

# **Traditional Health Worker Retreat Report**

## **October 24-25, 2016**

### **Portland, Oregon**

## **Summary**

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This was the first time since the THW Commission was established in 2013 that commission members had the opportunity to come together for two full days and engage in facilitated strategic planning sessions to explore and achieve the following overarching issues facing the commission:

- **Establishing Group Agreements**
- **Creating Mission and Vision statements**
- **THW Commission Structure**
- **Environmental Scan with SWOT Analysis**
- **Core Priorities & Goals**

The Retreat format was designed to stimulate dialogue and teamwork among the commission members. Spirited and thoughtful conversations considered the many ideas, interests and issues and offered practical solutions to challenging issues.

There was clear consensus among the participants that the commission needs additional organizational capacity and continued strategic planning. The group articulated many challenges and opportunities as well as ideas for working with each other. They came to a consensus on the five areas that they would like to focus in the next 3 to 5 years. Participants explored variations of strategies and issues associated with each.

The following are highlights of the key points raised by participants during many interactive conversations.

## **Group Agreements**

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The following agreements were identified for the group to use during their participation at the retreat and in future commission meetings and gatherings.

1. We need to be accepting of all ideas and opinions and views are welcomed.
2. Everyone will take care of their own needs.
3. It's ok to be silent to collect your thoughts.

4. Share the air.
5. Step in and step back.
6. No interruptions.
7. Stay focus on topic but acknowledge all the rabbit trails and detours along the way.
8. Be respectful.
9. Use parking lot to capture ideas.
10. Try to make the best of the time with all members of the group.
11. Acknowledge different learning styles.

## **Mission and Vision Statements**

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The THW Commission was established by HB 3407 this legislative mandate defined the work of the commission. An important issue for the participants was to create mission and vision statements that aligned with the mandate. The following are some of the many insights shared that informed their draft mission statement:

- Individual is what's important may get caught up in systems and person gets lost.
- Integrity of the CHW model to build capacities in communities.
- Broadening the definition of health integration.
- Through rule and education, training standards for workforce.
- Voice for holistic health and achieving optimal health.
- Supports a full range of roles.
- High quality training and supervision.

### **Mission Statement (Draft)**

***Our mission is to guide and advise the OHA to create policy and rules that ensure integrity, fidelity and promote the advancement of the THW workforce.***

### **Collective picture that informed the Vision:**

Maybe is not about integration where THW get integrated into the system, is about the THW transforming the system from a medical model to a social justice model.

### **Vision (Draft)**

***THW in Oregon will be fully recognized and compensated for their unique contributions to transforming health and social services, creating health equity and promoting social justice in our diverse communities.***

# SWOT Analysis

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Participants articulated many Strengths, Weaknesses, Opportunities and Threats that can affect the commission's work.

## Key Strengths:

- Passionate/committed
- Well connected
- Some members are nationally recognized
- Training workforce
- We know systems
- Legislative mandate
- Good stories to tell
- Source of academically credited research
- OHWA
- We approve trainings
- First hand experience from front workers
- Fully staffed
- Cross sectional representation of leaders
- First hand knowledge of the 5 worker types
- Inclusive of 5 worker types
- Diversity

## Key Weaknesses:

- Lack of quorum and low commission membership
- Communication: we don't communicate with others so well outside the commission
- Better branding
- Connecting more with legislators/city club
- Asking others to support, endorse us, sponsor us
- Internal structure, process and protocols in place to get information out
- Lack of resources, budget and marketing
- Lack of oregon representation from outside Willamette Valley
- Record of communication current tech to bridge communications

## Key Opportunities:

- Regional Health Equity Coalitions
- OHA Contracts
- National associations and coalitions
- Making a common cause with all worker types
- Tap into additional resources, i.e. commercial
- Technology and digital
- Quarterly newsletters
- Use OEI resources
- Invite outsiders. CCOs, other commissioners.
- Be more strategic
- Research and evaluation
- Report to Lund Report
- OHSU
- Having a budget
- Collaboration with transformation centers, federal, CCBHC
- Market our work through state summits
- Be involved with more rural areas struggling with peer mental health
- Investing in community health work
- Take advantage of state resources to get materials translated

## Key Threats:

- No brand awareness
- lack of replacements for commissioners
- CCO's and others not working with commission (not seeking out the commission)

- Loss of institutional memory
- No regulatory authority
- Staff turnover and lack of resources
- Lack of collaboration with local counties, health authorities etc.
- An influx of people who lack the necessary characteristics
- Racism
- Prejudice
- Stigma
- Sexism
- Homophobia
- Ableism
- 2 for 1
- Lack of awareness and education
- Re-education

### **SWOT Strategies**

In addition to identifying each of the components of the SWOT the participants engaged in a lengthy exercise and conversations to identify specific strategies that would help them take advantage of the strengths and opportunities that they had previously identified.

