



MHSOAC INCUBATOR SYSTEMS ANALYSIS PROJECT

JULY 2020

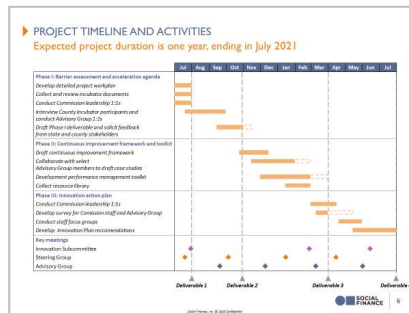
Deliverable 1: Detailed Project Workplan - DRAFT

10 Milk Street, Suite 1010, Boston, MA 02108



INTRODUCTION TO THIS DOCUMENT

- This document includes a project summary, timeline, detailed activities for each project phase, and other important project management information (e.g., an Advisory Board Charter)



- The contours of the project may shift as we continue to learn; we will remain adaptable to changing context and better information, and will adjust this document as needed
- We look forward to working closely with the Commission and contributing to driving forward the impact of the Innovation Incubator
- The primary points of contact for this project are Jake Segal (jsegal@socialfinance.org) and Jim Mayer (jim.mayer@mhsoac.ca.gov)

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▶ PROJECT BACKGROUND AND OBJECTIVES

MHSOAC has engaged Social Finance to develop recommendations and tools for furthering the mission and effectiveness of its Innovation Incubator

Background

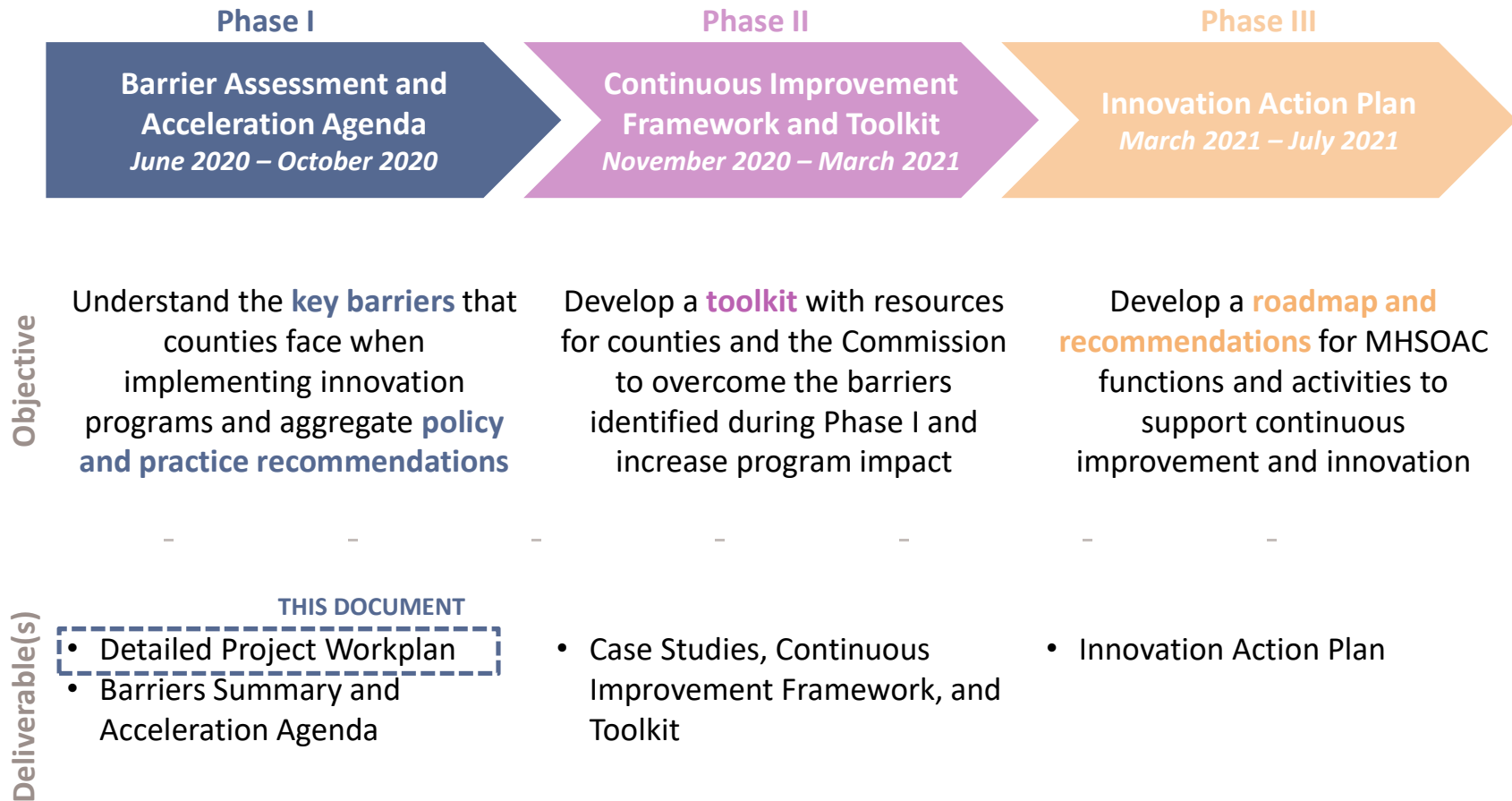
- The Mental Health Services Oversight and Accountability Commission's (MHSOAC) Innovation Incubator is working with multi-county collaboratives to **develop new and stronger systems to support mental health**.
- MHSOAC would like to strengthen statewide **capacity for continuous improvement**—attempting to disseminate tools and knowledge that would reach a wider array of counties (which may not yet be involved in the Incubator's work); to support practice transformation at scale; and to form a clearer mutual understanding between California mental health stakeholder of innovation and continuous improvement.

