NACCHO
National Association of County & City Health Officials

Catalyst Canvas Tool:
Activation Guidelines

Overview

This Catalyst Canvas Tool can be used by local health department (LHD) staff and Centers for Independent Living (CILs) representatives to delineate goals for a joint project. Using this tool will enable LHDs and CILs to accomplish the following:

1. **Goal:** Set a specific goal that will result in a desired change, such as "Develop new standard operating procedures that support X."
2. **Timing:** Delineate concrete examples describing why the identified goal is necessary at this particular time.
3. **Obstacles:** Identify barriers that might be encountered by LHDs and CILs in achieving the goal.
4. **Measures:** This section helps LHDs and CILs identify measures that will help them track progress toward their goal.
5. **Small Steps:** These are initial steps that can be taken by both parties toward realizing the goal.

Instructions

This tool can be used both in person or online. Below is a sample process map for LHDs and CILs working together.

Meeting Logistics

Identify any logistics that may be required to meet in-person or online, including:

- Accessibility Requirements
  ◦ Ensure that you have all assets required to support full participation. Is the meeting room accessible?
  ◦ Are all materials Section 508-compliant?
  ◦ Will you need an ASL interpreter?
  ◦ Do you need someone to read aloud the text on slides and describe graphics used on the Catalyst Canvas Tool throughout the meeting?

- Language Best Practices
  Be sure to use inclusive language preferred by the CIL community you are working with (identify-first or person-first, as appropriate) when referring to participants in the meeting and the persons they serve.

- Acronym List
  The facilitator may want to share a list of commonly used acronyms by both groups that may be used in the meeting.

Meeting Leaders

- While this is a group project, it is recommended that an LHD representative (referred to as the facilitator in this document) lead the tool completion process.

- It is also recommended that someone at the meeting be designated as a notetaker who will track and consolidate comments into a final document to be shared with the group.

Participant Introductions

The facilitator should call the meeting to order, introduce themselves, and then invite other participants to do the same:

1. Each LHD representative should introduce themselves, stating their name, title, and perhaps one thing they want to accomplish during the meeting.

2. CIL representatives should then introduce themselves in turn, stating their name, title, and perhaps one thing they want to accomplish during the meeting.

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Activating the Catalyst Canvas

1. **Review the Reason(s) for the Meeting**
   The facilitator should provide a basic overview of why the meeting is taking place. This overview should address:
   - Were there any specific incidents or gaps that prompted the meeting?
   - Why are those present at the meeting involved?
   - What information will be important for the facilitator to know?
   - What does each site hope to accomplish?

2. **Share the Tool**
   Use of the tool may differ depending on whether it used in person or online:
   - In-Person: Project a copy of the tool onto a whiteboard. That way, answers shared by LHD and CIL representatives can be written on the whiteboard and then recorded by the meeting notetaker.
   - In-Person or Online: Project or share a copy of the tool for group viewing. The facilitator can type-in answers or have the notetaker track, report, and consolidate feedback into a copy ultimately shared with the group.
   - In-Person or Online: Hand out copies of the Catalyst Canvas Tool to allow users to brainstorm ideas and share them with the group. An individual within the group can serve as a notetaker to consolidate ideas into one Catalyst Canvas.

3. **Set the Goal**

   Set a specific goal that will result in a desired change. The facilitator should provide an overview of why the parties are meeting and invite both sides to identify and articulate the goal they wish to achieve. This goal should be overarching and SMART—that is:

   - Specific (simple, sensible, significant)
   - Measurable (meaningful, motivating)
   - Achievable (agreed, attainable)
   - Relevant (reasonable, realistic and resourced, results-based)
   - Time bound (time-based, time-limited, time/cost limited, timely, time-sensitive)

An example would be:

The LHD and CIL will develop and disseminate a user guide outlining culturally responsive practices for community-based organizations delivering services to persons with disabilities by December 2024.

4. **Use the Tool to Walk Through the Goal Planning Steps**

   The action tool helps refine and identify barriers, measures, and steps toward fulfilling the stated goal.

   - **Timing:**
     - Why is this goal important at this time to the LHD and to the CIL?
     - What would happen if work toward this goal was delayed?
     - Is this goal related to other broader goals?
     - Do other things need to be accomplished first before achieving this goal?

   - **Obstacles**:
     - What barriers might keep the LHD and the CIL from achieving this goal?

   - **Measures:**
     The LHD and CIL should map out how they are going to measure their success. While this will involve a longer Evaluation Planning Process, consider what you want to know:
     - Formative Measures: Do you have the information necessary to demonstrate that your plan to reach your goal will work? "Focus groups revealed that persons with disabilities avoided accessing care at community-based organizations in census block A because frontline staff used stigmatizing language."

     - Process Measures: Have the specific steps outlined to achieve the goal taken place? "The guide was disseminated to community-based organizations by December 30, 2024."

     - Outcome Measures: Guidelines that establish that you achieved the established goal. For the example above, outcome measures might be "Persons with disabilities who seek care will report a 20% increase in patient satisfaction by May 2025."

- **Small Steps:**
  These are initial steps that can be taken by both parties toward realizing the goal. Examples might be:
    - Identifying other partners needed to facilitate the goal. For example, the LHD and CIL may want to contact national organizations that can help them connect with pertinent stakeholders and/or resources.

    - Finding additional resources about the issue that necessitated the goal in the first place.

    - Setting up a regular meeting calendar to ensure that the work toward the goal continues to move forward.

1. Timing – Why Now?
Why is the goal important to us now?

2. Obstacles
What will hinder our progress toward our goal?

Change Goal:
(Ex. "The LHD and CIL will develop and disseminate a user guide outlining culturally responsive practices for community-based organizations delivering services to persons with disabilities by December 2024.")

4. Small Steps
What action can we take to make progress on our goal?

3. Measures
How do we know we're making progress toward our goal?