## Strategy Mapping

A breakthrough approach to complex, upstream prevention strategies

INSIGHT FORMATION INC.

Bill Barberg, President & Founder

Featuring a guest presentation by **Michael Quinn Patton** 

# The Health of Populations is Intertwined with Complex Social and Economic Issues





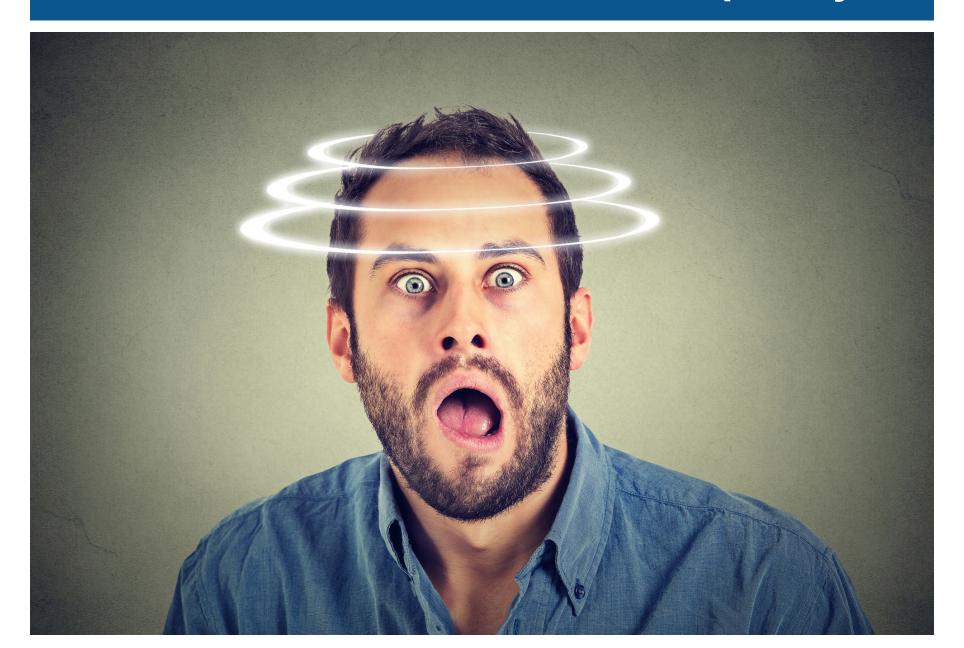








## **How Do You Deal with the Complexity!**



## The Right Tools are Key to Success!

### Different tools for different purposes

- Auto Mechanic
- Carpenter
- Surgeon
- Dentist



### Many tools are used to address social problems

- Academic Research Tools (RCTs, statistical models)
- Program Evaluation Tools (Logic Models, SMART Goals, Work plans, Annual Reports)
- Quality Improvement (QI) Tools (Six Sigma, PDSA, Run Charts, etc.)
- Public Health Epidemiology
- Clinical Information Tools (Electronic Medical Records, Health Information Exchanges)
- Organizational Strategic Planning

We need better tools for large-scale strategies—especially for upstream prevention

## Two Approaches to Strategy Mapping

#### Complexity Theory

#### **System Dynamics Workshop**

RES.15-004, IAP 2020

#### **System Dynamics:**

Systems Thinking and Modeling for a Complex World

James Edward Paine

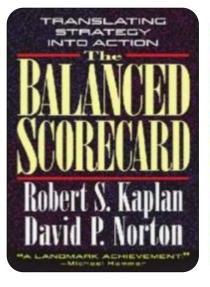
ocw.mit.edu

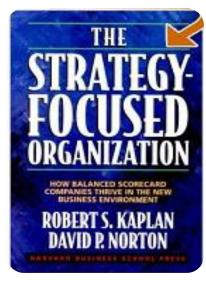
#### Understanding the current system/problem

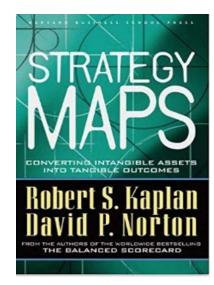
Strategy **formulation** / choices

**System Maps** 

#### **Strategy Implementation**







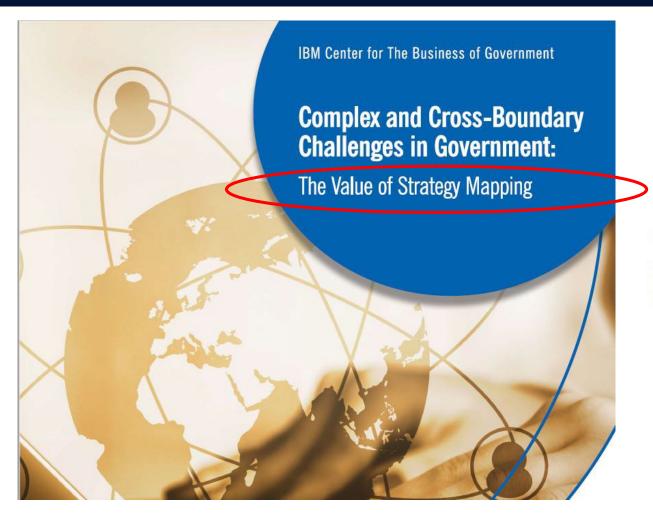
Developing the details of a multi-faceted strategy

Managing & measuring strategy **implementation** 

**Strategy Maps** 

Both involve System Thinking, but in different ways.

### Growing Momentum for Both Types of Strategy Mapping



January 2023

#### **EXECUTIVE SUMMARY**

Communities, regions, and nations increasingly face boundarycrossing challenges that require the efforts of many organizations and groups to address them effectively.

www.InsightFormation.com/phc2023

John M. Bryson, with Bill Barberg, Anne Carroll, Colin Eden, Bert George, Jose J. Gonzalez, Jessica Rochester, Laure Vandersmissen, and Bishoy Zaki

## Five Enablers of Breakthrough Improvements

- 1. Better diagnostics of complex drivers of poor health
- Better alignment of existing efforts, programs & services
- 3. Improvements to current efforts, programs & services
- 4. Identifying and overcoming obstacles to success
- 5. Improve strategy implementation by mobilizing coordinated action among many players in an ecosystem

## Using **System Mapping** Technique & Tools

- Striving to identify drivers, root causes, and leverage points
- Identify dependencies and loops
- Reduce risks of failure
- Reduce risks of unintended consequences

A process to harness the collective wisdom of a diverse group of participants

## Busy People Need the Right Tools

#### A Strategy Mapping Software Sampler

By Laure Vandersmissen, Bishoy Zaki, and Bert George

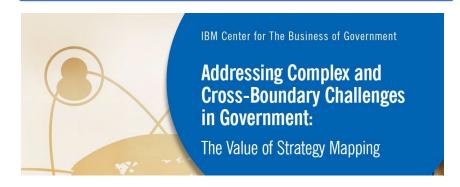
Software packages that are better for strategy formulation are presented first, followed by software packages that are better for strategy implementation.

Table 1. A Sample of Strategy Mapping-Related Sc	oftware	<b>Programs</b>
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Satturara Nama   Main Purpose Related				
oftware Name to Strategy Mapping	Functionality	Analysis Tools	Price	Comments
Enables     considered     development     of effective     approaches to     change. Takes     a team from     strategic issues     to agreed strategy     consisting of goals     and strategies     with action     packages     Explores     competitive     advantages based     on inter-linked     competencies     Strategic     management of     stakeholders     Strategic     management of     systemic risks	Specifically designed to support strategy formulation through causal mapping     Helps manage issue/problem complexity and enables systemic and sustainable strategies and outcomes to be considered     Allows for easy navigation of complex models, including multiple views and color-coding and labelling of statements     Summarises the map onto key statements (e.g., goals, strategies) and shows paths between key	Includes an extensive array of strategy map analysis tools  Supports anonymous contributions and evaluations of potential strategies and actions  Facilitates progress monitoring	From €500/yr to €1250 dependent on the number of users/models supported     Enterprise Edition—1000 users, unlimited models—price on application	Cloud-based and usable on most browsers, so participants can contribute from anywhere simultaneously  Most powerful of the strategy mapping softwarpkgs. reviewed for purposes of strategy formulation  Can handle very large causal map.

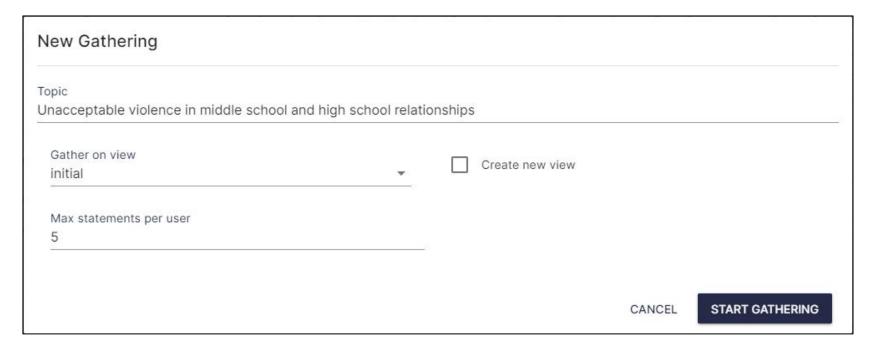


Most powerful of the strategy mapping software pkgs. reviewed for purposes of strategy formulation



## An Example of Using Strategyfinder

- Diagnosis and strategy formulation
- Done remotely along with a Zoom meeting
- Unacceptable violence in middle school and high school relationships
- Identify a problem; Use a "blind gathering" feature to capture people's best thinking on the causes.



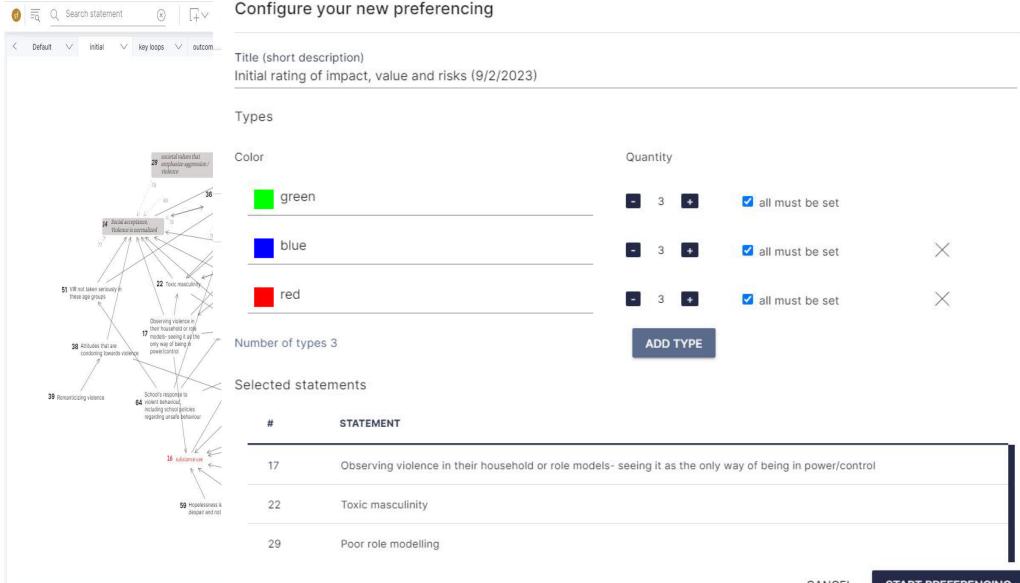
Minimizes problems with power dynamics or dominant voices

## Building out the System Model for a Problem

- View and de-duplicate (with discussion)
- Organize based on which things influence other things.
- Discuss, refine, and add additional statements