Objectives

1. To **assess learnings** across the Innovation Incubator's projects, to more clearly define the **role of continuous improvement and innovation**, to understand the value of multi-county collaboratives in supporting change at the community scale, and to **identify common barriers** experienced by counties in pursuing system-level improvements.
2. To distill and refine those learnings into a pragmatic **continuous improvement framework** that counties can use to improve outcomes, including through MHSOAC Innovation projects.
3. To **inform and guide changes** within MHSOAC and its state agency partners for continuous improvement and innovation in community mental health services.

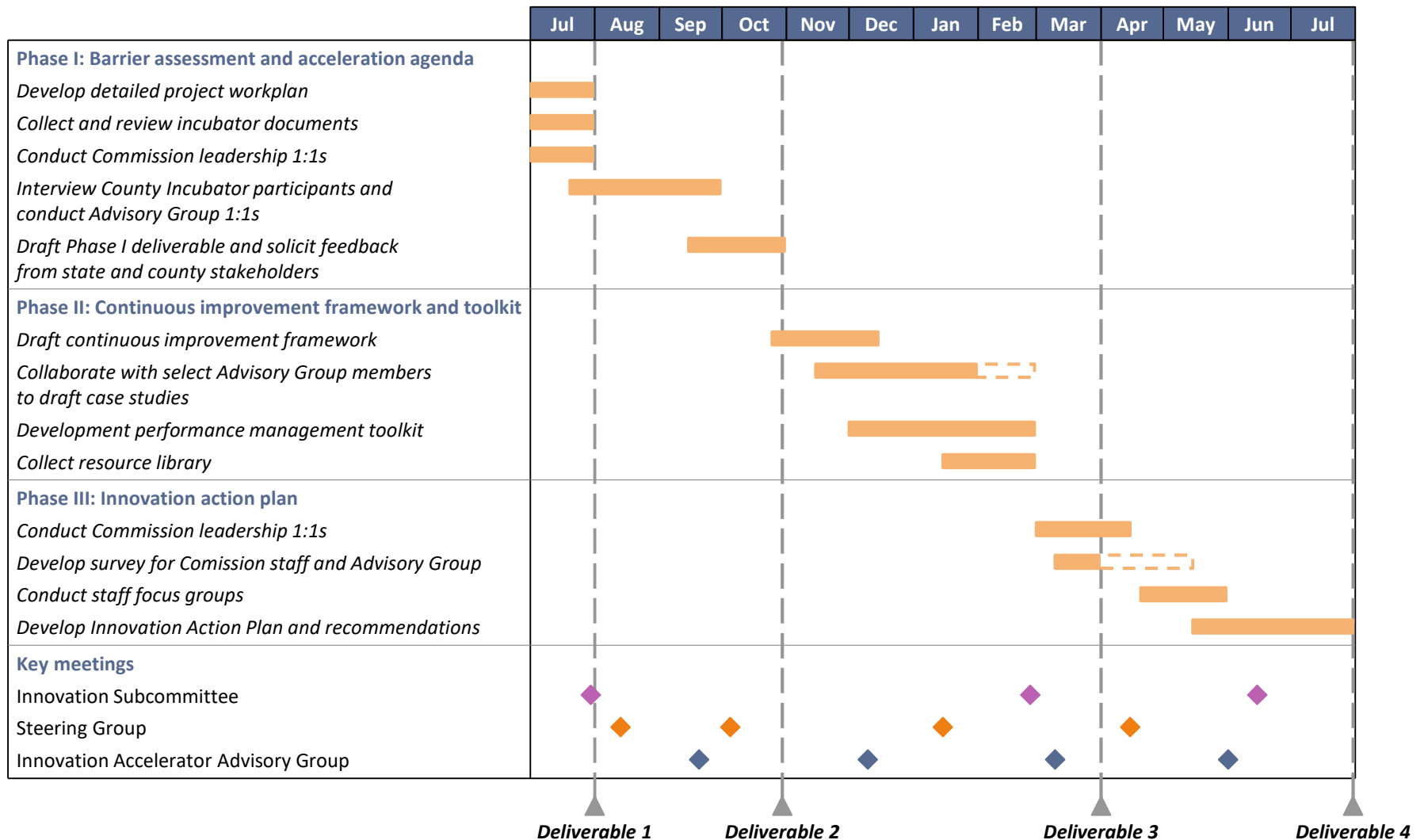
▶ SUMMARY OF PROJECT PHASES AND KEY DELIVERABLES

We will conduct the project in three phases, working in close coordination with Commission staff



OVERVIEW: PROJECT TIMELINE AND ACTIVITIES

Expected project duration is one year, ending in July 2021



► PROJECT MANAGEMENT

We will work in close coordination with commission staff throughout the course of the project


