



**NATIONAL ASSOCIATION OF
CHRONIC DISEASE DIRECTORS**

Promoting Health. Preventing Disease.

2020 GEAR GROUPS: Addressing Upstream Social Determinates of Health
ADVANCING PRACTICE through ACTION LEARNING

DESIGN DOCUMENT

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PURPOSE

The purpose of this document is to describe the process by which NACDD will implement the 2020 Generate-Educate-Activate-Respond (GEAR) Groups. It describes the purpose and background of the GEAR Groups, the use of the ECHO model™, the GEAR Group topics selection, and provides a timeline for implementation.

ABOUT GEAR GROUPS

The purposes of the NACDD GEAR Groups is to engage the chronic disease prevention and health promotion workforce in problem solving and learning about effective workforce development, leadership, networking and management strategies. NACDD will facilitate problem solving and peer-to-peer sharing and learning opportunities through the implementation of GEAR Groups that focus on priorities identified through the NACDD strategic plan and feedback from the NACDD Board and Chronic Disease Directors.

GEAR Groups provide opportunities for states to:

- Explore strategies for addressing emerging challenges and opportunities in chronic disease prevention
- Share best or promising practices with each other on program implementation and integration
- Assess the landscape and initiate planning in their state related to emerging issues with the support of a peer group and subject matter experts
- Create a sense of joint enterprise across states
- Jump start work on a special topic
- Facilitate deeper problem solving
- Develop personal relationships and build trust with practitioners in other states
- Address collective needs by tapping into the expertise of state and local practitioners
- Develop a network of peers

GEAR GROUP OBJECTIVES (ILPI Work Plan Year 2 reference)

- 1.1 Implement at least 4 GEAR Groups on topics prioritized by the Board of Directors with input from the Survey of States data.
- 1.2 Invite the workforce practicing at the local level on to participate in at least one GEAR Group focused on leadership and development.
- 3.1 Collaborate with University of New Mexico to use the Zoom Platform to implement practice-based learning.

Benefits of participating in a GEAR Group include:

1. Help members network and get to know one another
2. Deepen member knowledge and understanding of practical approaches to advancing work related to the selected topics
3. Help states initiate plans for leading and managing work to address the social determinants of health / upstream factors to chronic disease within the context of the participant's program or health department

2020 GEAR GROUP APPROACH: ACTION LEARNING THROUGH THE ECHO MODEL

Starting in 2019, NACDD pioneered the use of the ECHO model™ to meet the learning and development needs of state level chronic disease prevention practitioners through the GEAR Groups. The ECHO model™ is similar to the prior GEAR Group approach, but differs slightly in the type of technology used and its structure. ECHO model™ uses [ZOOM technology](#) to foster virtual collaboration.

The new approach provides for meetings to occur more frequently, weekly rather than monthly, and for a longer duration, 1.5 hours instead of one hour. The new model provides for fewer number of meetings-- four instead of six. Members participate in teleECHO™ meetings every week for four weeks. During the GEAR Groups chronic disease prevention and health promotion professionals from multiple states present their work through a case presentation to the subject matter experts (SME) and to each other, discuss challenges or new developments relating to their work, and determine the best course forward toward systems change. Meetings include state case presentations, mentoring by the SME, didactic presentations by a guest presenter, and group discussion. This GEAR Group structure is characterized by a balance between peer to peer mentoring, case-based learning, and practice-based or “action learning”. Each of these structural characteristics are defined in more detail below.

Peer to peer MENTORING & Support (Hub and Spoke Model): The ECHO model™ breaks down the walls between national experts and state/local chronic disease and health promotion professionals.

Subject Matter Experts serve as mentors and colleagues, sharing their chronic disease prevention and health promotion knowledge and expertise with the participating professionals. Essentially, ECHO® creates learning communities where state level professionals receive support and explore the data, partnerships, interventions, and evaluation strategies. Over the course of the four meetings, participants receive real time support, counseling on strategies for leading and managing change, and participate in guided reflection and preliminary planning. SMEs

provide feedback during the call and through a written response to each state's case story (details below).