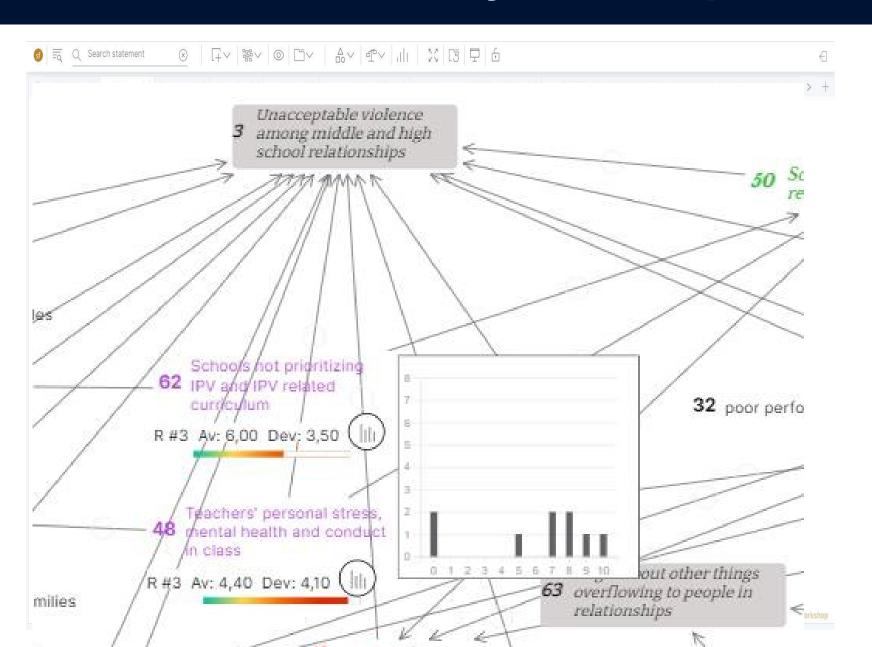
Quickly surfaces many important factors

## Draft of a System Map for a Problem



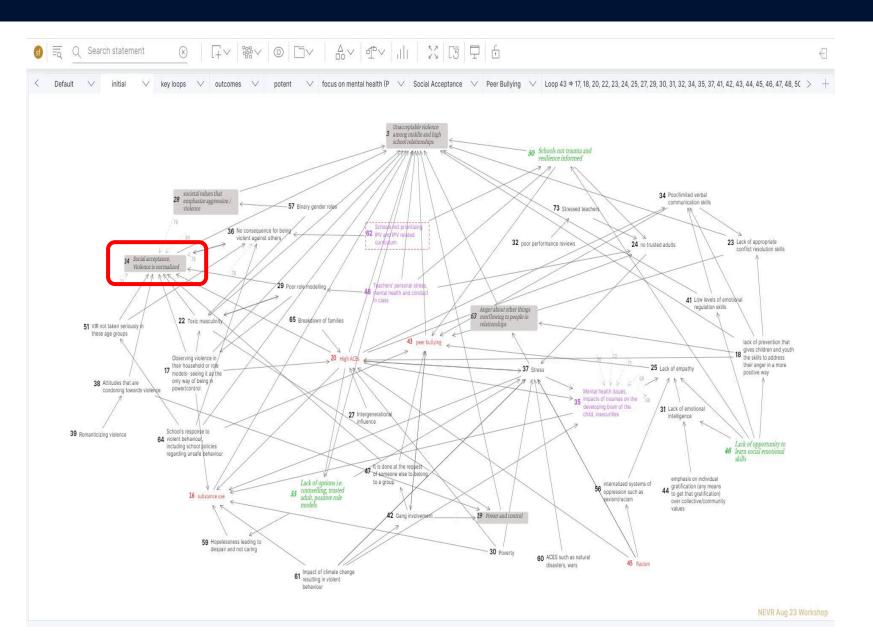


### Draft of a System Map for a Problem



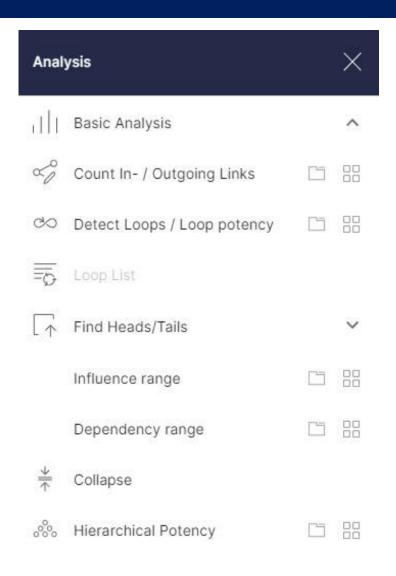


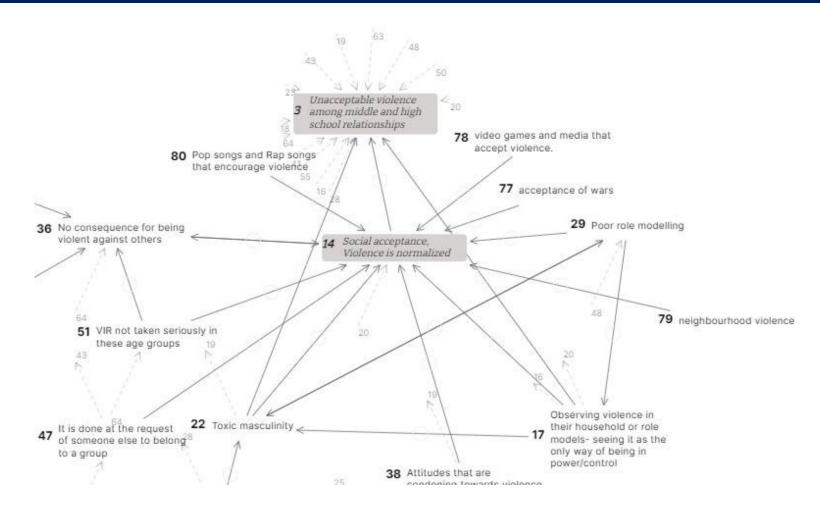
## Draft of a System Map for a Problem





## Powerful Tools for Engagement & System Thinking





Different groups can help refine different parts of the problem model over time

## Benefits of System Maps for Diagnosis

- Taps into many people's insights & input (blends them)
- Enhances system thinking for strategy development
- Identify influential, practical leverage points
- Find roles for many stakeholders to engage in change
- Builds buy-in and ownership
- Accumulate shared knowledge over multiple meetings

Important to allow time for problem analysis and strategy development (but not TOO MUCH time)

## Five Enablers of Breakthrough Improvements

- 1. Better diagnostics of complex drivers of poor health
- Better alignment of existing efforts, programs & services
- 3. Improvements to current efforts, programs & services
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Practical uses of **strategy maps** for population health impact

## The Need for Alignment

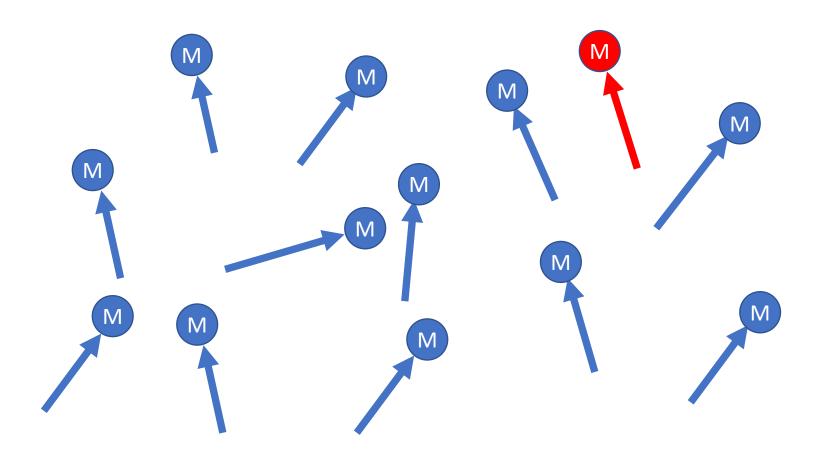
- Silos and fragmentation hinders success
- Redundancy, weak links, and bottlenecks waste resources
- Alignment enables system-thinking strategy implementation
- Allows organizations to focus on their strengths
- Leverage the strengths of others
- Share rather than re-create similar content

Without improving alignment of existing efforts, just getting more money rarely solves complex problems

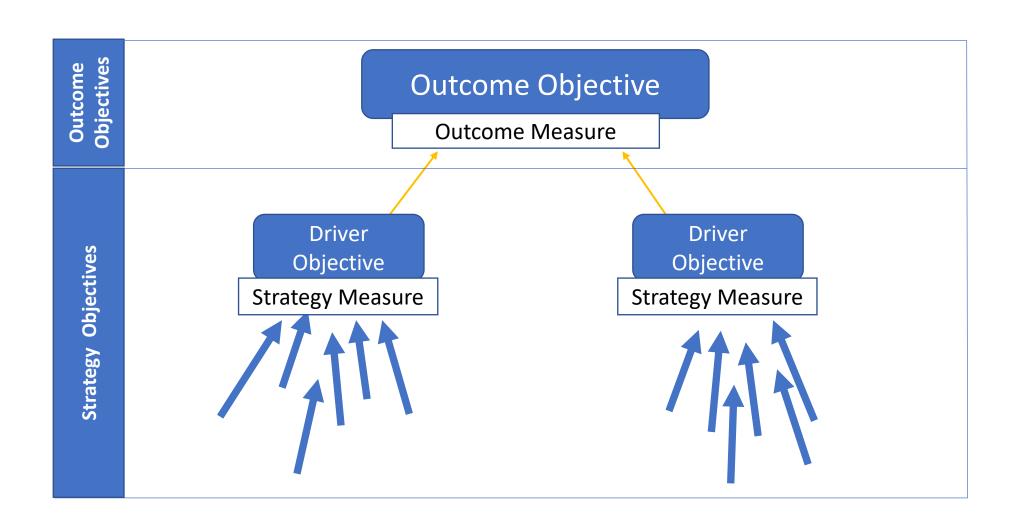
## Alignment Challenges without a Strategic Framework