	Role	Participants		Meeting Cadence
Commission Innovation Subcommittee	Guide the overall project and participate in developing recommendations for how the Commission can support the development of stronger county Innovation plans	<ul style="list-style-type: none"> Commissioner Itai Danovitch Commissioner John Boyd 		Three times over course of project
Project Steering Group	Provide overall project guidance, scope adjustments, and coordinate with Commission's other strategic initiatives	MHSOAC <ul style="list-style-type: none"> Toby Ewing Jim Mayer Sharmil Shah 	Social Finance <ul style="list-style-type: none"> Jeff Shumway Jake Segal 	Quarterly
Innovation Accelerator Advisory Group	Co-create and refine the project's core deliverables and disseminate key learnings (see draft charter in Appendix A)	<ul style="list-style-type: none"> 4-6 county leaders 3-4 engaged state partners 2-3 community members 2 members of the Commission 		Four times over course of project
Project Working Group	Facilitate project processes and outreach, discuss and iterate on findings and outputs, and troubleshoot as issues arise	MHSOAC <ul style="list-style-type: none"> Jim Mayer Sharmil Shah Trisha Duchaine 	Social Finance <ul style="list-style-type: none"> Jake Segal Kyle Doran Emily McKelvey Annie Jensen 	Biweekly or as needed
Project Sub-contractors	(i) A former county health director to support engagement with county leaders (ii) Individuals with lived experience who can support community engagement	<ul style="list-style-type: none"> TBD (In progress) 		As needed

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▶ PHASE I: BARRIER ASSESSMENT AND ACCELERATION AGENDA

Objective: understand the key barriers that counties face when implementing innovation programs and aggregate policy and practice recommendations

<i>Phase I Activities</i>	<i>Activity Goal</i>	<i>Timing</i>	
 Develop detailed project workplan	<i>Align Working Group around a detailed workplan that incorporates feedback from the Innovation Subcommittee and Steering Group</i>	July 2020	DELIVERABLE 1 DETAILED PROJECT WORKPLAN
		g.	
Draft Phase I deliverable and solicit feedback	<i>Summarize findings from all previous activities into a document that aggregates common barriers and an "Acceleration Agenda" with policy and practice recommendations</i>	Sept. to Oct. 2020	DELIVERABLE 2 BARRIERS & ACCELERATION AGENDA

▶ PHASE I: BARRIER ASSESSMENT AND ACCELERATION AGENDA

First, we will conduct a document review to develop an initial list of barriers and themes to explore in subsequent activities

<i>Phase I Activities</i>	<i>Activity Details</i>	<i>Document List</i>
<p>Develop detailed project workplan</p> <p>Collect and review Incubator documents</p> <p>Conduct Commission leadership 1:1s</p> <p>Interview county Incubator participants and conduct Advisory Group 1:1s</p> <p>Draft Phase I deliverable and solicit feedback</p>	<ul style="list-style-type: none">• Target timing: ~2-3 weeks (July 2020)• We will approach our document review through the lens of answering the following questions:<ul style="list-style-type: none">▪ What barriers do counties face in continuous improvement and innovation? Have any innovation incubator project helped identify or understand these barriers?▪ What strategies have stakeholders used to overcome these barriers?▪ Which efforts/programs have been most successful and why? Which have been least successful?• Our document review will allow us to seed an initial list of barriers and themes to explore in subsequent activities	<p>Documents to be reviewed include:</p> <ul style="list-style-type: none">• Select Innovation project plans• Reports from Innovation Incubator projects• Updates from other Commission-sponsored multi-county collaboratives and relevant strategic partnerships <p><i>The working list of documents will be updated throughout Phase I in workplan Appendix B</i></p>

► PHASE I: BARRIER ASSESSMENT AND ACCELERATION AGENDA

In parallel, we will solicit input from Commission leadership on the project direction and visions for success

<i>Phase I Activities</i>	<i>Activity Details</i>	<i>Interview List</i>
Develop detailed project workplan	<ul style="list-style-type: none"> • Target timing: ~2 weeks (July 2020) • We will explore the following themes in our interviews: <ul style="list-style-type: none"> ▪ Learn MHSOAC leadership members' visions of success of the project ▪ Anticipate and begin to form strategies for mitigating future challenges for the project ▪ Identify potential consultant sub-contractors for this work • These interviews will be the first of many conversations with Commission leadership throughout the course of the project 	<p>Individuals we have interviewed or will interview include:</p> <ul style="list-style-type: none"> • Commissioner Boyd (7/22) • Commissioner Danovitch (7/20) • Toby Ewing, Executive Director (7/16) • Brian Sala, Deputy Director, Evaluation and Program Operations (7/16) • Norma Pate, Deputy Director, Administrative and Legislative Services (7/17) • Sharmil Shah, Chief of Program Operations (7/30) • Other Commissioners, including the Chair and Vice Chair
Collect and review Incubator documents		
Conduct Commission leadership 1:1s		
Interview county Incubator participants and conduct Advisory Group 1:1s		
Draft Phase I deliverable and solicit feedback		

▶ PHASE I: BARRIER ASSESSMENT AND ACCELERATION AGENDA

Next, we will conduct interviews with County Incubator participants to further understand barriers and opportunities

