

**CFHI – PRIORITY HEALTH INNOVATION CHALLENGE
MINI-CHALLENGE #1: ENGAGEMENT STRATEGY FOR QUALITY IMPROVEMENT – OFFICIAL TERMS AND CONDITIONS**

1. MINI-CHALLENGE 1:

From time to time, CFHI, in its sole and absolute discretion, may make available additional monetary and other incentives to Challenge Teams participating in the CFHI Priority Health Innovation Challenge (the “**Challenge**”), pursuant to Section 12, “Other Award Opportunities” of the Challenge Terms (the “**Challenge Terms**”), available at: <https://www.cfhi-fcass.ca/sf-docs/default-source/documents/innovation-challenges/innovation-challenge-priority-health-official-terms-e.pdf>.

Without limiting the following *Mini-Challenge #1* (the “**Mini-Challenge**”) Official Terms and Conditions (the “**Mini-Challenge Terms**”), the Mini-Challenge is subject to all applicable terms and conditions of the Challenge. Any capitalized term used herein and not defined shall have the respective meaning assigned to it in the Challenge Terms. In the event of any discrepancy or inconsistency between these Mini-Challenge Terms and the Challenge Terms, the Challenge Terms shall prevail, govern and control to the extent required to resolve the conflict.

2. AWARD DETERMINATION PROCESS:

Mini-Challenge #1 Awards

Between July 24, 2019 at 12:00 p.m. ET and September 20, 2019 at 12:00 p.m. ET, Team Leaders of qualified participating Teams in the Challenge can submit a completed Engagement Strategy for Quality Improvement plan (the “**Plan**”) – using the template provided by CFHI with guideline and formatting specifications (a copy of which is attached to these Mini-Challenge Terms as Schedule “A”) – demonstrating clear and intended strategies for engaging key groups in their Challenge initiative to advance the primary outcome Indicator associated with the Team’s Registration and increase reach of the targeted patient/population identified at Registration (see Section 6 “Team Registration” of the Challenge [Terms](#)). Plans must be in English or French.

In relation to each Category, a panel of Judges appointed by CFHI will judge each Plan on the basis of the following weighted criteria:

Criteria	Weighting
Part I – Creating the Strategy	50%
1. Range – A broad range of stakeholders are identified in the plan, which includes key individuals and organizations needed to support, enact or provide strategic decision related to the initiative.	10%
2. Reach and Roles – The plan identifies stakeholders in various positions with a range of influence (direct/indirect/strategic), with key roles to play as it relates to implementation of the initiative (education & training, advocacy, evidence support/expertise, setting goals and targets, guidance or other).	10%
3. Barriers – The perceived potential barriers for each identified stakeholder group are clearly articulated.	10%
4. Timelines and Strategies – Timelines and appropriate tactics/strategies (e.g. peer connections, newsletters, e-briefs, town halls) for engaging with each stakeholder have been identified and align appropriately with the level of power and/or perceived influence for each stakeholder group.	10%
5. Key Messages and Expected Outcomes – The key messages identified for each stakeholder group clearly relate to the level of interest and influence, for each group respectively, as identified in the plan. The expected outcome(s) (ideal behaviour changes in actions, practices and interactions) for successful design and implementation of the initiative have been identified for each stakeholder group.	10%
Part II – Actioning the Strategy	50%
6. The team has identified tangible tactics/strategies for action the plan that would draw on the monies received for this award.	25%
7. The strategies identified will clearly support advancement of the primary outcome Indicator and target patient/population reach.	25%
Total Score	Maximum 100%

Each Plan will be given a score (the “**Plan Score**”) by the Judges. In order to be eligible for a Mini-Challenge #1 Award, the Plan must achieve a Threshold Plan Score of at least 75% (as determined by the Judges in their sole and absolute discretion). Odds of being selected depend on the number and calibre of eligible Plans submitted and received in each Category that satisfy the Threshold Report Score. In each Category, the Teams associated with the top five (5) Plans based on Plan Score (as determined by the Judges, in their sole and absolute discretion) will each be eligible to earn a Mini-Challenge #1 Award of \$10,000 CAD.

