Faculty of Design

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A method to include system mapping in strategic planning

Boltwood, Alana and Quintero Rawlings, Frances

A Method to Include System Mapping in Strategic Planning

Fran Quintero Rawlings,
Designer, Health Commons Lab

Alana Boltwood
Consultant, Metimea Inc.

RSD8 Activity Group

About us:

- Strategic Foresight & Innovation program at OCAD University in Toronto
- Systemic design consultants with experience in non-profits and government

Fran Quintero Rawlings:

Master's Research Project on the intersection of death, grief and social isolation.

Designer @ Health Commons Lab.

Alana Boltwood:

Master's Research Project modelled causes and effects of urban poverty.

Visualizing patterns to make sense of complex social systems, and thus strategize for change.

Have you participated in strategic planning?

What is a strategic plan?

A strategic plan is a process that **provides guidance** in **fulfilling a mission** with **maximum efficiency** and **impact**.[1]

Strategic planning is *like designing* an organization

1.https://www.tccgrp.com/wp-content/uploads/2018/09/Ten-Keys-to-Successful-Strategic-Planning-for-Nonprofit-and-Foundation-Leaders.pdf
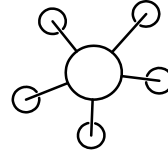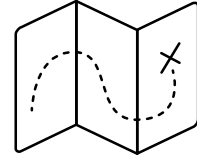
Objectives of strategic planning

Process of **defining** an **organization's direction**

Identifying and **prioritizing** focus areas (strategy)

Making **decisions** on **allocating resources** to pursue this **strategy**

Creating an **action plan** with **specific:**
- **objectives**
- **due dates** and
- who is responsible

Observation

Strategic planners **don't commonly use system mapping.**

- **3 /10 guides** to strategic planning mention Theory of Change.
    - **None** describe how to visualize a system.

- **3 interviews** with well known strategic planners in Toronto: they don't do system mapping

Hypothesis

Hypothesis

In the **social** sector,

Hypothesis

In the **social** sector,

strategic planning

could benefit from

system mapping.

Limitations

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Strategic planning is often:

- Short term (only 3-5 years)
- Tacit knowledge not shared or visualized
- Simplistic understanding of situation
- Not working on root causes

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Getting Past Limitations

Possible benefits of system mapping:

- Longer-term outcomes
- Make knowledge explicit (visualize)
- Understand complexity
- Situate organization in the system
- Work on root causes
- Choose objectives with high systemic impact
- Justify programs
- Anticipate systemic effects, make indirect interventions

Have you tried / participated in system mapping?

- Rich Pictures (Peter Checkland)

- Stakeholder mapping

- Causal Loop Diagram

- Root Causes: Fishbone or 9 Whys

- Theory of Change
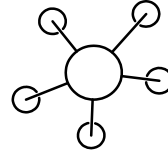
- Logic Model

- Other system mapping methods?

https://namescon.com/news/hand-up-for-your-start-up-scholarship-contest/
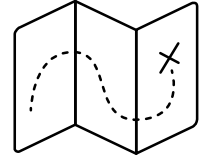
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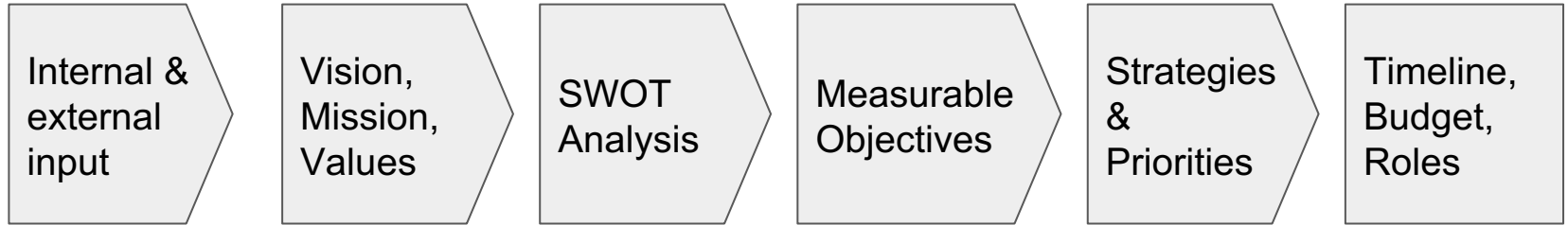Making **decisions** on **allocating resources** to pursue this **strategy**