<i>Phase I Activities</i>	<i>Activity Details</i>	<i>Interview List</i>
Develop detailed project workplan	<ul style="list-style-type: none">• Target timing: ~10 weeks (mid-July to late-Sept. 2020)• Social Finance will develop interview guides for each stakeholder type• Our interviews will focus on the following themes:<ul style="list-style-type: none">▪ Capacity to design and execute innovation programs▪ Barriers that hinder continuous improvement and innovation projects▪ Strategies that counties have used to resolve those issues▪ Ideas to unlock further progress and/or scale impact via policy change▪ Specific delivery mechanisms or tools that would be helpful for delivering project findings to counties	<p>We will conduct ~40 interviews among the following groups:</p> <ul style="list-style-type: none">• County leaders: ~10• Technical assistance providers: ~10• Culturally diverse community stakeholders and people with lived experience: ~10• Advisory Group members: ~12 <p><i>As we compile the list of interviewees, we will update Appendix C of this workplan</i></p>
Collect and review Incubator documents		
Conduct Commission leadership 1:1s		
Interview county Incubator participants and conduct Advisory Group 1:1s		
Draft Phase I deliverable and solicit feedback		

▶ PHASE I: BARRIER ASSESSMENT AND ACCELERATION AGENDA

To conclude Phase I, we will synthesize findings and develop recommendations in Deliverable 2: “Barrier Assessment and Acceleration Agenda”

<i>Phase I Activities</i>	<i>Activity Details</i>	<i>Deliverable 2 Review Process</i>
Develop detailed project workplan	<ul style="list-style-type: none">• Target timing: ~6 weeks (mid-Sept. to Oct. 31st, 2020)• We will summarize our findings and analysis for Phase I in Deliverable 2, which will:<ul style="list-style-type: none">▪ List barriers categorized by primary drivers (e.g., regulatory, cultural, financial, capacity), by those faced by different kinds of counties, and by complexity▪ Highlight examples of recommendations to overcome the above barriers▪ Assess tradeoffs between feasibility and impact for recommendations, identifying both “low-hanging fruit” and more ambitious, high-value opportunities▪ Distinguish between recommended actions for counties with different characteristics, state agencies (including the Commission), and the Legislature	<ul style="list-style-type: none">• We will share a summary of initial findings for input at the first meeting of the Innovation Accelerator Advisory Group in early fall• We will integrate feedback on initial findings from the Advisory Group and other stakeholders into the deliverable• After the deliverable is complete, the project Steering Group will meet to discuss any implications on the scope for Phase II
Collect and review Incubator documents		
Conduct Commission leadership 1:1s		
Interview county Incubator participants and conduct Advisory Group 1:1s		
Draft Phase I deliverable and solicit feedback		

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► **PHASE II: CONTINUOUS IMPROVEMENT FRAMEWORK AND TOOLKIT**
Objective: develop a toolkit with resources for counties and the Commission to overcome the barriers identified during Phase I and increase program impact

<i>Phase II Activities</i>	<i>Activity Goal</i>	<i>Timing</i>	
Draft continuous improvement framework	<i>Conduct expert interviews on best practices on best practices in driving public-sector innovation, improvement, and transformation, and develop an innovation framework that supports diverse counties in unlocking innovation</i>	<i>Oct. 2020 to Dec. 2020</i>	
Collaborate with select Advisory Group members to draft case studies	<i>Develop case studies on how counties have successfully overcome the barriers identified in Phase I or employed best practices in continuous improvement</i>	<i>Nov. 2020 to Jan. 2021</i>	
Develop performance management toolkit	<i>Build a toolkit for county leaders that provides practical resources for strengthening performance management within the continuous improvement framework and addressing barriers identified in Phase I</i>	<i>Nov. 2020 to March 2021</i>	DELIVERABLE 3 RESOURCE LIBRARY WITH CONTINUOUS IMPROVEMENT FRAMEWORK, CASE STUDIES, AND TOOLKIT
Collect resource library	<i>Package the continuous improvement framework, case studies, and performance management toolkit into an accessible resource library for county leaders</i>	<i>Jan. 2021 – Feb. 2021</i>	

▶ PHASE II: CONTINUOUS IMPROVEMENT FRAMEWORK AND TOOLKIT

First, we will seek expert input and draft a continuous improvement framework to model best practices in the promotion of innovation

Phase II Activities	Activity Details	Interview Types
<p data-bbox="233 509 539 704">Draft continuous improvement framework</p> <p data-bbox="233 725 539 920">Collaborate with select Advisory Group members to draft case studies</p> <p data-bbox="233 941 539 1136">Develop performance management toolkit</p> <p data-bbox="233 1157 539 1352">Collect resource library</p>	<ul style="list-style-type: none">• Target timing: ~6 weeks (late Oct. to Dec. 2020)• We will conduct a series of interviews and desk research focused on emerging practices in in strengthening public-sector innovation, improvement, and transformation• In parallel to the interviews, we will draft a continuous improvement framework based on our findings that will seek to:<ul style="list-style-type: none">▪ Establish the parameters, principles, and practices that characterize innovation▪ Build a mutual understanding of effective tools and strategies that public entities draw upon to drive innovation and continuous improvement	<p data-bbox="1438 532 1803 613">Types of experts we will interview may include:</p> <ul style="list-style-type: none">• Academic experts on innovation (e.g., HBS)• Private-sector innovation leaders (e.g., Google)• National government associations (e.g., NACo)• State and County offices of innovation (e.g., New Urban Mechanics)• Policy labs (e.g., Harvard Gov't Performance Lab) <p data-bbox="1438 1211 1829 1317"><i>Specific interviewees and sub-topics to be determined at the conclusion of Phase I</i></p>

