COMMUNITY & CANCER SCIENCE NETWORK

TOOLKIT

Community & Cancer Science Network

Evaluation+

7.23.2025

ACKNOWLEDGEMENTS

This toolkit would not exist without the contributions of countless individuals and organizations who have helped shape, test, and refine the CCSN transdisciplinary approach. We recognize the dedication of our community and academic Co-Principal Investigators, design team members and partners whose creativity and courage brought this work to life and have sustained this effort through deep relationships and shared learning. Special thanks to the original study team and the very first design team who took on the ambitious charge of addressing disparities through community-academic partnership. Their foundational work planted the seeds for all that followed. Thank you for believing in the possibility of doing things differently and doing them together.

This toolkit was partially funded through Advancing a Healthier Wisconsin Endowment, a Patient- Centered Outcomes Research Institute® (PCORI®) Eugene Washington PCORI Engagement Award (#25591) and the Greater Milwaukee Foundation.

The Advancing a Healthier Wisconsin Endowment (AHW) is a statewide health improvement philanthropy propelling promising work and ideas in health research, health care education, and community health initiatives to improve health equity in Wisconsin today, and for generations to come. Established by the Medical College of Wisconsin to steward a generous gift from Blue Cross & Blue Shiel United of Wisconsin, AHW has invested more than $275 million in healthy 475 projects since 2004.

The Patient-Centered Outcomes Research Institute® (PCORI®) is an independent, nonprofit organization authorized by federal law in 2010. Its mission is to fund research that will provide patients, their caregivers, and clinicians with the evidence-based information needed to make better informed healthcare decisions. PCORI is committed to continually seeking input from a broad range of stakeholders to guide its work.

The Greater Milwaukee Foundation is Wisconsin's largest community foundation and was among the first established in the world. For more than a century, the Foundation has been at the heart of the civic community, helping donors achieve the greatest philanthropic impact, elevating the work of changemakers across neighborhoods, and bringing people and organizations together to help our region thrive. Racial equity is the Foundation's North Star, guiding its investments and strategies for social and economic change. Leveraging generations of community knowledge, cross-sector partnerships and more than $1 billion in financial assets, the Foundation is committed to reimagining philanthropy, catalyzing systems change, convening and following community voice, and building inclusive culture to transform our region into a Milwaukee for all.

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INTRODUCTION

This toolkit was developed with and for teams engaged in the Community and Cancer Science Network (CCSN), a transdisciplinary initiative working to reduce cancer disparities in Wisconsin. It reflects the lessons, tools, and practices used across CCSN's projects that bring together researchers, clinicians, community leaders, survivors, co-survivors, and advocates to co-create effective sustainable solutions to cancer disparities. The work is grounded in a shared belief that complex problems require not only cross-sector collaboration, but also a deep commitment to equitable practice, humility, and systems thinking.

The toolkit is organized to reflect the core elements of CCSN's approach. It begins with background on the network and how we define our transdisciplinary model. It then explores how we convene diverse teams and build the relationships that make sustained collaboration possible. The heart of the toolkit focuses on the three dynamic stages of our work: (1) Incubate, (2) Innovate, and (3) Implement. These three stages of the approach are iterative, overlapping, and grounded in shared learning. Each phase includes goals, tools, and examples to support teams as they move from shared understanding to testable action. This is not a linear process. Teams may cycle through each stage more than once, and the practices described here are meant to support adaptive, resilient and evolving collaborations—not rigid ones.

This toolkit is part field guide, part invitation. It is packed with lessons learned the hard way and insights still unfolding. It's for anyone ready to shake up the status quo and build systems change from the ground up, with equity, curiosity, and collaboration leading the charge.

BACKGROUND

In 2016, Advancing a Healthier Wisconsin Endowment (AHW) sought to bring together the two sides of its Endowment – one side which funds research and education and the other that funds community-public health efforts – using a community-academic partnership model. What began as a planning and design process supported by root cause analysis, geographic mapping, and cross-disciplinary engagement, quickly evolved into something more. The work of building this initiative revealed a deeper need: not just for new ideas to address cancer disparities, but for new ways of working together to solve entrenched, complex problems. The collaborative methods, tools, and relationships built in the formative stages of our work became the foundation for what is now the CCSN transdisciplinary approach.

CCSN started with three pilot projects to develop and test its model. Today, CCSN has grown to encompass six transdisciplinary projects led by community and academic co-leaders and a network of more than 150 researchers, health care providers, and community leaders. Each project team is supported by a facilitator and developmental evaluator. Together this team integrates learning in real-time to inform the transdisciplinary team's innovation work as it advances towards community action and research agendas.

At the level of community, CCSN offers an approach to co-create localized cancer prevention and care solutions that truly reflect community needs. Rooted in its principles, CCSN ensures that the knowledge, support, and programs developed are not only scientifically advanced but also grounded in community experiences and values. Through CCSN, community members step into power with access to trusted relationships and resources that amplify their vision. Together, they shape solutions that reflect their realities and reimagine what health looks like on their own terms. For academic medicine, CCSN offers a groundbreaking model for integrating cutting-edge cancer research with community wisdom, community-driven insights, and strong, community-centered partnerships. By fostering transdisciplinary collaboration guided by our principles, CCSN enables medical researchers and educators to redefine what's possible in academic medicine, building new fields of inquiry grounded in trust, relevance, and equity. It accelerates real-world cancer solutions while reshaping the role of research in communities most impacted by disparities.

UNDERSTANDING OUR APPROACH

The Community and Cancer Science Network (CCSN) in Wisconsin transforms cancer prevention and care by uniting scientific advancement with social change guided by principles of deep equity, systems-thinking and integration of expertise from biology to policy. Bringing together researchers, clinicians, and community leaders, CCSN fosters equitable partnerships and continuous feedback loops that integrate lived experiences with scientific innovation. This transdisciplinary approach not only generates knowledge and solutions to address cancer disparities but also builds enduring relationships that evolve with changing needs.

Our approach includes three iterative stages:

INCUBATE	Co-learning to build trust and knowledge, and integrate diverse perspectives
INNOVATE	Use learnings to develop and prototype potential solutions
IMPLEMENT	Execute scalable and sustainable solutions.

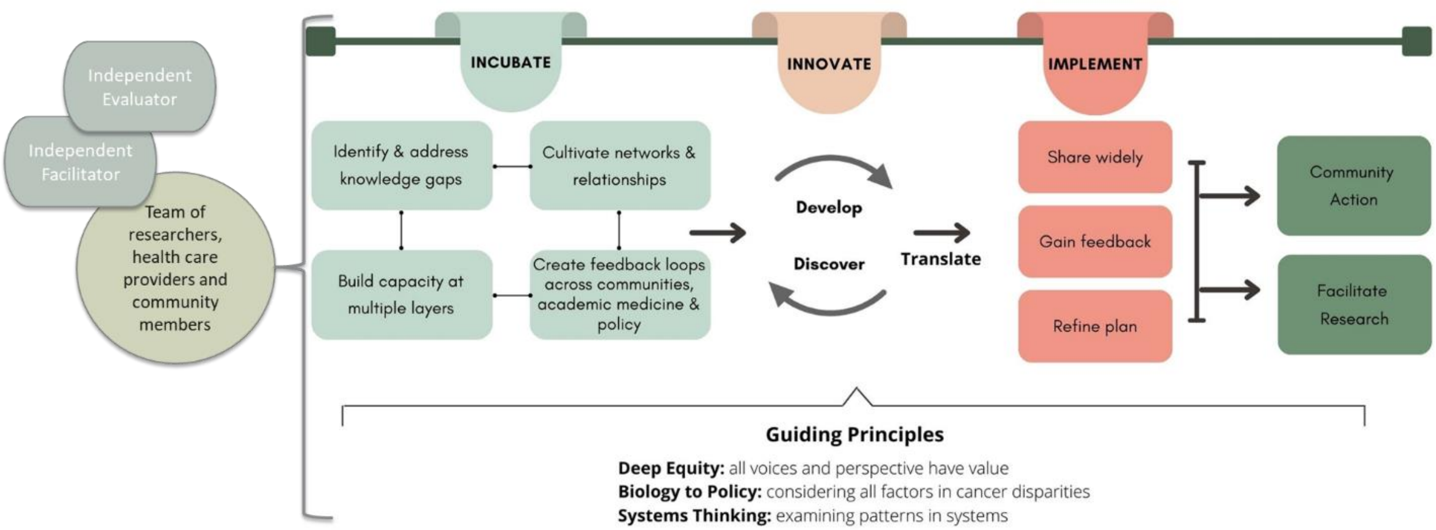


Figure 1: Community and Cancer Science Transdisciplinary Model to Address Cancer Disparities

This section unpacks the CCSN model and provides deeper background on its core components:

- The CCSN Core Principles
- The Basics of Transdisciplinary Science
- The Basics of Developmental Evaluation

The CCSN Core Principles: What Grounds Our Approach

At CCSN, we believe the *how* of our work matters just as much as the *what*. Addressing cancer disparities in meaningful, lasting ways requires more than crossing disciplines. It demands a deeper commitment to shared values, shared responsibility, and shared transformation. While many transdisciplinary efforts emphasize integration across fields, CCSN's model is anchored in three core principles that shape every phase of the work and guide how teams collaborate, learn, and innovate.

These principles are not theoretical. They show up in practice. They influence who's in the room, how decisions get made, how learning happens, and how solutions take shape. They are:

DEEP EQUITY

INTEGRATION FROM BIOLOGY TO POLICY

SYSTEMS THINKING

Each of these principles helps teams move beyond surface-level collaboration and toward something more powerful: *shared transformation grounded in trust, curiosity, and a commitment to change*.

DEEP EQUITY

What It Means: CCSN draws from Change Elemental's definition of deep equity and expands it to include equity across race, geography, identity, power, and knowledge systems. Deep equity is not limited to the outcome we seek. Rather, it is the means *and* the end—not just what we do, but how we do it. Deep equity requires more than inclusive participation; it calls on teams to examine and challenge entrenched ways of working and being—individually, interpersonally, and institutionally.

What You Might See in a Transdisciplinary Team:

- Co-leadership with fair compensation between community and academic partners.
- Regular reflection on power dynamics, including facilitation and decision-making structures.
- Diverse forms of knowledge (scientific, lived, professional) given weight in discussions.
- Willingness to shift direction when community input or lived experience signals a need.
- Creating space for more inclusive collaboration by rethinking habits that prioritize speed, control, or output over trust, relevance, and shared meaning.

> DEEP EQUITY IS THE WORK TOWARDS LOVE, DIGNITY, AND JUSTICE THAT REQUIRES ADDRESSING MULTIPLE STRUCTURAL, INSTITUTIONAL, INTERPERSONAL, AND INDIVIDUAL CAUSES OF INEQUITY (BOTH HISTORIC AND CURRENT), AND RECOGNIZES THE SOCIAL CONSTRUCTION OF IDENTITY, POWER, AND PRIVILEGE OVER TIME.
>
> – CHANGE ELEMENTAL

INTEGRATION FROM BIOLOGY TO POLICY

What It Means: Disparities in cancer outcomes don't come from one source. They stem from biological, clinical, social, economic, and policy-level systems. CCSN's approach encourages teams to move beyond disciplinary silos and traditional power structures, drawing on the best of each field while remaining open to transforming those fields beyond the current assumptions and limitations that make up those fields and hold disparities in place. Taking a broad view to understanding cancer disparities ensures that solutions address multiple factors that contribute to problems, rather than working from an incomplete picture.

What You Might See in a Transdisciplinary Team:

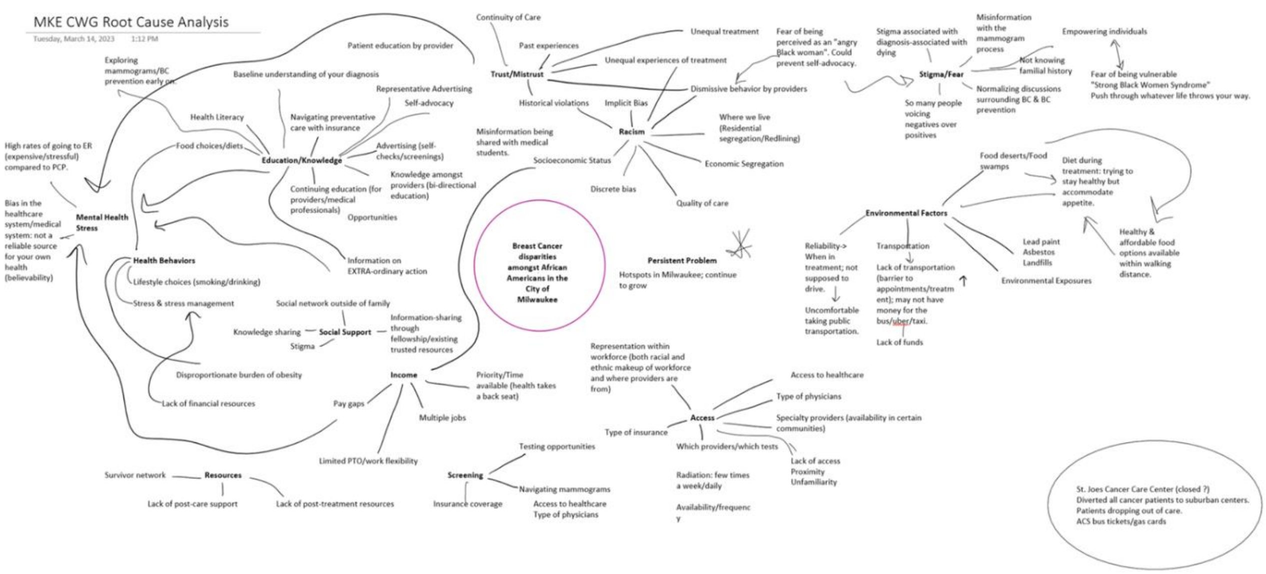
- Researchers, clinicians, and community members co-analyzing data across domains.
- Mapping tools or journey narratives that capture factors from cell biology, to care access, to policy implementation.
- New research questions or program designs that include both new scientific questions and methods, and community-level interventions.
- Respectful inquiry across disciplines to explore connections and challenge blind spots.