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Typical Strategic Planning*

Internal & external input → Vision, Mission, Values → SWOT Analysis → Measurable Objectives → Strategies & Priorities → Timeline, Budget, Roles

*Sequence varies, should be iterative

Enhancing Strategic Planning

Internal & external input

Vision, Mission, Values

SWOT Analysis

Measurable Objectives

Strategies & Priorities

Timeline, Budget, Roles
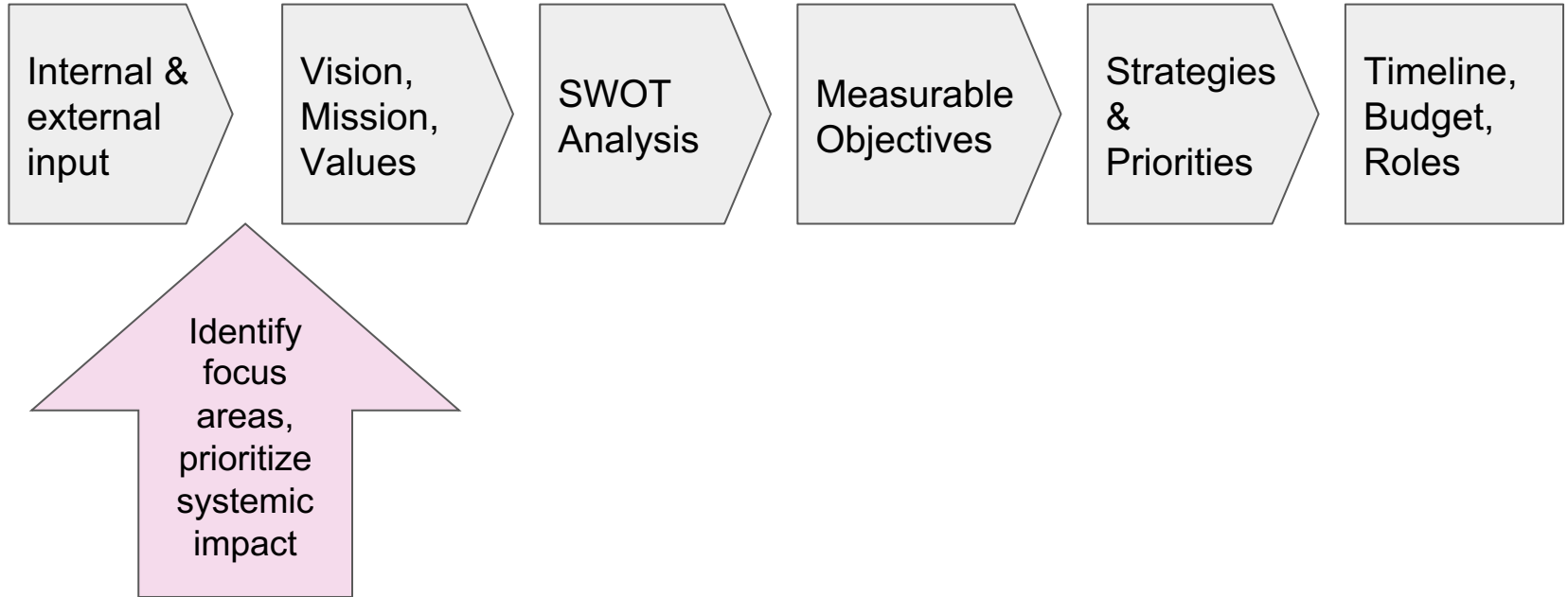
Identify focus areas, prioritize systemic impact

Depending on the organization's situation, they may benefit from system mapping at different stages.