#### **Outcome Objective**

**Outcome Measure** 

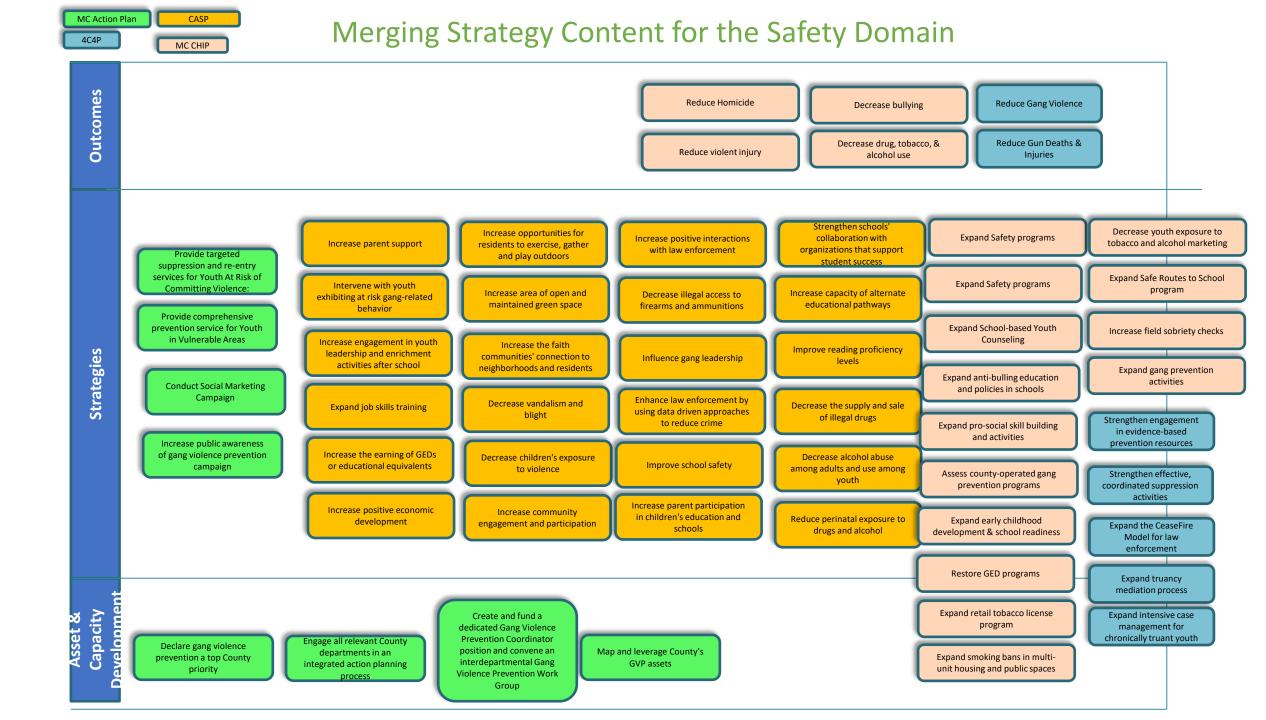


## Aligning Around the Community Strategy



### **Developing Strategy Maps**

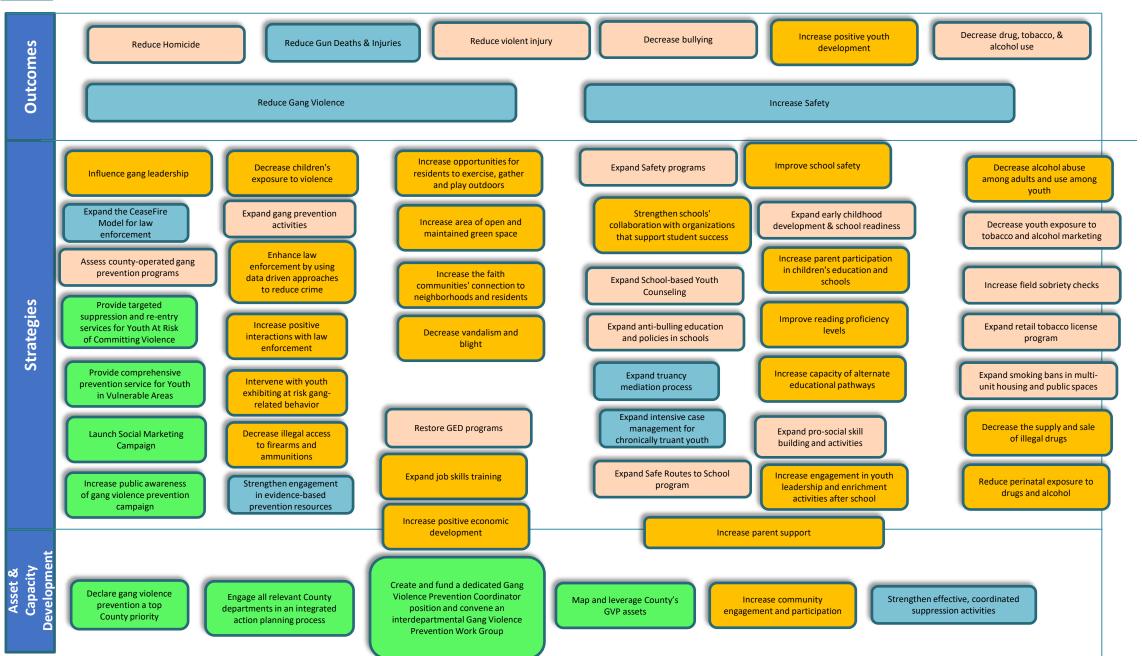
- Many different approaches but important principles
  - Do a system map of the problem areas
  - Leverage templates as a starting point
  - Merge and harmonize existing strategies, plans, grant-funded work, etc.
- Example of Merging and Harmonizing Strategies



MC Action Plan CASP MC CHIP

4C4P

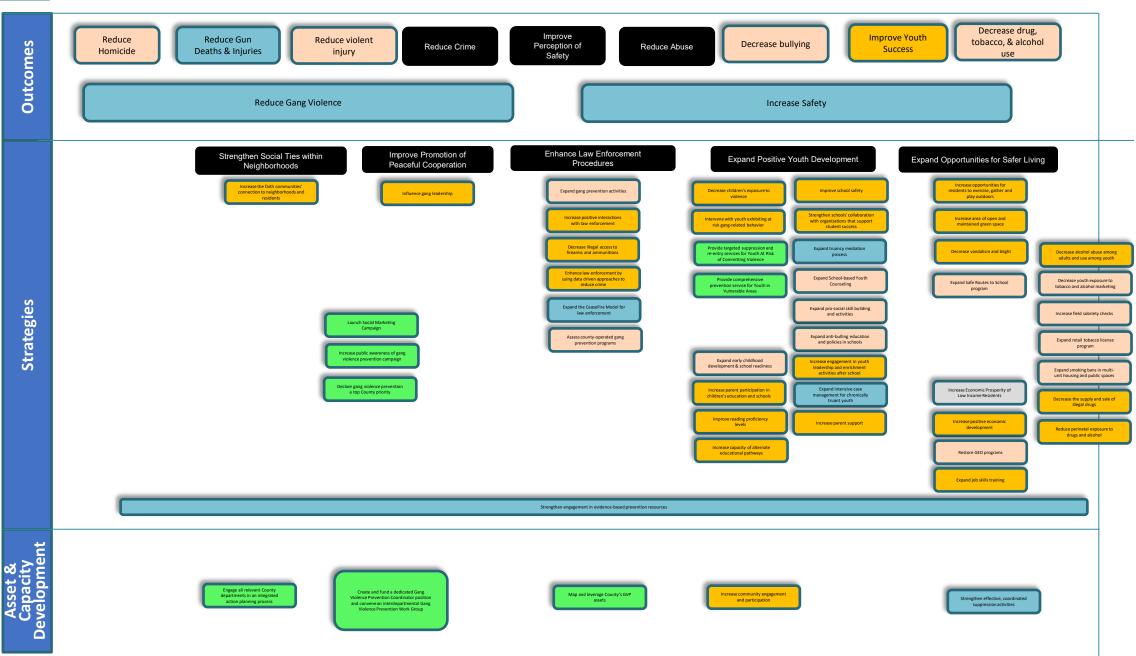
#### Merging Strategy Content for the Safety Domain



MC Action Plan CASP MC CHIP

4C4P

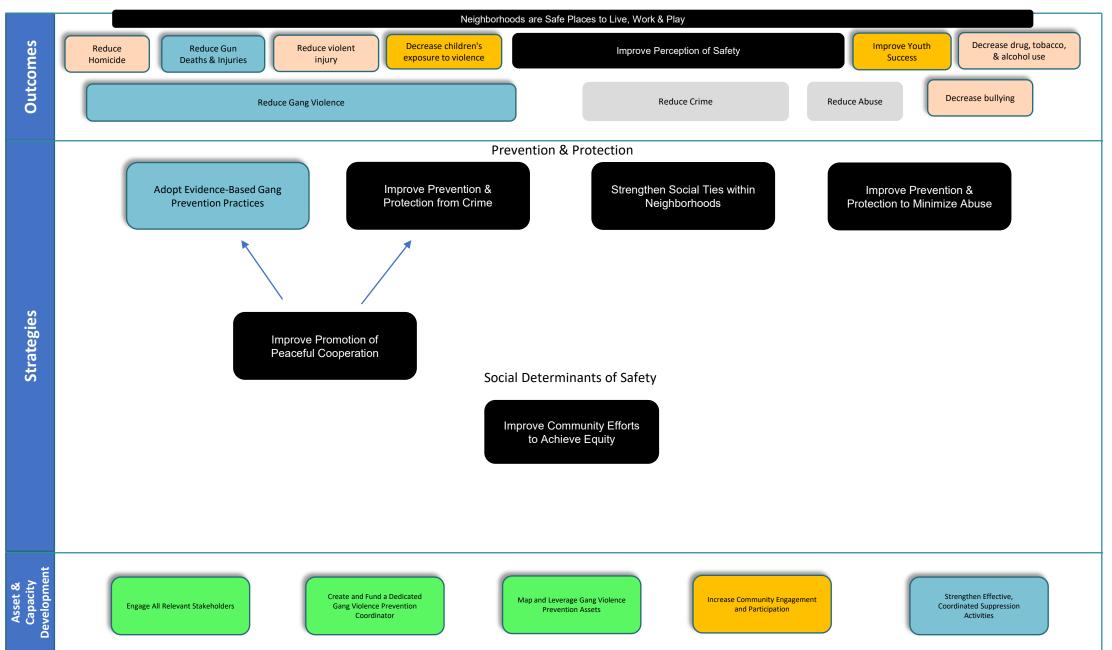
### Merging Strategy Content for the Safety Domain



MC Action Plan CASP MC CHIP

4C4P Added Content

#### Merging Strategy Content for the Safety Domain



MC Action Plan MC CHIP CASP Merging Strategy Content for the Safety Domain 4C4P MC Strategic Plan Added Content Neighborhoods are Safe Places to Live, Work & Play Outcomes Decrease Children's Decrease Drug, Improve Youth Reduce Reduce Gun Reduce Violent Improve Perception of Safety Tobacco, & Alcohol Use **Exposure to Violence** Success Homicide Deaths & Injuries Injury Decrease bullying **Reduce Gang Violence** Reduce Crime Reduce Abuse **Prevention & Protection** Improve Prevention & Strengthen Social Ties within Adopt Evidence-Based Gang Improve Prevention & Protection to Minimize Neighborhoods **Prevention Practices** Protection from Crime Abuse Improve the Built Environment Expand Community-based Victim Assistance Services Expand Pro-Social Skill Building Activities and Play outdoors with Law Enforcement Enhance Parenting Skills Increase Engagement in Youth Leadership & Enrichment Activities after School Increase Public Awareness of Gang Violence Prevention Campaign Counseling zations that Support Improve Public Space Lighting Expand Early Childhood Home Visiting Programs Expand Anti-bullving Expand Truancy Mediation Education & Policies in Schools Expand Community Gardens Strategies Expand Programs to Address Management for Chronical Truant Youth Assess County-Operated Gang Evnand Urhan Pathways Expand the Ceasefire Model for Law Enforcement Increase Parent Support Expand Gang Prevention Social Determinants of Safety Improve Promotion of Peaceful Cooperation Improve Community Efforts to Achieve Equity Increase Economic Expand Early Childhood Expand Substance Prosperity of Low Development & School Readiness Income Residents tobacco and alcohol marketing Development Restore GED programs Reduce Perinatal Exposure to Drugs and Alcohol of Illegal drugs

Capacity
Developmen

Engage All Relevant Stakeholders

Create and Fund a Dedicated Gang Violence Prevention Coordinator Map and Leverage Gang Violence Prevention Assets Increase Community Engagement and Participation

Strengthen Effective, Coordinated Suppression Activities

### **STRATEGY for Safety**



OUTCOME Objectives

Reduce Violence Improve Youth Success

Improve Community Feeling of Safety

Reduce Crime

Reduce Abuse

Improve School Climate

Decrease Drug, Tobacco, & Alcohol Use

Decrease Recidivism

Reduce the Economic Impact of Community Violence

Aspirational Vision: Neighborhoods are Safe Places to Live, Work & Play

S3: Expand Positive Youth Development \$4: Strengthen Social Ties within Neighborhoods