SYSTEMS THINKING

What It Means: Cancer disparities are symptoms of deeper, interconnected systems. Systems thinking helps teams identify root causes, leverage points, and unintended consequences of current ways of working. It looks not just within one sector, but across policies, institutions, and community conditions. It also encourages teams to look for patterns over time, across geographies, and within relationships.

What You Might See in a Transdisciplinary Team:

- Use of Root Cause Analysis, causal loops, or visual mapping to explore systems.
- Curiosity about how small changes might shift larger dynamics.
- Avoidance of single-issue solutions in favor of layered, adaptive strategies.
- Returning to earlier questions or rethinking an approach based on new understanding.



“IF YOU WANT TO FIX SOMETHING YOU ARE FIRST OBLIGED TO UNDERSTAND THE WHOLE SYSTEM.”

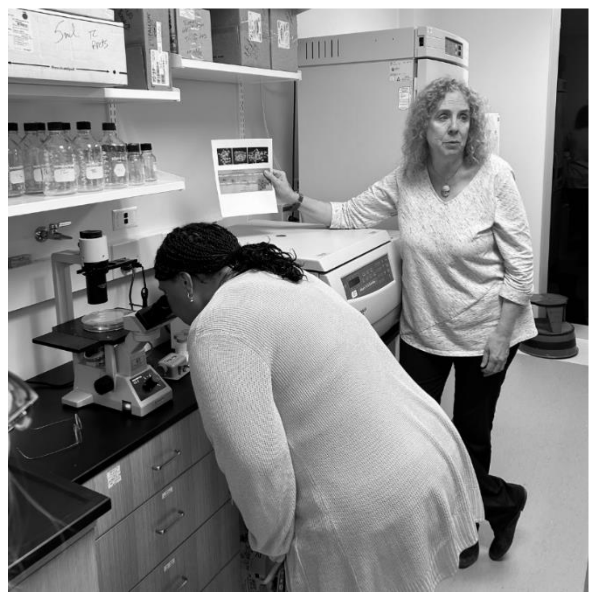
-LEWIS THOMAS

These principles work together to create the conditions where true transformation and collaboration can thrive. When practiced intentionally, they help teams not just respond to disparities but reshape the systems that create and sustain them.

In addition to our core principles, CCSN relies on two complimentary approaches –transdisciplinary team-based research and developmental evaluation—to nurture innovations and adaptations that will transform how we understand and address cancer disparities. One from the field of utilization-focused or applied evaluation and one from the field of academic research. Within their respective fields, each has evolved as a challenge to traditional practice.

The Basics of Transdisciplinary Team-Based Research

The transdisciplinary approach used in CCSN involves integrating knowledge and methods from multiple fields (like medical research, social sciences, public health, community advocacy, and patient care) to create a holistic view of cancer prevention and treatment. This approach goes beyond simply collaborating across disciplines; it actively combines insights and expertise from community leaders, academic medicine, and other professional disciplines to address complex cancer-related issues in ways that are more meaningful and sustainable.



The CCSN model is an adaptation of Hall et al's Four-Phase Model of Transdisciplinary Team-Based Research[1]. The CCSN transdisciplinary approach emphasizes:

1. **Cross-Field Collaboration**: Experts from affected communities, cancer biology, public health, social work, behavioral sciences, and policy work together, sharing insights that lead to local solutions tailored to community needs.
2. **Shared Leadership:** CCSN brings community wisdom and scientific expertise into active partnership as opposed to competing forces. Community members, patients, and advocates aren't just passive recipients of care or information; they're active contributors, compensated for their expertise to help shape research agendas and strategies. Academic medicine continues to play a vital role, but with an openness to shared power and the recognition that leadership development is needed on both sides to sustain authentic, equitable collaboration.

[1] Hall, K.L., Vogel, A.L., Stipelman, B.A., & Stokols, D. (2012). A four-phase model of transdisciplinary team-based research: Goals, team processes, and strategies. Translational Behavioral Medicine, 2(4), 415-430. Translational Behavioral Medicine (TBM).

3. **Mutual Learning and Adaptation:** Scientists and practitioners engage in reciprocal learning with the community, adapting research and interventions to reflect cultural, socioeconomic, and logistical realities as they integrate new knowledge and transform fields. This results in approaches that are more accessible, sustainable, effective, and better supported.

4. **Locally Responsible Solutions:** By valuing every participant's perspective, the CCSN model fosters strategies that are not only scientifically sound but also culturally relevant and accessible, where they are needed most. Because they are developed with community leaders in their communities, they are hyper-localized and sustainable.

This model of transdisciplinary collaboration is especially valuable because it not only focuses on the biological and clinical aspects of cancer but also on the social, environmental, and behavioral factors that contribute to disparities in cancer care and outcomes.

The Basics of Developmental Evaluation

Traditional evaluation helps answer known questions. Developmental Evaluation (DE) helps teams ask better questions when the answers (and sometimes even the problems!) are still emerging. While CCSN efforts incorporate elements of summative evaluation, formative evaluation, quality improvement, and implementation science, DE plays a unique role in supporting the transdisciplinary design. Developmental Evaluation provides a structured yet flexible approach for learning in real time, particularly when the path forward is uncertain or evolving. It helps teams design, test, and refine new strategies by creating space for reflection, feedback, and adaptation throughout the life of a project, program, or policy initiative.

TYPES OF EVALUATION

In systems-level and community-centered work, different types of evaluation serve different purposes. No single approach works for everything—so it's helpful to understand how each contributes to learning, improvement, and decision-making.

Summative Evaluation

Assesses the overall impact or effectiveness of a program after it's been implemented. Often used to determine if goals were met or to support funding and policy decisions.

"Did it work?"

Formative Evaluation

Provides feedback during the early design or development of a program. Helps shape the approach before full-scale implementation.

"How can we make this stronger before we launch?"

Quality Improvement (QI)

Focuses on making small, rapid changes to improve processes, services, or outcomes—often within healthcare or organizational systems.

"How do we make this work better in real time?"

Implementation Science

Studies how interventions are adopted, adapted, and sustained in real-world settings. Emphasizes fidelity, reach, and barriers to success.

"How do we effectively put evidence into practice?"

Developmental Evaluation (DE)

Supports innovation in complex and evolving environments. DE focuses on real-time learning, adaptation, and reflection as programs or strategies take shape.

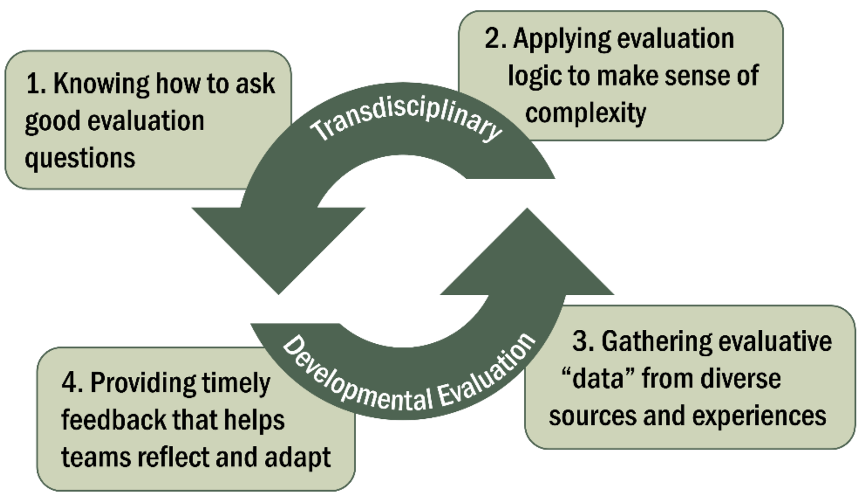
"What are we learning as we build—and how should that shape what comes next?"

Michael Quinn Patton (2010) describes DE as a way of thinking and acting strategically in complex environments[2]. It maps relationships, patterns, and underlying assumptions to help teams understand why and how change happens, and what conditions must shift to create new possibilities. In CCSN, we use DE as an iterative learning cycle that includes identifying where learning is needed, deciding how best to learn, generating insights, prototyping and testing ideas, observing, reflecting, improving, and sharing what's been learned.

Developmental Evaluation doesn't replace other types of evaluation. It complements them. While summative and formative evaluation answer important questions about process and effectiveness of solutions, DE is especially useful when the path forward is uncertain, the environment is shifting, or the goal is to support innovation. In CCSN, DE helps teams make sense of complexity as it unfolds by providing insight and structure without locking the work into rigid plans too early.

How DE and Transdisciplinary Approaches Work Together

Developmental Evaluation and transdisciplinary collaboration are mutually reinforcing. Both are designed for work that is complex, evolving, and grounded in relationships. In CCSN, we use DE as an iterative process that supports transdisciplinary teams by building four core capabilities:



DE offers the structure for learning in motion, helping teams pause, question, and adjust without losing momentum. At the same time, transdisciplinary collaboration brings the kind of cross-boundary insight and creativity that make DE meaningful. Together, they support a way of working that is responsive, generative, and grounded in shared discovery.

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[2] Patton, M. Q. (2010) Developmental Evaluation. Applying Complexity Concepts to Enhance Innovation and Use. Guilford Press, New York. Retrieved via https://www.guilford.com/books/Developmental-Evaluation/Michael-Quinn-Patton/9781606238721

Table 1: How Developmental Evaluation and Transdisciplinary Approaches Work Together

Developmental Evaluation (Evaluation Practice)	Transdisciplinary Approach (Research Practice)	How They Overlap & Strengthen Each Other
Designed for complexity and adaptation	Designed for integration across disciplines and sectors	Both support innovation in complex, uncertain environments
Emphasizes learning over time, even when outcomes are not yet defined	Emphasizes mutual learning and adaptation among scientists, community members, and practitioners	Shared focus on iterative, reflective practice that embraces uncertainty
Uses mapping (relationships, systems, assumptions) to generate understanding of problems and potential solutions	Uses collaborative insight-building to understand and act on systemic contributors to cancer disparities	Together, they illuminate hidden patterns and challenge siloed thinking
Centers strategic learning within the context of change	Centers co-learning and shared understanding across disciplinary and community lines	Enable teams to co-create dynamic solutions grounded in context
Evaluator is part of the team working closely with facilitators to support sensemaking and decision-making in real time	Team members are learners and contributors, not just experts	Both blur traditional boundaries between evaluator and practitioner, researcher and community and open the door to transforming their own fields
Flexible and responsive evaluators help modify strategies as new data and insights emerge	Transdisciplinary teams shift research and social agendas as new knowledge, lived experience, and priorities emerge	Encourage ongoing course correction and responsiveness to emerging needs
Values diverse data sources, both qualitative and quantitative	Values diverse types of knowledge including academic, professional, and lived	Create a richer evidence base for action by drawing from multiple ways of knowing

CONVENING A DESIGN TEAM

At the heart of CCSN's transdisciplinary approach to addressing cancer disparities is a strong, well-constructed design team. A CCSN design team brings together diverse expertise, lived experience, and bold thinking to create systems-level change. Design teams are the engines of early-stage innovation in CCSN. By working closely across roles and experiences, they surface patterns others might miss and test new ways of thinking that blend science, lived experience, and local insight. Their work not only seeds potential solutions but also shifts how each discipline approaches complex problems, creating ripple effects beyond the team itself.

Leadership Structure

Each design team is anchored by a Leadership Team, typically consisting of:

Co-Leads/PIs (Community and Academic): Each team is co-led by a community leader and an academic partner who shares responsibility for guiding the work, shaping priorities, and ensuring the process reflects both lived experience and research expertise. Their partnership models the cross-boundary collaboration at the heart of CCSN. Co-PIs work together to craft funding proposals to support the project design work.