Internal & external input → Vision, Mission, Values

Identify focus areas, prioritize systemic impact

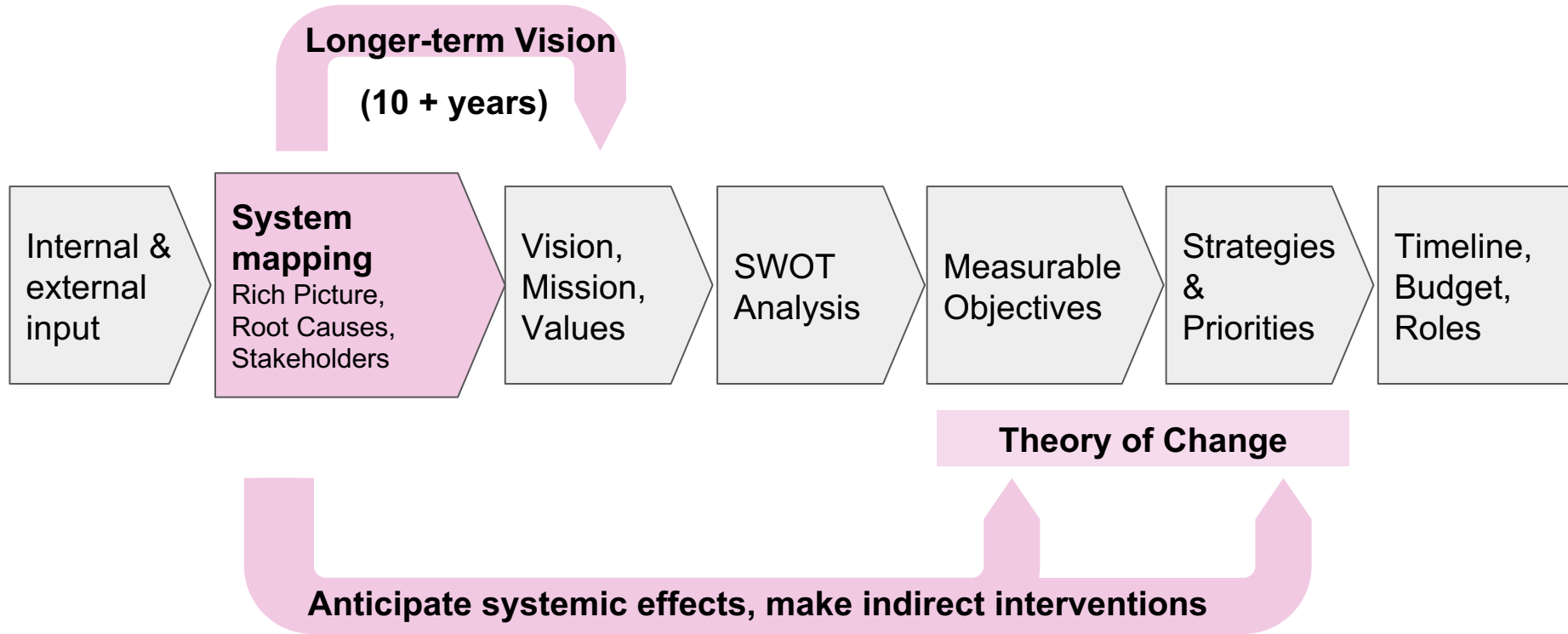Internal & external input → **System mapping** Rich Picture, Root Causes, Stakeholders → Vision, Mission, Values → SWOT Analysis → Measurable Objectives → Strategies & Priorities → Timeline, Budget, Roles

Why this is useful

Longer-term Vision

(10 + years)

| Internal & external input | **System mapping** Rich Picture, Root Causes, Stakeholders | Vision, Mission, Values | SWOT Analysis | Measurable Objectives | Strategies & Priorities | Timeline, Budget, Roles |

Theory of Change

Anticipate systemic effects, make indirect interventions

So we tested it...

