

DEVELOPMENTAL PATHWAY & MILESTONES CHECKLIST

OVERVIEW

Accountable Communities for Health (ACH) are enduring tables for stakeholders and residents to come together and collectively address community health priorities. Developing an ACH is an iterative process involving a number of stages and interdependent steps. To help a collaborative chart its progress, CACHI has developed a Developmental Pathway, based on the experience of the first six years of the initiative. Each of the stages of the Pathway in Fig. 1 displays a few key characteristics of that stage, while the Milestones Checklist provides a more detailed set of indicators. The Developmental Pathway identifies five basic stages:

- Building the Foundation
- Establishing the Collaborative
- Creating the ACH
- Strengthening the ACH
- Sustaining and Growing the ACH

The process of developing an ACH is organized around five primary goals, which reflect both the building blocks of an ACH and the work that an ACH carries out. The goals relate to:

- Overall infrastructure
- Equity and community engagement
- Portfolio of actions and strategies
- Financing and sustainability
- Data and communications

For each of the goals, the checklist includes key milestone(s), and, for each milestone, the checklist identifies indicators associated with each stage of development.

The milestones, along with the indicators, document the progress of implementation and articulate key steps and accomplishments at various intervals over the course of the developmental pathway. For example, milestones and indicators associated with Building the Foundation stage emphasize the start-up nature of the ACH, with a focus on infrastructure, relationship building, and resident engagement.

Subsequent stages focus on solidifying the infrastructure, obtaining agreement on outcomes and measures, and finalizing the development of a comprehensive portfolio of actions and sustainability plan.

The last stages represent a maturation of the ACH, including securing resources, greater alignment, and transitioning to community-driven governance. Bringing an equity lens to the ACH is critical to its success and should be integrated throughout the developmental process.

Taken together, these goals represent a new way of working together among the various partners and residents resulting in a collective effort to improve the health of the community.

THE DEVELOPMENTAL PATHWAY



It's important to recognize that creating an ACH is an iterative process. Depending on the history and assets of a given community when it embarks on this effort, progress may be quicker on some goals, while others may take more time. Moreover, the progress of each milestone doesn't happen independent from other milestones, and the ultimate structure of the ACH will depend on how it builds on, links, or aligns with existing initiatives or collaboratives within each community. Flexibility should be used in applying and interpreting progress of the individual milestones.



Fig. 1

Note: The Descriptors of each stage are intended to convey what's present at the beginning of that stage of development.

INSTRUCTIONS

The collaborative should fill out the Milestones Checklist to assess its state of readiness. The checklist is organized as follows:



- Goals (five) are green
- Milestones (between one and four for each goal) are in red
- Indicators of the Milestone(s) (total of 64 across all goals and milestones), related to each stage of development of the ACH, are in black

After you have filled out the checklist, review your responses and assess the overall stage of the developmental pathway that you believe your collaborative currently is in.

| | Building the Foundation | Establishing the Collaborative | Creating the ACH | Strengthening the ACH | Sustaining and Growing the ACH |
|------------------------------|-------------------------|--------------------------------|------------------|-----------------------|--------------------------------|
| Overall stage of development | ✓ | ✓ | ✓ | ✓ | ✓ |

| 1. SOLIDIFY ACH INFRASTRUCTURE AND ITS RELATIONSHIPS TO OTHER INITIATIVES AND/OR COLLABORATIVES | | | |
|--|------------------|----------------|----------------|
| <i>A. The ACH includes a diverse set of partners and organizational leadership from clinical, community-based and grass roots organizations, residents, business and sectors and stakeholders relevant to the selected health issue.</i> | EARLY STAGE ✓ | MID STAGE ✓ | COMPLETED ✓ |
| BUILDING THE FOUNDATION | | | |
| Individual organizations—grass roots and/or institutional organizations—work together in cross-sector partnerships. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative includes partners from the health and health care sectors and other non-health sectors aligned with the selected condition (e.g., education, justice, housing, social sectors), as well as community residents. | | | |