Facilitator: The facilitator creates conditions for inclusive, trust-based collaboration, holding space for diverse perspectives, supporting generative dialogue, and helping the group stay grounded in its shared purpose. (Appendix A)

Developmental Evaluator: The evaluator brings a learning lens to the work, helping the team ask meaningful questions, reflect on what's emerging, and adapt strategies as needed. Their role supports real-time insight, accountability, and continuous growth. (Appendix A)

The Leadership Team uses a collaborative leadership approach that situates everyone equally, and leaders do not "control" a group but rather guide the process(Shu and Wang 2021)[3].

Core responsibilities across the Leadership Team include:

- Coordinating the design process
- Modeling the values and behaviors of a transdisciplinary approach
- Managing project resources (human and financial) and ensuring fair distribution throughout the project
- Leveraging their networks and capacities to ensure the project is a success

A neutral facilitator and evaluator work side-by-side to create a learning environment that supports the CCSN approach and ensures its principles are infused throughout the process. While Co-Leads have a role in modeling the approach, the facilitator-evaluator pair are the team ensuring that the design team stays aligned with the project goals and has the tools they need to get transdisciplinary results.

TIP

We've found that some of our most effective Co-PIs come from fields like basic science and lab-based research or people who may not have prior experience in community-based or population health work, but who bring a fresh openness to transdisciplinary collaboration. What matters most isn't the discipline someone comes from, but how they show up. Critical are characteristics like humility, natural curiosity, and a comfort with ambiguity. These qualities allow Co-PIs to stay open to new ideas and nimble enough to follow the unanticipated directions that complex projects often take.

Team Composition

Design teams typically consist of 8–12 members who represent a mix across the biology-to-policy spectrum and across community and academic sectors. Ideal teams include:

- Community Champions with lived experience of the disparities being addressed
- Academic Medicine representatives
- Experts from fields like
  - Public Health
  - Technology
  - Communications & Marketing
  - Environmental Health
  - Industry
  - Philanthropy
  - Policy
  - Program Design
  - Service Delivery
  - Systems Design

Geographic representation may also be important, depending on your focus area.

To build your team, use CCSN's adapted MoSCoW method (Must have, Should Have, Could have, Wish/Won't have) to identify and prioritize potential members, ensuring balance across disciplines, identities, and perspectives. (Appendix B)

[3] Shu Q, Wang Y. Collaborative Leadership, Collective Action, and Community Governance against Public Health Crises under Uncertainty: A Case Study of the Quanjingwan Community in China. Int J Environ Res Public Health. 2021 Jan 12;18(2):598. doi: 10.3390/ijerph18020598. PMID: 33445697; PMCID: PMC7828130.

Core Qualities of Great Team Members

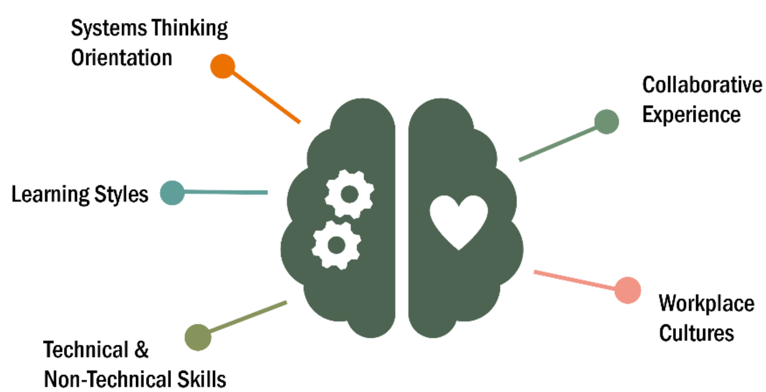
When selecting members, prioritize mindsets and interpersonal skills as much as technical expertise:

Blending Your Team

Aim for a rich mix of perspectives, including differences in systems thinking orientation, collaborative experience, learning styles, workplace cultures, and technical and non-technical skills

Encourage leaders to look beyond their known networks to find new voices and talents. A team's strength often comes from its diversity and the intersectionality of its members' identities and experiences.

Transdisciplinary teams will evolve because this is a living process, not a fixed formula. People's availability may shift, priorities can change, and sometimes you realize the team is missing key skills or perspectives you didn't know you'd need at the start. That's not failure. It's learning in motion! In CCSN, we see every member as both expert and learner, and we expect that as insights deepen, the team may need to stretch beyond its original boundaries. Tapping into new fields, voices, or partners is not only acceptable, it's often essential. Not everyone needs to be at the table from day one to make a meaningful contribution to the journey.



Recruitment Tips

Team participation requires a significant time commitment—design teams typically meet once or twice a month over a period of 18 to 24 months. At the start of the process, some of the people with the skills, relationships, or perspectives you need most may not be able to make that commitment. To plan, recruit more members than you think you'll need to allow for natural attrition over time.

Modeling from the start is key. So is setting the tone before the team ever meets. Onboarding to a transdisciplinary approach begins at recruitment. We've learned that if it's not absolutely clear how people are being invited to show up (and that this is a very different way of working), people quickly default to old patterns of collaboration. When that happens it can disrupt trust, stall innovation, and reinforce the very silos we're trying to break down. This doesn't mean we exclude people who are new to the work. It means we're looking for people who are ready and willing to lean into something that might feel unfamiliar or even uncomfortable at first.

TIP

When recruiting:

- Emphasize the shared goal of impactful change
- Clarify the time commitment
- Make it clear that members are expected to bring both expertise and a learner's mindset
- Set expectations for ambiguity and experimentation
- Share stories from past design teams, and—when possible—recruit returning members to mentor or coach

We look for a mix of thinking styles, lived experience, and expertise, but also for openness, curiosity, and humility. The recruitment process itself should reflect the values of the work: transparent, welcoming, and honest about what's being asked. Sharing stories from past design teams helps bring the process to life, and when possible, we bring returning members in as mentors or coaches to model the culture we're building. The goal isn't perfection. It's alignment, shared expectations, and a team that's prepared to learn and grow together.

TIP

Use the following questions and table during team formation or early-stage meetings to prompt discussion:

- *What do I bring to this work that's not on my resume?*
- *What do others see in me that I might overlook?*
- *What assumptions are we making about each other's roles?*

Group	Often expected to contribute...	Can also offer...
Researchers	• Data analysis • Literature review • Study design	• Systems thinking and strategy • Facilitation and synthesis skills • Curiosity and a willingness to learn from others • Cross-sector connections • Creative thinking beyond academic boundaries
Health Care Providers	• Clinical expertise • Knowledge of patient care • Referral pathways	• Firsthand insight into how systems impact patients and staff • Stories that humanize data • Leadership in shifting institutional culture • Empathy and advocacy skills • Deep community relationships often built over time
Community Leaders (including those with lived experience)	• Community context and needs • Barriers to care • Cultural insight	• Strategic thinking grounded in lived systems experience • Relationship-building and trust networks • Innovation born from necessity • Creative communication (storytelling, art, media) • Leadership that models resilience, adaptability, and integrity

Inclusive Selection Process

Transdisciplinary experience is not a requirement. In fact, many excellent contributors learn on the job.

Consider using a short application or informal interview. This step supports relationship-building and allows people to self-select into the process.

Sample Questions:

1. Why are you interested in joining a transdisciplinary design team focused on [topic]?
2. What skills and experiences would you bring to the team?
3. Are you able to commit to the following time frame?
4. What resources would support your participation?
5. Is there anything else you'd like to share with us?

Deepening Relationships: The Heart of Collaboration

Transdisciplinary collaboration is inherently messy. It can feel uncomfortable, be hard to explain, and at times even be discouraging. Strong relationships allow a team to hold that messiness. They create the safety needed to navigate conflict, sit with uncertainty, be accountable, adapt, and continue moving forward. Without trust, transdisciplinary work struggles to survive.

The pace at which we move through the different CCSN stages depends on the strength of relationships built across the team. At CCSN, what sets our approach apart is the deliberate attention we give to fostering trust, empathy, and mutual respect from the very beginning.

Early in process, we intentionally reserve significant time in meetings for building relationships. Often, about 20 minutes of a 60- to 90-minute agenda is set aside for warm-up and wind-down activities. Through them, team members come to see one another not just as experts, patients, or advocates, but as people they can trust and respect. In CCSN, this is paid, intentional, and essential work. It's one of the ways we challenge dominant norms that prioritize speed, hierarchy, and detachment over connection, care, and cultural relevance. Trust-building isn't a break from the real work. It's how the real work happens!

We know relationships are growing stronger when we witness genuine trust and empathy. Laughter becomes part of the rhythm of meetings, difficult conversations are handled with care, and members show up for each other beyond the formal structure of the design team. It's where our deep equity principle really comes to life.

IN CCSN, WE BELIEVE REAL SOLUTIONS GROW WHEN RESEARCH, PRACTICE, COMMUNITY WISDOM, AND LIVED EXPERIENCE MEET EACH OTHER WITH CURIOSITY AND RESPECT.

Relationship-building is not a single milestone; it requires ongoing care, especially as the work progresses, team members come and go, and dynamics change. Throughout all the stages, evaluators, facilitators, and Co-PIs debrief regularly, reflecting on group dynamics and adjusting as needed. We track attendance not to enforce compliance, but as a way of noticing shifts in engagement that may signal a need to reconnect.

We also weave practical tools into the process to support relationship-building:

- **Collaboration and Workstyle Tools:** Early assessments allow participants to share their experiences with collaboration, their personal workstyles, and the organizational cultures they bring into the group. These tools foster understanding and empathy across different ways of working. (Appendix C)
- **One-on-One Outreach:** When tensions arise or someone's presence fades, we reach out individually or in small groups to listen, check in, and reweave connection.
- **Meeting Debrief Reflections:** Quick reflections after meetings help identify emerging dynamics and celebrate successes in collaboration. (Appendix C)

SIGNS OF STRONG RELATIONSHIPS IN YOUR DESIGN TEAM

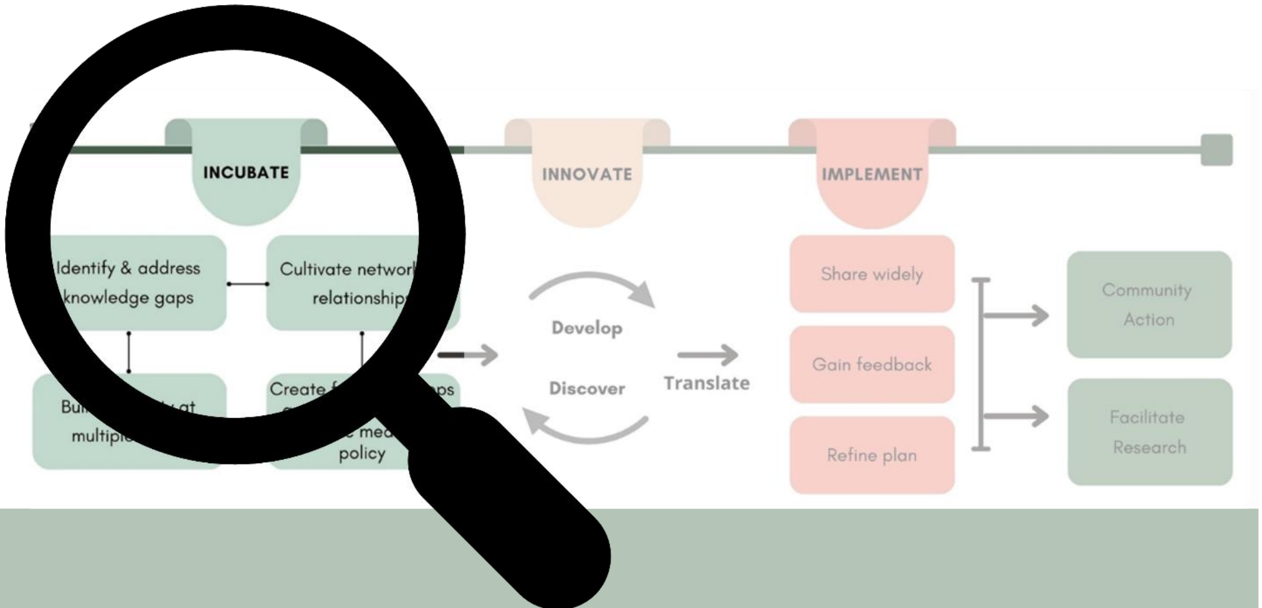
- Team members return after long absences and feel welcomed.
- Laughter is part of your regular meeting rhythm.
- People check in on each other outside of meetings.
- Side collaborations begin to emerge naturally.
- Group members feel safe sharing disagreement or vulnerability.
- There's space for joy, frustration, and even tears.
- People express care, curiosity, and respect — across roles and identities.

We believe that personal relationships are not a risk to good work. They are the reason good work happens. Strong relationships are not just measurable. They are visible and deeply felt. You know a design team's relationships are flourishing when members feel safe rejoining after absences, when side collaborations emerge naturally, and when both laughter and tears are welcome.