S5: Improve Law Enforcement Efforts to Reduce Violence & Crime

SOCIAL DETERMINANTS OF SAFETY S2: Improve Community Efforts to Achieve Equity

PREVENTION, INTERVENTION, ENFORCEMENT, RE-ENTRY

S6: Expand Alternatives to Expulsion & Incarceration

\$7: Improve Re-entry Process

STRATEGY Objectives

S1: Improve Alignment & Integration of **Existing Efforts** 

ED2: Improve the Quality, Affordability & Accessibility of Early Childhood Education & Childcare

ED4: Enhance Support for Academic & Community Success

Increase Household Income of Local Residents

ES6: Increase Availability of Quality, Transit-oriented Affordable Housing in the Region

Decrease Substance Abuse

Engage All Relevant Stakeholders

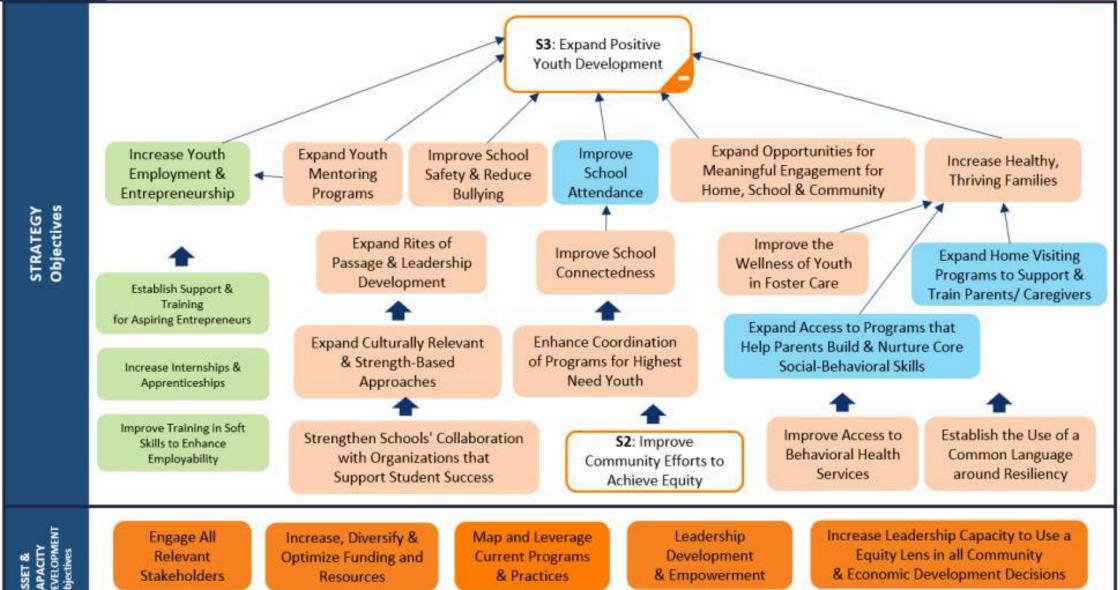
Increase, Diversify & Optimize Funding and Resources

Map and Leverage **Current Programs** & Practices

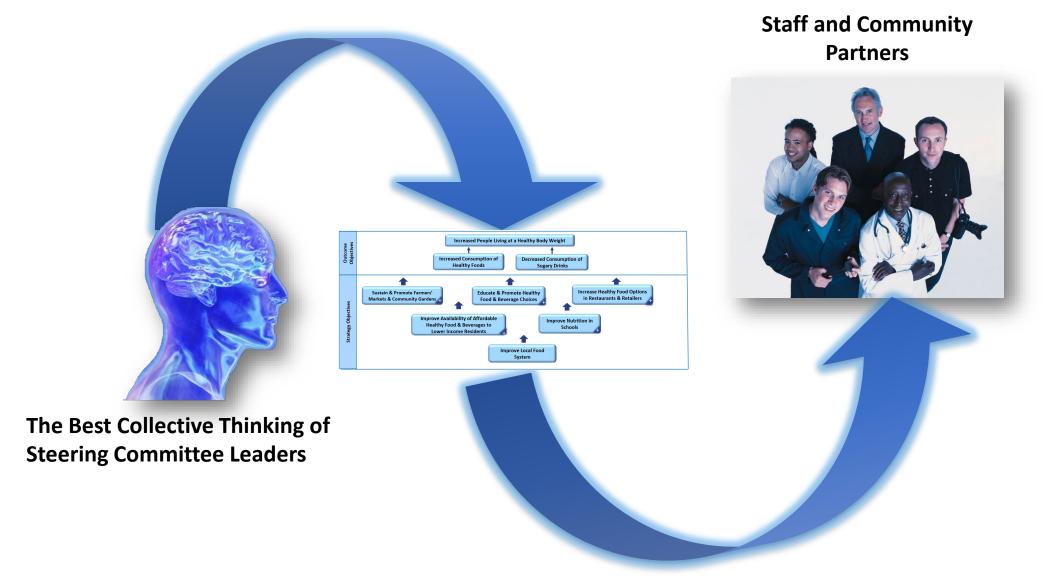
Leadership Development & Empowerment Increase Leadership Capacity to Use a Equity Lens in all Community & Economic Development Decisions

#### **Zoom: S3 Expand Positive Youth Development**

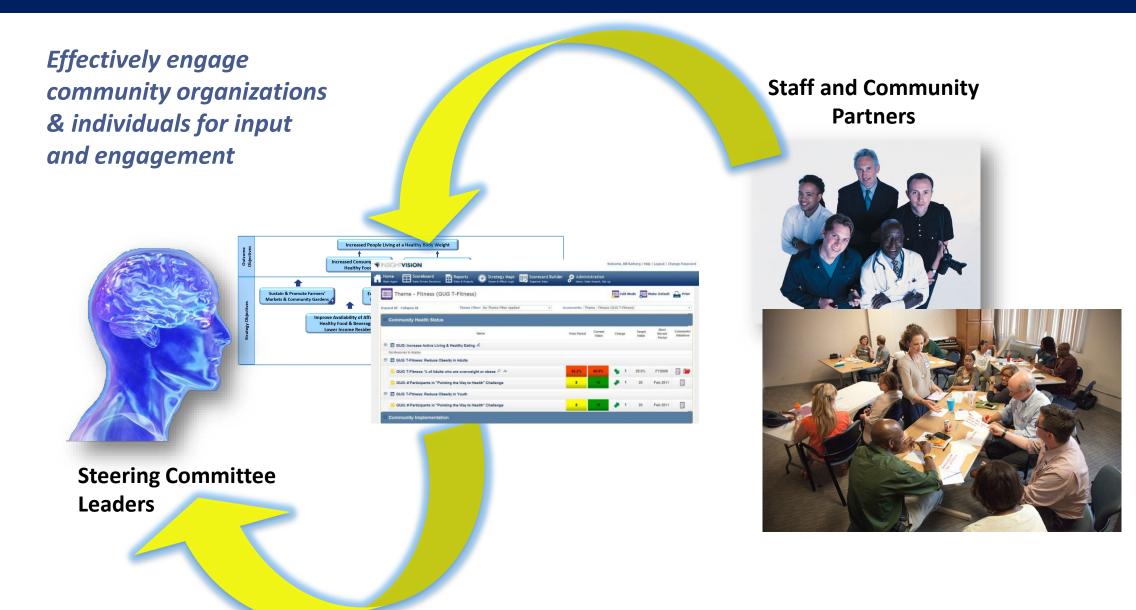




## Use Strategy Maps to Clarify & Communicate



## Strategy Maps & Scorecards Promote Communication



## Busy People Need the Right Tools

Table 1. A Sample of Strategy Mapping-Related Software Progra	Table	1. A	Sample of	Strategy	Mapping-Related	Software	Program
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Software Name	Main Purpose Related to Strategy Mapping	Functionality	Analysis Tools	Price	Comments
<u>nsightVision</u>	Online strategy engagement platform designed for refining, implementing and evaluating large-scale, long-term, multi-stakeholder strategies for social impact	Better for strategy implementation than formulation  Dynamic, zoomable strategy maps that include details of objectives, such as from-to gaps, stories, and links to supporting objectives  Integrated measurement and robust scorecard functionality to track progress on objectives  Supports planning, aligning, updating, and monitoring actions to support strategy implementation  Communication features and formats support alignment, breaking down silos, and shared accountability to address complex social challenges or system change.	Information     is managed,     structured, and     presented to     enhance insights     and analysis by     users	No free version     Pricing on request	Cloud-based and usable on most browsers, so participants can contribute from anywhere simultaneously  Most powerful of the strategy mapping softwarpkgs. reviewed for purposes of strategy implementation

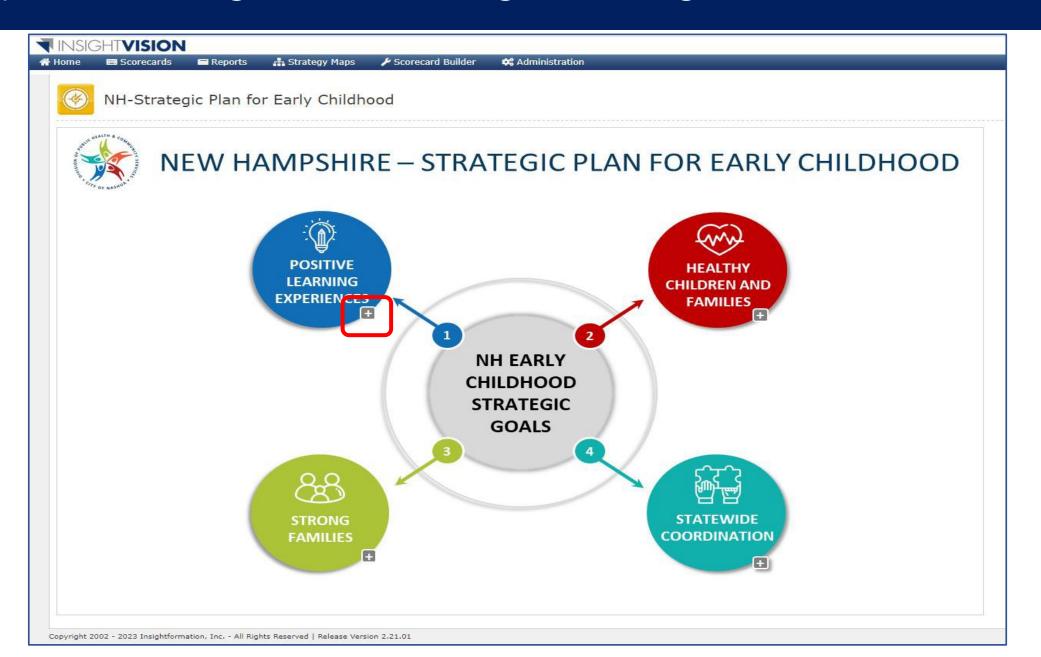




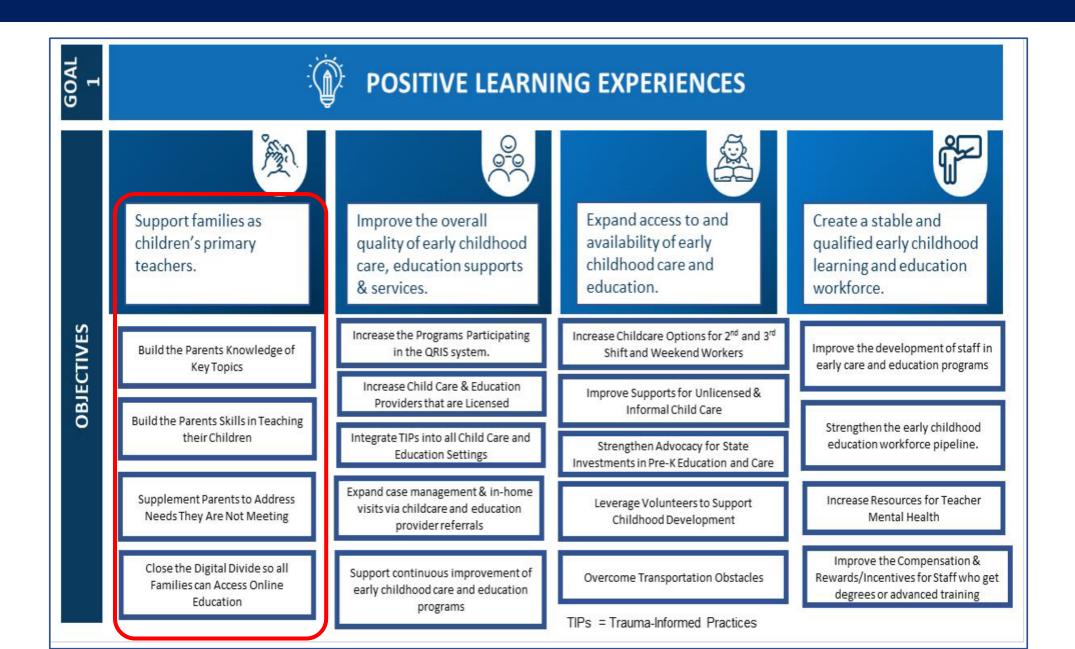
Most powerful of the strategy mapping software pkgs. reviewed for purposes of strategy **implementation** 



