Seven Steps for Policy, Systems and Environmental Change:
Worksheets for Action



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THE GEORGE WASHINGTON UNIVERSITY
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GW Cancer Center

GW Cancer Center
CANCER CONTROL TAP
Tap into resources to control cancer

INTRODUCTION

This *Seven Steps for Policy, Systems and Environmental Change: Worksheets for Action* is a companion to Policy, Systems and Environment (PSE) information included on the George Washington University (GW) Cancer Center Training & Technical Assistance website and *Action for PSE Change: A Training*. The GW Cancer Center developed these resources to assist comprehensive cancer control (CCC) professionals in planning, designing, implementing and evaluating PSE change initiatives. Each is organized around the seven steps of the PSE change process.

The training provides background information on the PSE change process, a PSE action plan template, real-world examples and suggests theoretical and evaluation approaches to help grow the PSE change evidence base. The training is available at the GW Cancer Center's Online Academy. The Online Academy offers a number of training and education opportunities for health care and public health professionals to help advance patient-centered care and evidence-based public health practice.

HOW TO USE THIS RESOURCE

This guide is intended to be a companion resource to the web-based training and online information. You can use the worksheets in this guide as a starting point for thinking through your PSE change strategy or as a brainstorming tool for your team members.

If you need technical assistance or would like more information, please contact us at cancercontrol@gwu.edu.

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ABOUT THE GW CANCER CENTER (GW) CANCER CENTER TRAINING & TECHNICAL ASSISTANCE PROGRAM

The George Washington University (GW) Cancer Center Training & Technical Assistance Program is funded through a cooperative agreement from the Centers for Disease Control and Prevention (CDC) to design and implement training and technical assistance to comprehensive cancer control programs and partners. The GW Cancer Center Technical Assistance Program (TAP) website houses all of the resources to assist CCC program at cancercontroltap.org

Established in 2015, the George Washington University (GW) Cancer Center is a collaboration of the George Washington University, the GW Hospital, and the GW Medical Faculty Associates to expand GW's efforts in the fight against cancer. The GW Cancer Center also incorporates all existing cancer-related activities at GW, with a vision to create a cancer-free world through groundbreaking research, innovative education, and equitable care for all.

ABOUT THE COMPREHENSIVE CANCER CONTROL PROJECT

In 2013, the Institute for Patient-Centered Initiatives and Health Equity (formerly the GW Cancer Institute) was awarded a 5-year cooperative agreement to work with CDC to design and implement comprehensive, high-quality training and technical assistance to CCC programs and their partners to implement cancer control activities. The GW Cancer received subsequent cooperative agreements in 2018 and 2023. To learn more, visit cancercontroltap.org/.

DISCLAIMER

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BACKGROUND



Health outcomes are the result of a complex combination of factors including not only biological or genetic causes but also race, ethnicity, gender, sexual orientation, socioeconomic status, education level, mental health and geography (National Academy of Medicine, 2017). Health problems are influenced by PSE that make it easier to sustain unhealthy behaviors than to foster healthier choices.

Individual lifestyle choices are only one part of our ability to live healthy, productive lives. A mix of social, economic and physical factors drives health disparities, or "differences in incidence, prevalence, mortality, burden of disease, and other adverse health conditions" (National Academy of Medicine, 2017). Despite progress in cancer prevention, screening and treatment, a disproportionate share of uninsured, medically underserved and minority populations across the United States are impacted by cancer (American Cancer Society, 2009). Health disparities are nearly impossible to address without a multi-level, ecological or PSE change approach that considers the opportunities and challenges facing all people in the community.

Following several reports in the early 2000s from the National Academy of Medicine (NAM) focused on an increased recognition of social determinants of health and social ecological approaches to population health (NAM, 2000, 2002, 2004), CDC convened the National Expert Panel on Community Health Promotion, and the PSE change approach was born (Liburd & Sniezek, 2007; Comprehensive Cancer Control National Partnership, 2015). To achieve quicker change and foster healthier communities, one NAM report recommended policymakers and public health professionals (NAM, 2004):

- Support community and neighborhood empowerment
- Establish strategic partnerships
- Educate stakeholders and decision-makers
- Identify community leaders and build on existing resources
- Gather and use relevant data
- Maintain a focus on evaluation throughout the PSE change process
- Share successful strategies with other communities

The PSE change approach includes and addresses these types of recommendations. By adjusting the policies, systems and environments that impact our daily lives, we can create settings that allow for sustainable, healthy behaviors. PSE change facilitates embedding healthy options in the fabric of our society.