While much of the CCSN work can happen virtually, occasional in-person gatherings are vital. Informal, joyful time together recharges the team, strengthens bonds, and renews the collective commitment to reimagining systems and ending disparities. Whether held in a community space or a science lab, these gatherings reinforce the value of every partner's wisdom and signal that all settings, and voices, are essential to the work. Meeting in a community not only builds trust, it reinforces the importance of keeping solutions rooted locally for long-term sustainability and directs investment into the places most impacted by the work.

The design of the learning phase also strengthens relationships. Structured activities that invite both small- and large-group dialogue give people chances to practice new ways of thinking and collaborating. Breakout rooms, varied groupings, and different modes of participation help both introverted and extroverted team members find ways to connect. Fun is not an extra; it is essential. If the team is not laughing together, the process is not fully working.

Phase	Meeting Format	How it Helps	What to Watch For
INCUBATE	In-Person	• Builds initial trust and safety • Creates space for relational grounding and storytelling • Encourages vulnerability and empathy early on	• May not be accessible for all participants at the start • Can require more planning and coordination
	Virtual	• Keeps early engagement steady and accessible • Supports flexible participation while relationships form	• Harder to build deep connection without intentional design • Relational cues may be missed
	Hybrid	• Allows new members to join gradually • Honors different comfort levels and schedules	• Requires strong facilitation to avoid creating an in-group/out-group dynamic
INNOVATE	In-Person	• Encourages creativity and bold thinking • Enables fast iteration and co-creation • Energizes the team through shared experience	• Harder to include all stakeholders in person • Risk of privileging voices that are physically present
	Virtual	• Supports brainstorming using collaborative platforms • Allows for structured reflection between ideation sessions	• Less effective for sparking spontaneous ideas or creative tension • Needs energy-boosting facilitation to avoid fatigue
	Hybrid	• Combines reach and creativity • Encourages contribution from diverse geographies and disciplines	• Needs clear ground rules and tech support to ensure equity in dialogue
IMPLEMENT	In-Person	• Builds momentum and alignment • Supports community-based rollout, town halls, and celebration of progress	• Logistically demanding for dispersed teams • May not capture all feedback loops
	Virtual	• Keeps progress on track with check-ins and data reviews • Enables quick pivots and ongoing communication	• May lose nuance in how solutions are landing in communities
	Hybrid	• Balances real-world implementation and real-time learning • Offers flexibility for diverse stakeholders to stay engaged	• Must intentionally design for power-sharing across formats



INCUBATE PHASE: BUILDING THE FOUNDATION FOR INNOVATION

In CCSN, incubation isn't about rushing to solutions. It’s about taking the time to define the challenge together. During this phase, teams explore both the scientific and social roots of the problem and begin imagining how its unique perspectives can contribute to real change. Because our focus was on addressing cancer disparities, we intentionally stretched beyond academic medicine into the social, environmental, and systemic drivers of health.

CCSN teams bring together many kinds of expertise — research knowledge, professional experience from fields like clinical care, technology, media, or policy, and lived wisdom rooted in community realities. Every member brings something critical to the table, and every voice matters in shaping the direction we take.

Goals during the Incubate Phase are to:

1. Deepen shared understanding of the challenge, where it comes from, how it persists, and why simple solutions aren't enough.

2. Create the habits of connection and feedback that allow new fields and methods to emerge across disciplines.

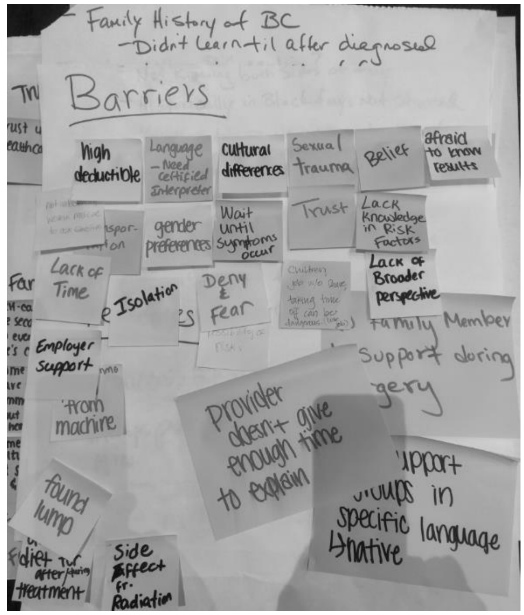
A typical CCSN team meets for about 60–75 minutes every other week during this stage. Early on, regular meetings keep momentum going, but the pace naturally shifts as teams move into deeper learning and external activities. Hybrid meetings — a mix of on-line and in-person sessions — give flexibility for busy schedules and different ways of engaging.

We've found that offering multiple ways to show up helps all kinds of participants reflect and contribute thoughtfully. Some people bring their best insights into an in-person discussion; others prefer the space of online sessions. Sometimes having virtual and in-person options for a meeting is simply a matter of convenience. Regardless, in CCSN, engagement is an invitation, not a demand. Life happens, and our teams are built to honor accountability while making space for the human experience across a long journey together.

Core Components of the Incubate Stage

We use a mix of facilitation tools and reflection strategies designed to help teams observe deeply, surface assumptions, and make sense of complexity together. Facilitators and evaluators use virtual collaboration platforms and facilitation supplies to keep the conversation moving forward and document what insights are being generated. These tools are adapted to fit the needs of each team, but all share a common goal: helping the group see the full picture before moving into solutions.

DEEPENING UNDERSTANDING OF THE PROBLEM



Root Cause Analysis: Used early and often, Root Cause Analysis helps teams move beyond surface-level symptoms to explore the deeper systems at play. Facilitators guide participants through visual mapping exercises to help answer: What's underneath this challenge? What keeps it in place? Rather than assuming a linear cause, this tool encourages a multi-perspective, multi-layered exploration that includes biology, policy, social context, and history. (Appendix D)

5 Whys: A simple yet powerful narrative technique for unpacking complexity. By asking "Why?" repeatedly (typically five times), teams are encouraged to slow down and dig deeper. This tool often works in tandem with Root Cause Analysis, helping clarify which root causes are most relevant, and which are assumptions worth re-examining. It works well in small groups or when refining an insight that emerges during a discussion.

Six Word Story: This reflective exercise invites team members to distill an aspect of their experience or insight into just six words. These stories reveal powerful undercurrents of emotion, identity, hope, frustration—that often shape how people approach collaboration and problem-solving. It's a tool for connection, self-awareness, and shared meaning-making.

ONE OF THE THINGS THAT MAKES THIS PROCESS SO UNIQUE IS RECOGNIZING THAT THE QUESTION YOU THOUGHT NEEDED TO BE ANSWERED MIGHT NOT BE THE RIGHT ONE. AND YOU NEED TO BE HUMBLE ENOUGH TO REALIZE THAT.

CREATING FEEDBACK LOOPS: BUILDING THE CAPACITY TO LEARN AND ADAPT TOGETHER

In transdisciplinary work, feedback isn't just helpful, it's essential. When people from different fields, backgrounds, and ways of knowing come together, they often bring different mental models, assumptions, and expectations. Without intentional feedback loops, these differences can quietly stall collaboration or reinforce the very silos we aim to disrupt.

Feedback loops are how we create the habits of listening, sensemaking, and adjusting in real time. They help teams stay grounded in shared purpose while remaining open to new insights, especially when the work gets uncomfortable or the path forward is unclear. These loops are not only about reflection; they are about creating a collective intelligence that is more responsive, equitable, and capable of solving complex problems.

In the Incubate Phase, we use feedback to:

- **Make thinking visible.** People often approach the same challenge in different ways. Feedback helps surface unspoken assumptions, conflicting interpretations, or hidden insights that can reshape the team's understanding of the problem.
- **Build trust and mutual respect.** When people feel heard and understood, they are more willing to stay in the process, especially when it gets hard or ambiguous.
- **Create adaptive momentum.** Innovation requires the ability to course correct. Early and frequent feedback loops help teams stay nimble and responsive, adjusting their questions, tools, or data gathering as they learn more.

These loops can take many forms:

- **World Cafés** that remix small groups and allow ideas to evolve across conversations.
- **Discussion sessions** that invite deeper interpretation of qualitative or community-gathered data.
- **Listening sessions** that center community voices not just as input, but as essential guidance.

WHAT TO EXPECT DURING THE INCUBATE PHASE

YOU'RE BUILDING RELATIONSHIPS FIRST.
Trust and shared understanding come before designing solutions.

YOU'LL BE LEARNING ACROSS DIFFERENCES.
We value academic knowledge, professional expertise, community wisdom, and lived experience equally.

THERE IS NO RUSH.
This phase is about getting it right, not getting it fast.

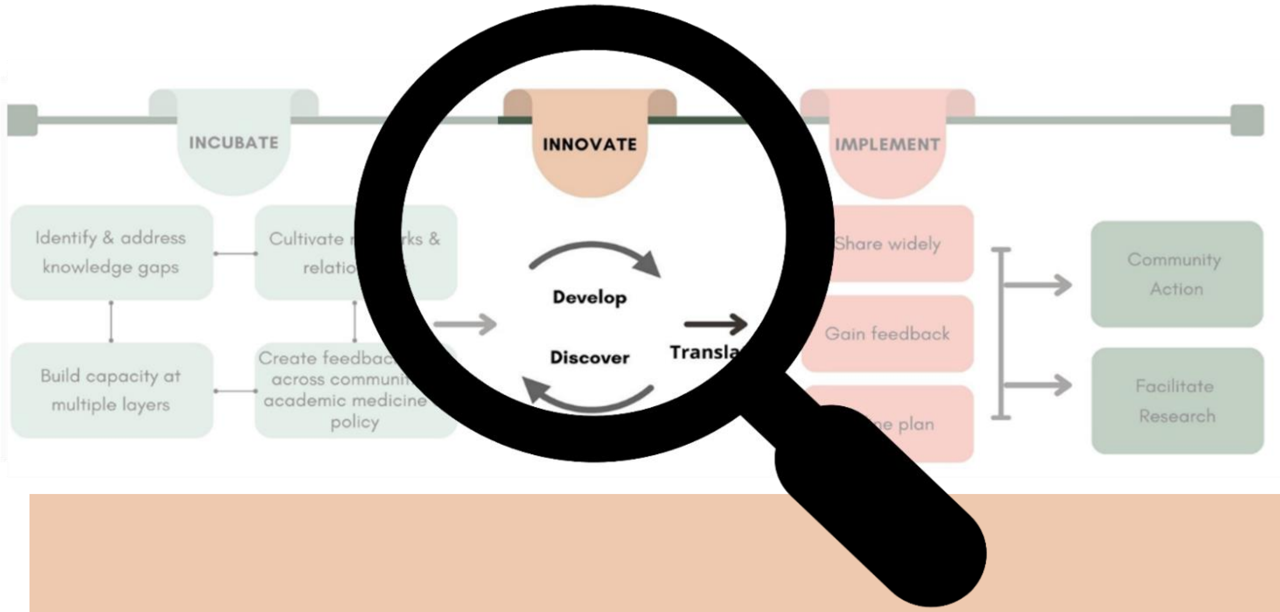
PARTICIPATION IS FLEXIBLE BUT VALUED.
Life happens, and we work together to keep everyone connected.

CURIOSITY IS ESSENTIAL.
Ask questions, offer insights, and stay open to new ways of thinking.

DISRUPTIONS ARE OPPORTUNITIES.
When the world changes, we adapt and stay grounded in our purpose.

- **Additional data collection** including community scans, story collection, or environmental scans.
- **Right Now Surveys** are short 3-questions survey used by transdisciplinary teams between meetings to help facilitators and evaluators plan the next steps. (Appendix E)

Over time, these feedback practices build the team's muscle for real-time learning—a muscle that will be essential as the work moves into innovation and implementation. They also make it more likely that innovative ideas will take root, because they've been shaped not just by good intentions, but by ongoing dialogue, critical thought, and relational trust.it more likely that innovative ideas will take root, because they've been shaped not just by good intentions, but by ongoing dialogue, critical thought, and relational trust.



INNNOVATE PHASE: WHERE NEW IDEAS TAKE SHAPE

In the Innovate Phase, transdisciplinary teams begin the work of transforming insight into possibility. This phase builds directly on the deep understanding developed during Incubate, asking teams to synthesize what they've learned and generate new solutions that are both creative and grounded. It's where patterns and perspectives come together not just to imagine change, but to re-envision what that change could look like.

The Innovate Phase unfolds in two key parts. First, teams enter a generative space for idea development drawing from Human-Centered Design methods, storytelling, and data synthesis tools to stimulate creativity and problem solving. Facilitators and evaluators work alongside the group to support bold thinking, ensure that all voices are contributing, and help connect emerging ideas back to the systems and values that matter most.

Next, teams refine and test their ideas. Using a set of criteria they co-develop, often based on feasibility, alignment with CCSN principles, and fit for both scientific and social settings, teams assess which solutions are ready to move forward. Developmental evaluation supports this process, helping teams reflect in real time and making thoughtful adjustments along the way.