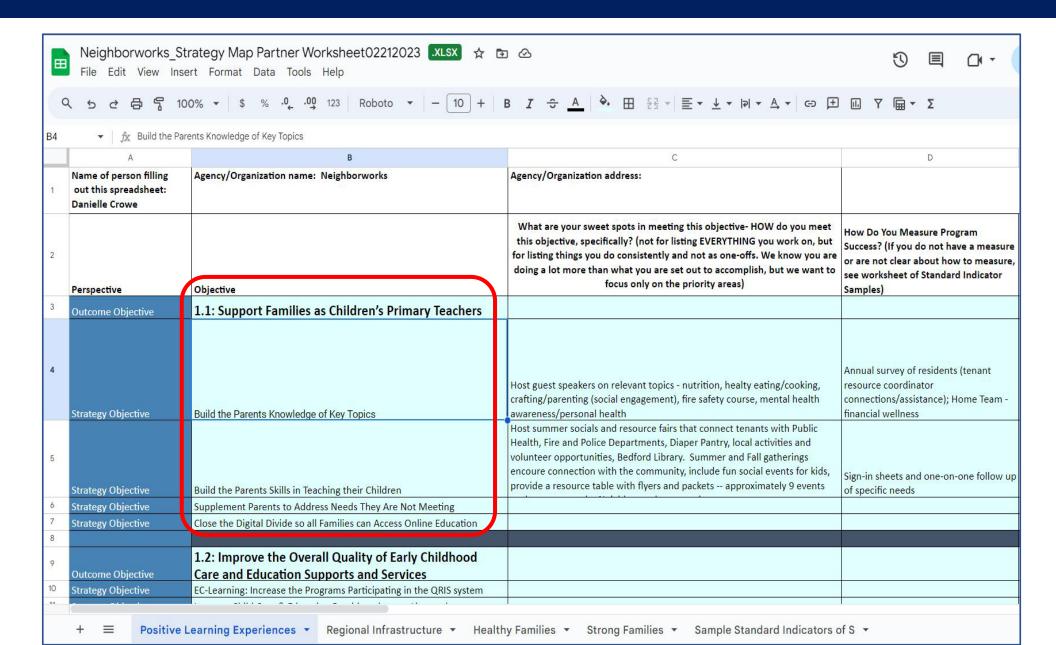
### Top-Level Navigation for a Region to Align with a State Strategy



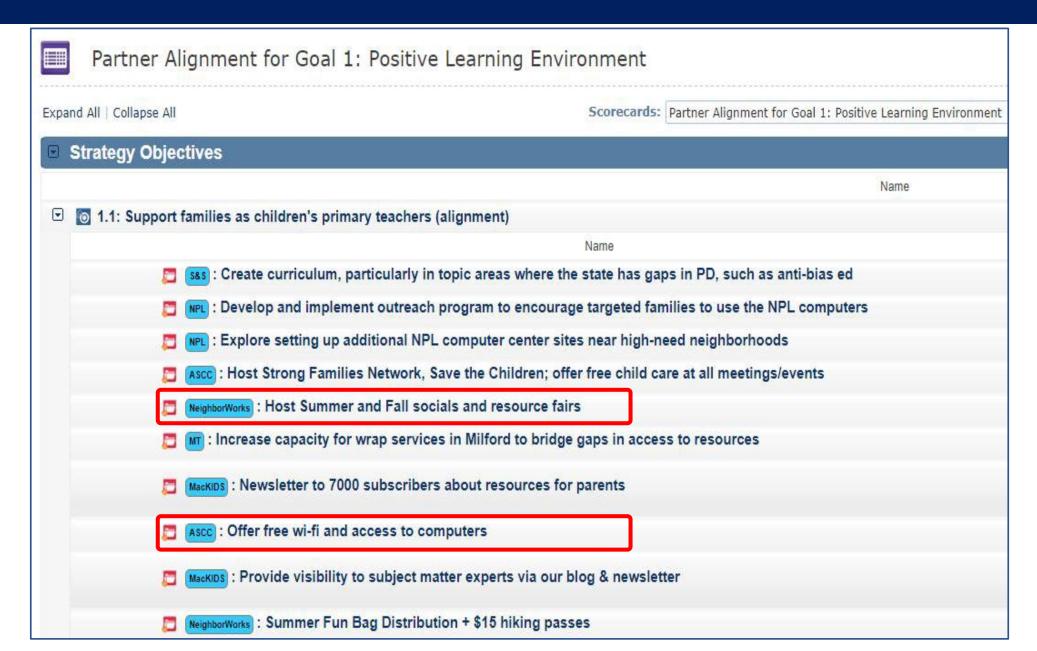
### Learn more in the Free E-Book Shared as a Resource



### Gathering Information from Dozens of Community Partners



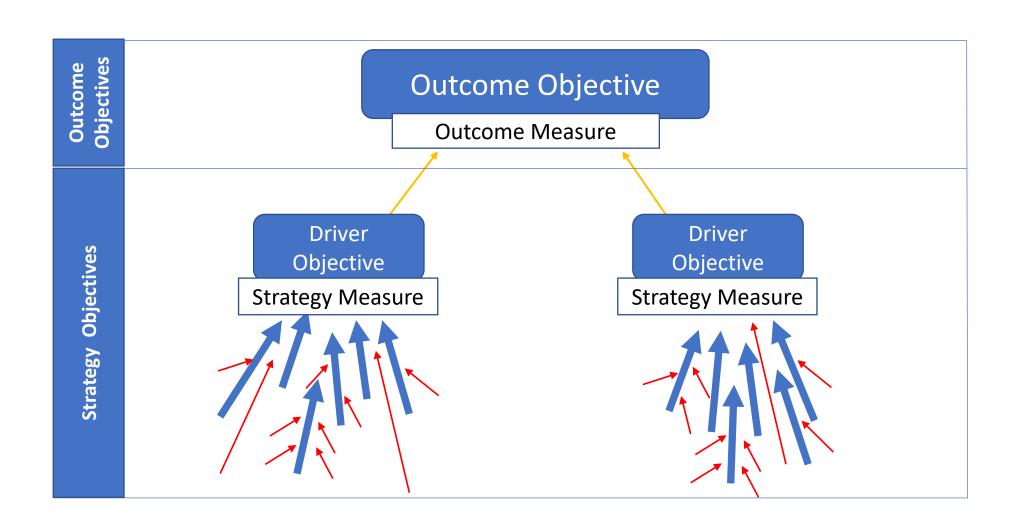
### Break down silos by showing who is working on Objectives



### Five Enablers of Breakthrough Improvements

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# Aligning Around the Community Strategy

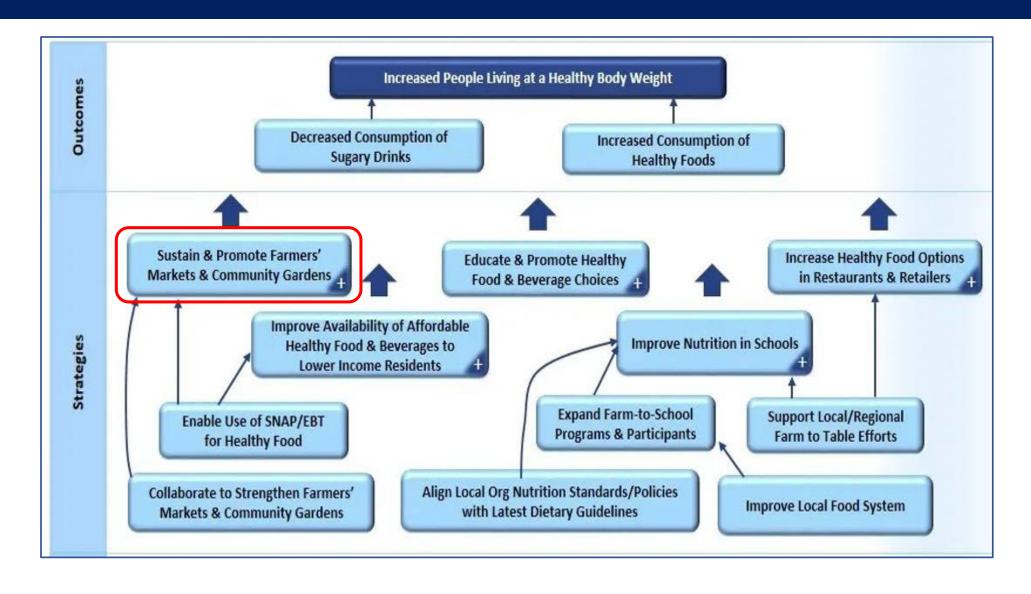


# Valuable Ways to Improve Existing Programs

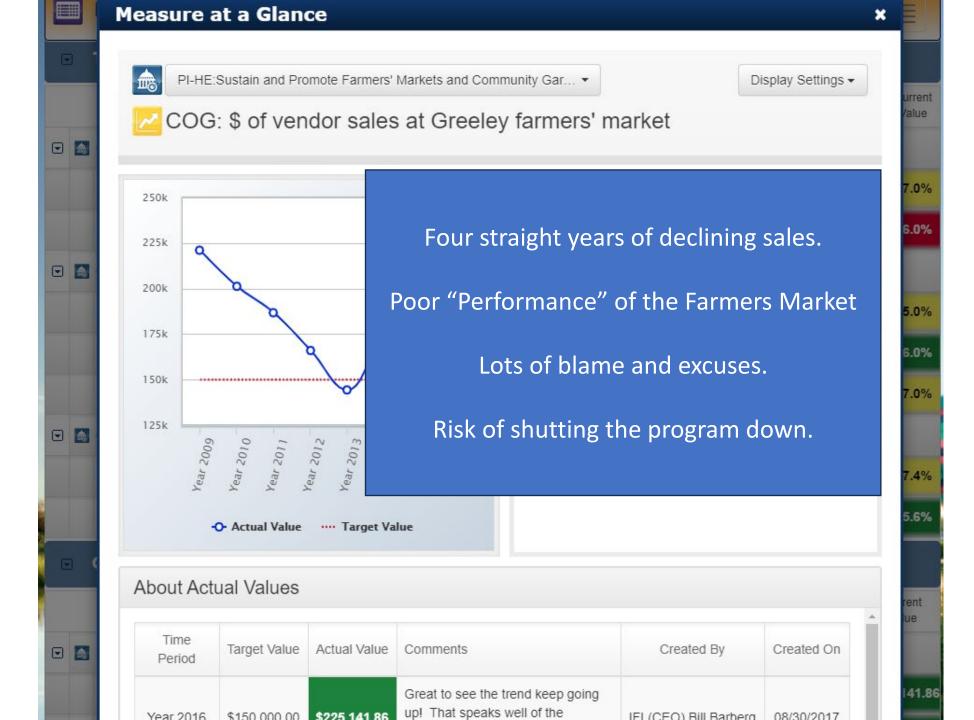
- Engage organizations & volunteers to provide "assists"
- Creatively use new technology, apps, or analytics
- Leverage and share good eLearning, training or coaching
- Find inspiring examples and borrow good ideas
- Raise awareness of programs, service opportunities, etc.
- Collaborate on grant-seeking

