Proposed Peer Learning Teams Facilitation Services for the Wyoming Primary Care Association

This is a proposed agreement for services for the development, management, and facilitation of a CEO Peer Learning Team and a Health Care Provider Peer Learning Team for members of the Wyoming Primary Care Association (WYPCA), with contract period commencing on date of contract award through March 31, 2017.

A facilitated Peer Learning Team is a professional community of practice designed to create peer-to-peer exchanges on how to effectively address specific job-related challenges and opportunities. Most professionals have plenty of experience learning in classroom settings, through one-on-one instruction, or by accessing reference materials such as books, journals, and on-line content. Fewer of us have experience learning in a professional community setting where we are both learner and teacher at different times. Peer learning teams provide a tailored opportunity for health center staff to develop themselves and a comfortable and effective forum to discuss challenges and test approaches with others who really understand their work.

A well-designed Peer Learning program has benefits that extend beyond the participants in the groups. Sponsoring organizations learn about the needs of their constituents, early warning signs of concerns, and issues that are brewing, as well as concrete success stories to share with their funders and stakeholders.

An additional benefit is that the popularity of such a program can increase visibility, membership, and good will towards the sponsoring organization, as well as provide a receptive forum for communicating messages and getting feedback about events and issues. Because the relationships are maintained over longer periods than other types of training programs, the peer learning team provides an ideal setting for long-term focus groups to test out new ideas and approaches and to keep your finger on the pulse of membership needs.

Our Approach

The purpose of peer learning teams is to strengthen the individual and collective capacities of the group to accomplish their goals. Learning Teams accelerate the learning curve of a group tackling the difficult aspects of their roles and assist individuals in moving forward in their most challenging areas by hearing lessons learned and best practices from those in similar situations. Learning discussions between individuals with similar responsibilities give everyone a boost, provide mentorship, and allow the group to build on the cumulative knowledge and experience gained from multiple discussions.

We design all learning teams from the perspective of participants—their current concerns, needs, and areas of interest. This makes the content real and relevant to them, and creates a genuine willingness to engage because the topics are unique and customized. When the participants involved get to know one another well, topics can be addressed at a deep level. Cultivating this genuine understanding breaks down barriers across organizations and allows them to work together and collaborate on other issues outside the learning team.
Collaborative Design and Roll-out – Estimated 30 Hours

- Conduct initial project kick-off call with WYPCA planning team to identify overall project objectives and desired outcomes of the project, and discuss the initial planning steps including team composition and structure, event design, timing of team rollout, technology, and other logistics.
- Provide sample documentation to assist with communicating the purpose and objectives of the peer learning teams to promote the project.
- Conduct input conversations with up to 12 potential team participants—6 for the CEO Team and 6 for the Healthcare Provider Team—to clarify what’s most important to them in regards to topics, team structure, and timing of events.
- Develop clear parameters for how the learning teams will function in terms of group norms, meetings, expectations, and duration, in addition to outlining a communication plan to encourage participation.
- Collaborate with WYPCA staff to develop an initial curriculum of the learning teams that directly addresses participant needs, issues, opportunities, and development gaps.

Learning Team Call/Webinar Facilitation – Estimated 168 Hours

- Collaborate with WYPCA staff to develop five (5) comprehensive Peer Learning Team call agendas and discussion questions for each team. Also, identify the appropriate facilitation strategy and how to best frame the conversations to get to the essence of the issue, encourage breakthrough thinking, and balance participation across the different engagement styles of participants.
- Conduct participant check-ins as needed to discuss potential call/webinar topics
- Determine need and recruit potential Subject Matter Experts, based on determined call topics
- Facilitate five (5) calls or webinars for the CEO Team and five (5) calls or webinars for the Health Care Provider Team.
- Review and edit Summary Notes developed by WYPCA staff for five (5) CEO Team calls/webinars and five (5) Health Care Provider Team calls/webinars.

Face-to-Face Meeting Planning and Facilitation – Estimated 75 Hours

- Conduct Planning Calls with WYPCA staff to develop agendas and discuss preparations for a three-day Face-to-Face Meeting to be tentatively held August 25-26, 2016 in Wyoming.
- Develop participant materials.
- Collaborate with WYPCA staff on meeting logistics, room set-up, and facilities conducive to a peer learning environment.
- Identify and evaluate potential subject matter experts to ensure a good fit for participant needs and the peer learning environment. This is especially important for speakers who do not have prior PCA/health center experience.
• Facilitate CEO and Health Care Provider Peer Learning Team Face-to-Face Meetings, with recruitment, registration, support and note-taking by WYPCA staff. Each team will have their own meeting, with one joint session overlapping the two meetings.