WHEN TEAMS HAVE SPACE TO STRETCH THEIR THINKING AND STAY GROUNDED IN SHARED VALUES, NEW IDEAS EMERGE THAT NONE OF US COULD HAVE BUILT ALONE.

Because this phase asks teams to stretch their thinking and integrate multiple forms of expertise, it often benefits from longer and in-person sessions. We use structured yet flexible tools such as consensus-building methods like Technology of Participation (TOPs) facilitation processes, lateral thinking exercises, and transdisciplinary reflection surveys to keep meetings active, collaborative, and creative. The result isn't just a good idea, it's a well-supported, value-aligned idea ready for real-world testing.

It's worth remembering that powerful innovation often happens in messy times. CCSN's approach took root during major disruptions — a global pandemic, racial justice uprisings, political uncertainty. Rather than being thrown off course, we learned to lean into the moment. Our model is stronger because we stayed open to learning, even when the world around us was changing fast.

Core Components of the Innovate Phase

We've learned that capacity for this kind of work doesn't just happen. It must be built. Facilitators and evaluators play a key role here: making the invisible visible, helping teams name when they're doing transdisciplinary work, and holding space when the process gets messy or unclear.

At every meeting, we anchor the team in shared purpose and revisit how this work is different. We reflect on when we're relying too heavily on one perspective or resisting the discomfort that often comes with transformation. These small moments of awareness are part of what allow new ideas, relationships, and solutions to take shape.

In CCSN, we look at health disparities through many different lenses—biological, clinical, social, economic, environmental. When we bring people together across those boundaries, something new begins to emerge. But emergence isn't automatic. It takes intention, structure, and humility.

Equity Pause: Equity work requires intentional reflection, not just good intentions. We build equity pauses into our process to help teams slow down and examine how power, privilege, and systemic inequities may be shaping their designs. These moments invite honest conversation, foster accountability, and ensure that equity remains a lived practice, not just a stated value. (Appendix H)

Action Learning: People learn by doing, especially when the work is complex. We structure action learning moments into the process, giving teams a chance to test small ideas, reflect in real time, and adjust. These cycles strengthen the group's ability to think across boundaries while staying grounded in shared goals.

Lateral Thinking Exercises: Sometimes the most important ideas come from surprising places. We use short, creative exercises at the start of meetings to help people loosen up, challenge assumptions, and get comfortable with being a little unsure. These warm-ups might seem light, but they serve a deeper purpose: encouraging people to bring forward unconventional ideas and to approach hard problems with flexibility and curiosity.

WHAT TO EXPECT DURING THE INNOVATE PHASE

IDEAS TAKE SHAPE.
Teams generate bold, grounded solutions from what they've learned.

CREATIVITY COMES ALIVE.
In-person sessions spark trust, creativity, and dynamic team exchange.

BRING A CRITICAL EYE.
Facilitators push to ensure equity, reflection, and clarity throughout this phase.

IDEAS GET TESTED.
Ideas are refined using co-developed criteria.

TOOLS PROVIDE GUIDANCE, NOT RESTRICTION.
Flexible methods support creativity, consensus, and real-time learning.

NEW THINKING EMERGES.
Teams stretch thinking, embrace discomfort, and build transdisciplinary capacity.

Consensus Facilitation: Structured dialogue that supports teams in surfacing concerns, identifying priorities, and aligning on core ideas. We often use the TOPs ORID method to structure group conversations or insight generating surveys. It walks teams through four stages:

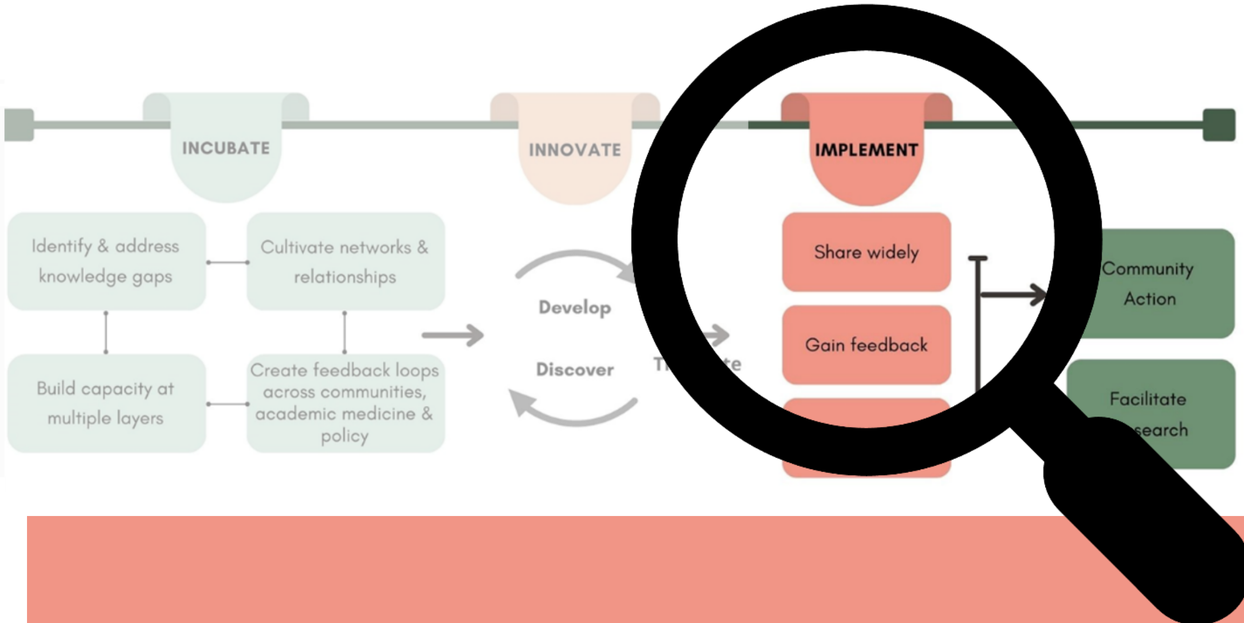
- **O**bjective: What do we know?
- **R**eflective: How do we feel about it?
- **I**nterpretive: What does it mean?
- **D**ecisional: What do we want to do next?

It's a simple framework, but it helps keep conversations from getting stuck or dominated by one kind of thinking. It also respects both facts and feelings as valid parts of problem-solving.

Conceptual Modeling for Question Development and Prioritization (SEED Method): Developed by the Center on Society and Health, this tool guides teams through a structured process to unpack complex health issues and map how social, clinical, and systemic factors interact. In CCSN, we use it to help teams identify leverage points, shape research questions, and explore potential solutions that reflect both community needs and scientific priorities. It's especially useful for generating ideas that lead to comparative clinical effectiveness research and helping teams ask not just what works, but what works best for whom, and under what conditions.

Fit & Feasibility Screens: Teams assess proposed ideas based on alignment with values, social and scientific opportunities, sustainability, and implementation potential. (Appendix F)

This phase is best supported through in-person sessions where energy, trust, and creative exchange can build momentum. While some reflection or synthesis can be done virtually, generating a testable solution benefits greatly from being in the room together.



IMPLEMENT PHASE: TRANSLATING INSIGHT INTO ACTION

The Implement phase is where a team's shared vision becomes a lived experiment. It's not the end of the work; it's a new beginning. Implementation within CCSN is not about executing a perfect plan. It's about testing solutions in the real world, learning from what happens, and staying accountable to the transdisciplinary process and our principles.

The habits built throughout the process—curiosity, feedback, reflection—are just as essential as the solution itself. Because the truth is: no idea is ever finished. We think of implementation not just as translation of research or social interventions, but as transformation:

- *Translation means grounding the idea in logistics, resources, relationships, and timelines.*
- *Transformation means staying open to how the work evolves once it's out in the world, changing the way we approach solutions together to address disparities, and being willing to go back, adjust, or even rethink the idea entirely based on what's learned.*

Core Components of the Implement Phase:

As teams move into Implementation, the focus shifts from idea development to real-world testing and action. But implementation in CCSN isn't about rolling out a fixed plan, it's about staying responsive, reflective, and aligned with the communities and scientific opportunity the work is meant to serve. This phase requires structure, flexibility, and continuous learning. The core components below help guide teams as they bring their ideas to life in a way that remains grounded in shared values, clear priorities, and meaningful collaboration.

Town Halls and Listening Sessions: As solutions move outward, so must the conversation. Town Halls give community members a chance to respond, refine, and sometimes redirect what's being implemented. These sessions help ensure that implementation stays aligned with real needs and fosters long-term trust.

Accelerated Action Planning: A structured process that turns good ideas into focused action. In a short time frame, teams outline what needs to happen, who's responsible, what resources are required, and what barriers might arise. It's collaborative, transparent, and designed to support momentum.

WHAT TO EXPECT DURING THE IMPLEMENT PHASE

IDEAS BECOME ACTION.
Teams bring solutions to life through real-world testing and collaboration.

PLANS STAY FLEXIBLE.
Implementation adapts based on feedback, reflection, and lived experience.

COMMUNITY VOICES GUIDE DIRECTION.
Planned feedback sessions keep work aligned with real needs.

ACTION GETS FOCUSED.
Teams clarify tasks, roles, timelines, resources, and possible barriers.

LEARNING REMAINS CENTRAL.
Intentional reflective practices turn execution into continuous learning.

CHANGE IS ONGOING.
Teams revisit, adjust, and refine ideas as new insights emerge.

Before and After-Action Reviews: These simple reflection tools help teams learn in motion. Before Action Reviews clarify expectations, identify risks, and align the team around purpose. After Action Reviews offer space to reflect on what worked, what surprised us, and what could be improved. Together, they help teams build insight into how their implementation choices are shaping outcomes, strengthening accountability and learning as they go. (Appendix G)

The work of implementation is not the final step. It's another stage of learning. While we describe these phases as distinct, in practice they are fluid and iterative; teams often move back and forth between them, revisiting earlier insights or rethinking solutions as new learning emerges.

MEASURING TRANSDISCIPLINARY PARTNERSHIP

CCSN doesn't just bring people together, it asks them to work in fundamentally different ways. It requires teams to stretch across disciplines, build trust across lived experiences, and solve problems that span biology to policy. That's why strong relationships are not an accident; they're the result of ongoing care, reflection, and intention.

In CCSN, we don't see partnership as a background condition. We see it as the heart of the work and necessary to address disparities. Measuring the quality of that partnership helps teams name what's working, see what's shifting, and strengthen the conditions needed for bold, equitable solutions to take shape.

Why Measure Partnership?

Because we're asking people to work differently, we also need ways to understand how that work is going. This isn't about evaluation for the sake of compliance. It's about learning how we work together and what helps collaboration thrive. We measure partnerships about every six months in CCSN, and the facilitator and evaluator use these insights to help shape the team process.

Measuring transdisciplinary partnership helps teams:

- **Track how they are learning and growing together**
- **Stay grounded in shared values and purpose**
- **Identify moments when more support or adjustment is needed**
- **Ensure equity is showing up in both the process and the outcomes**

Our Tools

CCSN developed and adapted a flexible set of tools that reflect different aspects of transdisciplinary partnership. Teams can use one or more depending on where they are in the process and what they want to learn.

HARVARD BUSINESS REVIEW (HBR) LEARNING ORGANIZATION SURVEY

At its core, transdisciplinary work is about learning. This survey was developed by HBR and explores whether teams are creating an environment that supports learning together.

CCSN looks at 11 subscales from three domains from the tool:

- **Supportive Environment:** Do people feel safe sharing ideas? Are diverse perspectives welcome?
- **Learning Practices**: Are teams making time to reflect, give feedback, and improve together?
- **Leadership for Learning:** Are leaders modeling curiosity and supporting growth?

This tool helps teams see how learning shows up in daily work not just at the end of a project. The tool offers:

- Alignment with core transdisciplinary concepts
- Flexibility across different team sizes
- Benchmarks for comparing overtime or with other groups
- Focus on inclusive perspectives—not just leadership views

Deep Equity

CCSN created two items that assess practices related to deep equity:

- "This team regularly engages in cross-cultural literacy development."
- "This team has a process to assess how its ideas or solutions may impact different groups differently."

These items help teams reflect not just on whether learning is happening, but *who* it serves and *how* it happens. They offer insight into whether the team's learning environment supports practices that will challenge status quo ways of engaging.

Since the HBR Learning Organization Survey did not cover all the factors needed to support strong transdisciplinary teams, we looked at the Wilder Collaboration Factors Inventory. While the other tools focus on learning environments and systems, the Wilder Collaboration Factors Inventory zooms in on *team dynamics*. We used two of the Wilder Collaboration Factors Inventory subscales that align with CCSN's values of shared purpose, co-leadership, and mutual respect.

Two key domains:

- **Shared Vision:** Are we committed to the same goals?
- **Shared Mental Models:** Do we understand what we're trying to do, and believe it's worth the effort?