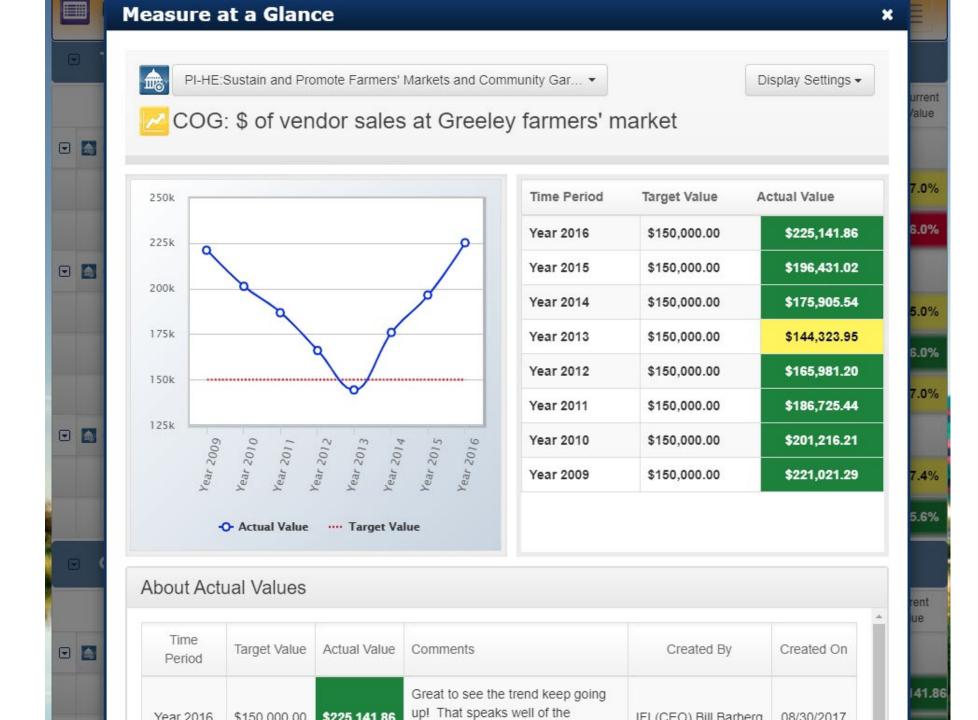
It's almost always easier and more economical to enhance existing programs than launch new ones.

## Rallying "Assists" to Help Accomplish an Objective



Organizations Helping Achieve Healthy Eating Throughout Weld County			
Name	Trend & Duration	Target Value	Current Value
Strategy: Sustain and Promote Farmers' Markets and Community Gardens			
	<b>+</b> 3	\$150,000.00	\$225,141.86
☑ Discover Weld: # of farmers' markets in Weld County 🔑 🧿	+ 1	6	11
City of Greeley: \$ of sales through kids coupons at Greeley farmers' market	0	\$404	\$404
City of Greeley: # of individuals/families participating in community gardens in Greeley	<b>+</b> 2	123	112
☑ High Plains Library District: # of community gardens at branch libraries	1	3	0
Healthy Kids Club: # of promotional events at Greeley Farmers' Market	0	15	12
Healthy Eating: # of community gardens in Weld County	+ 3	20	26
Strategy: Educate & Promote Healthy Food & Beverage Choices			
∠ Weld Public Health: # of times 5210 messages have been disseminated	_ 2	140,000	80,956
Weld Public Health: # of partners that promote 5210 message and 9 Ways to Grow Healthy Colorado Kids consistent message campaigns	+ 1	13	13
Weld Public Health: # of times 9 ways to grow healthy kids was disseminated	2	55,000	31,864
Weld Public Health: # of recognized breastfeeding friendly businesses in Weld County	_ 1	37	37
Weld Public Health: # of recognized breastfeeding friendly child care centers	• 1	15	15





## Five Enablers of Breakthrough Improvements

- 1. Better diagnostics of complex drivers of poor health
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### What Roadblocks or Obstacles can be Removed?

- Unintended consequences of policies or programs can hinder success of good programs
- Discussions around strategy maps can reveal barriers
- Expanded group of stakeholders can remove barriers
  - Example: Drivers Licenses in Arkansas

Systematic efforts to remove obstacles can lead to breakthroughs.

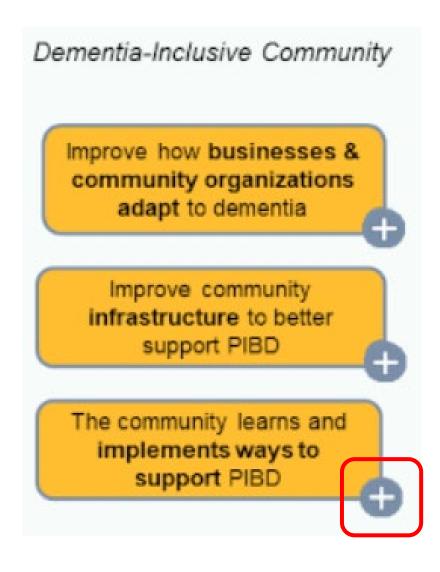
## Six Enablers of Breakthrough Improvements

- 1. Better diagnostics of complex drivers of poor health
- 2. Better alignment of existing efforts, programs & services
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# How do you manage a strategy to scale up choirs?

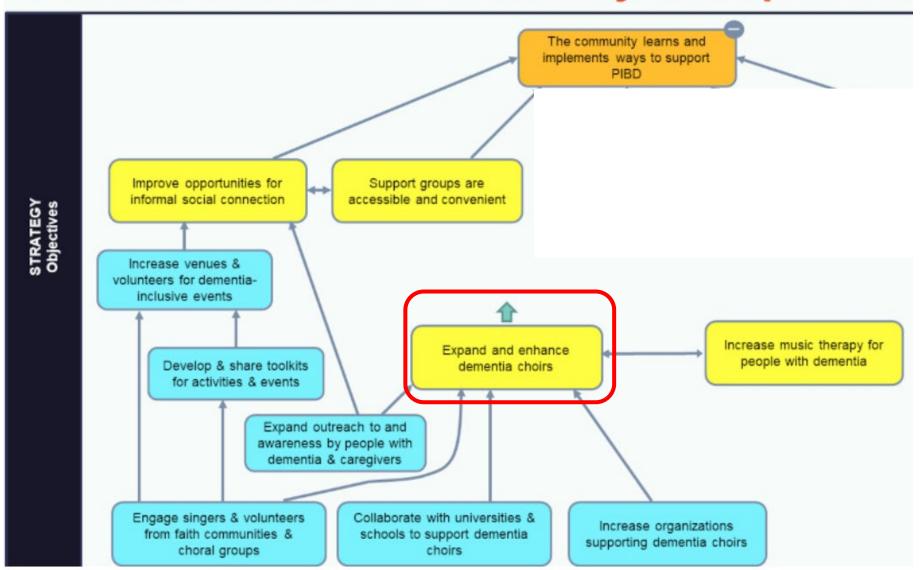


## Zooming in on a Top-Level Objective

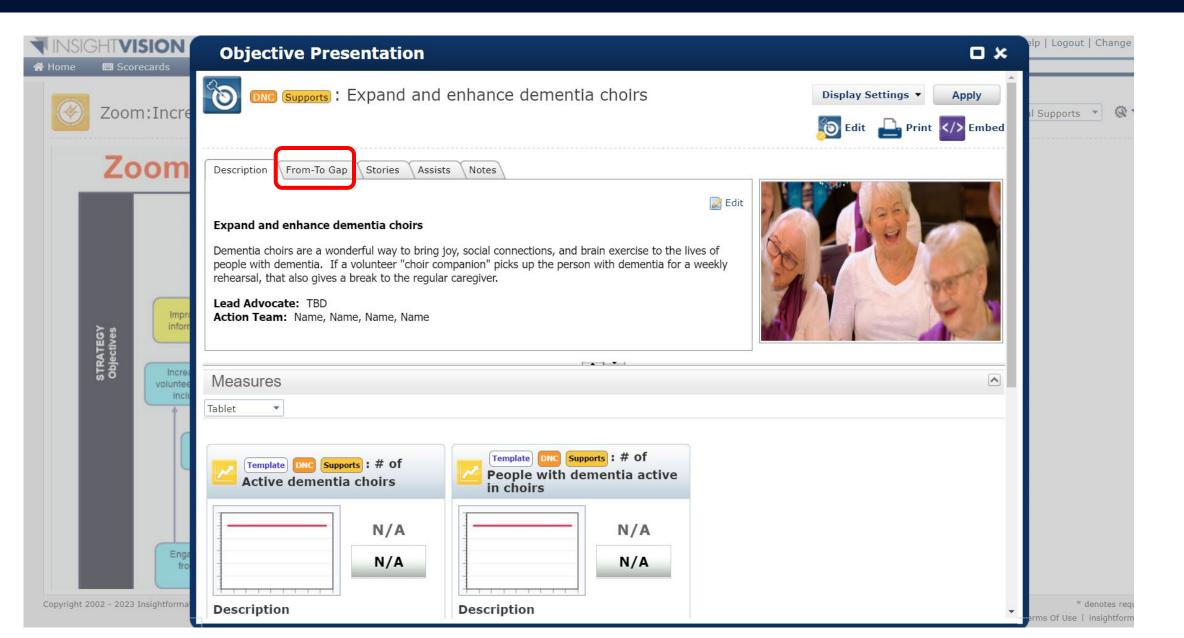


## Zooming in on a Top-Level Objective

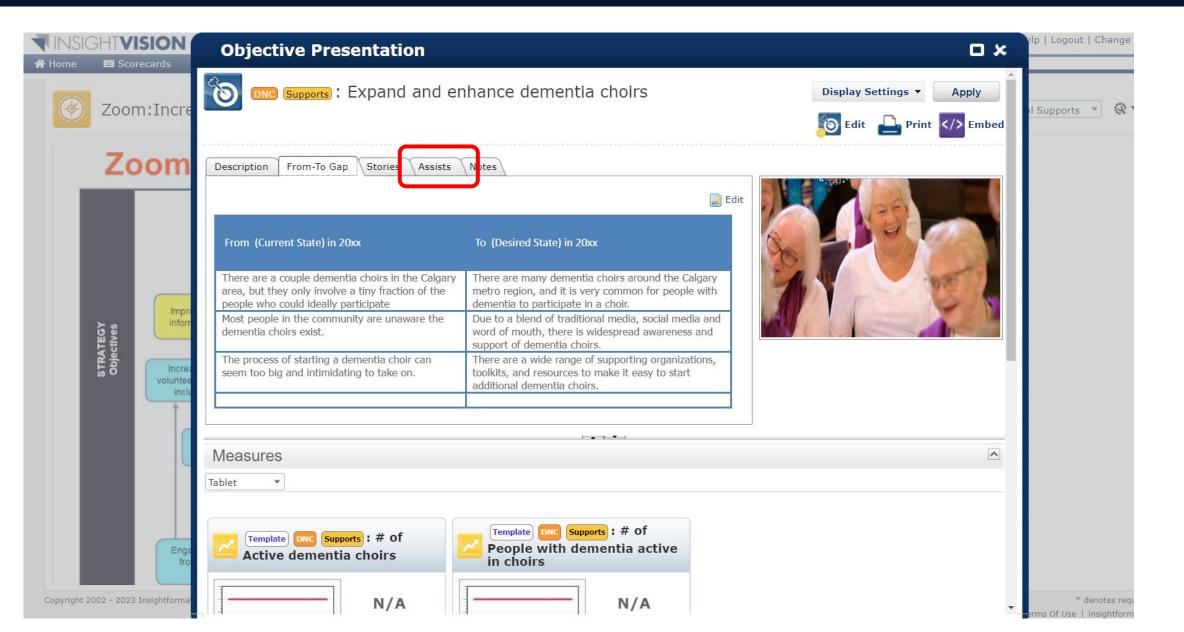
## **Zoom: Increase Community Interperson**