| CREATING ACHs | | | |
|--|-------------|-----------|-----------|
| There is a high level of participation in the ACH by senior level people (decision-makers) of partner organizations. | | | |
| STRENGTHENING ACHs | | | |
| Relationships, trust, and alignment among partners deepen, and partners begin changing their practices to better align and link with each other. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| New partners join the ACH to reflect new priorities or geographies. | | | |
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| <i>B. The ACH establishes a sound governance structure, including a leadership team that includes residents, which ensures effective decision-making and accountability to partners and the community.</i> | EARLY STAGE | MID STAGE | COMPLETED |
| BUILDING THE FOUNDATION | | | |
| A group of cross-sector and/or community organizations come together to form a collaborative to improve community health and equity. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative makes progress toward establishing a formal governance structure, with a leadership team—including an explicit role for community residents— a broad all partners stakeholder group, and sub-committees as appropriate (e.g., sustainability and financing, portfolio of actions, etc.). | | | |
| CREATING ACHs | | | |
| The ACH finalizes a formalized governance structure and processes to monitor activities, manage member commitments (e.g., participation agreements), document decision-making responsibilities, etc. | | | |

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| The leadership team subscribes to a distributed leadership model with various team members assuming leadership roles on different topics, e.g., sustainability, implementation of specific strategies, etc. | | | |
| STRENGTHENING ACHs | | | |
| The ACH establishes mechanisms and practices of transparency to ensure accountability between partners and between the ACH and the community. | | | |
| The ACH maintains a process for onboarding new partners and resident leaders. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH reviews and revises the governance structure and work groups as it takes on new priorities or geographies. | | | |
| The ACH continuously increases resident and community leadership in its governance structure. | | | |
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| C. <i>The ACH identifies a trusted and well-respected backbone entity with the skills and capacity to convene and coordinate the various aspects of the ACH.</i> | EARLY STAGE | MID STAGE | COMPLETED |
| BUILDING THE FOUNDATION | | | |
| NONE | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative identifies the backbone entity, which designates staff for the ACH activities. | | | |
| CREATING ACHs | | | |
| Roles and responsibilities of the backbone entity are clearly defined and, to the extent some of the roles are carried out by other organizations, they are made explicit. | | | |
| STRENGTHENING ACHs | | | |
| The ACH periodically reviews how the backbone functions are being carried out and confirms the existing backbone entity or chooses a new backbone entity(ies) to carry out those activities. | | | |

| SUSTAINING AND GROWING ACHs | | | |
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| The ACH secures funding, either directly, in-kind, or through the Wellness Fund, to support the backbone’s core functions and ongoing operations. | | | |
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| D. <i>The ACH has a shared <u>long-term vision and goals for community health improvement that prioritizes equity, developed through a collaborative process that engages community residents.</u></i> | EARLY STAGE | MID STAGE | COMPLETED |
| BUILDING THE FOUNDATION | | | |
| The group of organizations review the Community Health Needs Assessment and other data, as well as consults with the community, to identify priorities. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative formally initiates a process to develop a shared vision and goals for community health improvement that prioritizes equity, based on input and engagement from multi-sector partners and the community. | | | |
| CREATING ACHs | | | |
| The collaborative formally adopts a shared vision and goals for community health improvement. | | | |
| The ACH partners have a clear understanding of how the ACH (vision & goals) fits and/or integrates with other collective action tables or structures. | | | |
| STRENGTHENING ACHs | | | |
| ACH partners take steps to align their priorities with the vision and goals of the ACH and with community priorities. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH refreshes its vision and goals to incorporate new priorities and conditions and ensure equity is explicitly articulated. | | | |
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2. EMBED EQUITY AS A CORE PRINCIPLE THROUGHOUT ACH POLICIES AND PRACTICES AND INSTITUTE MEANINGFUL COMMUNITY PARTICIPATION

