## Appendix 6: Convening #1 Summary, Monterey, CA

August 22, 2016

10am-1pm

Core Metrics: Driving Change towards Health and Well-Being

On August 22nd from 10am-1:00 pm, we had a convening with a select group of stakeholders in Monterey County. The stakeholders represented diverse organizations throughout the county with unique missions, but united around a common theme of creating an environment to foster health. Our objectives were to support participants in:

* Understanding the Core Metrics: what they are and how they can help make Monterey County healthier
* Exploring how the Core Metrics can be collectively used as part of Monterey's Community Health Assessment; related data and health improvement strategies
* Identifying any critical gaps the community sees in the measures themselves
* Familiarizing them with LiveStories and how that tool may serve them in driving action
* Learning what other participants are working on to make Monterey County healthier and what data activities each other is engaged in

**High-level agenda**

* 9:30 Registration
* 10:00 Welcome, Objectives and Framing the Convening
* 10:20 Check-circle
* 10:45 Presentations on Core Metrics + LiveStories + Impact Monterey County
* 11:15 World Cafe - small group dialogue
* 12:45 Closing
* 1:00 End

We began the conversation by welcoming participants, setting the context of why we are convening and how the meeting will take place by presenting the agenda. We reviewed our hopes for the convening and objectives.

Krista Hanni shared her hopes for the day and explained why these particular stakeholders were invited, which was due to their involvement in creating health for the community of Monterey County.

Steven Teutsch explained to the participants why Monterey County was selected for this project, the reasons included that they:

* Are engaged community leaders
* Desire having a set of indicators
* Are willing to demonstrate the potential value of the Vital Signs metrics

We then co-created our Operating Principles, or agreements about how we will engage and interact with one another throughout the process. This was an opportunity to invite full participation by tending to what each of the attendees needed to share their perspectives. Ideas named included: understanding the purpose of the convening, transparency and trust.

Next, we did a full group check-in circle, where we asked each participant to share their name, organization and answer the question: What is the biggest leverage point you see that could bring well-being to Monterey County through collective action? The purpose of this opening circle was to build community, learn about who is in the room and listen to the many different perspectives present.

Steven Teutsch then gave a presentation on the Core Metrics, the purpose of the project and intent to use a frugal set of measures amongst diverse stakeholders to drive action.

Suzanne Ryan-Ibarra then shared a visual PowerPoint slide of LiveStories. Examples of websites built using this tool were offered to demonstrate how it utilizes data to create a beautiful visual story to evoke action.

Suzanne talked about the potential of LiveStories to focus on particular areas to help drive change, as well as, weave a story people connect to.

Krista Hanni then shared the four priority areas from Impact Monterey County, including Safety, Physical Health and Mental Health, Educational Attainment, and Economic Self-Sufficiency.

Next, we utilized a methodology called World Cafe, which is used to surface collective wisdom through both small group dialogue and whole group sharing. During this process, a round of three different questions is discussed to surface diverse perspectives. After each question, people switch tables, go talk to new people and have the opportunity to cross-pollinate ideas. After each question round, we would listen to what surfaced at each of the tables to hear any patterns or themes emerging.

Question Round 1: How might the Core Metrics be helpful to you and what you are already doing with the 4 priority areas?

Harvest: What are you working on related to Impact Monterey’s 4 Priority Areas?

Question Round 2: What, if any, critical gaps do you see in the measure set themselves related to the 4 priority areas for Impact Monterey? What’s missing?

Harvest: What are the gaps?

Additional Gaps

Key Themes

Gap 1

Key Themes

Gap 2

Question Round 3: Given all that you have heard today - how might we move forward to spur collective action with this shared knowledge base? What could we do together?

Harvest: What are the priority areas we can focus in on for the LiveStories report?

In conclusion, the group decided on the following Action Items: 1) Add measures of perceived and objective safety to the Core Metrics set and incorporate into the Core Metrics LiveStories report, 2) Create a LiveStories report that focuses on safety, and 3) Translate all LiveStories reports for this project into Spanish.

We asked who might be interested in helping to craft the LiveStories report, and we had 5 volunteers, or interested parties that would help continue the work. We will partner with these volunteers to review and revise the LiveStories reports, and return in December to present LiveStories and explore how it may be used to create greater well-being in their community and drive action.