Traditional Public Health Behavior Change:	PSE Change:
• Time limited touch point • Often results in only short-term behavior change • Traditionally individual level • May be done in isolation or not part of a larger plan • Short-term effort (typically 1-3 years) • Less sustainable (usually funding-dependent)	• Ongoing • Produces longer-term behavior change over time • Community/population level • Part of an ongoing plan and engages multiple stakeholders • Long-term • Sustainable

Adapted from Food Trust (2012).

STEPS OF THE PSE CHANGE PROCESS



As you proceed through each step of the PSE change process, use the corresponding worksheet to help you think through your strategy. You may wish to provide copies of each worksheet to your team members in order to prepare in advance of a team meeting. Alternatively, you may prefer to use a whiteboard or flip chart to brainstorm ideas in a group setting.

Please note that while these steps follow a linear order, that is not necessarily the case for the PSE change process. In practice, individuals can approach the steps in an order that makes sense, keeping in mind that they may overlap. You should revisit the steps regularly throughout the PSE change process to stay current with changing conditions.

In this guide, you will find a worksheet devoted to each of the following PSE change steps:



Step 1: Engage – Build partnerships and engage the community
PSE change initiatives involve a wide variety of people, agencies and organizations from all corners of the community, working toward a common goal. As with other public health initiatives, partnerships are vital to any PSE change process. They make it possible to divide the work so it can be completed more efficiently. Working with diverse partners also strengthens efforts by capitalizing on each member's strengths and reaching each member's constituencies.



Step 2: Scan – Perform environmental scans
An environmental scan can help determine what actions should be taken within the broad health issue you want to address. The environmental scan allows you to identify gaps, trends and factors affecting the political, social, economic and legal contexts to help you understand the drivers of PSE change.



Step 3: Assess – Identify priority areas
After you have scanned the external environment surrounding the health issue you want to address, you now understand the drivers and challenges of your potential PSE change initiative. However, you need evidence to support your position and the development of SMART objectives. Assess and review available data to determine which specific aspect of the health issue can be potentially resolved or lessened through PSE change. Your state, tribe or territory cancer control plan is a great place to start.



Step 4: Review – Assess feasibility of interventions
Once you have developed SMART goals and objectives, review the feasibility of your proposed PSE change intervention to determine if your goals and objectives can be implemented. Work with stakeholders to develop a strategy for turning an idea, goal or objective into action, including a discussion of the political climate and readiness. Ensure that key champions are involved to provide support.



Step 5: Promote – Promote awareness, communicate and educate
Communicate the need for your PSE change effort. Communicate to all stakeholders the need for PSE change prior to implementation to help lessen potential resistance. Incorporate various forms of media to educate and build support from stakeholders and the public, when appropriate.



Step 6: Implement – Take action
The first five steps of the PSE change process lead to the implementation of your PSE change intervention. Carry out PSE change activities that link directly with goals and objectives in your cancer control plan.



Step 7: Evaluate – Measure your success
Evaluate the processes employed during the implementation of your PSE change intervention, as well as the short-term, intermediate and long-term outcomes expected to result from the intervention. Evaluation can provide quantitative and qualitative data to demonstrate the change(s) that occurred.

Action for PSE Change WORKSHEET

Step 1: Engage – Build Partnerships and Engage the Community

Use this worksheet as you consider how to identify and engage partners necessary for PSE change.

Why are partners integral to PSE change? Consider the following:



- Why should others care about PSE change?
- How does PSE change impact others in the community? - Identify your stakeholders
- What can be accomplished as a group that cannot be accomplished by individual people or organizations?