| <i>A. The ACH adopts and incorporates diversity, inclusion, and equity (DIE)/ anti-racism principles throughout the activities of the ACH.</i> | EARLY STAGE | MID STAGE | COMPLETED |
|--|-------------|-----------|-----------|
| BUILDING THE FOUNDATION | | | |
| Individual organizations and the nascent collaborative begin discussions of DIE principles and participate in trainings on DIE. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative’s vision, goals and composition explicitly articulate and demonstrate a commitment to diversity, inclusion & equity/anti-racism. | | | |
| ACH partners develop an understanding of the root causes of the priority issue, including any relevant policies or systems barriers that have led to racial, ethnic, gender or other inequities. | | | |
| CREATING ACHs | | | |
| The ACH develops and puts into practice principles of diversity, inclusion & equity/anti-racism throughout all decisions and operations, e.g., equity criteria in outcomes and indicators. | | | |
| STRENGTHENING ACHs | | | |
| The ACH adopts equity metrics for measuring progress with regard to its own operations and implementation of strategies. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH regularly reviews its progress on equity metrics, develops a narrative and demonstrates specific ways in which it is advancing equity. | | | |
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| B. <i>The ACH centers the voices of community residents who are most impacted by inequities in the governance of the ACH, as well as in the design and implementation of the strategies.</i> | EARLY STAGE | MID STAGE | COMPLETED |
|---|-------------|-----------|-----------|
| BUILDING THE FOUNDATION | | | |
| The group of organizations conducts outreach to residents and community organizing groups to inform them about the ACH and engage them in identifying the priority issues that will be the first area of focus for the ACH. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The ACH implements at least one targeted strategy for engaging residents, especially residents most impacted by inequities. | | | |
| CREATING ACHs | | | |
| The ACH recruits residents from the targeted geography(ies) and includes them in its governance (e.g., decision-making) structure. | | | |
| The ACH adopts multiple strategies to maximize resident involvement (e.g., leadership training, meetings in community locations, after hours, stipends, language and physical access, etc. | | | |
| STRENGTHENING ACHs | | | |
| The ACH establishes mechanisms of regular communications and accountability to the community. | | | |
| Residents are engaged in carrying out strategies, ideally assuming leadership of one or more strategies. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| Priorities for ACH activities and outcomes are aligned with needs and expectations of the community. | | | |
| A process for centering and prioritizing community priorities and leadership is developed and implemented. | | | |
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3. DEVELOP, IMPLEMENT, MEASURE AND REFINE A COHERENT PORTFOLIO OF ACTIONS

| <p><i>A. A range of strategies are aligned to achieve a set of prioritized outcomes that include short and long-term timeframes, upstream and downstream factors, equity metrics, and measures for monitoring progress, including systems changes.</i></p> | EARLY STAGE | MID STAGE | COMPLETED |
|--|-------------|-----------|-----------|
| BUILDING THE FOUNDATION | | | |
| NONE | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The ACH utilizes the Community Health Needs Assessments and other community inputs to determine a priority health issue or community condition to focus on. | | | |
| CREATING ACHs | | | |
| The ACH inventories strategies and activities that are already underway, regarding the priority issue, as well as opportunities for connections and reinforcement. | | | |
| The ACH identifies a set of common outcomes, including equity-related outcomes, for the priority issue and develops a preliminary portfolio of actions (POA). | | | |
| STRENGTHENING ACHs | | | |
| The ACH identifies gaps in the portfolio of actions (POA) and potential strategies (e.g., new strategies or scaling existing ones) for addressing them. | | | |
| The ACH creates an implementation plan for the POA. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH collects data and other information to help measure progress toward outcomes, including documenting systems changes. | | | |
| The ACH reviews and refines the POA, based on progress toward short-term and long-term goals, including equity. | | | |
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4. DEVELOP AND IMPLEMENT THE ACH’S SUSTAINABILITY APPROACH, SECURE FUNDS AND ESTABLISH A WELLNESS FUND