Case Study:
Senior Pride Network

Workshop:

- 5 participants
- 2 days x 3 hours each day
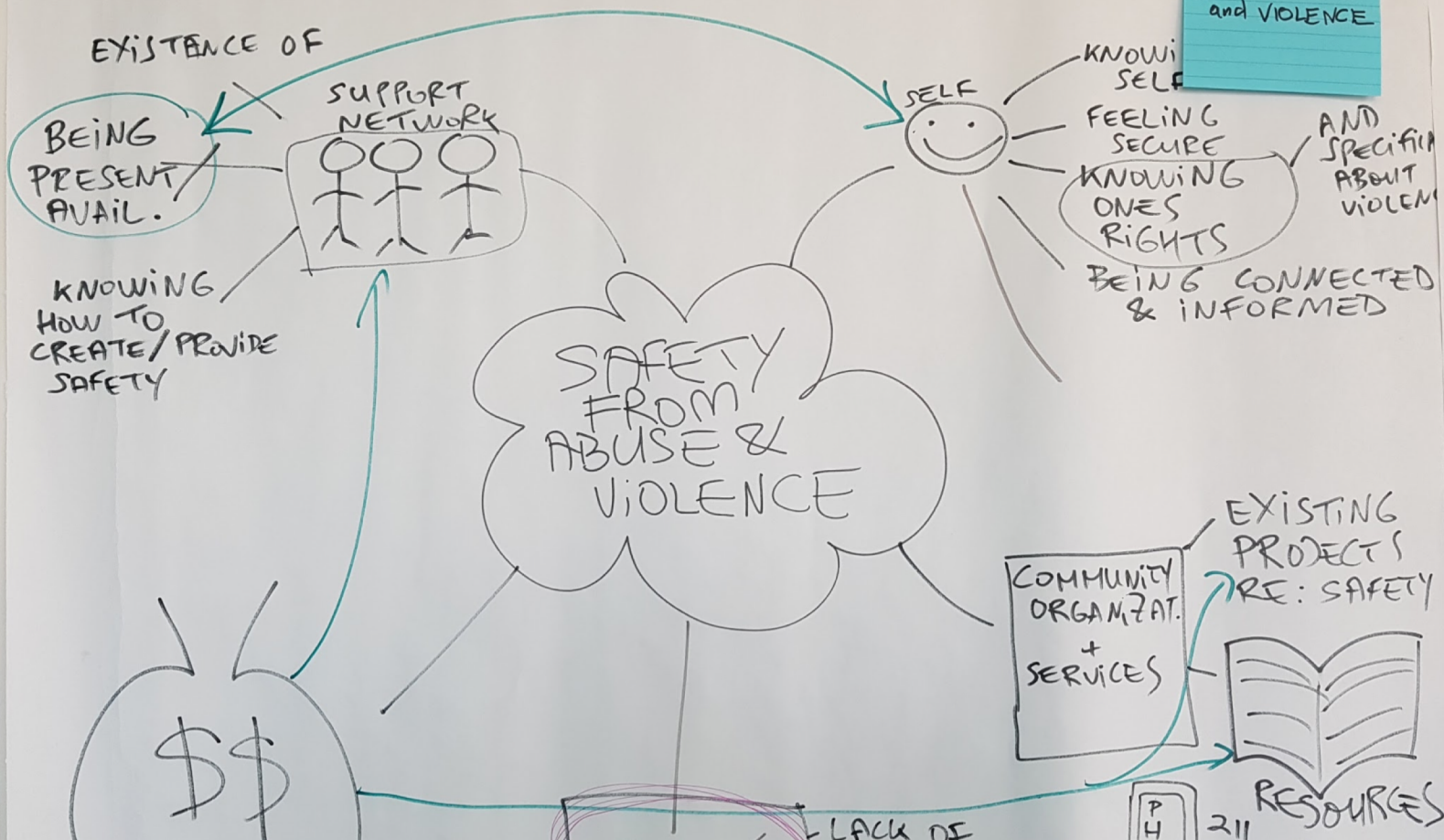
Objective:

- to kick off strategic planning process

Activities:

