lab. You might also wish to invite others, such as:

- People who did not participate in the Action Lab Phase but joined your effort sometime during the Sprint Phase
- People who were invited to participate (in the Action Lab and/or Sprint Phase), but for whatever reason have not been directly involved
- Stakeholders whom you want to be involved in this effort going forward (see Design for the Future later in Phase 4)
- Funders, government representatives, media representatives, elected officials and/or others whom you want to be aware of your efforts and results

Welcome and Introduction

At the start of the event, a celebratory tone will welcome all participants to the final phase of the Equity Action Lab and will help participants to feel motivated to authentically engage with one another. There may be new faces in the room, as the Momentum Lab is a great place to include individuals who may need to be involved in the future of the initiative. It is appropriate to review the Equity Action Lab model briefly to refresh participants' memories of the journey they have been on and to orient new participants to the history of the group.

Presentation of Results and Progress Made

Design Teams have the opportunity at the Momentum Lab to share their progress with the Leadership Team and other attendees. Presenters should briefly discuss the context and need for the project, the project goal, and progress made toward the goal. It is good practice to discuss any challenges faced, lessons learned, and changes made along the way. This is an opportune time for attendees to ask clarifying questions or give preliminary suggestions before diving into the work of planning for sustainability.

By now, you probably understand that no two Equity Action Labs are exactly alike. However, most Momentum Labs fit into one of the following “results” scenarios:

1. The team(s) achieved (or exceeded) their Equity Action Lab aim.
2. The team(s) came close to achieving their Equity Action Lab aim.
3. The team(s) made some measurable progress but didn't achieve their Equity Action Lab aim.
4. The team(s) didn't make any measurable progress during the Sprint Phase.

Suggested framing and considerations for each of the above-mentioned scenarios:

- 1) **Team(s) that achieved (or exceeded) their Equity Action Lab aim** — For teams in this scenario we recommend:
 - Letting those who were involved in the day-to-day work deliver the results (not their bosses or the Momentum Lab facilitators)
 - Focusing on your results and celebrating your achievements!
 - Include quantitative results

- Include qualitative results, especially how your efforts have improved the lives of people with lived experience (those affected by your topic area)
- Ensuring an equal focus on how you have changed/improved the system(s) in which you were working
 - Consider showing some illustration of the “before” and “after” of the system
- Including some of your “fail-forwards” and lessons learned
- Mentioning some “pain points” and parts of your system that still aren’t working optimally (this will prime your participants for the *Designing for the Future* section of the Momentum Lab)

2) Team(s) that came close to achieving their Equity Action Lab aim — For teams in this scenario we recommend:

- Letting those who were involved in the day-to-day deliver the results (not their bosses or the Momentum Lab facilitators)
- Focusing on your results and celebrating your achievements!
 - Try to make sure this feels like a win for all involved (especially if you set a very ambitious goal)
 - This can often be done by briefly reviewing the “before” (when you started your Equity Action Lab) and “after” (at the end of your Sprint Phase)
 - Include quantitative results
 - Include qualitative results, especially how your efforts have improved the lives of people with lived experience (those affected by your topic area)
- Ensuring an equal focus on how you have changed/improved the system(s) you were working in
 - Consider showing some illustration of the “before” and “after” of the system.
- Including some of your “fail-forwards” and lessons learned, including a brief discussion around the reasons for not quite achieving your aim (this could include listing the barriers to achieving your goal)
- Mentioning some “pain points” and parts of your system that still aren’t working optimally (this will prime your participants for the *Designing for the Future* section of the Momentum Lab)

3) Team(s) made some progress but didn’t achieve their Equity Action Lab aim — For teams in this scenario we recommend:

- Beginning with framing your topic area and the overall aim of improving your system(s)
- Letting those who were involved in the day-to-day present on the progress made
- Focusing on your progress made and lessons learned, and celebrating your achievements!
- Enhancing the motivation to continue to work together
- Discussing barriers to progress and to achieving your aim and what you can do next time to address these barriers
- Discussing potential paths toward achieving the initial aim and/or setting a new aim (in advance of the “Designing for the Future” session later in the Momentum Lab)

