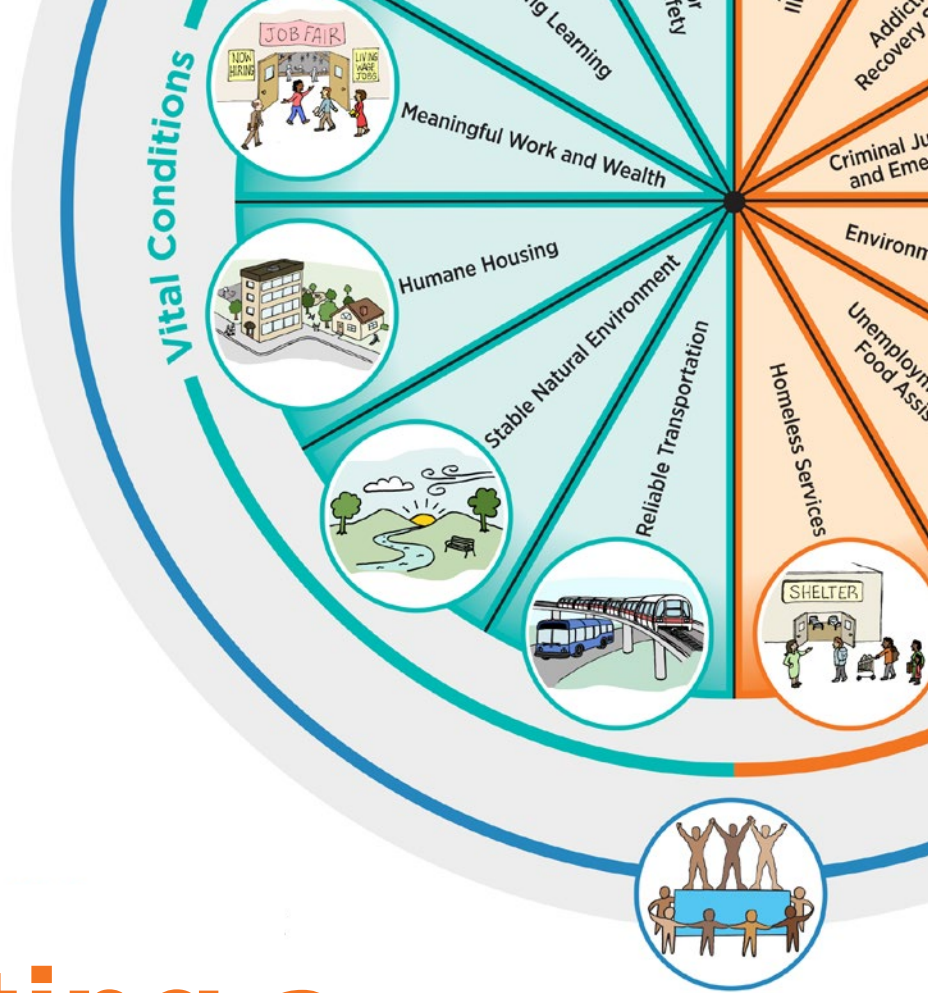




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Negotiating a Well-Being Portfolio

A Tool for Regional Leaders Ready to Create a Balanced and Impactful Set of Policies, Programs, and Practices to Transform Well-Being

This resource was made by The Rippel Foundation, as part of its ReThink Health Ventures project, with support from the Robert Wood Johnson Foundation.



Negotiating a Well-Being Portfolio

A Tool for Regional Leaders Ready to Create a Balanced and Impactful Set of Policies, Programs, and Practices to Transform Well-Being

The Negotiating a Well-Being Portfolio exercise is designed to help regional leaders like you explore how to create a balanced and impactful set of policies, programs, and practices that will transform the system that produces health and well-being in your region.