This tool helps teams surface misalignments early and build clarity around shared purpose and offers benchmarks for teams to determine whether additional work is needed in these areas.

TRANSDISCIPLINARY ORIENTATION SCALE

Working in a transdisciplinary way means shifting how we think, not just what we do. This tool, developed by CCSN, helps individuals reflect on their own mindset and orientation toward transdisciplinary collaboration. The dimensions we measure were identified by working with different teams over the last seven years and coming to understand the different ways team members approach problem solving. They include communication, comfort with complexity, creativity, critical thinking, integrative thinker, intellectual curiosity, lifelong learning, multisector collaboration, problem solving, systems thinking, and tolerance for ambiguity.

Each item asks team members to locate themselves across three ways of working: single-disciplinary, multi-disciplinary, and transdisciplinary.

This assessment is not a test, it's a mirror. It helps people name their learning edges and better understand how their approach contributes to the team's overall readiness for the work. It also helps facilitators and evaluators understand how the initial team coming together complements problem-solving styles and how individuals' styles shift throughout their work together.

Giving Meaning to Measurement

Measurement in CCSN isn't a one-time event. It's a way to stay curious, track our growth, and deepen trust. These tools help teams:

- Pause and reflect on how collaboration is evolving
- Create shared language for what they're experiencing
- Adjust course when needed to stay aligned with values

Used together or individually, these tools strengthen teams' ability to do the real work—building partnerships that can hold complexity, generate trust, and move bold ideas into action.

CONCLUSION: TRY THE WORK, TRANSFORM THE WAY

This toolkit is more than a collection of tools or a guide to strategy—it's an invitation to shift how we understand problems, how we build solutions, and how we relate to one another in the process. The Community and Cancer Science Network (CCSN) quickly evolved away from being single project or model into a bold experiment in what becomes possible when we stop working in silos and start building partnerships rooted in equity, curiosity, and shared responsibility.

Over the course of this work, we learned that strong relationships, brave questions, and a willingness to sit with uncertainty are just as important as technical expertise. We also learned that transdisciplinary collaboration doesn't just ask people to contribute their knowledge. It asks them to transform it. When community members, scientists, clinicians, policy thinkers, and advocates come together in genuine partnership, new ideas emerge that no one group could have created alone.

Trying this approach doesn't require perfection. It starts with a shift in intention to do things differently, even when it feels uncomfortable. Maybe that means creating space in your next meeting for reflection or relationship-building. Maybe it means forming a team that includes people whose expertise looks different than yours. Maybe it's using one of the tools in this guide to help your team surface assumptions or deepen shared understanding. Whatever your starting point, know that the most important thing is to begin.

This toolkit is a field guide but it's also a conversation starter. If you've made it this far, we hope you've found ideas that spark something in you. We hope you feel affirmed in what you already do well and encouraged to stretch in new directions. And we hope you know you're not alone. The CCSN network is filled with people still learning, still asking better questions, and still committed to building something more just, more collaborative, and more transformative.

INVITATION TO CONNECT

If you're curious about what this could look like in your context, or if you're already experimenting and want a thought partner, reach out. We would love to connect, share what we have learned, and hear what you are discovering.

Start where you are. Stay open. Trust the process.

Let's build what comes next together.

Learn more at http://www.ccsnwi.org, or reach out to our partners at Evaluation Plus at www.evlauationplus.org.

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APPENDIX

Appendix A: Sample Job Descriptions

A.1 Facilitator Job Description

Position Announcement
Project Facilitator
Collaborative Workgroups (CWG) Initiative
Wisconsin Women's Health Foundation

HOURS: 30-40 hours per week (0.8 - 1.0 FTE), Benefits-Eligible

LOCATION: Remote position with the ability to travel to:

- Northeast Wisconsin with a special focus on Marinette, Oconto, Menominee, and/or Shawano counties *OR*
- Southeast Wisconsin with a special focus on Milwaukee, Racine, and/or Walworth counties

REPORTS TO: Projects Manager

JOB SUMMARY: The Collaborative Workgroups Project Facilitator holds a key position on the *Collaborative Work Group (CWG) initiative*, which aims to develop and implement transdisciplinary approaches to reduce breast and lung cancer disparities in Wisconsin. The CWG initiative is part of the Community Cancer Science Network (CCSN) and funded by the Advancing Healthier Wisconsin (AHW) Endowment at the Medical College of Wisconsin. The Project Facilitator will be employed by the Wisconsin Women's Health Foundation, one of three community partners on the grant. This is a unique opportunity for a highly motivated professional with exceptional interpersonal, facilitation, and communication skills to create meaningful change and advance health equity in Wisconsin.

RESPONSIBILITIES:

1. **Create, facilitate, and support Collaborative Workgroups (60%)**
    - Thoughtfully recruit and onboard academic and community members to participate in collaborative workgroups (2-3 groups, with up to ten members in each group)
    - Schedule, prepare, organize, and manage the work groups logistics and communication
    - Create an intentional environment that fosters learning, listening, shared vocabulary, and explores solutions to reduce cancer disparities
    - Utilize dynamic group facilitation and engagement techniques to cultivate and create a safe, exciting, and equitable atmosphere
    - Track and document all workgroup activities including attendance, engagement, discussion, and solutions

2. Oversee day-to-day operations of the project (20%)

- Serve as the WWHF's point person for all CWG activities and communication
- Plan, monitor, and assess project goals, objectives, and activities in collaboration with other team members
- Create and submit all required reports
- Proactively identify workplan gaps or areas for improvement and execute plans to address issues
- Track and process invoices

3. Collaboration and relationship building with internal and external project partners (20%)

- Collaborate regularly with internal and external partners to build CWG infrastructure, monitor progress, provide updates, identify project needs, troubleshoot any issues, and provide on-going technical assistance
- Attend and contribute to all required CWG and CCSN meetings and events
- Represent the CWG project to both internal and external partners

SUCCESSFUL CANDIDATES WILL HAVE:

- Lived experience with the continuum of cancer care (prevention, screening, diagnosis, treatment, survivorship, end-of-life)
- Strong connections to the communities of focus
- Exceptional facilitation, interpersonal, and communication skills
- The ability to create and uphold an inclusive, highly engaging, and equitable workgroup culture
- Demonstrated ability to prioritize work/time, set personal timelines, and to work in a self-directed and independent manner sometimes with little oversight
- A strong desire to create meaningful change, reduce cancer disparities, and advance health equity
- The ability to uphold and operationalize the core principles of initiative which include: 1) biology to policy perspectives, 2) grounding in equity and justice, and 3) systems thinking

MINIMUM QUALIFICATIONS:

1. At least one year of group facilitation/adult education experience
2. At least one year of project management/coordination experience
3. Strong technical skills including Microsoft Office Suite and Zoom
4. Ability to travel regular to <u>at least two</u> of the following counties: Marinette, Oconto, Menominee, Shawano, Milwaukee, Racine, and/or Walworth (adhering to WWHF's COVID-19 safety protocol)

DESIRED QUALIFCATIONS:

1. At least three years of group facilitation/adult education experience
2. At least three years of project management/coordination experience
3. Familiarity or expertise in human-centered design methodology, adult learning theories and principles, and/or complex collaboration frameworks such as Results-Based Accountability or Accelerated Action Planning

A.2 Evaluator Job Description

Internal Position Announcement
Community Storyteller/Evaluator
Collaborative Workgroups (CWG) Initiative
Wisconsin Women's Health Foundation

HOURS: 30 - 40 hours per week (0.75 FTE - 1.0 FTE), Benefits-Eligible

LOCATION: Remote position in Southeast or Northeast Wisconsin

REPORTS TO: Projects Manager

JOB SUMMARY: The Community Storyteller/Evaluator holds a key position on the *Collaborative Work Group (CWG) initiative*, which aims to develop and implement projects aimed at reducing breast and lung cancer disparities in Wisconsin. The CWG initiative is part of the Community Cancer Science Network (CCSN) and funded by the Advancing Healthier Wisconsin (AHW) Endowment at the Medical College of Wisconsin. The Community Storyteller/Evaluator will be employed by the Wisconsin Women's Health Foundation, one of three community partners on the grant. The position directly supports two local workgroups and participates in a community of practice with other community-based evaluators. This is a unique opportunity for a highly motivated professional with exceptional listening, storytelling, and communication skills to create meaningful change and advance health equity in Wisconsin.

RESPONSIBILITIES:

1. **Design and contribute to CWG evaluation frameworks (60%)**
    - Collaborate regularly with internal and external partners to build workgroup evaluation and data collection system
    - Create and oversee project-level evaluation plans
    - Help build workgroup capacity to use data to inform project decision-making and planning
    - Assist workgroups in developing evaluation plans, and advocate for and implement participatory and equitable evaluation practices
    - Work closely with the work group facilitators to integrate credible sources of knowledge into the design process

2. **Collect, manage, analyze, and interpret CWG data and information (20%)**
    - Attend all CWG sessions
    - Assist the workgroups in identifying learning questions and appropriate methods to address these questions
    - Prepare summaries and reports
    - Support the dissemination of findings

3. **Collaboration and relationship building with internal and external project partners (20%)**
    - Collaborate on the building of the larger initiative's theory of change, evaluation plan, measures, and methods

- Participate in the evaluation community of practice and developmental evaluation coaching activities
- Attend and contribute to all required CWG and CCSN meetings and events

SUCCESSFUL CANDIDATES WILL HAVE:

- A fully secure and confidential home workspace (computer, phone, printer, and other supplies are provided)
- The ability to travel regularly to at least two of the following counties: Marinette, Oconto, Menominee, Shawano, Milwaukee, Racine, and/or Walworth (when deemed safe to do so following WWHF's COVID-19 safety protocol)
- Lived experience with the continuum of cancer care (prevention, screening, diagnosis, treatment, survivorship, end-of-life)
- Strong connections to and within the communities of focus
- Exceptional public speaking, communication, listening, and writing skills
- Experience conducting formative and summative evaluation OR a strong interest in evaluation methods
- The ability to create and uphold an inclusive and equitable evaluation culture
- Demonstrated ability to prioritize work/time, set personal timelines, and to work in a self-directed and independent manner
- A strong desire to create meaningful change, reduce cancer disparities, and advance health equity
- The ability to uphold and operationalize the core principles of initiative which include: 1) biology to policy perspectives, 2) grounding in equity and justice, and 3) systems thinking

MINIMUM QUALIFICATIONS:

1. At least one year of experience with data collection, management, analysis, and interpretation
2. Strong technical skills including Microsoft Office Suite and Zoom
3. Ability to travel regularly to at least two of the following counties: Marinette, Oconto, Menominee, Shawano, Milwaukee, Racine, and/or Walworth (adhering to WWHF's COVID-19 safety protocol)

DESIRED QUALIFCATIONS:

1. At least three years of experience with data collection, management, analysis, and interpretation
2. Familiarity or expertise in community-based participatory or human-centered design methodology

Appendix B: MoSCoW Method

Transdisciplinary Design MoSCoW Matrix

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Topic:

Geography:

	Community Perspectives	**Health System Perspectives**	**Academic Medicine – Researchers centrality of role is in basic, clinical, translational research**
***Must Have* –** These voices are fundamental to our team's success			
Should Have – These voices are important			
Could Have – If we can access these voices, it would help our team process			
Wish For– We will likely not include these voices on our team but will need to gain their insights			

Adapted From: Clegg, D. and Barker, R. (1994) *Case Method Fast-Track: A Rad Approach*

Appendix C: Tools to Support Relationship Building

C.1 Workstyles Assessment

The purpose of this brief questionnaire is to get some idea of your primary and secondary working styles based on these scores.

In the first column ("Most like me"), put a "1" in the box next to the statement that most closely describes you when interacting with peers or colleagues. Leave the other boxes in the column blank. In the second column ("Next closest"), put a "2" in the box next to the statement that is next closest to describing you. Leave the other boxes in the column blank. There are no correct answers to these questions. Base your responses on how you are today, not how you think you should be or would like to be in the future.

EXAMPLE: When I make a presentation in front of a group…

Most like me (1)	Next closest (2)	
☐	☐	a. I am entertaining and often humorous.
☐	☐	b. I am clear and concise.
1	☐	c. I speak relatively quietly.
☐	☐	d. I am direct, specific and sometimes loud.

1. When talking to a peer or colleague…

Most like me (1)	Next closest (2)	
☐	☐	a. I maintain eye contact the whole time.
☐	☐	b. I alternate between looking at the person and looking down.
☐	☐	c. I look around the room a good deal of the time.
☐	☐	d. I try to maintain eye contact but look away from time to time.

2. If I have an important decision to make…

Most like me (1)	Next closest (2)	
☐	☐	a. I think it through completely before deciding.
☐	☐	b. I go with my gut instincts.
☐	☐	c. I consider the impact it will have on other people before deciding.
☐	☐	d. I run it by someone whose opinion I respect before deciding.