4) Team(s) didn't make any measurable progress— For teams in this scenario we recommend:

- Beginning with framing your topic area and the overall aim of improving your system(s)
- Building (or rebuilding) the motivation to continue to work together using public narrative (stories from people whose lives have gotten better due to your efforts, and/or other methods to help participants reconnect this hard work to something meaningful to them)
- Letting those who were involved in the day-to-day work present on lessons learned during the Sprint Phase
- Celebrating lessons learned as achievements on your journey!
- Discussing barriers to progress and to achieving your aim
- For each barrier, developing a potential plan to remove it, circumvent it, or diminish it going forward
- Continuing to build motivation throughout the day by connecting participants emotionally to the work
- Discussing potential paths toward achieving the initial aim and/or setting a new aim (in advance of the Designing for the Future session later in the Momentum Lab)

Case Study: Presenting Results

At the 2019 Maricopa County Community Health Improvement Plan (CHIP) Momentum Lab, Design Team presenters were asked to create a concise and timed presentation with basic information about their project. They were allowed to present five slides in five minutes. During the presentations, audience members were asked to record any questions or reflections on a pre-printed worksheet. Presenters were able to briefly address some audience questions at the end of the presentations. Because this event brought together three separate Design Teams, representatives from each team also participated in a panel-style Q&A session where a moderator asked a few starter questions, then audience members asked clarifying questions. Panelists had the opportunity to reflect on the prepared moderator questions ahead of time and used this as an opportunity to give the audience a deeper understanding of the work being done. This was helpful for Health Improvement Partnership of Maricopa County (HIPMC) partners who were attending in order to find their place in the future of the CHIP workgroups as they transitioned from 100 days of action to planning for the next five years.

Designing for the Future

The bulk of the Momentum Lab should focus on how work will continue in the future. There are several paths to consider when determining the next steps for the Equity Action Lab topic area. Depending on the purpose, the progress made during the Sprint Phase, the willingness of stakeholders to continue working together, and the longer-term desired outcomes, there are three potential strategies for moving forward:

1. Sustain gains by implementing a monitoring system.
2. Build upon success and scale up one or more of the change ideas you tested.
3. Set a new short-term aim, develop new ideas to test, and begin scaling ideas already tested.

The Design Team (and Leadership Team when relevant) should spend some time selecting the most appropriate option before the Momentum Lab or be sure to prepare contingency facilitation plans for the event. Regardless of which strategy is chosen, taking the project into the future requires two components: setting a new goal and action planning. The potential variations on these key elements for each strategy are outlined below:

Strategy 1: Monitor and Sustain Gains

The Equity Action Lab process may be used to quickly work through a problem and achieve a desired target. When this is the case and the outcomes are achieved during the Sprint Phase, the sustainability work is primarily intended to establish procedures to monitor ongoing performance and establish parameters for future intervention when needed. The new goal set in this case would be to continue performance at the desired level. Action plans may be designed to assign roles and responsibilities related to tracking and analyzing data over time and creating procedures for reconvening the team if outcomes do not continue at the desired level.

Suggested tool

- [Control Chart](#)

Strategy 2: Scale Up Success

This option is intended to amplify the results achieved through the Sprint Phase by expanding the successful change to more settings. Depending on the topic, this may involve expanding the work to other sites (e.g., from five schools to 100 schools over the next two years), or adapting the change to additional settings (e.g., from launching in five schools to maintaining the change in five schools and adding five early child care centers, five community centers, and five worksite wellness programs over the next two years).

Goals set in the Momentum Lab that focus on this strategy may include a longer-term aim paired with annual milestones. The group might discuss what policies and system changes are needed and what strategies might be used to meet the milestones. Then, be sure to bring the long-term planning back to immediate action. The group should start creating an action plan for the tasks that need to be completed in the near future, beginning to work toward the first milestone.