• Review and edit Summary Notes developed by WYPCA staff.

• Conduct Debrief Call with WYPCA staff to discuss meeting outcomes, possible changes to the planning process, and evaluate different aspects of the meeting.

**WYPCA will be responsible for the following:**

• Participating in planning calls with Integrated Work staff to ensure call/webinar and meeting topics address priorities and primary objectives of the organization.

• Be the primary point of contact for Peer Learning Team participants, including communication related to recruitment, call/Webinar/meeting agenda and summary note distribution, notification and reminder emails, participant and outside speaker engagement, troubleshooting, and other issues as needed.

• Developing draft call/webinar and meeting Summary Notes, for review by Integrated Work.

• Providing a conference call line or webinar platform for each learning team call or webinar.

• Securing appropriate meeting space and audio/visual needs for the Face-to-Face Meeting and coordinating logistics with the chosen venue.

• Printing Face-to-Face Meeting materials for participants.

• Contracting with agreed upon Subject Matter Experts.

**Integrated Work – Organization Overview**

Integrated Work, LLC is a woman-owned consulting firm grounded in more than 16 years of experience in sharing effective management strategic with organizational clients, facilitating high-stakes meetings, and supporting organizations through transition and growth. Working with non-profit organizations, government agencies, and mission-driven corporations, we provide facilitation, coaching, training, and consultation to help organizations reach their full potential. In all of our client engagements, we integrated insights and knowledge from the individuals involved into a collective organizational capacity that exceeds expectations. We have a consistent travel record of delivering high-quality results, allowing our organization to grow through repeat clients and word-of-mouth referrals. We have been designing and leading peer learning teams for the Health Resources and Services Administration and non-profit organizations since 1999.
Fee Structure
The following fees are based on a combination of discounted labor rates out of respect for the mission of the Wyoming Primary Care Association.

<table>
<thead>
<tr>
<th>Deliverables</th>
<th>Unit Fee</th>
<th>Qty.</th>
<th>Fees</th>
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</thead>
<tbody>
<tr>
<td>Collaborative Design and Roll-out</td>
<td>$ 2,200</td>
<td>1</td>
<td>$ 2,200</td>
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<tr>
<td>• Conduct Project Kick-off Call</td>
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<td>• Deliver communication samples and templates</td>
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<tr>
<td>• Conduct up to 12 input calls with potential participants (6 for each team)</td>
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<td>• Develop initial team curriculum</td>
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<tr>
<td>Learning Team Call/Webinar Facilitation – 10 sessions</td>
<td>$ 2,000 per call</td>
<td>10 (5 per team)</td>
<td>$ 20,000</td>
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<tr>
<td>• Agenda development and planning with WYPCA staff</td>
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<tr>
<td>• Conduct participant check-ins</td>
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<tr>
<td>• Remote facilitation of conference calls or webinars</td>
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<tr>
<td>• Review and edit Summary Notes</td>
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<tr>
<td>Face-to-Face Meeting Planning and On-site Facilitation</td>
<td>$ 16,242 for two teams</td>
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<td>$ 16,242</td>
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<tr>
<td>• Agenda development and planning with WYPCA staff</td>
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<tr>
<td>• Collaborate with WYPCA staff on meeting logistics</td>
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<tr>
<td>• Identify and recruit subject matter experts, if desired based on meeting agenda</td>
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<tr>
<td>• On-site facilitation of two-day learning team meeting</td>
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<tr>
<td>• Review and edit Summary Notes</td>
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<tr>
<td>Project Communications</td>
<td>$ 1,200</td>
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<tr>
<td>Total Fees</td>
<td>$ 39,642</td>
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*Total Fees do not include direct expenses for travel—mileage, hotel, meals, and ground transportation. Every effort is made to minimize expenses out of respect for our clients’ budgets.*

Payment Terms
Integrated Work will invoice based on completion of Deliverables, in accordance with an Invoicing Schedule to be developed upon finalization of a Learning Team Schedule. Payment can be made via check mailed to: 5408 Idylwild Trail, Suite A, Boulder, CO 80301.

Please sign and email or fax this agreement to Darby Coleman at darby@integratedwork.com or (303) 516-9806.
Agreement approved by:

**Wyoming Primary Care Association**

Signature: ____________________________

Print Name: __________________________

Date: ___________

**Integrated Work**

Signature: ____________________________

Print Name: __________________________

Date: ___________

March 11, 2016