For the avoidance of any doubt, there will be five (5) Mini-Challenge #1 Awards in relation to each Category for a total of ten (10) Mini-Challenge #1 Awards in the Challenge. If, in relation to any Category, there are fewer Teams that satisfy the Threshold Plan Score than there are Mini-Challenge #1 Awards available to be received, then fewer Mini-Challenge #1 Awards will be awarded accordingly. In the event of a tie between two (2) or more eligible Plans in a Category based on Plan Score, the Team associated with the Plan – from amongst all such eligible Plans that are tied – with the highest combined score on Criteria 1 and 7 (followed in the event of a further tie by Criteria 2, then Criteria 3, then Criteria 4, then Criteria 5, then Criteria 6) will be selected as the eligible recipient of the applicable Mini-Challenge #1 Award. In the event of an exact tie based on criteria 1 and 7, 2, 3, 4, 5, and 6, a new panel of judges will be appointed by CFHI to break the tie in accordance with the preceding procedures.

ANYONE DEEMED BY CFHI TO BE IN VIOLATION OF CFHI’S INTERPRETATION OF THE LETTER AND/OR SPIRIT OF THESE MINI-CHALLENGE TERMS OR THE CHALLENGE TERMS FOR ANY REASON MAY NO LONGER BE CONSIDERED ELIGIBLE TO PARTICIPATE. NO INDIVIDUAL OR ENTITY IS AN AWARD RECIPIENT UNLESS AND UNTIL CFHI OFFICIALLY CONFIRMS SUCH

INDIVIDUAL OR ENTITY AS AN AWARD RECIPIENT IN ACCORDANCE WITH THESE MINI-CHALLENGE TERMS AND THE CHALLENGE TERMS.

Once the selected eligible Plans and corresponding Teams are confirmed by CFHI in accordance with these Mini-Challenge Terms and the Challenge Terms, the Mini-Challenge #1 Awards will be awarded pursuant to Section 10 of the Challenge Terms. For greater certainty and the avoidance of any doubt, to be eligible to earn a Mini-Challenge #1 Award, all Plans and participant Teams in the Mini-Challenge must qualify to earn an Award in the Challenge in accordance with the Challenge Terms. CFHI reserves the right, in its sole and absolute discretion, to require proof of identity and/or eligibility (in a form acceptable to CFHI) for the purposes of verifying eligibility to participate in the Mini-Challenge. Failure to provide such proof to the complete satisfaction of CFHI within the timeline specified by CFHI may result in disqualification in the sole and absolute discretion of CFHI.

Engagement Strategy for Quality Improvement

Guidelines and definitions

- 1) **Stakeholders:** Identify all key individuals and organizations who need to be involved in supporting, enacting or providing strategic decisions to your initiative. Consider their level of power/influence and interest. Examples include:
 - Families and family representative committees
 - Providers (e.g. family physicians and specialists, front-line staff, community/social workers, etc.)
 - Pharmacists, pharmacy chains and/or pharmacist association
 - Allied health professionals and staff (e.g. PTs/OTs, personal support workers, dieticians, cleaning staff, therapists)
 - Quality and measurement specialists/decision support
 - Executive sponsors (Executive Director, CEO, Board of Trustees)
 - Community health centres, hospitals or clinics (community and hospital-based)
 - Local or provincial NGOs, coalitions and networks
 - Regional or provincial health authorities/government
 - Professional and regulatory organizations
 - Non-health sector partners (schools, workplaces, municipalities, recreation and community services, immigrant service organizations)

- 2) **Type:** Classify each stakeholder by type of stakeholder.
 - **Direct stakeholders**, who your team should interact directly with to effect change or to anticipate the opportunity to influence—because these stakeholders are central to the initiative
 - **Strategic stakeholders**, who your team should interact directly with to influence direct stakeholders.
 - **Indirect stakeholders**, who your team should interact periodically with because they have an indirect stake in the outcomes of your initiative

- 3) **Position:** Identify the position/level of support you expect of each stakeholder.
 - Likely to support
 - Likely to slow down

- Likely to oppose
- Don't know yet

4) **Role:** Identify the role you expect this stakeholder to play as you implement your initiative.