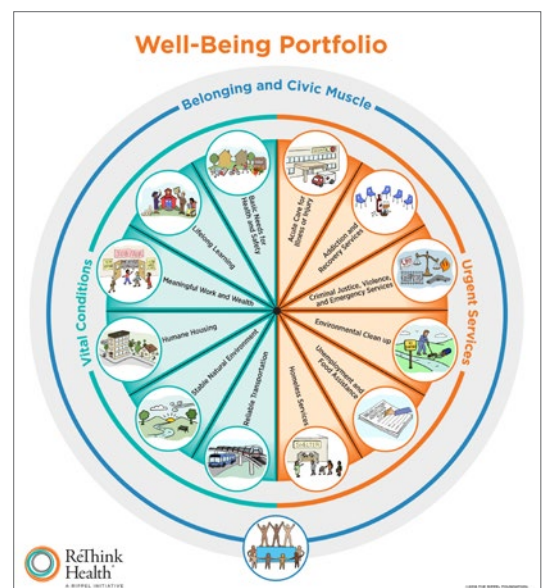
For the exercise, you will consider 12 different portfolio options. Each represents a category of policies, programs, and practices that address either urgent needs or vital conditions. Investments in urgent needs enable anyone under adversity to access the services they may need temporarily to regain or restore health or well-being (such as acute care for illness/injury, food assistance, or income support). Investments in vital conditions enhance the properties of places and institutions that all people need all of the time to be healthy and well (such as a living wage, education, humane housing, and others). You can also make investments on the outer ring, which represents efforts to strengthen belonging and civic muscle. Investments here assure specific attention is paid to development of the special capacities of people and institutions that convey to all a sense of belonging and power to influence the policies, practices, and programs that shape our world.

A region's transformation strategy represents those strategic areas its stewards believe they should focus on to pursue health transformation. In working with your region's "pie," you will develop a visual representation of a well-being portfolio. This visual will help you understand the mix of vital conditions and urgent services that make up much of the investment (of time, money, and other resources) in your region today and explore how the mix should shift in the future to deliver better results.

This exercise will be most effective if you are able to gather major stakeholders from across your region (for example, the leadership team of a multisector partnership and some who aren't involved as well). Importantly, this exercise assumes that you have developed a shared vision or value proposition for regional transformation. Stakeholders can't decide the best way to get where they're headed if they don't know where they're headed. So, if you need to develop a shared purpose before proceeding, you can learn more [here](#).

In addition to these instructions, this tool includes:

- ➔ **Negotiating a Well-Being Portfolio summary** (see pages 6-10), which offers an introduction to the dynamics of a health ecosystem and explains the elements of a well-being strategy. This should be distributed as a handout during the session.
- ⬇️ **Negotiating a Well-Being Portfolio poster**, to be used in the exercise. (An example is shown on the right.)
- ⬇️ **Sample slides** (complete with talking points) that facilitators can use to guide a group of regional leaders through the exercise.





INSTRUCTIONS

Time: 2 ½ – 3 hours

Goal: To assess your region’s current and proposed portfolio and allocation of resources, relative to your strategic vision for health system transformation.

Materials and set-up

- Room for your group to gather in full and also to divide into teams of 4-6 people
- 1 set of 20 blue sticky dots for each team of 4-6, cut into 20 single dots
- 1 set of 20 red sticky dots for each team of 4-6, cut into 20 single dots
- Facilitator takes a set of blue and red dots equal to the total number of dots distributed to all of the teams (20 red dots + 20 blue dots x total # of teams); these do NOT need to be cut into singles
- Flip chart and markers for note-taking
- Red and blue markers (optional)
- Copies of the [Negotiating a Well-Being Portfolio poster](#). You will need enough for each team to have one 36 x 40-sized copy (8 ½ x 11 is sufficient, but 36 x 40 will allow everyone in the room to see the composite results of each team engaged in the exercise), as well as two 36 x 40 posters that can be kept at the front of the room. (You will likely need only one of the larger format posters, but it is useful to have a second on hand in case there is significant disagreement.)
- Copies of the Negotiating a Well-Being Portfolio summary on pages 6-10 (one per person)

Pre-work

1. Participants should read the Negotiating a Well-Being Portfolio summary (see pages 6-10), in advance or during the beginning of the exercise. Ensure all participants have hard copies of the summary at the start of the exercise.
2. Identify a facilitator to guide participants through the exercise.
3. Provide the [sample slides](#) to the facilitator. The slides will help the facilitator lead the exercise because they include talking points and visual instructions for the process. Facilitators might want to customize a bit for their own situations but should not make any significant changes to the sample deck as it represents ReThink Health’s brand. Please contact ThinkWithUs@ReThinkHealth.org with any questions.
4. The facilitator may want to post the partnership’s vision or value proposition for the region somewhere at the front of the room, clearly visible to all participants, or provide a copy to each participant. There is a placeholder in the slide deck to add the value proposition as well.