Members are also strongly encouraged to connect with other members of the group between meetings through weekly networking challenges. Bio's and contact information are shared, so individuals can reach out and follow up on information discussed by other states in the GEAR Group meetings. We saw positive and strategic connections happen within and across states in 2019.

CASE BASED LEARNING (Peer-to Peer Learning Loops): The ECHO® model is characterized by an "All Teach All Learn" approach. This is best described through an analogy of the little schoolhouse, where all grade levels are combined, and students learn from one another, while working at their own pace on their assignments. In this example, some state members may represent a proactive state where actions to address the topic are already underway, while others will represent states taking on this work for the first time. Additionally, each state may have a unique perspective or project that pushes participants to think differently. Other participants may be on these calls to just build their learning and skills for later use.

Each state is asked to submit a written case story / presentation form in advance of the first GEAR Group Meeting. The SME and participants are asked to review the case presentation forms in advance of the verbal presentation. The SME provides written recommendations on the case presentation form, and all come prepared to share ideas to support the presenter in their work. The facilitator notes recommendations generated by the state participants or the SME, and updates the case form to be shared back with participants after the call.

ACTION LEARNING (Developing Practitioners While Getting the Work Done): Action learning happens when individuals or small groups actively work and learn in the process of developing solutions for real-world problems. According to a recent study by the National Association for Talent Developmentⁱ, this approach can take place in live situations or virtually (through electronic means). Action learning can be dual-purpose when leaders are developed by having them generate and test solutions to challenges. The following are four elements of action learning according to Reg Revans, author of the *ABCs of Action Learning*. These elements inspired the current redesign of the GEAR Groups.

1. The learning experience should be centered around finding an answer or a solution to a problem that exists in the real world.
2. Learning is a voluntary process, and the learner must be willing to learn.
3. Action Learning is a highly social activity and process which takes time to be fully effective
4. Developing the individual's knowledge base and skill sets are just as essential as arriving at the solution to the scenario or problem.ⁱⁱ

Action Learning is an important part of how NACDD supports states through GEAR Groups. GEAR Group members are asked to assess opportunities related to their GEAR Group topic and develop preliminary plans of action for implementation within their state. Members are

encouraged and given tools to help them think through how to expand their current practice. They can thereby apply their learning in real-time as well as seek the support and guidance from experts and peers throughout the process. This approach benefits the individual learner while also helping meet important goals of the state health office.

Action learning is facilitated within the 2020 GEAR Groups in two explicit ways. First, the facilitator leaves time at the end of each GEAR Group call to allow each participant to share one idea from the presentations that they will take back and apply in their work. Second, participants are offered an optional “Call to Action Tool” that encourages reflection and allows for documentation of plans. Participants are asked to reflect and identify action items that can be accomplished within the next seven days, 30 days, and 90 days to move forward on their identified challenge. They present their plans during the final call of the GEAR group and are offered additional guidance from their peers and the SME.

Micro-Learning Opportunities through Didactic Presentations

During three of the 4 weeks, a speaker is invited to present for 10 minutes on a special topic. The first topic of each group is focused on a leadership and management topic, this year the theme for this topic is *Public Health Influencer – Finding your Leverage Points to Inspire Change*. Subsequent didactic presenters are recruited to push the thinking or provide resources to help state’s push practice around upstream factors.

Communication & DISSIMINATION (Sharing the Learning)

NACDD seeks to share the lessons learned through the 2020 GEAR Groups with the wider NACDD membership and beyond. The following actions are planned:

1. Share the final Resources and References document from each GEAR Group on the NACDD website.
2. Highlight select case stories to share as part of a General Member Webinar and possibly on the NACDD Website.
3. Collect and share testimonials from GEAR Group participants about their work and their GEAR Group Experience.