| <i>A. The ACH adopts and implements a sustainability approach/plan that articulates its value, quantifies its needs, and identifies specific funding sources.</i> | EARLY STAGE | MID STAGE | COMPLETED |
|--|-------------|-----------|-----------|
| BUILDING THE FOUNDATION | | | |
| NONE | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative identifies and enlists members of the collaborative with health, financing, business and investment expertise to participate in the collaborative’s financing and sustainability efforts. | | | |
| CREATING ACHs | | | |
| The ACH develops a sustainability framework, starting with a statement of benefit and value, e.g., a value proposition, which identifies both financial and non-financial benefits of an ACH. | | | |
| STRENGTHENING ACHs | | | |
| The ACH identifies and quantifies, to the extent possible, all assets and resources supporting the ACH’s activities, including in-kind contributions, and determines the funding needed to support the backbone functions. | | | |
| The ACH finalizes a sustainability plan that includes agreements among partners regarding priorities and strategies, such as collaborative fundraising. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH develops a funding appeal for the ACH infrastructure, including backbone, as well as key activities associated with the Portfolio of Actions, and obtains commitments from different sources. | | | |
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| B. <i>The ACH operates a Wellness Fund (or other community-led vehicle) as a mechanism for attracting, braiding, and blending resources from a variety of organizations and sectors, to support the ACH’s infrastructure and Portfolio of Actions.</i> | EARLY STAGE | MID STAGE | COMPLETED |
|---|-------------|-----------|-----------|
| BUILDING THE FOUNDATION | | | |
| NONE | | | |
| ESTABLISHING COLLABORATIVES | | | |
| NONE | | | |
| CREATING ACHs | | | |
| NONE | | | |
| STRENGTHENING ACHs | | | |
| The ACH develops goals and principles for a Wellness Fund (or other community-led vehicle). | | | |
| The ACH identifies options for a Wellness Fund administrator, formally selects the administrator, and formalizes a governance structure and relationship with the ACH (if it resides in a separate entity). | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The Wellness Fund secures contributions from diverse sources and puts into place the means for distributing those funds. | | | |
| The ACH and Wellness Fund collaboratively establish fund disbursement/grant-making framework and criteria that prioritize prevention and equity. | | | |
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| 5. COLLECT, SYNTHESIZE, AND SHARE DATA/INFORMATION AND COMMUNICATE TRANSPARENTLY THE ACH’S PROGRESS TO COMMUNITIES AND STAKEHOLDERS | | | |
| A. <i>The ACH identifies, collects, synthesizes and reports data/information to monitor and communicate, through a dashboard or other mechanisms, progress regarding ACH assets and infrastructure (e.g., Wellness Fund), outcomes (e.g., selected health condition), equity and overall impact.</i> | EARLY STAGE | MID STAGE | COMPLETED |

| BUILDING THE FOUNDATION | | | |
|--|-------------|-----------|-----------|
| The group of organizations identify relevant data sources to inform the goals and priorities. | | | |
| ESTABLISHING COLLABORATIVES | | | |
| The collaborative/ACH inventories available data/ information sources related to the health and well-being of the community and equity to inform the prioritization of the issue or condition. | | | |
| CREATING ACHs | | | |
| The ACH inventories available data/ information sources related to the priority health issue or condition. | | | |
| The ACH determines indicators of success—qualitative and quantitative—for the overall ACH infrastructure, portfolio of actions, equity, and how progress will be communicated. | | | |
| STRENGTHENING ACHs | | | |
| The ACH operationalizes outcome measures and indicators of success and begins collecting data/ information and regularly reporting on the measures | | | |
| The ACH identifies needed infrastructure, analytical capacity, and processes for data/information reporting, as well as a strategy for developing or otherwise filling those needs. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH has mechanisms in place to support regular data reporting and storytelling to partners, the community, and funders. | | | |
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| B. The ACH implements communications strategies, using data, persuasive narratives, and visual mechanisms, to “tell its story” to engage stakeholders and the community in the ACH as well as to facilitate accountability. | EARLY STAGE | MID STAGE | COMPLETED |
| BUILDING THE FOUNDATION | | | |
| NONE | | | |

| ESTABLISHING COLLABORATIVES | | | |
|---|--|--|--|
| The collaborative/ACH develops a preliminary communications strategy and materials to communicate and recruit partners in establishing the collaborative. | | | |
| CREATING ACHs | | | |
| The ACH develops a preliminary narrative, based on the agreed-upon vision and goals, to explain the ACH to partners, potential partners, the community, and other key audiences. | | | |
| STRENGTHENING ACHs | | | |
| As part of its overall communications plan, the ACH begins development of a dashboard, narrative and/or other data visualization approaches, to increase transparency and communicate accountability to partners, investors, and the community. | | | |
| SUSTAINING AND GROWING ACHs | | | |
| The ACH refines its communications strategy to incorporate storytelling, data visualization approaches, and audience-specific messages, to convey progress on indicators and document systems changes. | | | |
| CHECKLIST COMPLETE | | | |