#### **SO Strategies: Use strengths to take advantage of opportunities.**

- Use commitment, knowledge and connections to create synergy and fill gaps.
- Create and merge all the environmental scans that all of us are doing or have knowledge of (TWH) across Oregon.
- Use connections to gather or make known research of all types to make the case for THW's and also identify best and promising practices.
- Gather consumers to tell stories in newsletters, Lund report, presentations, and integrate knowledge into regional health equity coalitions.

#### **WO Strategies: Minimize weaknesses using the opportunities identified.**

- Use technology to network and Lund report.
- Active, outreach to specific groups.
- Equity coalition, insurance, CCOs.
- OEI staff-stronger facilitation role for more efficient meetings (to better help public attend and appropriately engage).

#### **ST Strategies: Use strengths to minimize threats.**

- Leverage relationships w/in commission to market externally.
- Use legislation to embolden commission authority.
- Use regional collaborators to inform community and system partners.
- Include public health, prevention and health promotion.
- Need a training strategy for rural areas.
- Create a speakers bureau.

#### **WT Strategies: Minimize weaknesses and avoid threats.**

- Communication-Community engagement, regular reports, invite CCO's systems, community engagement, specialist, budget.
- Internal Processes- Use proxy, shorter meetings, VCON, change/rotate locations.
- Resources- Advocate for commission's budget.
- Leverage "advocacy association" OCHWA, ODA, ACBBO
- Institutional Oppression-Education, marginalized communities in leadership roles, sharing research, findings, illustrate individual stories.

## Strategic Priorities

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The following are the five strategic priorities that the participants identified as the most important to achieve in the next three to five years.

1. Improve our communication, brand awareness, messaging, registry, technology.
2. Expand and improve education, community engagement, system engagement, and workforce engagement.
3. Invest in/launch research and data collaborations.
4. Improve internal processes (meetings, recruitment or board members, diversity, inclusion, commitment, sustainability).
5. Launch environmental awareness and collaboration.

## SMART Goals

Based on the proposed five priorities the participants identified the following three goals focusing on the registry, marketing materials and internal processes first.

### **Goal A: Traditional Health Worker (THW) Registry**

Specific Goal	Measurable	Achievable	Relevant	Time-bound
Commission to provide ongoing oversight of Traditional Health Worker Registry.	<ul style="list-style-type: none"> <li>Prepared demonstration by IT department- feedback provided to IT period, throughout implementation.</li> <li>Testing period provided for OEI and Commission to test utility of registry: Ease of use.</li> <li>Functionality (report printing, confirmation of registration, etc.)</li> <li>Mass education series proved to THW registry Stakeholders.</li> <li>Registry launch promoted and supported by OEI and Commission.</li> </ul>	Mohamed- Commission – Communication and accountability plan	This goal is tied to a legislative mandate.	<ul style="list-style-type: none"> <li>Mohamed to meet with OHA's IT Staff one week before November THW meeting.</li> <li>Mohamed and Commission's work plan to be complete by January 2017.</li> </ul>

**Goal B: Traditional Health Worker (THW) Marketing Materials**

Specific Goal	Measurable	Achievable	Relevant	Time-bound
The development of THW's marketing materials: logo, acronym, mission/vision, audience-specific messaging, and talking points.	<p>Marketing milestones:</p> <ul style="list-style-type: none"> <li>• Social media presence</li> <li>• Number of THW program inquiries</li> <li>• Number THW registry applicants (geographical spread, overall engagement)</li> </ul>	<ul style="list-style-type: none"> <li>• The development of tracking metrics</li> <li>• Data roll-up to assess most significant touch points</li> </ul>	<p>Marketing materials that are:</p> <ul style="list-style-type: none"> <li>• Culturally relevant</li> <li>• Carry a unified message</li> </ul>	<ul style="list-style-type: none"> <li>• Workgroup established – 3-6 months</li> <li>• Finalize work plan – 2 months (after workgroup is established)</li> <li>• Operationalization – ongoing</li> </ul>