NACDD COMPETENCIES

GEAR Groups related to the following NACDD Competencies, with a focus on #1. Build Support, #4. Leading Strategically and #6 . Managing Programs and Resources (bold below). These competencies will be incorporated into marketing materials, highlighted in the participant guide and on select agendas.

1. **Build Support: Chronic disease practitioners establish strong working relationships with stakeholders, including other programs, government agencies and nongovernmental lay and professional groups to build support for chronic disease prevention and control.**
2. Design and Evaluate Programs: Chronic disease practitioners develop and implement evidence-based interventions and conduct evaluation to ensure on-going feedback and program effectiveness.

3. Influence Policies and Systems Change: Chronic disease practitioners implement strategies to change the health-related policies of private organizations or governmental entities capable of affecting the health of targeted populations.
4. **Lead strategically: Chronic disease practitioners articulate health needs and strategic vision; serve as a catalyst for change and demonstrate program accomplishments to ensure continued funding and support within their scope of practice.**
5. Manage People: Chronic disease practitioners oversee and support the optimal performance and growth of program staff as well as themselves.
6. **Manage Programs and Resources: Chronic disease practitioners ensure the consistent administrative, financial, and staff support necessary to sustain successful implementation of planned activities and build opportunities.**
7. Use Public Health Science: Chronic disease practitioners gather, analyze, interpret and disseminate data and research findings to define needs, identify priorities, and measure change.

As an example of how competencies are addressed, each group explores the difference between leadership and management, as defined by a leading author in this field, John P. Kotter. They then reflect on which leadership tactics or management tactics are most relevant to the change participants were hoping to see in their chronic disease units, state health agencies or beyond. The overarching reminders here are that in Public Health, leadership is needed at all levels of an organization – not just at the top of the organizational hierarchy, and that leadership doesn't produce lasting change without effective management tools in place.

ASSESSMENT DATA FOR PRIORITIZING TOPICS

The topics for the GEAR Groups are based on needs expressed by states through multiple channels including; the Survey of States, findings from the 2019 Chronic Disease Prevention Leadership Meetings, NACDD Board Member prioritization processes and input, as well as key informant interviews. These data provide clear direction on what is most needed and most critical for this practice and learning method. The topics selected support established priorities of the associations' leadership as determined through the data and prioritization process and align with one or more of the activities under the four pillars (NACDD Board of Directors Strategic Map, 2019).

2020 TOPICS

The 2020 GEAR Groups topics will explore the intersection of chronic disease programs with the social determinants of health. Didactic presenters will help participants explore opportunities for advancing work on upstream factors relating to the following topics.

- Food Security
- Building Active, Healthy, and Inclusive Communities
- Physical Activity and Nutrition in Early Care and Education
- Preventing Adverse Community Experiences

Each GEAR Group will explore how to advance their work by exploring the related social determinants of health / upstream factors. In addition, the following practice-based topics will be explored:

- Proven or Promising Interventions or Policies
- Internal and External Partnerships
- Data Needs and Opportunities
- Evaluation Needs and Next Steps

TECHNOLOGY

The GEAR GROUPS will be implemented using ZOOM. Web cameras will be provided to all participants who are in need and who express this need in the application.

FREQUENCY / DURATION

GEAR Groups meet weekly for a 1-month period (4 weeks). Meetings are convened for one and a half hours each session. Each GEAR Group participant is invited to assist in pre-work and will be asked to review relevant resources throughout the four-week period. An orientation call will be offered to all interested GEAR Group participants prior to the start of the first call in order to provide an orientation to the process and address any questions.

AGENDA

A proposed standard agenda is suggested below. This agenda is flexible based on several factors, including the availability of expert presenters and cases. It should also be noted that the first meeting of the group will include time to help the members get to know each other.