- **Education & Training:** Stakeholders may participate in key training and education activities and/or become a training champion (“train the trainer”)
- **Advocacy:** Stakeholders may help to build commitment to your agenda and be empowered to advocate for change. Advocacy can help to induce needed policy/regulatory changes as well as to promote cultural shifts within relevant stakeholders.
- **Evidence support/Expertise:** Stakeholders have technical and experiential knowledge and can help to find innovative and local solutions to complex problems.
- **Setting goals and targets:** Stakeholders can help to build momentum and reach agreement on a set of goals and targets.
- **Guidance:** Stakeholders can be “value consultants” offering guidance on how to move forward or on what options are socially, politically and ethically sound.
- **Other...**

5) **Potential Barriers:** Anticipating barriers keeps you focused on how best to align your work with that of others. Always explore what stakeholders perceive as potential barriers before starting your initiative.

6) **Key Message and Expected Outcomes:** Articulate the key messages for each stakeholder group, based on their level of interest and influence e.g. consider what the program needs from that stakeholder. In preparing for your time with each stakeholder, first answer the question “what’s in it for them?”, then articulate the outcome(s) you expect to see to successfully design and implement your initiative.

- Describe the ideal behavioural changes in actions, practices and interactions: What do you expect the stakeholder to be doing better? With whom will your stakeholder be interacting?
- Consider how these actions will contribute to your initiatives overarching objectives.

TIP: Use the following format for the outcome statement: “We expect to see [stakeholder] who [description of behaviours in the active present tense].”

7) **Engagement strategies:** Identify what strategies will work best for the given group. What does the evidence say? Consider past experience and limited time that people have. Some ideas: Having champions connect with their peers, newsletter, E-Briefs, Townhall, get onto “standing agendas”, prepare “Roadshow” ppt and tweak as needed, local press, email updates, etc.

8) **Timeline:** Identify when to engage with each stakeholder throughout the course of the Priority Health Innovation Challenge. Be mindful of their level of power/influence and interest.

Part I: Creating the Strategy

Engagement Strategy for Quality Improvement

Organization name: _____ Initiative Aim: _____

Team Lead name: _____ Primary Outcome Indicator: _____

Stakeholder	Type of Stakeholder	Position	Role	Potential Barriers	Key Message & Expected Outcomes	Engagement Strategies	Timeline
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				

Stakeholder Engagement Plan Worksheet

Stakeholder	Type of Stakeholder	Position	Role	Potential Barriers	Key Message & Expected Outcomes	Engagement Strategies	Timeline
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				
	<input type="checkbox"/> Direct <input type="checkbox"/> Strategic <input type="checkbox"/> Indirect	<input type="checkbox"/> Likely to support <input type="checkbox"/> Likely to slow down <input type="checkbox"/> Likely to oppose <input type="checkbox"/> Don't know yet	<input type="checkbox"/> Education & Training <input type="checkbox"/> Advocacy <input type="checkbox"/> Evidence support <input type="checkbox"/> Setting goals & targets <input type="checkbox"/> Guidance <input type="checkbox"/> Other: _____				

Part II: Actioning the Strategy (max. 500 words)

If successful, how would your team use the award dollars for this mini-challenge to further the above engagement strategy? *E.g., Who are the key groups you would engage first and why? What strategies would you employ to engage them and why? How would this advance the primary outcome indicator that you are focused on and/or the number of individuals you will be able to reach?*