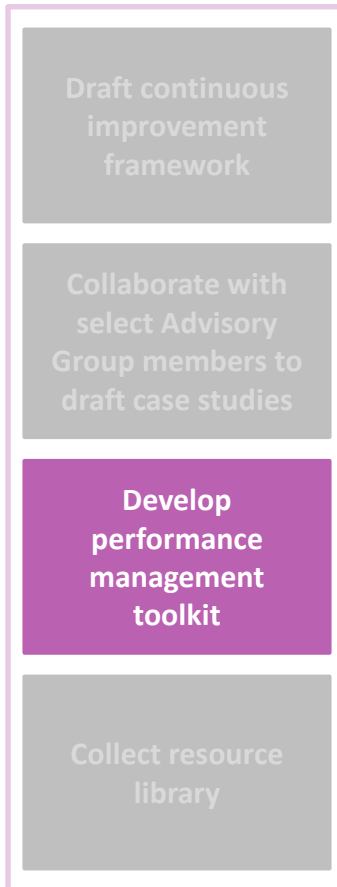
► **PHASE II: CONTINUOUS IMPROVEMENT FRAMEWORK AND TOOLKIT**
 We will then work with the Advisory Group to develop at least five case studies that highlight how counties have overcome barriers identified in Phase I

<i>Phase II Activities</i>	<i>Activity Details</i>	<i>Case Study Review Process</i>
Draft continuous improvement framework	<ul style="list-style-type: none"> • Target timing: ~10 weeks (mid-Nov. 2020 to late Jan. 2021) • We will develop at least five case studies that: <ul style="list-style-type: none"> ▪ Demonstrate how counties have successfully overcome the barriers identified in Phase I and how those successes could be replicated ▪ Includes a profile of at least one program participant illustrative of the success of the project ▪ Highlight examples in which counties drew from or modeled best practices and principles from the literature • We will seek to highlight examples from a diverse set of counties, lifting up models relevant to many types of stakeholders 	<ul style="list-style-type: none"> • We will collaborate with select Innovation Accelerator Advisory Group members and other county leaders when developing case studies • We will present draft case studies to the Advisory Group for collective feedback
Collaborate with select Advisory Group members to draft case studies		
Develop performance management toolkit		
Collect resource library		

▶ PHASE II: CONTINUOUS IMPROVEMENT FRAMEWORK AND TOOLKIT

Next, we will build a toolkit for county leaders with resources for strengthening performance management

Phase II Activities



Activity Details

- Target timing: ~12 weeks (early Dec. 2020 to late Feb. 2021)
- We will develop a toolkit for county leaders that provides practical resources for strengthening performance management within the continuous improvement framework and:
 - Highlights resources and specific opportunities for deployment within the context of regular county processes
 - When possible, differentiates for whom (e.g., which agencies, positions, types of counties) different tools are likely to be most useful
 - Includes briefing and training materials designed to help counties implement the tools
- The toolkit will be designed for busy county leaders and presented in formats suitable for briefing and training county staff

Toolkit Components

Toolkit components will be shaped to match barriers identified in Phase I, with potential examples being:

- Tools for shifting from contract monitoring to active performance management
- Strategies for developing effective outcomes goals
- Tactics for engaging providers to develop a collaborative problem-solving environment
- Assessments for counties to better understand inequities in outcomes across racial, gender, and age groups
- An aggregation of measurement and evaluation tools, guides, and best practices

► **PHASE II: CONTINUOUS IMPROVEMENT FRAMEWORK AND TOOLKIT**
 Finally, we will package and deliver the continuous improvement framework, case studies, and toolkit into Deliverable 3

<i>Phase II Activities</i>	<i>Activity Details</i>	<i>Deliverable 3 Dissemination</i>
Draft continuous improvement framework	<ul style="list-style-type: none"> • Target timing: ~10 weeks (mid-Jan. to late March 31st, 2021) • We will package the outputs of all previous Phase II activities into Deliverable 3, a resource library for county leaders that will include: <ul style="list-style-type: none"> ▪ Modules segmented by audience (incorporating suggestions of the Innovation Accelerator Advisory Group on the best format for delivery) ▪ A “package” of printable materials that includes robust guidance for readers to easily find what is most relevant to them ▪ An online landing page that is searchable and easy to navigate 	<p>In partnership with members of the Innovation Accelerator Advisory Group, we will:</p> <ul style="list-style-type: none"> • Introduce the resource library materials through at least one statewide conference (e.g., Words to Deeds) • Pilot and revise the materials through at least two leadership development trainings with partner counties
Collaborate with select Advisory Group members to draft case studies		
Develop performance management toolkit		
Collect resource library		

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▶ PHASE III: INNOVATION ACTION PLAN

Objective: develop a roadmap and recommendations for MHSOAC functions and activities to support continuous improvement and innovation