- 5min Introductions [Facilitator]
- 5min Case Presentation 1 [State following the NACDD case presentation form]
- 8 min Questions and recommendations from States
- 2 min Summary and recommendations related to the case from the SME
- 5min Case Presentation 2 [State following the NACDD case presentation form]
- 8 min Questions and recommendations from States
- 2 min Summary and recommendations related to the case from the SME
- 5min Case Presentation 3 [State following the NACDD case presentation form]
- 8 min Questions and recommendations from States
- 2 min Summary and recommendations related to the case from the SME
- 10 min Didactic Presentation [Expert]
- 5 min Questions for presenter [States]
- 15 min Reflection and Synthesis [all answer]
 - “What is one idea or resource from today that you will take back and apply to your work?”
- 5 min Reminders and Closing [Facilitator]

STATE CASE STORIES/ Presentations

Each state presents a case related to the GEAR Group topic. If the state is not currently working on something related to the GEAR Group topic, they are asked to describe proposed or future

work by researching other states and discussing how they will go about implementing that strategy within their own state. Case presenters are also asked to come prepared with 2-3 questions about their work to elicit guidance and ideas from the GEAR Group participants and the SME. The Reflection and Synthesis segment provides for increased engagement and peer-to-peer support and action learning.

INTENDED MEMBERS

The intended audience for the GEAR GROUPs are Chronic Disease and Health Promotion workforce / staff. The CDD may elect to encourage these opportunities among select staff to assist in building capacity and developing future leaders (succession planning). One of the 2020 GEAR Groups [Building Active, Healthy, and Inclusive Communities] will include participants from local health departments.

NUMBER OF MEMBERS

2020 GEAR GROUPs are limited to 12 state participants. No more than two people from one state can participate in a GEAR Group at a time. Any chronic disease prevention or health promotion staff person may elect to register if they indicate support from their chronic disease director. The GEAR Group participants may be from any state, territory, or in the selected group, a local health department. During the 2020 GEAR Groups one offering [Building Active, Healthy, and Inclusive Communities] will allow local level practitioners to participate with their state counterpart during one of the topics to forge a partnership and advance leadership opportunities.

REGISTRATION

Individuals or states elect to participate in the GEAR Groups through an online registration process, using survey monkey and transitioning to Qualtrics as soon as possible. Registrants are placed on a waiting list if a group has more than 12 state participants.

COMMUNICATIONS / RECRUITMENT / MARKETING

Registration for the GEAR Groups will be announced through the following methods through collaboration with the NACDD Communications Department:

- Post to the NACDD website
- Distribute an e-mail invitation using mail chimp to reach those included on NACDD's distribution list targeting individuals working within state health departments.
- Promote via social media
- Additional marketing may be carried out to reach individuals in local health departments and to reach those in related areas, such as injury prevention, tobacco control, infant mortality, etc.

ROLES

- **NACDD GEAR Group FACILITATOR (HUB):** A NACDD GEAR Group Facilitator will be designated for each of the GEAR Groups. The GEAR Group Facilitator will coordinate the logistics on all aspects of the implementation and evaluation of the GEAR GROUPs along

with the other NACDD GG Consultants, communications team, and evaluators. This role includes:

- Develop, collect feedback, and finalize all communications (e-mail announcements, web content, social media, meeting invites, etc.) and deploy marketing materials in collaboration with the NACDD Communications team.
- Track registration and communication with members.
- Compile pre-work (level setting) materials for each GEAR Group Topic (if needed) in collaboration with the SME.
- Coordinate usage of ZOOM.
- Work with the GEAR Group SME to develop a plan for level setting and the didactic presentations that will be offered during each meeting. Support SMEs in assisting the didactic presenters in presentation formatting / timing.
- Develop specific questions/data to capture from each call on the post group evaluation survey and share with the evaluator.
- Maintain communications with the GEAR GROUP SMEs and provide any support requested (as able).
- Facilitate the GEAR Groups meetings.
- Capture shared resources and recommendations in the case response template and the Resources and References document.
- Maintain communications with the members of the GEAR GROUP and provide any support requested (as able), this includes sending materials 3 business day prior to and two business days following each GEAR Group Meeting.
- Act as a subject matter expert on the linkages to the social determinants of health.
- Make mid-point corrections, as needed.
- **GEAR Group Support**
 - Prepare and distribute meeting invitations to participants of the GEAR GROUPS (using a standard invitation format where possible).
 - Complete iECHO reporting.
 - Update the ILPI calendar with meeting dates.
 - Help format the Resources and References Document post meetings.
- **Subject Matter Experts (SMEs)**
 - Coordinate directly with the GEAR Group Facilitator.
 - Participate on each of the GEAR Group meetings related to the assigned topic.
 - Advise on who can be expert presenters – provide connections if needed and work with the GEAR Group Facilitator / Consultants to develop a plan for the didactic presentations that will be offered during each meeting.
 - Some Subject Matter Experts will also serve as presenter for the didactic portion of the GEAR Group meeting.
 - Review each written case presentation and prepare resources and recommendations for each case in advance of each presentation by completing the designated portion of the case presentation form.
 - Help identify resources and reference materials for pre-or post-reading.
 - Provide guidance and support to members during the call.

- Stay on time in close conjunction with the Facilitator during each meeting.
- Advise on direction and opportunities for improvement.
- Review and approve the resources and references document and final case response documents.
- Encourage GEAR Group participants by validating appropriate recommendations and resources before sharing recommendations and resources for each case.
- **NACDD Evaluation Team:**
 - Collaborate with the Innovation team to finalize the GEAR Group evaluation plan (see description below)
 - Update post GEAR Group evaluation surveys for 2020 (Qualtrics).
 - Ensure evaluation surveys are sent with 3 business days following the completion of each GEAR Group.
 - Prepare short post GEAR Group reports showing survey and three / six month follow up findings.
 - Prepare a 2019 and 2020 GEAR Group evaluation report after the completion of all 2019 and 2020 GEAR Groups.
- **NACDD Communications Team:**
 - Collaborate on marketing messages for 2020, including writing announcement e-mails, webpage development, and social media blurbs.
 - Support ongoing dissemination of lessons learned through the GEAR Groups by supporting the collection of testimonials (in collaboration with the evaluation team), sharing quotes or resources routinely through social media.
 - Provide updates through social media.
 - Highlight GEAR Group successes identified through follow-up evaluation.
- **Didactic Presenter (HUB or Partner):** Provide a 5-10-minute didactic presentation on the select topic. Note: In some cases, the facilitator or SME will provide that didactic presentation and in other instances expert presenters will be recruited from states, national organizations or CDC.
- **GEAR Group Member (SPOKE):** GEAR Group Members agree to the “All Teach All Learn” approach, meaning everyone has lessons to teach and learn no matter their level of experience.
 - Participants commit to presenting one case throughout the course of GEAR Group
 - Participants and are asked to provide guidance and share resources in response to other participant’s case presentations.
 - Participants are encouraged to be active listeners - to tune into how work was initiated, managed, funded, evaluated, or sustained - to focus on communication strategies, planning practices, and how other states gained consensus among different groups.
 - Participants are encouraged Complete the 7/30/90 Action Plan and share their goals with others during the final GEAR Group call.