3. My office or work space mostly has...

Most like me (1)	Next closest (2)	
☐	☐	a. Family photos and sentimental items displayed.
☐	☐	b. Inspirational posters, awards and art displayed.
☐	☐	c. Graphs and charts displayed.
☐	☐	d. Calendars and project outlines displayed.

4. If I am having a conflict with a peer or colleague...

Most like me (1)	Next closest (2)	
☐	☐	a. I try to help the situation along by focusing on the positive.
☐	☐	b. I stay calm and try to understand the cause of the conflict.
☐	☐	c. I try to avoid discussing the topic causing the conflict.
☐	☐	d. I confront it right away so that it can get resolved as soon as possible.

5. When I talk on the phone with a peer or colleague...

Most like me (1)	Next closest (2)	
☐	☐	a. I keep the conversation focused on the purpose of the call.
☐	☐	b. I spend a few minutes chatting before talking about work.
☐	☐	c. I am in no hurry to get off the phone and don't mind chatting about personal things, the weather and so on.
☐	☐	d. I try to keep the conversation as brief as possible.

6. If a peer or colleague is upset...

Most like me (1)	Next closest (2)	
☐	☐	a. I ask if I can do anything to help.
☐	☐	b. I leave them alone because I don't want to intrude on their privacy.
☐	☐	c. I try to cheer them up and help them to see the bright side.
☐	☐	d. I feel uncomfortable and hope they get over it soon.

7. When I attend meetings…

Most like me (1)	Next closest (2)	
☐	☐	a. I sit back and think about what is being said before offering my opinion.
☐	☐	b. I put all my cards on the table so my opinion is well known.
☐	☐	c. I express my opinion enthusiastically, but listen to others' ideas as well.
☐	☐	d. I try to support the ideas of the other people in the meeting.

8. When I make a presentation in front of a group…

Most like me (1)	Next closest (2)	
☐	☐	a. I am entertaining and often humorous.
☐	☐	b. I am clear and concise.
☐	☐	c. I speak relatively quietly.
☐	☐	d. I am direct, specific and sometimes loud.

9. When another person is explaining a problem to me…

Most like me (1)	Next closest (2)	
☐	☐	a. I try to understand and empathize with how they are feeling.
☐	☐	b. I look for the specific facts pertaining to the situation.
☐	☐	c. I listen carefully for the main issue so that I can find a solution.
☐	☐	d. I use my body language and tone of voice to show them I understand.

10. When I attend training programs or presentations…

Most like me (1)	Next closest (2)	
☐	☐	a. I get bored if the person moves too slowly.
☐	☐	b. I try to be supportive of the speaker, knowing how hard the job is.
☐	☐	c. I want it to be entertaining as well as informative.
☐	☐	d. I look for the logic behind what the speaker is saying.

11. When I want to get my point across to another person...

Most like me (1)	Next closest (2)		
☐	☐	a.	I listen to their point of view first and then express my ideas gently.
☐	☐	b.	I strongly state my opinion so that they know where I stand.
☐	☐	c.	I try to persuade them without being too forceful.
☐	☐	d.	I explain the thinking and logic behind what I am saying.

12. When I am late for a meeting...

Most like me (1)	Next closest (2)		
☐	☐	a.	I don't panic but call ahead to say that I will be a few minutes late.
☐	☐	b.	I feel bad about keeping the other person waiting.
☐	☐	c.	I get very upset and rush to get there as soon as possible.
☐	☐	d.	I apologize profusely once I arrive.

13. I set goals and objectives that...

Most like me (1)	Next closest (2)		
☐	☐	a.	I think I can realistically attain.
☐	☐	b.	I feel are challenging and would be exciting to achieve.
☐	☐	c.	I need to achieve as part of a bigger objective.
☐	☐	d.	Will make me feel good when I achieve them.

14. When explaining a problem to someone whom I need help from...

Most like me (1)	Next closest (2)		
☐	☐	a.	I explain the problem in as much detail as possible.
☐	☐	b.	I sometimes exaggerate to make my point.
☐	☐	c.	I try to explain how the problem makes me feel.
☐	☐	d.	I explain how I would like the problem to be solved.

15. If others are late for a meeting with me...

Most like me (1)	Next closest (2)	
☐	☐	a. I keep myself busy by making phone calls or working until they arrive.
☐	☐	b. I assume they were delayed a bit and don't get upset.
☐	☐	c. I call to make sure that I have the correct information (date, time and so on).
☐	☐	d. I get upset that the person is wasting my time.

16. When I am behind on a project and feel pressure to get it done...

Most like me (1)	Next closest (2)	
☐	☐	a. I make a list of everything I need to do, in what order and by when.
☐	☐	b. I block out everything else and focus 100 percent on the work I need to do.
☐	☐	c. I become anxious and have a hard time focusing on my work.
☐	☐	d. I set a date to get the project done and go for it.

17. When I feel verbally attacked by another person...

Most like me (1)	Next closest (2)	
☐	☐	a. I tell the person to stop it.
☐	☐	b. I feel hurt but usually don't say anything about it to the person.
☐	☐	c. I ignore the anger and try to focus on the facts of the situation.
☐	☐	d. I let the person know in strong terms that I don't like their behavior.

18. When I see a peer or colleague that I like and haven't seen recently...

Most like me (1)	Next closest (2)	
☐	☐	a. I give them a friendly hug.
☐	☐	b. I greet them but don't shake their hand.
☐	☐	c. I give them a firm but quick handshake.
☐	☐	d. I give them an enthusiastic handshake that lasts a few moments.

YOUR STYLE SCORES

See below for your primary and secondary style scores. The highest number in each column indicates your primary and secondary styles.

	Primary Style	Secondary Style
	0 Amiable	0 Amiable
	0 Analytical	0 Analytical
	0 Driver	0 Driver
	0 Expressive	0 Expressive
Totals:	0 (Total should equal 18)	0 (Total should equal 18)

Important Note: If each of your scores does not equal 18, you may have missed a column, added too many numbers or typed an incorrect number. Review each statement to ensure you have typed only one "1" in the "Most like me" column and only one "2" in the "Next closest" column.

Understanding Your Style

Having a higher score in one style indicates you are comfortable using that style in many situations but is not necessarily an indicator of what you choose in all circumstances. You will notice you are not just one style, and neither is anyone else, which is why it is important not to label anyone based on their scores. We are all different and complex. Understanding yourself better is the first step to becoming more effective when working and interacting with others. Learning about other people's styles can help you understand their priorities and how they differ from your own.

Read the following pages to find out more about the characteristics of all four styles.

Reference: The four terms (Driver, Expressive, Amiable and Analytical) were originally coined by Dr. David Merrill, founder of Tracom Consulting Group. If you are interested in reading more about the research done by Dr. Merrill and his associates, read *Personal Styles and Effective Performance: Make Your Style Work for You* by Dr. David Merrill and Roger Reid (Radnor, PA: Chilton, 1981).

THE FOUR STYLES

Amiable (Dove)

People with the Amiable style are characteristically calm, patient, consistent, dependable and loyal. Typically highly cooperative, sensitive and easy to get along with, they tend to be great listeners. Amiables value stability, sincerity and harmonious relationships, and they usually have very high emotional intelligence. They typically avoid confrontation, yet have the ability to mediate in conflict situations, if necessary. Amiables tend to be introverted and are uncomfortable being the center of attention, so they may be perceived by others as timid or too accommodating when it comes to voicing their opinions. Because they are generally more interested in the group arriving at consensus than being personally right, Amiables sometimes come across to others as unsure or hesitant when making decisions.

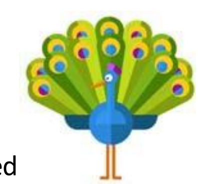
Analytical (Owl)

People with the Analytical style are characteristically logical, fact-based and task- oriented, and tend to focus on precision and perfection. Typically more private with personal information, they are usually polite but reserved. Analyticals often have a strong desire to be precise and exact and typically won't openly discuss ideas until they are confident with their information or decision. They value numbers, statistics and ideas, and usually love details and discipline, and you can usually count on them to be persistent, diligent and systematic. Sometimes, Analyticals can be seen by others as withdrawn, boring, quiet, reclusive and even sullen at times. If they seem indecisive, it's probably because of a need to assess all the data first. Because they are generally methodical, objective and candid, Analyticals may come across to others as impersonal, inflexible, rigid, overly critical or insensitive.

Driver (Eagle)

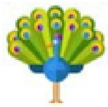
People with the Driver style are characteristically decisive, competitive, independent and confident. As an action-oriented and ambitious style, they are usually focused, direct, practical and driven. Extremely goal-oriented, Drivers tend to value results, speed and personal achievement, and they usually thrive on being in charge, taking risks and telling others what to do and how to do it. Typically, they take the lead and get things done, and they are usually highly effective in crisis situations. Sometimes, Drivers can be seen by others as domineering, pushy, impatient, insensitive and even aggressive. If they seem unempathetic, it's probably because Drivers tend to be task- rather than relationship-oriented and typically don't take things personally or think others should either. Because they focus on getting results and saving time, Drivers may come across to others as, controlling, short-tempered, bossy and uncompromising.

Expressive (Peacock)



People with the Expressive style are characteristically friendly, enthusiastic, socially adept and optimistic. They tend to be full of ideas and thoroughly enjoy brainstorming with others. Typically, talkative and open, Expressives tend to readily exchange information and life experiences, and are usually motivated by acceptance and appreciation. They value creativity and collaboration, and work best in a stimulating, personal and friendly team environment. You can ordinarily count on Expressives for their energy, encouragement and vision, but they usually leave the details to others. Sometimes, they can be seen by others as overly dramatic, impulsive, disorganized and even egotistical. Because Expressives are generally spontaneous, self-assured and passionate, they may be perceived by others as too impulsive, overly talkative, unrealistic and abrasive.

Expressive (Peacock)



How to recognize:

- Enjoys attention and recognition.
- Relies on hunches, intuition and feelings.
- Gets excited about new ideas and loves to brainstorm.
- Values creativity and collaboration.
- Is easily bored with routine and details.
- Prefers to work with others and wants everyone to have fun at work.
- Is very talkative and readily shares personal information.
- Works on multiple project simultaneously.

Reacts to pressure and tension by:

- "Selling" ideas or becoming argumentative.

May be perceived by others as:

- Too focused on socializing.
- Speaks every thought out loud.
- Talks more than listens.
- Lacks follow-through.

Words used to describe this style:

Adventurous	Comes on too strong
Collaborative	Disorganized
Creative	Dominating Dreamer
Energetic	Egotistical
Enthusiastic	Emotional
Fun	Impulsive
Innovative	Lacking substance
Intuitive	Scattered
Optimistic	Talks too much
Passionate	Undisciplined
Sociable	Unrealistic
Spontaneous	

Tips for communicating with this style:

- Be enthusiastic, open and flexible.
- Focus on developing a relationship and be willing to share stories and experiences.
- Use lots of examples, demonstrations and visual aids as they remember information by association.
- Be sure to focus on the big picture.
- Don't get bogged down in the details.
- Ask and answer "who" questions.

Driver (Eagle)

How to recognize:

- Likes to be where the action is.
- Has strong opinions and doesn't take things personally.
- Values results and saving time.
- Takes charge and is good at delegating work.
- Not shy, but is private about personal matters.
- Has a fearless attitude and thrives on new challenges and takes initiative.
- Is decisive, direct and comfortable taking risks.

Reacts to pressure and tension by:

- Taking charge or more control.

May be perceived by others as:

- Impersonal and pushy.
- Too competitive.
- Doesn't consider others' opinions.
- Power-hungry.

Words used to describe this style:

Ambitious	Aggressive
Competitive	Blunt
Confident	Bossy
Decisive	Controversial
Determined	Domineering
Direct	Forceful
Dominant	Impatient
Fearless	Insensitive Pushy
Honest	Strong-willed
Independent	Stubborn
Powerful	Unempathetic
Results-focused	

Tips for communicating with this style:

- Be clear, accurate, rational and orderly.
- Focus on the task and talk about results or expected results.
- Argue facts, not feelings.
- Provide concise, precise and organized information.
- Be brief and provide options, but don't provide details unless asked.
- Be prepared to answer "what" questions.

C.2 Meeting Debrief Tools

What? So What? Now What? Meeting Debrief

What? Describe what happened. What did you pick up on? What aspects jumped out to you?

- What is the problem or issues that came up?
- What did you notice?
- What were peoples reactions?
- What positive and negatives aspects did you observe?

So What? Determine ramifications of this meeting? Make sense of what your learned. Define the impact it had on the team?

- How did what happened affect the people there? How does it affect the future?
- Why is this important? What critical questions does this information cause us to ask?
- What emotions surfaced? How did this meeting make us feel?
- What conclusions can we draw from this meeting?

Now What? Establish a plan of action. What's the limit? What activities are reasonable?

- What do we need to move forward? How do we ensure it is positive?
- What did we learn? How will you use the insights we discovered going forward?
- What will we do differently next time? What will we do the same?
- What hidden opportunities were uncovered? How can we use them for our benefit?