Facilitator's Agenda

1. **Seat people in teams of 4-6, but if the full group is small you should adjust to make sure that you have a minimum of 3 teams. Assign teams in advance, if possible, so that each has diverse perspectives from different sectors across the region. Give each team one copy of the Negotiating a Well-Being Portfolio poster and their allotted 20 red dots and 20 blue dots.**
2. **Opening (10 minutes)**
 - a. Welcome
 - b. Review the full group's vision for the region, as well as the current reality and the gap that needs to be closed to achieve that vision
 - c. Review the agenda for the session
 - I. A frame for strategy
 - II. Urgent needs and vital conditions
 - III. Characterizing your region's current portfolio: how are you allocating your efforts now?
 - IV. Characterizing your desired future portfolio for the region: how do you want to allocate your efforts to close the gap and achieve your vision?
 - V. Now what? Implications for your group and next steps to refine your portfolio
3. **A Frame for Strategy: Urgent Needs and Vital Conditions (10 minutes)**
 - a. Using the sample slide deck, explain to the full group the concept of a well-being portfolio and the definitions of urgent needs and vital conditions. Alternately, participants can read the Negotiating a Well-Being Portfolio Summary to orient themselves to the concepts.
4. **PART 1: Characterizing Your Region's Current Portfolio (2-minute introduction; 20 minutes to complete in small groups)**
 - a. Using one Negotiating a Well-Being Portfolio poster per small group, consider where the resources in your region are currently directed. Consider funding, time, and in-kind resources. Include activities outside of your direct control—things done by partnerships or organizations not in the room. This should be a representation of work across your region, not the work of a single organization.
 - b. Using the 20 blue sticky dots, groups should work together to place the blue sticky dots on the poster, distributing the dots across portfolio areas in a way that they agree accurately depicts the current investments in their region. Since each member of the group brings their own perspective, members may need to negotiate with one another to agree on what represents the current distribution of resources across portfolio areas. For that reason, do not stick the dots on until there is general consensus on the region's current portfolio.
5. **Check-in With Large Group (2 minutes)**
 - a. Announce: "It's time to move to Part 2. Is everyone moving along ok? This is not a time to report back, but if anyone has any questions on the process this is a great time to ask."
 - b. Explain Part 2 (using sample slide deck)
6. **PART 2: Characterizing Your Desired Future Portfolio for the Region (30 minutes in small groups)**
 - a. In Part 2, ask groups to determine and report back on:
 - I. What are the priority areas for future investment?
 - II. What is the logic for reallocating resources? Continuing to invest resources?
 - III. What are the implications for this leadership group?



- b. To begin, evenly distribute the red dots to each person in the group. Each person should write their initials on their dots. (Later, when negotiating, only the person who has placed a dot will be able to move it, so it is important that each dot is identified.)
- c. Each team should then repeat the Part 1 exercise for your desired future portfolio.
- d. Ask each person to place (but not stick) their red dots on the poster next to each of the portfolio elements they believe regional resources should be directed toward to achieve the group's aspirations for the region.
- e. As a group, they may then negotiate over placement of the red dots, but only the person who placed a dot may move it.
- f. Once the small group has achieved consensus on the elements, stick the dots to the poster.
- g. This process should lead to conversations that will help each team answer the questions in "a" (above). Ask teams to prepare to present their results to the larger group.
- h. Teams should bring the Negotiating a Well-Being Portfolio posters representing their desired future portfolio to the front of the room.

7. Break (15 minutes)

- a. During the break, the facilitator should use a separate Negotiating a Well-Being Portfolio poster (like the one the small groups are using), to aggregate the counts of red dots from each of the groups in Part 1 and blue dots from Part 2. The goal is to represent the larger group's totals.