MEMBER BENEFITS (used for recruitment)

Individuals who participate have the potential to:

- Develop professionally
- Increase their professional identity
- Devise better solutions and make better decisions in their chronic disease programs
- Gain access to subject matter experts who may be able to help you focus and articulate developing ideas
- Participate in didactic learning opportunities
- Network with peers and increase his/her interaction among those peers
- Influence national practice

Organizations also benefit when their representatives participate in a GEAR GROUP. When an organization allows its personnel to join, it is potentially improving:

- Public health practices in their health department
- Employee efficiency, in terms of time and cost, in retrieving information and a reduced learning curve
- Industry benchmarking capacity
- Involvement in national initiatives
- Organizational reputation as a contributor in building new capabilities

EVALUATION

The GEAR GROUP evaluation will align with the work plan requirements for process, impact and outcomes as well as milestones and outputs (see above). This will also align with the overall program outcomes in the NACDD strategic map. Areas of evaluation focus may include:

- Finding out “what works” and “what does not work”
- Improving capacity to identify and implement effective public health practices
- Demonstrating effectiveness of a GEAR GROUP to stakeholders

Evaluation is a critical component of this effort. The evaluation team will include NACDD evaluation staff and members of the Innovation Team.

- **Evaluation Level 1 – PROCESS** [What steps did NACDD carryout? Did NACDD follow its plan]
Evaluation Question: Did we do what we said we would do?
Method: Document Review. NACDD will capture information about the process used for marketing, recruiting, orientation, relationship development, scheduling, etc. and compare it to the design document and implementation plan. Findings of this process will be documented in the HOOPLA.
Use of Findings: Findings will be reviewed by the GEAR GROUP Evaluation Team and a list of recommendations for improvement will be compiled.
- **Evaluation Level 2 - SHORT TERM IMPACTS** [Participant Satisfaction/ Knowledge/Attitudes/Relationships]
Evaluation Questions: Did GEAR Groups meet participant expectations? Did knowledge increase? Did attitudes change? Were peer-to-peer relationships established? Did participants share resources and references with colleagues within their state? Did participants establish new partnerships within their state?

Method: A survey will be distributed to all participants at the end of the GEAR Group implementation period to assess baseline and summative knowledge, attitudes, and relationships. A retroactive pre-post approach will be used as experience shows people think they have a higher knowledge of select topics pre-program than they do. A survey after the fact will also capture the extent to which expectations were met and member satisfaction was achieved. Survey findings will be analyzed using statistical analysis. A short report will be prepared for each GEAR Group one month after the close of the GEAR Group (this time period allows two-3 weeks for collecting responses and 1-2 weeks for analysis).
Use of Findings: Findings will be reviewed by the GEAR GROUP Evaluation Team and a list of recommendations for improvement will be compiled.

- **Evaluation level 3 - OUTCOMES** [State level implementation and impact – Did this process result in state level action]

Evaluation Questions: Did states produce a 7/30/90 plan of action? To what extent did state’s implement their 7/30/90 plan of action? What were the facilitators and barriers to implementing their 7/30/90 plan of action?

Method: Survey and/or targeted interviews will be implemented. Each state is encouraged to produce and implement a 7/30/90 action plan and will be told someone will reach out to them in three months to assess progress. The NACDD evaluation team will develop a survey and or a targeted interview to assess the extent to which participants made progress on their 7/30/90 plan of action and determine how the GEAR Group experience influenced their state level practice and accomplishment of program specific performance measures. This follow up process will collect qualitative data on facilitators and barriers to implementation.

Use of Findings: Findings will be reviewed by the GEAR GROUP Evaluation Team and a list of recommendations for improvement will be compiled. Further, if time permits the team may decide to prepare a manuscript of the project for a peer-review publication.

Potential Additional Evaluation Questions:

1. To what extent did participants increase leadership competencies?

TIMELINE

Specific tasks and timelines are defined in the 2020 GEAR Group project plan / work plan.

GEAR Groups will be held:

- Food Security – February
- Building Active, Healthy, and Inclusive Communities – February
- PAN in Early Care and Education – March
- Preventing ACES – April

ⁱ *Experiential Learning for Leaders: Action Learning, On-the-Job Learning, Serious Games, and Simulations*, <https://www.td.org/newsletters/atd-links/action-learning-for-leadership-development>

ⁱⁱ Revans, R. W. (1998) *ABC of action learning*. London: Lemos and Crane