When scaling up a project or idea, it is helpful to consider how the infrastructure of the group will need to evolve accordingly. For example, meeting schedules, group leadership, roles and responsibilities, budgets, and data sharing may all need to evolve over time. What works for a small team testing out ideas in five schools may not be sufficient when a larger number of partners is working with 100 schools.

Suggested tools

- [A Framework for Scaling Up Health Interventions](#)⁹
- [Scale-Up Plan Template](#)

Case Study: Scaling Up

In Maricopa County's 2018-2023 CHIP, the team utilized the Equity Action Lab process to move the county closer to achieving established five-year goals for community health. The desired outcome of the Equity Action Lab was to create positive momentum around projects which would then be scaled up to meet the much larger community goals over a five-year period. For example, one CHIP Design Team focused on connecting 50 families at five schools to produce from an urban farm through a voucher redemption system. During this group's Momentum Lab, new partners joined the existing ones to break down the five-year goal — getting 100 food outlets to distribute locally grown produce — into smaller annual milestones. Learnings from the initial 100 days of action were crucial to identify realistic milestones and helped determine what strategies would be undertaken first. The group chose a first-year strategy of expanding the number of outlets distributing local produce by scaling up the voucher program to the rest of the schools in the target school district, as well as piloting a Food Rx backpack program with a local health care clinic. (The clinic “prescribed” specific healthy foods and then provided them in a backpack.) Other strategies scheduled for subsequent years included working with corner stores on vending contracts. A scale-up grid was used to help the group discuss how different infrastructure elements may evolve over the five-year timespan. This helped identify key elements that needed to change right away, including a new meeting schedule and expanded team leadership roles.

Strategy 3: Set a New Aim, Continue Testing Ideas, and Begin Scale-Up

In some instances, maintenance or scale-up of the work completed during the initial Sprint Phase is not needed, but the larger outcomes of the initiative have not yet been achieved. In these scenarios, the Equity Action Lab can be viewed simply as a building block or critical step to open up the pathway for a new short-term aim. The new short-term aim should build upon the success of the first Sprint Phase and focus on improving the same root problem. A Momentum Lab designed using this strategy may look much like the initial Action Lab and contain activities designed to facilitate goal setting, development of a driver diagram or other change theory visualization, and the identification of new ideas to test, and end with action planning (including the scale-up of ideas that have already been tested and refined). The group may choose to frame this as a second Sprint, working in another short-term timeframe with continued weekly check-ins, or even establish a new timeline and meeting schedule.



Source: Health Improvement Partnership of Maricopa County

⁹ Barker PM, Reid A, Schall MW. A framework for scaling up health interventions: lessons from large-scale improvement initiatives in Africa. *Implementation Science*. 2016;11(1):12.

Case Study: Defining a New Goal

In 2018, a group of youth from Maryvale — a neighborhood in Phoenix, Arizona — embarked on a project to map community resources and gather local data about community issues. The issue of community safety was identified by reviewing the results of over 800 surveys from residents and local businesses. The youth used the Equity Action Lab process to further refine their focus and establish a campaign called *Make Maryvale Brighter*. This campaign focused on advocacy for fixing broken streetlights in their community. During the Sprint Phase of their Equity Action Lab, they attended community events to meet their 100-day goal of educating and collecting data from 250 residents, as well as identifying the number of streetlights in need of repair. At their Momentum Lab in January 2019, they identified a second 100-day aim to get at least five of the identified streetlights repaired during their second Sprint Phase.

Putting It All Together: Equity Action Lab Planning Worksheet

The [Equity Action Lab Planning Worksheet](#) adapted from an earlier version developed by [Community Solutions](#), contains summaries of many of the steps outlined in this implementation guide along with sample agendas and tools. Please feel free to use it as you customize an Equity Action Lab that works for your team or community!

Glossary

Words can have different meanings to different people. For definitions included in this guide, please refer to the [100MLives Glossary](#).

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