8. Debrief (30 minutes)

- a. Share the composite poster and invite participants to identify the implications of this exercise (5 minutes)
 - I. Note the future priorities implied by the compilation of all votes. (Circle the largest groups of dots and note the number of votes.)
 - II. Note differences from current portfolio.
 - III. Note any significant differences across the small groups.
- b. Ask each small group to report on their proposed areas of highest spending/investment in the future and logic for what current practices, policies, and investments should continue and what should change *to close the gap*. (5 mins per group)
- c. OPTIONAL: If there was a great deal of variation across the groups (which is unusual), you can conduct a final poll by giving all participants 4 blue dots, post a clean "pie" and ask all to vote again, having heard all the reports.
- d. Discussion:
 - I. Review key outcomes.
 - II. Conduct a straw poll: Does the composite new portfolio directionally reflect what you want to do to close the gap between your vision and reality?
 - For those who say no, what would need to change?
 - For those who think it is directionally correct but could be improved, how would you change it?
 - III. What are the implications for your leadership?

9. Next Steps and Close (10 minutes)

Negotiating a Well-Being Portfolio

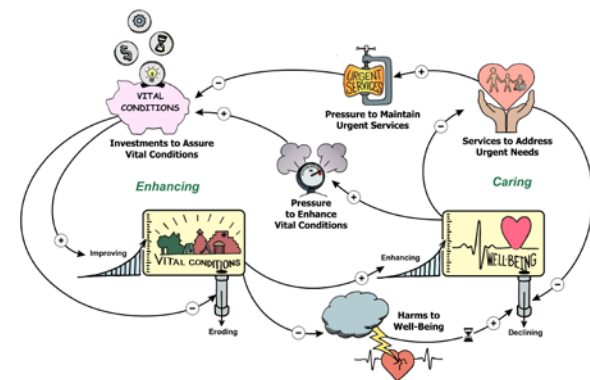
Across the country, thousands of multisector partnerships like yours are working to enhance health and well-being in cities, counties, and other regions. Some of the most ambitious partnerships engage large numbers of residents and other stakeholders, all of whom may work together as legitimate stewards of their common system to steer their regions in a new direction. One of the most pressing—and promising—things you, as a group of stewards, can do is to negotiate an interdependent well-being portfolio. A portfolio becomes interdependent when its parts are designed to work well together through a balanced and impactful set of policies, programs, and practices that stewards implement to transform the system that produces health and well-being in their region.

When diverse stakeholders come together across sectors and backgrounds, it can be difficult to see connections; and it can be even harder to think through how changes in one area of people’s lives may play out to affect other areas over time. **This exercise will help you see the dimensions of your region’s health ecosystem**, including the distinct variables and organizations that depend on and interact with one another to produce health and well-being (see the Dimensions of the Health Ecosystem graphic to the right).

With a wider ecosystem view, you and your colleagues are likely to spot many places to consider introducing new policies, programs, and practices, and to understand the importance of considering how every decision might impact the rest of the system. For example, the diagram on page 7, titled Dynamics of the Health Ecosystem, shows how three complementary dynamics combine to shape the character of the entire ecosystem over time.

- **Dynamic 1, “Enhancing”:** Well-being depends on a consistent set of vital conditions, such as stable housing, healthy food, clean air, and others. If any of those conditions erode, a variety of harms will predictably arise, which in turn will drive the demand for urgent services to restore well-being. Investments that assure vital conditions—e.g., those made toward education, living wages, safer neighborhoods, routine health care, and others—not only enhance well-being, but also to prevent harm and avert the need for costly, often inequitable urgent services.
- **Dynamic 2, “Caring”:** Whenever well-being declines, a powerful caring response kicks in to address urgent needs, such as acute care for illness or injury, food assistance, shelter, addiction treatment, and others. When