How will you identify and evaluate your potential partners? Consider the following:



- Which stakeholders (decision makers, patients, caregivers, employers, providers, researchers, etc.) should be included in the PSE change process? Why?
- Are there any other partners who should be brought into the conversation? – Consider non-traditional partners like businesses, industry or non-health care organizations
- Why does (or should) each stakeholder care about the issue(s)?
- Will any stakeholders be opposed to the change? Why?
- Do the stakeholders' missions align to accomplish the shared goal(s)? How?
    - If not, what common ground do you all have?
- What resources (tangible and intangible) do you need that stakeholders can provide?

How can you hold stakeholders accountable? Consider the following:



- Have you identified a leader (either an individual or a committee/group) to hold the team accountable and drive the process forward?
- Which model of leadership will work best for the PSE change initiative?

Notes:

Action for PSE Change WORKSHEET

Step 2: Scan – Perform Environmental Scans

Use this worksheet as you consider how to identify factors affecting the external environment to determine the actions necessary for potential PSE change.

Assuming you have identified a broad health issue you want to address, how will you determine the appropriate actions for PSE change? Consider the following:

- What is the ultimate purpose of the PSE change?
- What is your "ask"? – Identify an area of interest
- What level of PSE change is necessary (local, state, federal or institutional)?
- Is the environment conducive to the PSE change? – Consider public opinion and identify community champions

What factors should you think through when conducting an environmental scan as you plan your PSE change effort? Consider the following:

- Who is already attempting PSE change efforts?
  - Identify additional partners as well as supporting or opposing stakeholders you could bring to the table
- What is the current political context? What is the nature of the relationship between community stakeholders? – Look for grey literature (non-commercial or academic literature) such as reports, white papers, government documents or any non-academic publications
- What is the current economic context?
  - What economic impact (positive or negative) could the PSE change effort have on community stakeholders?
  - What programs are being funded and who is funding them? – Look at funding announcements
- What is the current social context? – Think about social determinants of health, such as housing, education and income, and how demographic factors may play a role in the health issue
- What is the current legal context? – Look at trends related to proposed and passed legislation to understand potential windows of opportunity and challenges associated with the legislative process
- What opportunities and threats are posed by the above gaps, trends and factors in the environment? – Summarize the challenges identified in your scan

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Action for PSE Change WORKSHEET

Step 3: Assess – Identify Priority Areas

Use this worksheet as you consider how to assess existing data that will help you determine which specific aspect of the broader health issue can be addressed through PSE change.

What issue(s) are important and why?

- Is this issue more relevant for any particular subpopulation in your community, tribe, territory or state?

What data do you need to support your position on the issue(s)? Consider the following:

- Where can you obtain data to support your position?
- Are there data that can be used in opposition to your position?
- What kind of data can you obtain (qualitative, quantitative, peer-reviewed journals, trusted primary sources, etc.)? — Ensure that the data are evidence-based, objective, reliable and valid
- Are data/evidence available regarding the potential costs and benefits of the PSE change?
- Are the data compelling? Can you tell a story to make your case?

What are your SMARTIE (specific, measurable, attainable, relevant, time-bound, inclusive, and equitable) goals and objectives for your PSE change initiative? Consider the following:

- What is the rationale for each of the goals and objectives?
- What is your timeline for accomplishing these goals and objectives? Why?
- What would happen if the issue(s) is/are not addressed?
- What are the milestones along the way to reach the goals and objectives?
- What would success look like? – This sets you up for Step 7: Evaluate
- What happens if you achieve success?

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Action for PSE Change WORKSHEET

Step 4: Review – Assess Feasibility of Interventions

Use this worksheet as you consider project feasibility – it will help you develop a strategy for turning your ideas, goals and objectives into action.

Are your goals and objectives feasible in the current economic and political environment? Consider the following:

- What authorizing environment(s)/setting(s) must you work within?
- Who are the gatekeepers and decision makers in this environment/setting?
- Do key stakeholders hold assumptions or biases that need to be addressed or mitigated? How might you do this?
- Has someone already taken a stand on the issue(s)? If so, what happened?
    - How might this impact your PSE change efforts?