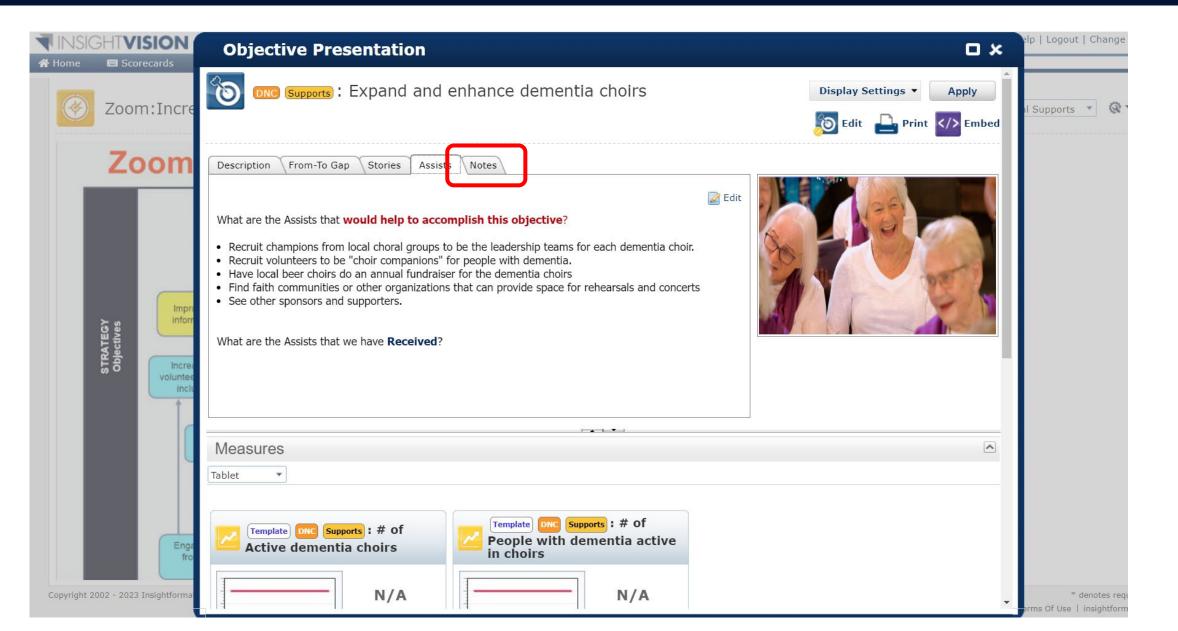
## Details for an Objective



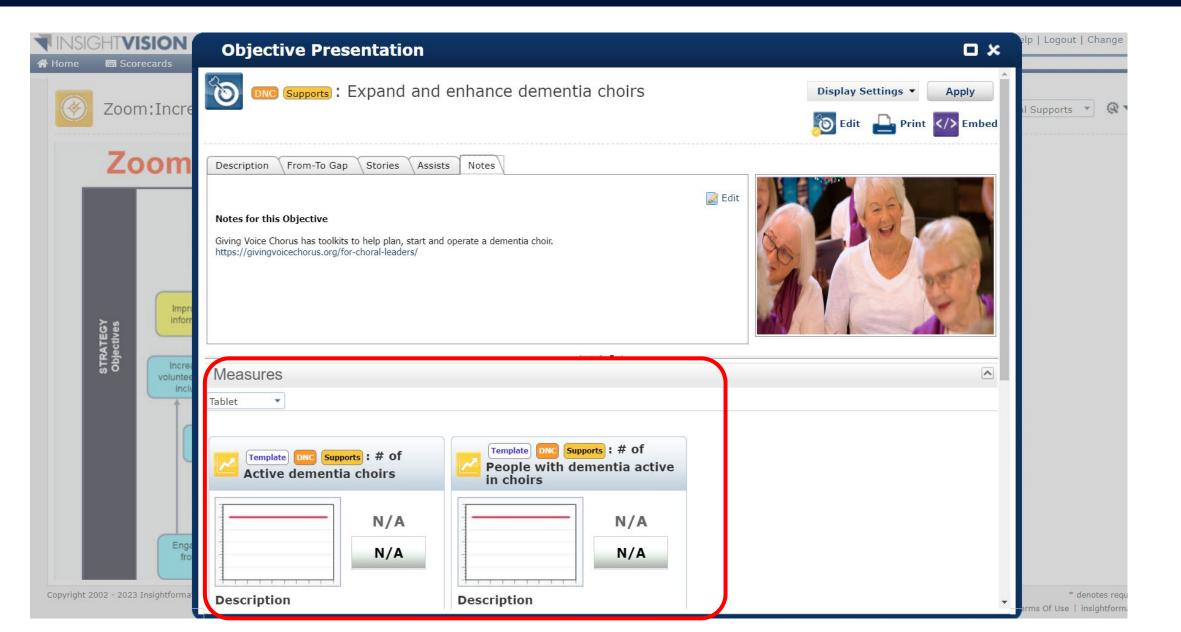
## Clarifying the From-To Gap



# Identifying and Tracking "Assists"

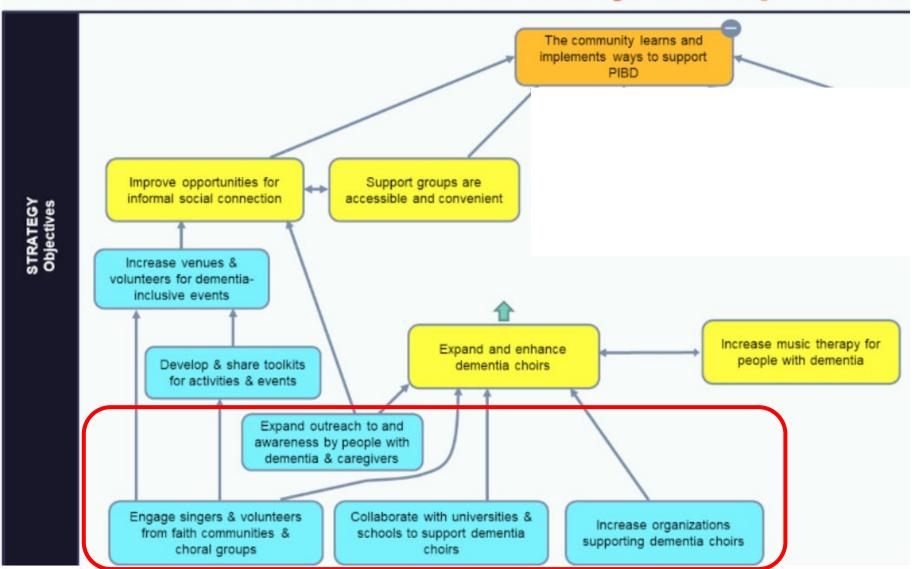


## Measures of Progress on the Objective



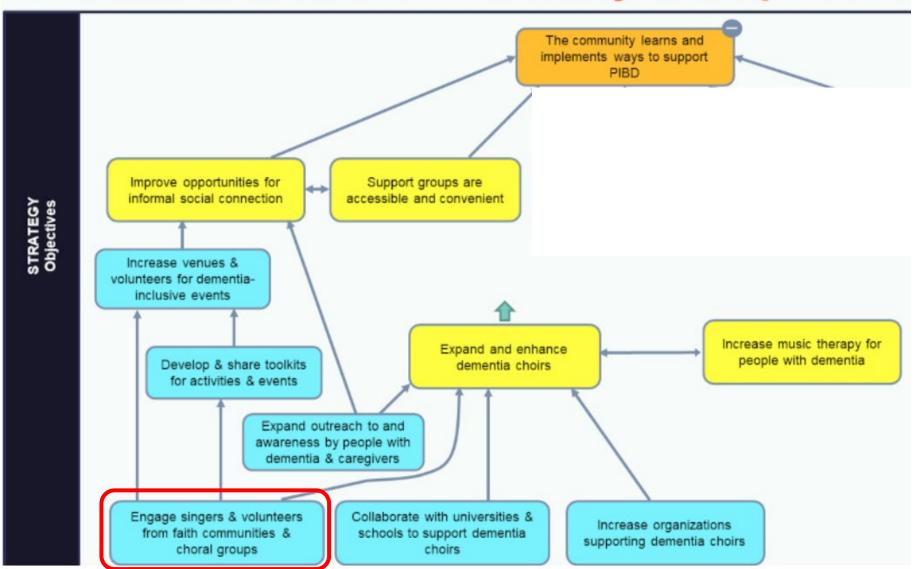
## Developing details for the "Driver" Objectives