Dimensions of the Health Ecosystem

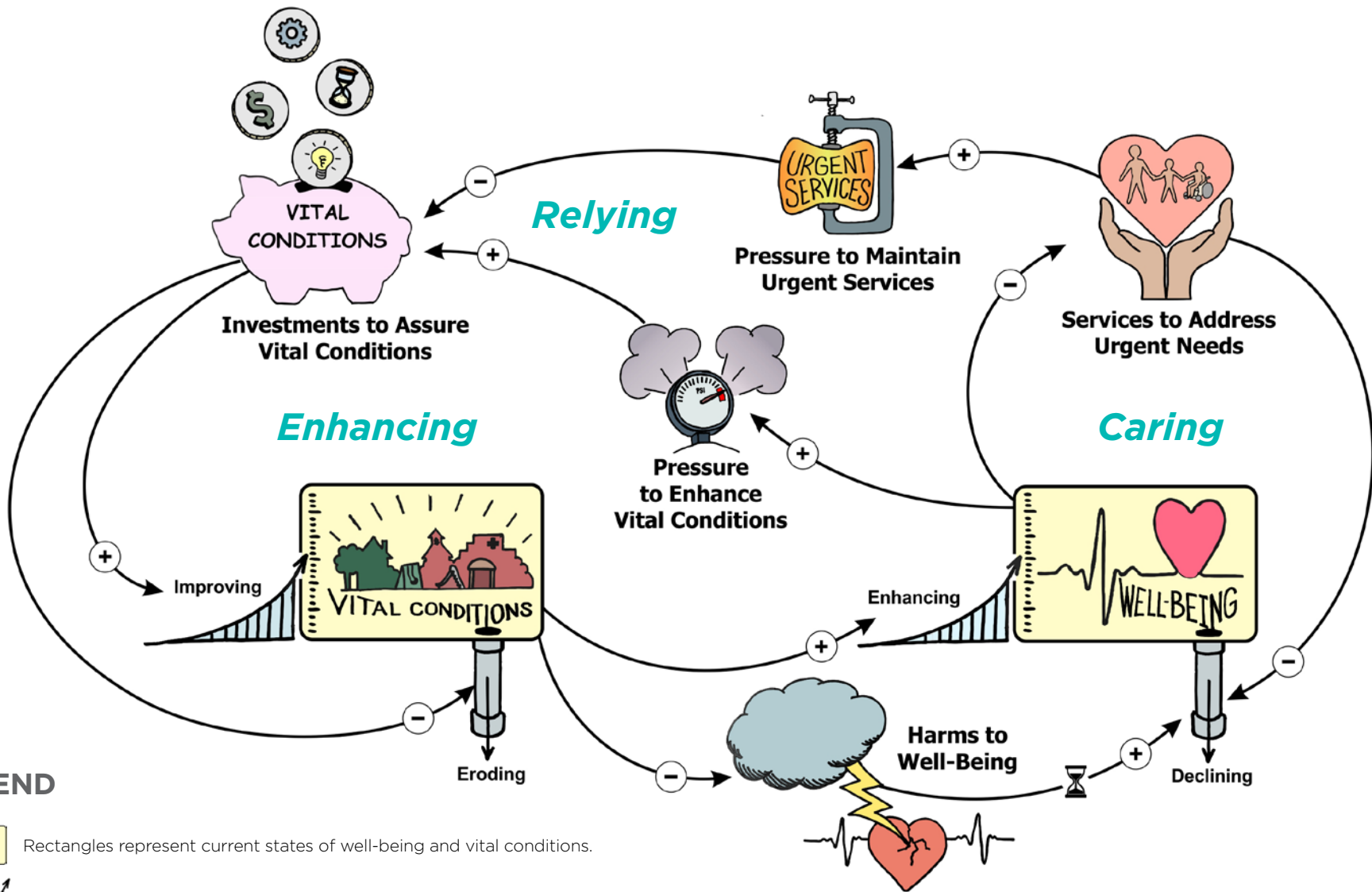


faced with excess demand or resource constraints, each service industry may find ways to improve accessibility, effectiveness, and efficiency.

- **Dynamic 3, “Relying”:** Several competing pressures govern whether there is a greater reliance on delivering urgent services or investing in vital conditions. Both are necessary, and the particular mix depends on how regional leaders contend with pressures that are politically contested and constantly in flux. To break from business as usual, regional leaders working together as system stewards must build a strong sense of belonging and civic muscle—these are special capacities of people and institutions that convey to all a sense of belonging and power to influence the policies, practices, and programs that shape the world. For instance, underinvestment or conscious divestment in vital conditions will generate persistent need for urgent services along with related pressure to maintain them. Conversely, mounting harms and overstretched service industries will amplify pressure to enhance vital conditions.

Understanding and mapping these dynamics of a changing ecosystem may better equip you and others in your region to negotiate an interdependent strategy that will produce more equitable health and well-being over time.