<i>Phase III Activities</i>	<i>Activity Goal</i>	<i>Timing</i>	
Conduct Commission leadership 1:1s	<i>Conduct one-on-one interviews with Commission leadership to better understand the status quo, perceived challenges with the Innovation funding process, and ideas for the future</i>	<i>March 2021 to April 2021</i>	
Develop survey for Commission staff and Advisory Group	<i>Develop a short survey for Commission staff and Innovation Accelerator Advisory Group members to surface ideas and themes</i>	<i>March 2021</i>	
Conduct staff focus groups	<i>Elaborate on survey findings and facilitate discussion about how the Commission can use its authorities to support continuous improvement and innovation</i>	<i>April 2021 to May 2021</i>	
Develop Innovation Action Plan and recommendations	<i>Co-develop recommendations with Commission staff for strategically aligning and improving Commission activities that support continuous improvement and innovation</i>	<i>Jan. 2021 – Feb. 2021</i>	DELIVERABLE 4 INNOVATION ACTION PLAN

▶ PHASE III: INNOVATION ACTION PLAN

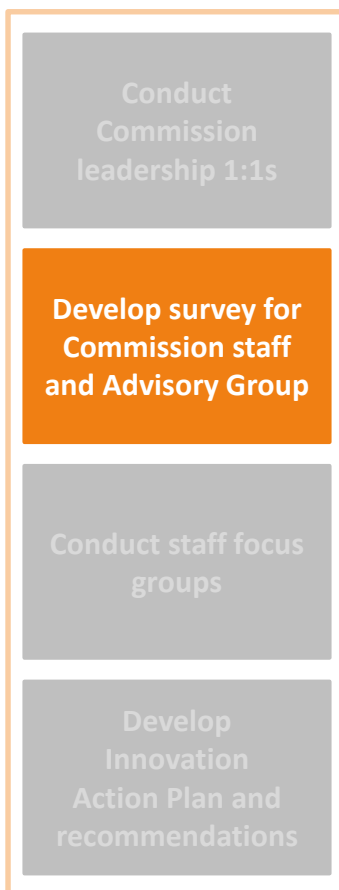
First, we will conduct interviews with MHSOAC leadership to understand challenges and opportunities for the Commission in supporting innovation

<i>Phase III Activities</i>	<i>Activity Details</i>	<i>Interview List</i>
<p>Conduct Commission leadership 1:1s</p> <p>Develop survey for Commission staff and Advisory Group</p> <p>Conduct staff focus groups</p> <p>Develop Innovation Action Plan and recommendations</p>	<ul style="list-style-type: none">• Target timing: ~6 weeks (early March to mid-April 2021)• We will conduct one-on-one interviews with Commission leadership to better understand:<ul style="list-style-type: none">▪ The status quo of how the Commission's functions, activities and processes support county innovation and continuous improvement▪ Perceived challenges with the innovation funding process▪ Ideas for improvements to the status quo	<p>Exact list to be determined at the onset of Phase III, likely including most members of the management team</p>

▶ PHASE III: INNOVATION ACTION PLAN

Next, we will conduct a brief survey to gather input from Commission staff and the Advisory Group that will be incorporated into the Action Plan

Phase III Activities



Activity Details

- Target timing: ~4 weeks (March 2021)
- Develop, conduct, and analyze a brief quantitative survey which respondents will have the opportunity to:
 - Identify challenges for the Commission in supporting innovation and continuous improvement
 - Offer input and feedback on potential actions the Commission could take to mitigate those challenges
 - Prioritize types of content to be included in the Innovation Action Plan (Deliverable 4)

Survey Respondents

Survey respondents will include:

- Innovation Accelerator Advisory Group
- Commission staff: more precise list TBD, but will include current and former innovation team members Shannon Tarter, Grace Reedy, and Marcus Galeste
- Other stakeholders involved in the innovation process

▶ PHASE III: INNOVATION ACTION PLAN

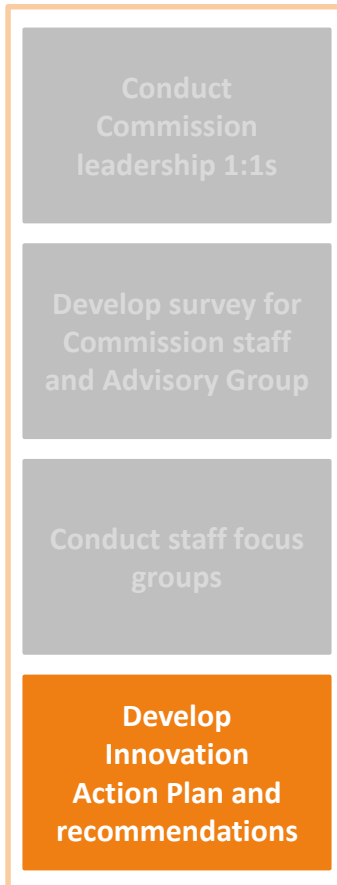
After reviewing the survey results and themes, we will conduct focus groups with Commission staff to expand and elaborate on the findings