## **Zoom: Increase Community Interperson**

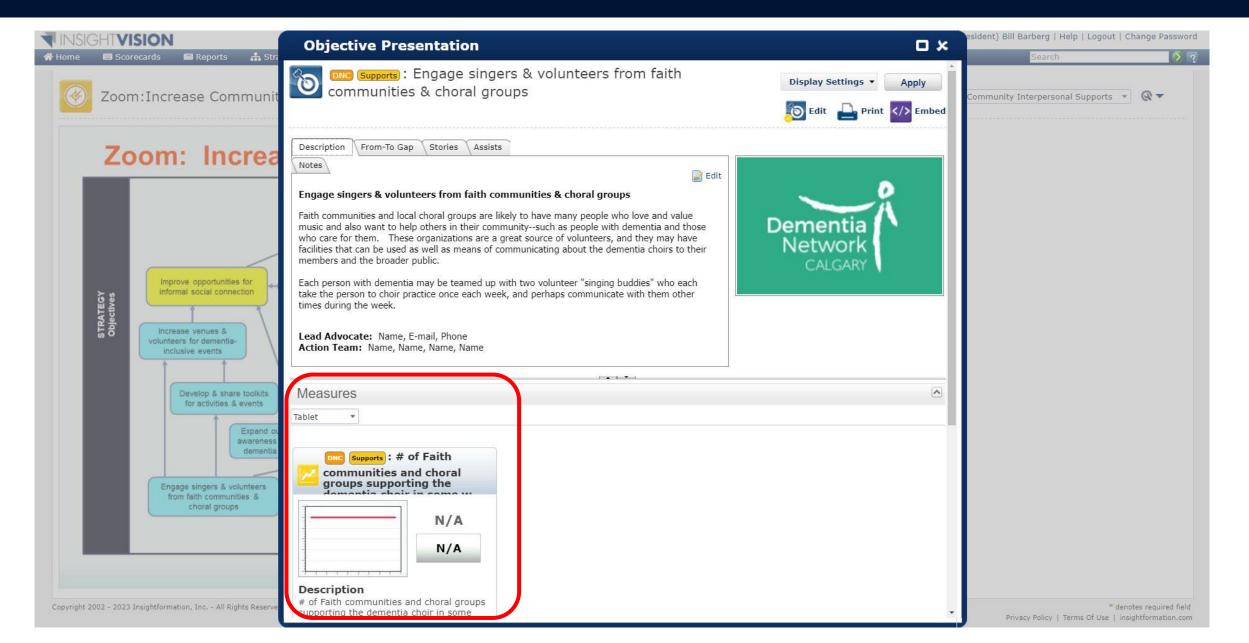


## Zooming in on an Objective

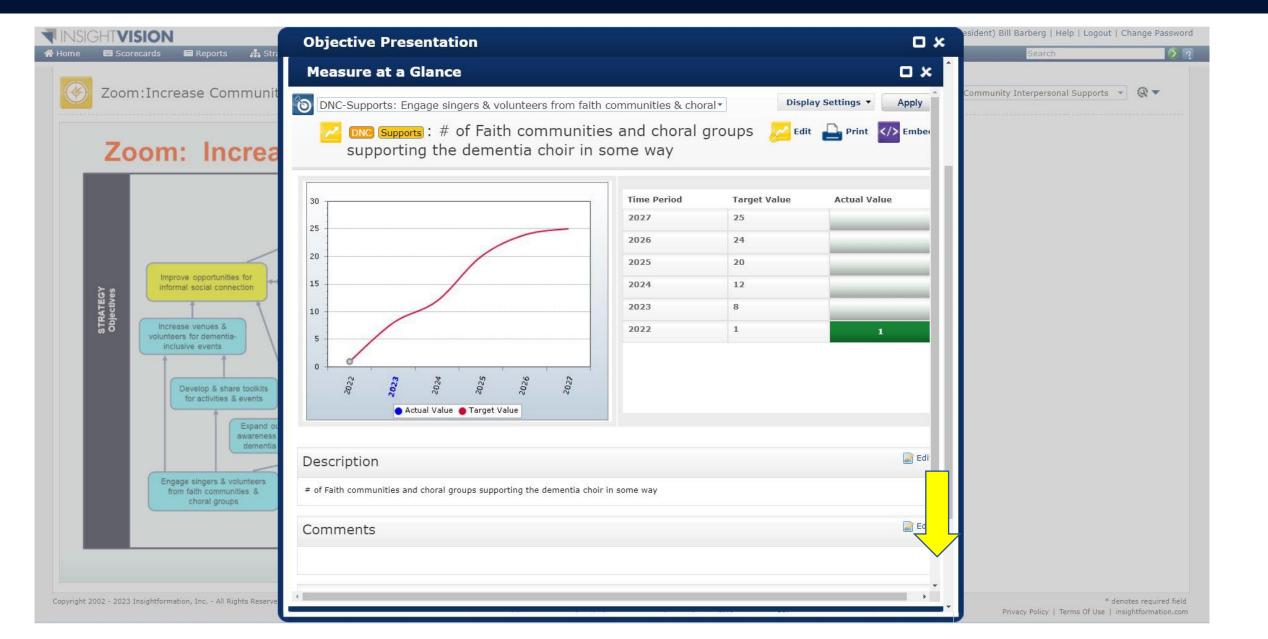
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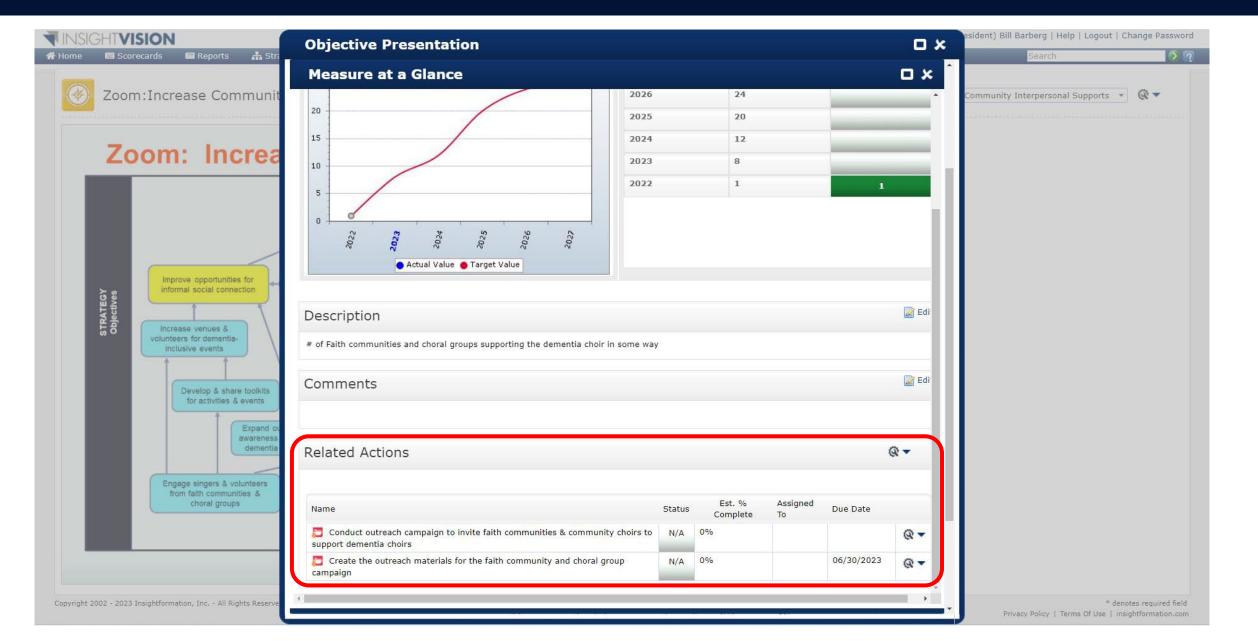
## Objective Details and Measures



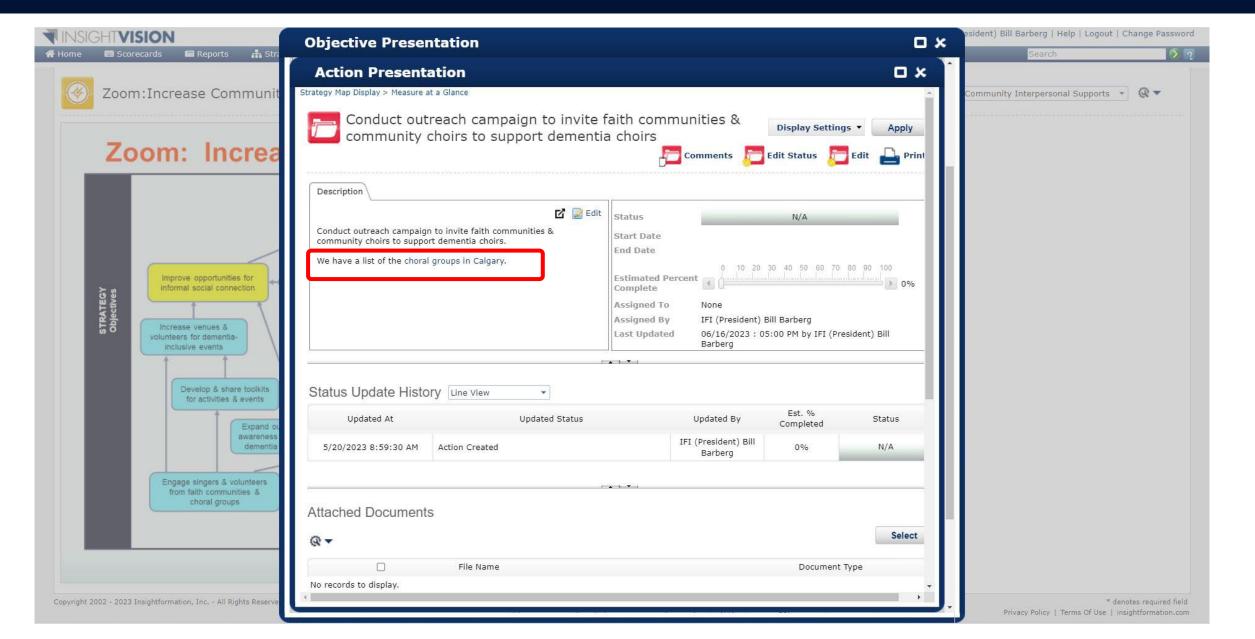
### Measure at a Glance View



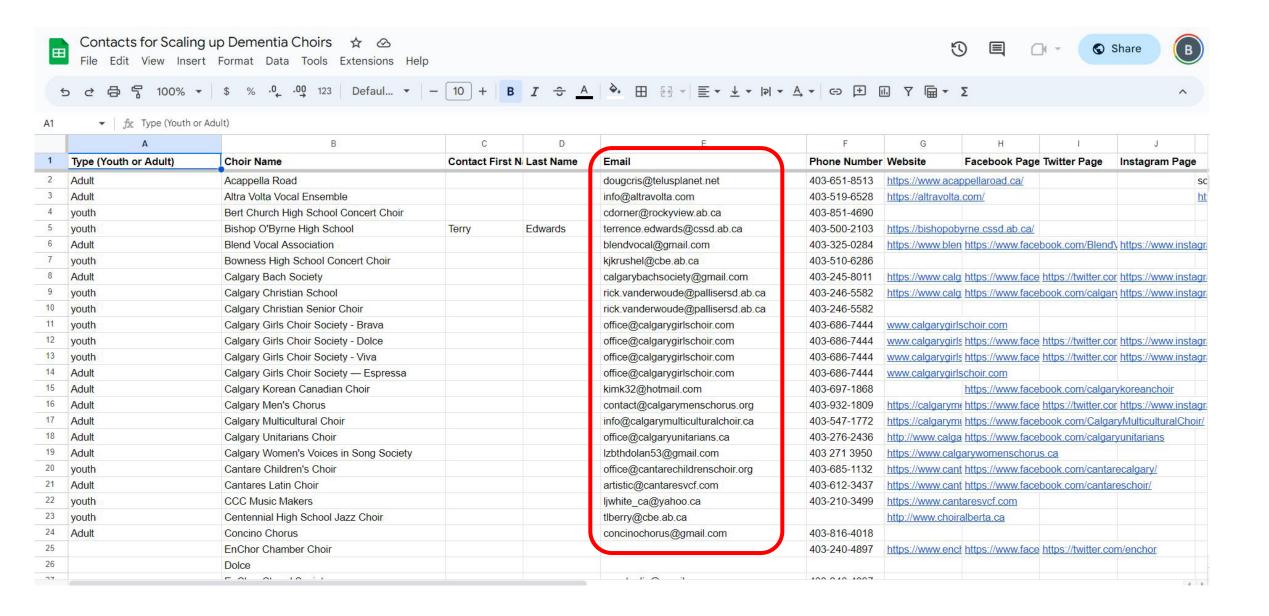
## Actions to Accomplish the Measure



## Manage the Next Steps: Find Candidates to eMail



### After a few hours...



### MQP on Strategy Maps as a "Theory of Transformation"



Access the full webinar on the resource page we will share.

# Carefully Designed Interactive Courses



Six Hours of High-Value Content -- a bargain at \$95 Give me a business card or email address or message me on LinkedIn and I'll email you a 100% discount link.

**Instructors** 



Bill Barberg



Michael Quinn Patton



Donna Kabangai



**David Peter Stroh** 



John M. Bryson

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### Specific Recordings on the Resources Page

#### www.InsightFormation.com/phc2023

#### Videos of InsightVision in Action

#### InsightVision Demonstrations

- An early stage collective impact success story using InsightVision (30:33)
- Indianapolis: Managing a wide range of measures using InsightVision (11:07)
- Moving to Actions and Mobilizing Assists using InsightVision (4:55)

We have full webinar recording on InsightVision as a "digital backbone" for Collective Impact.

## For Resources & More Information...

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