Dynamics of the Health Ecosystem



Definitions of a Well-Being Portfolio

The Portfolio Imperative

Sustaining well-being requires contributions from virtually every quarter of your region's health ecosystem, if only to contend with the sheer variety of massively entangled threats and opportunities. Having a portfolio of interventions is a must. All regions, including yours, already have a portfolio of interventions in play—whether acknowledged or not. Your portfolio is enshrined in the way resources flow and is animated by prevailing ideas about what ought to be done, by whom, with whom, for whom, and in what amounts. The question is: what portfolio of vital conditions and urgent services should make up much of the investment (of time, money, and other resources) to yield better results over time?

Negotiating Priorities

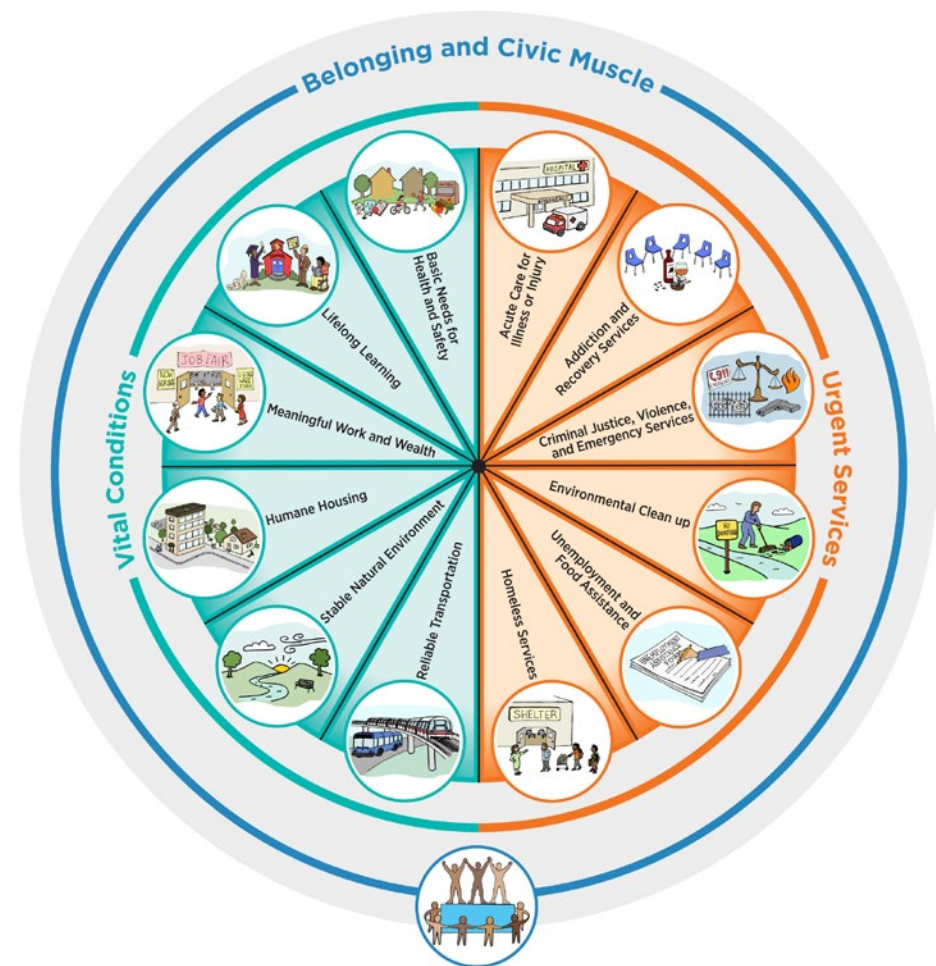
Even if stakeholders in your region agree on common ends, they may disagree—sometimes forcefully—about the best means. This creates a need to negotiate priorities.

System stewards with a wide-angle view of the whole ecosystem know that a sound portfolio of interventions must maintain a delicate mix of investments to assure vital conditions, to address urgent needs, as well as to strengthen belonging and civic muscle. This exercise will help you begin to think through the many potential combinations that could make up the portfolio of interventions that will achieve a shared vision for your region, including the positive and negative consequences that could be realized from each.