**Goal C: Traditional Health Worker (THW) Meetings**

Specific Goal	Measurable	Achievable	Relevant	Time-bound
To improve the overall functionality and engagement of THW meetings.	<ul style="list-style-type: none"> <li>• Participant engagement and satisfaction.</li> <li>• Increased meeting productivity.</li> <li>• Full and consistent attendance.</li> <li>• Cross-sector representation.</li> <li>• Agenda development to reflect THW culture.</li> <li>• Process transparency.</li> </ul>	<p>Pre-planning sessions to bring in THW culture into agenda development.</p> <ul style="list-style-type: none"> <li>• Survey monkey (Google forms) assessment of meeting participants experience.</li> <li>• Meeting tools and notes:</li> <li>• Motion matrix</li> <li>• Task matrix</li> </ul>	<ul style="list-style-type: none"> <li>• Consistent with THW culture.</li> <li>• Brining in external facilitators.</li> </ul>	<ul style="list-style-type: none"> <li>• Trial period – November – March (5 months).</li> <li>• Committee to provide timely feedback via survey</li> <li>• Midway assessment – April 2017.</li> </ul>

## Action Steps

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- Workgroup creation and assignments:
  - Speakers Bureau; Education; Outreach
  - Communication
  - Environmental Awareness and Collaboration Opportunities
- Assessment of Temps Committee – should this become a Staff task?
- Passing of bylaws:
  - Subcommittee application
  - Voting rights for Commission Representatives
- Retreat report to be completed
- Write-up of Board Recruitment process

## Recommendations on next steps

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1. Organizational Capacity: Build capacity among the commission members.
  - Finalize Mission and Vision statements.
  - Identify and establish commission Values (with outside facilitation if possible).
  - Identify which meetings/gatherings would benefit from outside facilitation for the next couple of gatherings.
  - Clarify OEI & Commission Roles and Responsibilities in working together to accomplish goals.
2. Strategic Planning:
  - Develop additional SMART goals for the remaining two strategic priorities.
  - Conduct an assessment of current committees and decide which ones to update, add or delete based on the strategic priorities and goals.



## Retreat Evaluation (Day 1)

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The following are the comments (in their own words) offered by each of the participants on both days of the retreat.

### 1. What's one thing you liked?

- Having food, beverages and room to move was helpful
- I actually really enjoyed the SWOT and think is important
- Round table discussions
- Food
- Revisit the Mission
- The food and the camaraderie
- Allowing the free flow of thoughts and ideas
- Good facilitation
- The time we took to reflect on our work with the commission
- Great food, casual atmosphere
- The food
- Refocus on the agenda to make sure we can finish a lot done!
- Back and forth discussion
- Edith's facilitation style-focused but flexible, very positive, very relaxed
- The company
- The structure and time management of the facilitator
- No pressure, relaxed working on the mission and vision
- How respectful we are when discussing ideas
- Having current (up to date) bills/legislation.
- Mission and vision developing exercises
- Moderated discussions
- Great location and food

### 2. What's one thing you would like to add?

- Very well done today
- Add an extra icebreaker at some point to break up the work, one more element of fun.
- Less tangents within groups
- More time to get to know each other
- Nothing
- History of past work commission
- More "art" work
- The mission and vision writing process would have been easier for me to fully conceptualize if we could have worked off a shared digital document.
- Time to work on rules

### 3. What's one thing you would like to delete or change?

- Clarify around role of commission vs. OHA/OEI staff
- Clarity around goals (maybe that's tomorrow)
- Nothing
- No on tempest (Dinámica)
- Shorter drive
- Nothing
- Delete tempestad

## Retreat Evaluation (Day 2)

### 1. In the last two days I am proud of...

- People's honesty and feeling like we have purpose as a group.
- How the commission came together to work on these large tasks.
- Honest, passionate communication and dialogue.
- The commission for developing a strong vision and mission statement.
- The way we all treated each other with kindness.

## **2. Something that was helpful...**

- Seeing things in writing, being able to process out loud.
- The facilitators.
- To know our limits and responsibilities
- Edith's excellent facilitation
- I think you showed how aligned we all are. Came to retreat feeling we might not build consensus.

- I learned more about the responsibilities of the commission
- Mission
- Bonding with members of the commission and staff
- Our 5 to 6 priorities.
- I am proud to be a commissioner (for the first time)

- SWOT and SMART tools
- Connecting more with my fellow commissioners
- Listening
- SWOT Analysis
- Strong facilitation, we are passionate and need that.

## **3. From 1 to 10 with (10-very successful), how successful was the retreat?**

One person responded with a (7)

Six people responded with (8)

Two people responded with (9)

One person responded with (10)

### **Additional comments:**

*Coming to this Retreat I have such a new respect, admiration, knowledge and inspiration. Prior to this I felt our meetings were dysfunctional.*

*I've never realized how I probably wasn't as invested as I should now that we've spent these two days together.*

*This has been really productive.*

*We've tackled a whole gamut of things.*

*We've never been given the space to talk this much in depth about the work and the commission.*