<i>Phase III Activities</i>	<i>Activity Details</i>	<i>Focus Group Participants</i>
<p>Conduct Commission leadership 1:1s</p> <p>Develop survey for Commission staff and Advisory Group</p> <p>Conduct staff focus groups</p> <p>Develop Innovation Action Plan and recommendations</p>	<ul style="list-style-type: none">• Target timing: ~6 weeks (mid-April to late May 2021)• We will conduct small focus groups among staff to expand upon these ideas and themes that emerged in the survey• We will develop a script for the focus groups to allow us to facilitate a conversation about how the Commission can support and encourage investment in the continuous improvement framework• We will focus both on specific MHSOAC policy recommendations and on broader statewide ideas	<ul style="list-style-type: none">• Exact participants TBD• Focus groups will be differentiated, potentially by functional role at the Commission or some other distinction

▶ PHASE III: INNOVATION ACTION PLAN

To conclude the project, we will synthesize learnings and recommendations from previous activities into Deliverable 4: an Innovation Action Plan

Phase III Activities



Activity Details

- Target timing: ~10 weeks (May 2021 through July 31st, 2021)
- We will synthesize input and learnings from all previous activities (including Phases I and II) into an Action Plan (Deliverable 4) that will include:
 - An **internal-facing roadmap** to support continuous improvement and innovation
 - **Mechanisms for counties** to build stronger Innovation plans, share learnings, and leverage the support of technical assistance
 - Recommendations for how the **Commission's activities** can drive continuous improvement and innovation among county partners
 - A **policy brief** for state administrators and lawmakers that highlights priorities for supporting continuous improvement at the nexus of mental health, criminal justice, homelessness, and hospitalization.

Deliverable 4 Review Process

- The internal roadmap and policy brief will be reviewed in a final meeting of the Innovation Accelerator Advisory Group by May 31, 2021
- We will incorporate Commission and Advisory Group feedback and complete final documents by July 31, 2021

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▶ APPENDICES A, B, C

Appendix A: Innovation Accelerator Advisory Board Charter

Innovation Accelerator Advisory Group – Draft Charter

Project Background

The Mental Health Services Oversight and Accountability Commission (MHSOAC) Innovation Incubator is supporting counties to develop new and stronger systems to support mental health.

MHSOAC would like to strengthen statewide capacity for continuous improvement—working to disseminate tools and knowledge that would reach a wider array of counties (which may not yet be involved in the Incubator's work), to support practice transformation at scale, and to form a clearer mutual understanding between California mental health stakeholders of innovation and continuous improvement.

To this end, MHSOAC has engaged the nonprofit organization Social Finance in a project to develop recommendations and tools for furthering the mission and effectiveness of its Innovation Incubator. The project has the following objectives:

1. Assess lessons learned to date across the Innovation Incubator's projects, understand the value of multi-county collaborations in supporting change at the community state, identify common barriers experienced by counties in pursuing system-level improvements, and highlight county-level success that could inform efforts across the state.
2. Distill and refine learnings into a pragmatic continuous improvement framework that counties could use to improve outcomes, including through MHSOAC Innovation projects.
3. Inform and guide changes within MHSOAC and its state partners for continuous improvement in innovation in community mental health services.

The project began in July 2020 and will conclude in July 2021.

Purpose and Composition of the Project's Advisory Group

The Innovation Accelerator Advisory Group ("The Advisory Group") is intended to inform, co-create, and disseminate key learnings. The Advisory Group will be asked to help the project in the realities and possibilities of making transformative change—lead as ambassadors within their communities of practice to accelerate dissemination of findings from the project.

The Advisory Group will be composed of 4 county leaders, 3-4 engaged state partners, 2-3 community members with lived experience in California's mental health system, 2 members of the Commission, and 1-2 facilitators from Social Finance. It will meet as a full group at least four times over the course of the project. Members will also be asked to engage in more regular, one-to-one or one-to-many, meetings, and in addition to this group, the project intends to engage a wide selection of community stakeholders, county state leaders, practitioners, and researchers.

Structure and Scope of Work

Engagement of the Advisory Group will follow the three phases of the project.

- **PHASE I: Barrier Assessment and Acceleration Agenda** (July 2020 – October 2021)
 - During Phase I, Social Finance and members of MHSOAC staff (the "Working Group") will seek to understand the key barriers that counties face when implementing innovation programs and agree

policy and practice recommendations. This work will include one-on-one conversations with individual Advisory Group Members to brief them on project progress and understand their perspective on Phase I priorities.

Following this initial assessment, Social Finance will hold the first meeting of the Advisory Group, during which Advisory Group members will assist with assessing and prioritizing the recommendations developed throughout Phase I.

- **PHASE II: Continuous Improvement Framework and Toolkit** (November 2020 – March 2021)
 - In Phase II, the Working Group will develop a toolkit with resources for counties and the Commission to overcome the barriers identified during Phase I and increase program impact.
 - To support this effort, members of the Advisory Group will be engaged to create (and perhaps co-author) case studies on how counties have successfully overcome the barriers identified in Phase I. The Advisory Group shall be convened twice during Phase II to discuss and comment on the resources and their delivery, with the intention of facilitating collaborative creation process and joint ownership of the final product. At the first of these Phase II meetings, the Working Group will present draft case studies to the Advisory Group for collective feedback. At the second meeting, the Working Group will present the penultimate draft of the continuous improvement framework, toolkit, and case studies to discuss case cases and dissemination strategy.
- **PHASE III: Innovation Action Plan** (March 2021 – July 2021)
 - For Phase III, the Working Group will develop a roadmap for MHSOAC functions and activities to support continuous improvement and innovation. This work will culminate in the development of an Innovation Action Plan that will synthesize learnings and recommendations from the project.
 - Advisory Group members will offer input into the Action Plan by participating in a short online survey and a likely virtual Focus Group about how the Commission can use its authorized (and especially the Innovation Plan process) to support and encourage investment in the continuous improvement framework.
 - At the Advisory Group's fourth and final convening, members will review and provide feedback on the draft Action Plan.