Below is summary of potential strategy options, for potential inclusion in a Well-Being Portfolio.

Portfolio Elements

Investments in Vital Conditions, Urgent Services, & Belonging and Civic Muscle





Investments to Assure Vital Conditions

Properties of places and institutions that all people need all the time to be healthy and well



Basic Needs for Health and Safety

Basic requirements for health and safety

- Adequate air and water
- Nutritious food
- Routine physical activity
- Sufficient sleep
- Safe, satisfying sexuality and reproduction
- Freedom from crime, injury, violence, traumatic stress, and addiction
- Routine health care (physical and mental)



Lifelong Learning

Continuous learning, education, and literacy

- Cognitive, social, and emotional abilities
- Early childhood experiences
- Elementary and high school
- Higher education
- Career and adult education



Meaningful Work and Wealth

Rewarding work, careers, and standards of living

- Job training/retraining
- Well-paying, fulfilling jobs
- Family and community wealth
- Savings and limited debt

Services to Address Urgent Needs

Services that anyone under adversity may need temporarily to regain or restore health and well-being



Acute Care for Illness or Injury

Acute and post-acute care for physical and mental illness

- Emergency medical services
- Acute hospitalization
- Trauma-informed care



Addiction and Recovery Services

Services to address mental health and recovery needs

- Behavioral health care
- Substance abuse treatment and support
- Inpatient and outpatient services for substance abuse and mental illness



Criminal Justice, Violence, and Emergencies

Efforts to maintain public safety and fairly adjudicate violations of the law

- Police and fire departments
- First response teams (e.g., 911 dispatch, suicide hot lines, poison control)
- The criminal justice system



Investments to Assure Vital Conditions

Properties of places and institutions that all people need all the time to be healthy and well



Humane Housing

Humane, consistent housing

- Adequate space per person
- Safe structure
- Affordable costs
- Diverse neighborhood (without gentrification, segregation, and concentrated poverty)
- Close to work, school, food, and recreation/nature



Stable Natural Environment

Sustainable natural resources and freedom from climate hazards

- Clean air, water, and soil
- Natural spaces
- Freedom from extreme heat, flooding, wind, radiation, and earthquakes



Reliable Transportation

Reliable, safe, and accessible transportation

- Close to work, school, food, and leisure
- Safe transport
- Active transport
- Efficient energy use
- Few environmental hazards

Services to Address Urgent Needs

Services that anyone under adversity may need temporarily to regain or restore health and well-being



Homeless Services

Short-term housing for people experiencing homelessness

- Emergency shelters



Environmental Clean-Up

Efforts to clean up hazards in air, water, soil, homes, workplaces, and communities

- Lead abatement
- Water treatment
- Brownfield decontamination



Unemployment and Food Assistance

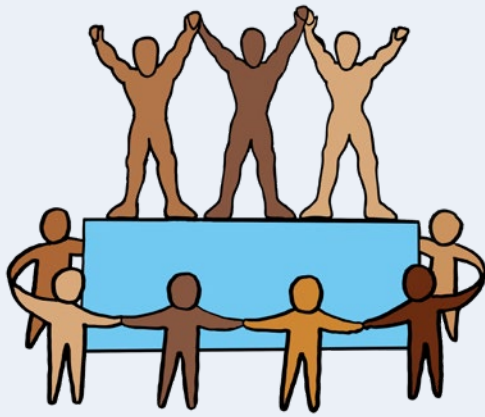
Assistance for those who are disadvantaged, out of work, or disabled

- Federally supported programs for disadvantaged families (TANF, SNAP, WIC)
- Food banks
- Energy assistance
- Childcare assistance



Efforts to Strengthen Belonging and Civic Muscle

Special capacities of people and institutions that convey to all a sense of belonging and power to influence the policies, practices, and programs that shape the world



Efforts that strengthen belonging and civic muscle include

- Arts, culture, and spiritual life
- Social support
- Freedom from stigma, discrimination, and oppression
- Support for civil rights, human rights
- Civic agency, engagement (voting, volunteering, public work)
- Collective efficacy
- Nonprofit organizations
- Civic science
- Transparency
- Communications, information technology, and social networking
- Politics and partisan discourse

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