Adapted From: Fellow, *How to Run an Effective Debrief Meeting: 8 Steps (+ Template)* and Eoyang, G.H. and Holladay, R.J. (2013). *Adaptive Action. Leveraging Uncertainty in your Organization.*

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Appendix D: Root Cause Analysis

Root Cause and Prioritization Activity

Overview: *This activity can be used with anyone. It is an easy and accessible method, regardless of literacy, to discuss an issue, its relationships with other issues and understand its root causes.*

Goals:

1) Understand the root causes of an issue or the links between two issues
2) Elicit potential solutions
3) Prioritize potential solutions

Materials Required:

Butcher paper or dry erase board

Markers

Stickers

Prompt questions

Background:

- **Health** is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity (World Health Organization).
- **Health is shaped by many influences,** including gender, genetics, access to medical care, our personal behavior as well as the living and working conditions of our homes and communities and the economic and social opportunities or resources we have access to. These influences or factors are highly interconnected.

Activity Overview:

1) *Welcome and introductions*
2) *Goals and overview of activity*
3) *Map the root causes*
4) *Review and identify potential solutions*
5) *Prioritize solutions*
6) *Closing*

Welcome and Introductions. Greet everyone and thank them for their willingness to participate in the activity. Ask everyone to introduce themselves and answer the question. This activity is to help warm the group up to sharing and participating. It is meant to be a safe space where they begin to trust the facilitator and each other. The question can be anything relevant to the group or current events. Examples could be:

- If you were able to travel in time, what point in the future or past would you visit?
- If you could ask President Obama one question what would you ask him?
- If you could talk to one person, now living, who would it be and why?

Goals and Overview. Provide a brief overview of what the goals of the activity are and why their expertise is so important to the solutions of the issue. The goals include:

1) Understand the links between (*insert your issue*) and (the disparity)
2) Illicit potential solutions
3) Prioritize potential solutions

Map the Root Causes. Start by laying a few guides for sharing;

- Everyone's opinion is theirs and shouldn't be considered right or wrong. We can't debate or judge it.
- We will let everyone talk and complete their idea before the next person talks.
- Everyone will get a chance to share.

On butcher paper or a dry erase board, write and link your two words**, for example we will use Poverty and Health**, but you should use the priority area that was identifies.

Share with them that we know that there is a link between the two issues and we need their help in understanding what those pathways are.

Ask them to start brainstorming **how** and write their answers in words or short phrases on the paper or board.

For each answer ask the follow up, **why-** why does what they shared cause it and how does that affect our health or poverty, depending on where they started.

Example:

Participant: Poverty is caused by a lack of a job.

Facilitator: Why does a lack of a job affect poverty?

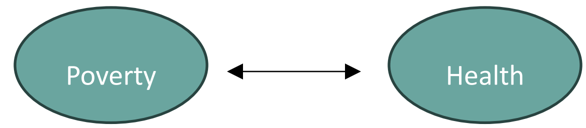
Participant: With no job, there is no money.

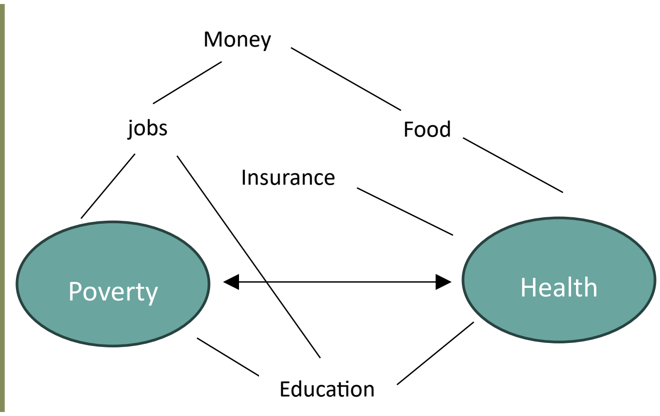
Facilitator: Why does not having a job or money matter to health?

Participant: I can't buy food.

Facilitator: How does that affect your health?

As the discussion continues, ask for responses from a variety of individuals in the room. Begin to draw lines linking each concept together, mapping them together. Note, it can get messy but try to keep the lines that link readable.





Prompt Questions: *Throughout the activity you may experience pauses in discussion or new concepts. Here are a few prompt questions to keep the discussion going:*

- How do **living conditions** affect health? How are they affected by poverty?
- How do **working conditions** affect health? How are they affected by poverty?
- How do **social connections** (family and friends) affect health? How do they affect poverty?

Review and Identify Potential Solutions

After the group has begun to slow down on their responses begin to shift to reviewing what has been shared and solicit potential solutions. Ask participants to share what they would like to see change or happen to improve the situation or causes of your issue, in this case, health and poverty. Refer to the map and the various responses to find solutions.

Make note of each one on a separate butcher paper or part of the board.

Additional prompt questions could include:

- What new programs or services would improve the situation?
- What current programs or services could be improved? How could they be improved?
- What can an individual do to improve the situation?
- Is there something the government could do to improve the situation? Healthcare organizations? Schools? Churches and community groups?

If you hear ideas that seem similar to previously shared responses, clarify with the participant if what they shared is different from the other response and make note if it is.

Prioritize Solutions

Now that there is an extensive list of potential solutions, provide everyone with three sticker dots. Explain that they now get to vote for the solutions they feel are the most important to start with. Explain that they can vote for three different solutions or use their dots on one or two solutions; it is up to them how they vote. Remind them that they are part of a series of these sessions to help inform the collaborative work and their time and energy is appreciated.

Closing

Once the voting is complete. Review the top solutions and ask if there are any observations that anyone would want to share. Thank everyone for their time, honesty and openness to share.

Adapted By: The *Center for Urban Population Health*. Originally sourced from the *Center on Social Disparities in Health, University of California, San Francisco.*

Appendix E: Right Now Survey

SURVEY INTRO

We wanted to offer an opportunity to reflect independently on today's meeting and get some input on how the meeting went and where to take the conversation. This survey is called a "Right Now" survey and is three (3) short open-ended questions to help you reflect. The survey is completely anonymous. There are no wrong answers. And we don't think it will take you more than 5 minutes to complete. The facilitation team will review the responses and bring themes and questions to discuss to the group the next time we meet. We will keep the survey open until November 8th. Please respond to the questions based on how you feel about the Understanding Cancer Disparities in Transgender and Nonbinary Populations project coming out of Friday's presentation.

QUESTIONS

Right now, I am looking forward to:

Right now, I am still challenged by:

Right now, I still have questions about:

Adapted From: Spark Policy Institute*. The Developmental Evaluation Toolkit: The "Right Now" Survey*

Appendix F: Fit and Feasibility Screens

F.1 Adapted Strategy Screen

Date:

Big Question: *Does the prototype or approach in its current form align with our charge as a collaborative workgroup?*

(1) Is it designed in a way to sufficiently impact cancer disparities in our community? And is how it will do so clearly defined?

If "No," return prototype to design table?

(2) Is how we went about building the prototype consistent with the CCSN transdisciplinary model?

- Did we fully consider root causes across the biology to policy spectrum and use that knowledge to inform our design?
- Will the prototype foster equity? Does it push status quo conditions or understanding and improve upon them?
- Are the policies and practices that will guide implementation of the prototype fair and just for everyone involved?
- Does the solution bridge academic health sciences and communities in ways that will deepen trust and relationships? Will it make both systems better equipped to address disparities?

If "No," return prototype to design.

(3) Is our design human-centered? Do we know who will be impacted? Do we have *proof* that the people impacted by this approach want it?

If "No," return prototype to design.

(4) Have we clearly defined the outcomes or intended changes that will come about from implementation?

If "No," return prototype to design.

(5) Can it be implemented successfully?

- Is there capacity to test? (Human, financial)
- Is there political will present to test?

- Do we have owners or sponsors to test the work?
- Are community members participating in the implementation being fairly compensated for the expertise they are providing?

If "No," return prototype to design.

Decision:

What additional improvements or redesign needs to occur based on our discussion to develop an implementation plan for this prototype?

Adapted From: La Piana Consulting. (2019) *Strategy Screen*

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F.2 Fit and Feasibility Matrix

CCSN FIT AND FEASIBILITY MATRIX

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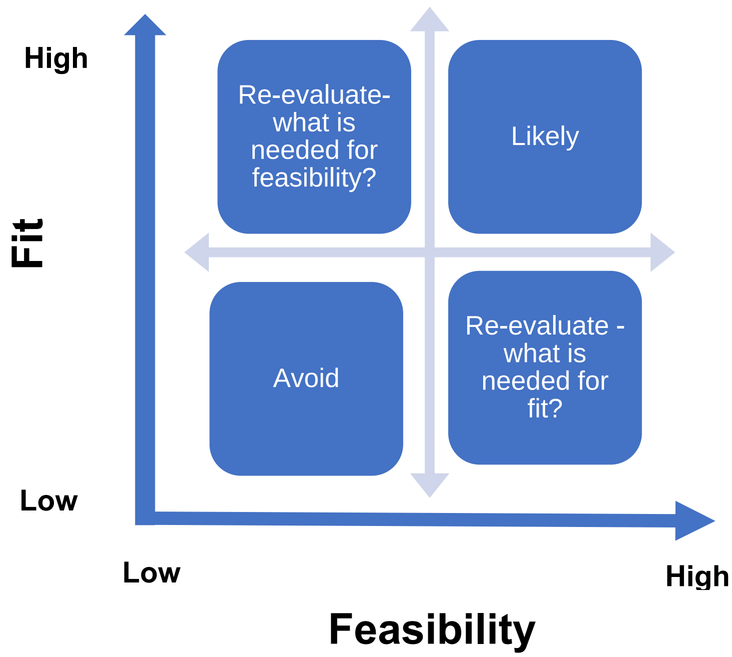
Understanding Cancer Disparities in the Transgender/Nonbinary Population

Approach:____

Step 1: Please rate the proposed concentration area against the following criteria:

Fit	Co-Leadership between community and research is possible.	Unlikely ⟷ Absolutely
Fit	Potential to impact multiple parts of the system.	Unlikely ⟷ Absolutely
Fit	Has many avenues for participation	Unlikely ⟷ Absolutely
Fit	Identify measurable social outcomes/proxy measures to demonstrate impact.	Unlikely ⟷ Absolutely
Fit	Likely to generate new evidence or research opportunities (e.g. CER or other comparative clinical effectiveness studies.)	Unlikely ⟷ Absolutely
Feasible	Allows for safety/security of those engaged	Unlikely ⟷ Absolutely
Feasible	Is sustainable beyond a project of funding	Unlikely ⟷ Absolutely
Feasible	Can be accomplished in 1-5 years	Unlikely ⟷ Absolutely
Feasible	Can identify resources (people/funds) to implement	Unlikely ⟷ Absolutely

Step 2: Consider how you ranked each one of the above criteria and indicate where you rank it on the matrix below.



Step 3: Summary Notes

Appendix G: Before & After-Action Reviews

G.1 Before Action Review

Before Action Review Report Template

Date:
Attendees:
Focus/Project:

What are our intended results?	
What will success look like?	
What challenges might we encounter?	***What have we learned from similar situations or experiences?***
What are we willing to commit to achieve our intended results?	

Set a date to conduct an After Action Review:

Adapted From: Fourth Quadrant Partners, **Introduction to the Before and After Action Reviews** and Emergent Learning***,*** **Before and After Action Reviews**

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G.2 After Action Review

After Action Review Report Template

Date:
Attendees:
Focus/Project:
Next AAR Opportunity:

What did we expect to happen?

What actually happened?	***Why did it happen?***

What did we learn that we want to carry forward?

What do we want to test between now and our next AAR?

Who else in the organization would benefit from knowing what we learned or is working on similar strategies? Who will be responsible for sharing learnings with them?

Adapted From: Darling M, Parry C, Moore J. (2005) *Learning in the thick of it. Harv Bus Rev. 2005 Jul-Aug;83(7):84-92, 192. PMID: 16028819*. and Vanderbilt University (2010) *Guide to the After Action Review*

For more on After Action Reviews or to see the After-Action Review Toolkit, contact Evaluation Plus.

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Appendix H: Equity Pause

Equity Pause Worksheet

Complete this equity pause thinking about your collaborative project. This is for your own personal reflection. You will not turn in your completed form.

Who am I designing this project for?

How am I respectively situated relative to this project? The organizations or people involved? What power do I have?

How does my identity impact the way I am interacting with this project?

What is the equity challenge in this project?

How does my experience impact the way I am thinking about challenges and solutions?

How do I maintain awareness of my biases and challenge them to see people more authentically?

Who do I rarely listen to and why?

How might my identity and role in this project affect how and what people share with me?

How can I create more equitable engagement as part of this project and any related on-going work (ex. Future directions your project might take)?

Adapted From: EquityxDesign (2016). *Racism and Inequity are Products of Design. They Can Be Redesigned.*

Evaluation+