Appendix B: Phase I Document Repository List

TBD (in progress)

Appendix C: Phase I Interview Outreach List

TBD (in progress)

▶ APPENDIX D: ABOUT SOCIAL FINANCE



Dedicated to mobilizing capital to drive social progress

Our History

- **Founded in January 2011** by David Blood, Sir Ronald Cohen, and Tracy Palandjian
- **First dedicated** Pay for Success intermediary in the country

Our Global Network

- Social Finance UK, was founded in 2007 and launched **the world's first Social Impact Bond** in 2010
- Our Global Network now includes Social Finance **UK, US, Israel, India, and the Netherlands**

Our Team

- **Team of 60** includes experienced professionals from the public, private, and nonprofit sectors
- Offices in **Boston, MA, Austin, TX, and San Francisco, CA**

Children & Families



Criminal Justice



Education



Health



Sustainability & Resiliency



Workforce



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Innovation Accelerator Advisory Group – Draft Charter

Project Background

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MHSOAC would like to strengthen statewide **capacity for continuous improvement**—working to disseminate tools and knowledge that would reach a wider array of counties (which may not yet be involved in the Incubator’s work), to support practice transformation at scale, and to form a clearer mutual understanding between California mental health stakeholders of innovation and continuous improvement.

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1. **Assess lessons learned** to date across the Innovation Incubator’s projects, understand the value of multi-county collaboratives in supporting change at the community scale, identify common barriers experienced by counties in pursuing system-level improvements, and highlight county-level successes that could inform efforts across the state.
2. Distill and refine learnings into a pragmatic **continuous improvement framework** that counties can use to improve outcomes, including through MHSOAC Innovation projects.
3. **Inform and guide changes** within MHSOAC and its state partners for continuous improvement and innovation in community mental health services.

The project began in July 2020 and will conclude in July 2021.

Purpose and Composition of the Project’s Advisory Group

The Innovation Accelerator Advisory Group (“The Advisory Group”) is intended to inform, co-create, and refine the project’s core deliverables and disseminate key learnings. The Advisory Group will be asked to help ground the project in the realities and possibilities of making transformative change—and serve as ambassadors to others within their communities of practice to accelerate dissemination of findings from the project.

The Advisory Group will be composed of 4-6 county leaders, 3-4 engaged state partners, 2-3 community members with lived experience in California’s mental health system, 2 members of the Commission, and facilitators from Social Finance. It will meet as a full group at least four times over the course of the project; members will also be asked to engage in more regular, small-group brainstorming, materials review, and input.

In addition to this group, the project intends to engage a wide selection of community stakeholders, county and state leaders, practitioners, and researchers.

Structure and Scope of Work

Engagement of the Advisory Group will follow the three phases of the project.

- **PHASE I: Barrier Assessment and Acceleration Agenda** (July 2020 – October 2021)

During Phase I, Social Finance and members of MHSOAC staff (the “Working Group”) will seek to understand the key barriers that counties face when implementing innovation programs and aggregate

policy and practice recommendations. This work will include one-on-one conversations with individual Advisory Group Members to brief them on project progress and understand their perspectives on Phase I priorities.

Following this initial assessment, Social Finance will hold the first meeting of the Advisory Group, during which Advisory Group members will assist with assessing and prioritizing the recommendations developed throughout Phase I.

- **PHASE II: Continuous Improvement Framework and Toolkit** (November 2020 – March 2021)

In Phase II, the Working Group will develop a toolkit with resources for counties and the Commission to overcome the barriers identified during Phase I and increase program impact.

To support this effort, members of the Advisory Group will be engaged to shape (and perhaps co-author) case studies on how counties have successfully overcome the barriers identified in Phase I. The Advisory Group shall be convened twice during Phase II to discuss and comment on the materials and their delivery, with the intention of facilitating a collaborative creation process and joint ownership of the final product. At the first of these Phase II meetings, the Working Group will present draft case studies to the Advisory Group for collective feedback. At the second meeting, the Working Group will present the penultimate draft of the continuous improvement framework, toolkit, and case studies to discuss use cases and dissemination strategy.

- **PHASE III: Innovation Action Plan** (March 2021 – July 2021)

For Phase III, the Working Group will develop a roadmap for MHSOAC functions and activities to support continuous improvement and innovation. This work will culminate in the development of an Innovation Action Plan that will synthesize learnings and recommendations from the project.

Advisory Group members will offer input into the Action Plan by participating in a short online survey and a (likely virtual) focus group about how the Commission can use its authorities (and especially the Innovation Plan process) to support and encourage investment in the continuous improvement framework.

At the Advisory Group's fourth and final convening, members will review and provide feedback on the draft Action Plan.