What is your group's capacity to implement this PSE change? Consider the following:

- What resources exist to promote and implement your PSE change?
- Are there well-resourced opponents who might attempt to counter your promotion and implementation efforts?
- What resources do you still need to accomplish your goals and objectives?
    - Will your activities cost money? If so, where will that money come from?
- What are the barriers to implementing the PSE change? Can they be overcome?
- Now that your PSE change activities are better defined, are there additional partners who might have resources or be able to help the group overcome unforeseen or anticipated barriers?
    - How can you bring them to the table?
- Do the original goals and objectives need to be redefined based on this information?

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Action for PSE Change WORKSHEET

Step 5: Promote – Promote Awareness, Communicate and Educate

Use this worksheet as you consider how to communicate and frame the need for a specific PSE change.

How can your message be best framed for each of your stakeholder audiences? Consider the following:

- What do you want your intended audience to do?
- What do they get out of your intended PSE change? – You're trying to generate buy-in
- What are your intended audience's strengths and how can those be incorporated into your messaging? – Help them feel empowered to work toward the PSE change
- How can you use the information and data obtained in the previous steps to determine what stakeholders need/want to hear and understand?
- What cultural and/or community norms can be incorporated to strengthen the message and make it more relevant for each audience? – Do not make assumptions. Work with gatekeepers to inform your messaging
- Have you checked with community members to get their feedback on the messaging?
    - How will you incorporate their feedback?

How will you communicate with your stakeholders? Consider the following:

- How can you best communicate your message so the intended audience understands it? – Consider language proficiency and health literacy
- How can you use the information and data obtained in the previous steps to determine how best to reach your stakeholders?
- Which media platform(s) are best suited to promoting the message for each audience?

How will you get your promotion effort off the ground? Consider the following:

- Will you need specific resources in order to communicate your message? – Decide whether you need financial, in-kind, consultation (advice from experts) and/or access (to people, organizations and systems)
    - How will you obtain the resources?
- Do you have partners with communication experience to help lead these efforts?
- Do any partners have large and influential networks to disseminate the information?
- What obstacles may you need to overcome in order to communicate your message?

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Action for PSE Change WORKSHEET

Step 6: Implement – Take Action

Use this worksheet as you consider how to carry out your PSE change activities.

Have you done due diligence to prepare to implement your goals and objectives? Consider the following:

- Have you developed a detailed PSE agenda and action plan detailing all that needs to take place to meet your objectives?
- Has enough awareness-raising taken place among stakeholders about the issue and the need for PSE change?
- Are stakeholders committed and engaged? – If yes, this will help ensure success
- Are partners committed to maximizing what they can bring to the project?
- Have sufficient resources been established to ensure successful implementation and sustainability of the PSE change effort?

As you prepare to carry out your planned activities, what is your overall vision for success? Consider the following:

- What are some potential short-term successes and what do they mean for the overall PSE change process?
- What are some potential long-term successes and what do they mean for the overall PSE change process?
- How will you determine if additional resources are necessary to sustain change?
- How will you continuously engage stakeholders and keep momentum going?
- How will you adapt to a changing environment?
- What would it look like if your efforts were not successful?

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Action for PSE Change WORKSHEET

Step 7: Evaluate – Measure Your Success

Use this worksheet as you plan to measure the impact of your PSE change activities or as you reflect on the effort once it concludes.

What are the outcomes of the PSE change? Consider the following:

- What difference did the PSE change make in the short-term?
- What type of intermediate changes occurred?
- What was the long-term difference/impact of the PSE change?
- How will you measure/document the impact of the PSE change?
- What were the reactions of stakeholders?
    - Were you able to meaningfully address concerns or challenges? If not, why?
- Were there barriers to implementing the PSE change? If so, what were the lessons learned?

What will your next steps be following the PSE change? Consider the following:

- How will you communicate to stakeholders the outcomes and impact of the PSE change effort?
- What contingency plans are in place if you are not completely successful?
- How will you adjust your goals and objectives if you are not successful?
- What will your new goals and objectives be if you are successful?

Notes:

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