“Begin Here” Document

For implementation teams, here is the inventory of tasks that need to be accomplished before, during and after I-LEAD to realize full value. This is not exhaustive but focuses on items that help ensure the implementation of a high-quality workshop.

1. Before I-LEAD
	1. Form the implementation team, and start a concept note for communication with stakeholders. Review the I-LEAD principles – these will help guide the team with critical decisions to make about workshop design and implementation.
	2. Ensure buy-in from key stakeholders who will both champion and support the workshop whether it is going to be country-level or province-level or organization-level.
	3. Engage the stakeholders in an initial meeting to discuss the scope and focus of the workshop (what digital health challenges to address), making sure there is consensus on those 2 things. The scope may initially be broad but that is the beginning of an iterative process. A stakeholder map helps identify who are important for problem solving during the workshop and who will be important for strengthening country- or regional digital health alliances.
	4. With stakeholder buy-in, the implementation team establishes **consensus and commitment right away** on resources (staffing, venue, catering, per diems, supplies, timelines, etc.).

Once the key stakeholders have reached consensus on workshop scope and focus and committed to organizational roles and resources, both the participants and implementation team will work concurrently to prepare for I-LEAD.

Participants

* 1. Once participating teams are forming,[[1]](#footnote-2) begin the process of challenge prioritization, such that top 3 challenges are identified. In practice, even with pre-workshop preparation, a country team gets to address 1-2 out of 3, unless they have really prepared well to address all three. Out of the 3 priority challenges, they identify 1-2 difficult decisions to tackle for the PDMP exercise.[[2]](#footnote-3) The top 3 challenges become one of the inputs to the rest of the I-LEAD process (logic model thinking here). The other input is the ISHO assessment, discussed next.
	2. Teams must complete the ISHO assessment because there will be not enough time for them to work on this during the week. In practice, there will be disagreements on how to score items and this takes time to resolve. (Locate the template in the package to assess level of work needed). The other reason is the ISHO assessment activity before I-LEAD prepares the country participant to work together and exercise their collaboration skills. The outcome of this pre-I-LEAD collaboration helps the implementation diagnose potential collaboration problems early rather than late in the game.
	3. Once these inputs are more or less complete (good enough), we begin to have participating teams (country, province, or organization) work on their country slides. (Locate the template in the package.) Give the participants enough time to complete a draft of their slides and have them check in with the implementation team as to task completion, before I-LEAD begins.

Implementation Team

* 1. At point 1c, there is enough input for the implementation team to craft the first draft of the weeklong agenda (identify/confirm/orient speakers, train facilitators). The top 3 challenges will inform the development of the challenge-focused content of the workshop (examples: HIE, data security, AI implementation, standards). This ensures that the workshop addresses 2 knowledge scaffolding needs: (1) knowledge scaffolding needed for collaborative problem solving and roadmap development; and (2) knowledge scaffolding needed to solve prioritized challenges.
	2. Verify that the implementation team has all presentations, presenter attendance, and that presentation have the expected content and length.
	3. In the agenda, prioritize group activities needed to address priority challenges (knowledge application sessions) as the week progresses. Teams attend the workshop to solve important priority problems **and** to acquire collaborative problem-solving skills to solve the others after the workshop.[[3]](#footnote-4) They are not there to learn everything about digital health but to have good enough knowledge (“nuggets”) to know how to develop the roadmap and action plans – avoid the temptation to do “content packing.”[[4]](#footnote-5)
	4. Just before the I-LEAD workshops begins, visit the venue to ensure that it is set up as expected – technology, connectivity, breakout rooms (if applicable), room set up, supplies, etc. Make sure that participants can find the workshop location.
	5. Also just before the workshop begins, the implementation team and facilitators should walk through the agenda to ensure that all roles are filled, supplies are in place, and everyone understands their roles and sessions. Ensure that QR codes for daily evaluations are correct.
	6. Study the latest agenda for opportunities to connect the dots and reinforce learning across topics and activities. Study the foundational slides and activity guides and be prepared to back up assigned speakers in case of emergencies.
	7. Begin to strengthen in-country alliances by seeking speakers with expertise on prioritized challenges.
	8. To facilitate collection of inputs (ISHO assessment, country slides, top 3 challenges, BYODD), as well as for scheduling check-in meetings, assign a coordinator for each participating team.
1. During I-LEAD
	1. There is a natural applied learning rhythm to the I-LEAD week. We begin with knowledge scaffolding (frameworks and principles – ISHO pillars, problem solving, thinking hats, dance of contribution). We start collaboration warm up (or shocker) with MM challenge which helps teams realize early how weak or strong their collaboration and facilitation skills are (see/connect with Tom Wujek video).[[5]](#footnote-6) We want the participants to get used to the routine (reflection, evaluation, synthesis in the morning - contribution of energy and effort to warm up).
	2. We begin to establish continuity between pre-I-LEAD and during I-LEAD activities by Day 1 by allocating a short amount of time to remind teams of their pre-workshop homework and showing them the full roadmap. They continue polishing ISHO assessment work and country slides and prepare for team presentations.
	3. On Day 2 start diving into the support content materials (HIE, data security, global goods - closely related to the priorities participants said they want to collaborate on).[[6]](#footnote-7) We continue to emphasize continuity by showing the breadcrumbs / journey trail (the roadmap) and what we need accomplished each day. The Strategy session is particularly important as Vision and Strategy (of Vision, Strategy Operations and Tactics) are the meat of I-LEAD (vision is addressed during draw Toast exercises.)
	4. For the implementation team, the Day 1 end-of-day after-action review will help resolve issues that affect workshop quality and meeting emergent needs early.[[7]](#footnote-8) Be prepared to finetune the agenda based on initial feedback. The need for major course corrections may become more apparent on Day 2. Review the next day’s agenda to ensure that all materials are ready, everyone is clear on their roles, and there are no speaker/agenda issue to address.
	5. On Day 5, we invite participants to join national or regional communities of practice and be active members of those communities. This serves different purposes – continuing education, further growth in the profession, mentoring, networking, knowledge sharing, and further strengthening the social capital established across participating teams (needed for post-I-LEAD work).
2. After I-LEAD
	1. To accomplish translation of vision and strategy to action, the in-country I-LEAD implementation team would need to follow up on I-LEAD deliverables (vision-strategy to operations-tactics).
	2. Specifically, the I-LEAD roadmaps/action plans still need to be translated into projects and there are several options: (1) engage with the I-LEAD participants to develop full project designs out of the roadmap to be implemented by participating organizations; (2) use existing programs within the country to implement those projects (can include GEEKS, I-DASH, academic and non-academic fellowships).
1. Tuckman’s stages of team formation. Also assume gaps in collaboration skills (six blind men and the elephant). [↑](#footnote-ref-2)
2. There should be enough courses of action and criteria to compare (for the exercise 3 COAs is OK). [↑](#footnote-ref-3)
3. Related to the elephant metaphor: “How do we swallow a big elephant?” [↑](#footnote-ref-4)
4. Consider Dreyfus levels of skills acquisition, lifelong learning. [↑](#footnote-ref-5)
5. Collaborative problem solving is at the heart of I-LEAD. [↑](#footnote-ref-6)
6. These topics are found in the master slide decks and are assumed to be there because the participating teams are going to work on challenges related to those topics. [↑](#footnote-ref-7)
7. Embodies principles of design and strategic thinking that we teach in the workshop. [↑](#footnote-ref-8)