- Rich Pictures (Peter Checkland)
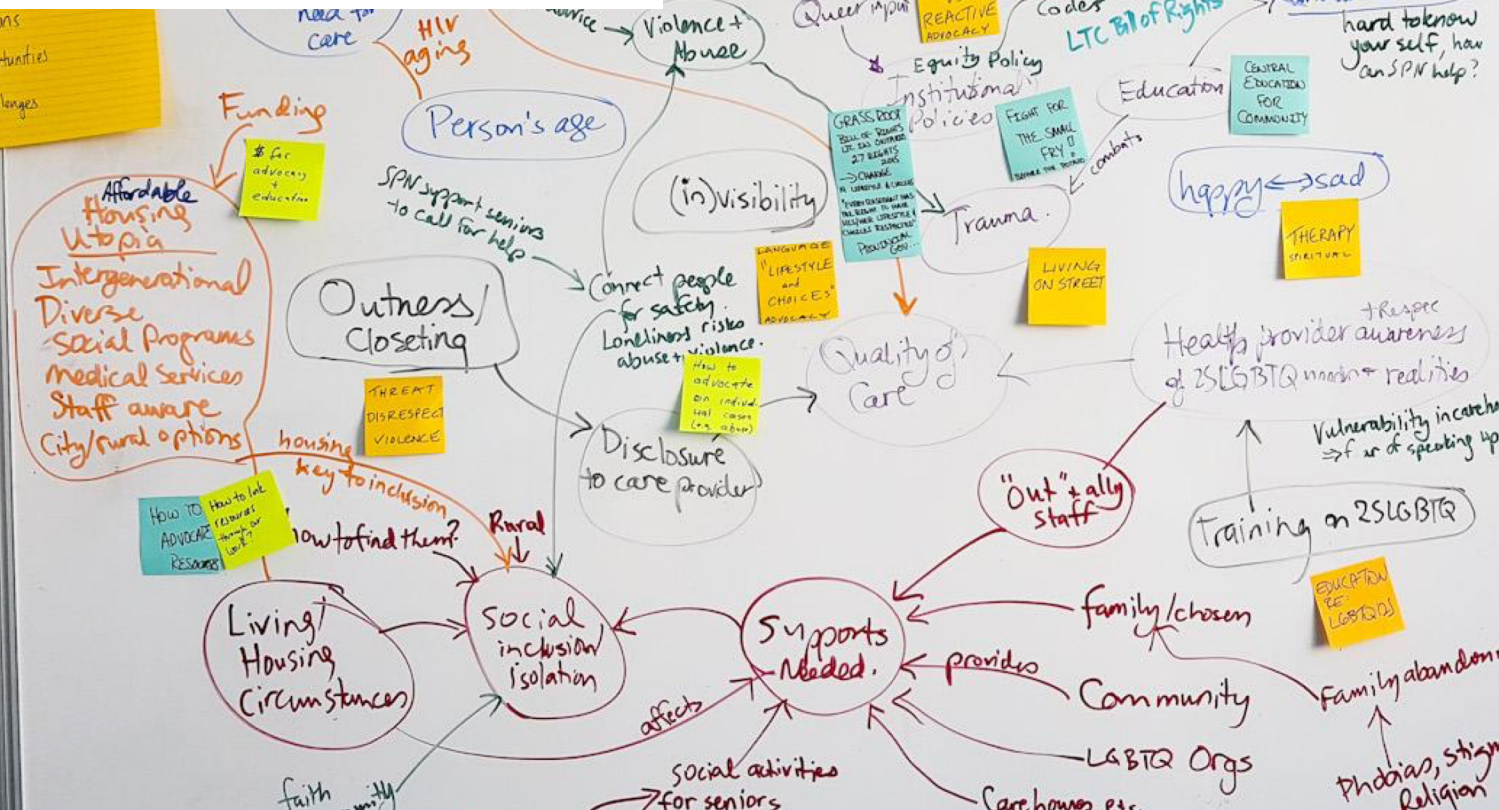- Stakeholder Mapping
- Causal Loop Diagram

Rich Picture

Rich Picture

- Tacit knowledge surfaced, made explicit
- Created alignment & perspective
- Broader understanding of systemic issues
- Better understanding of forces driving & impacting issues

Causal Modelling and Synthesis

Iterating the causal map

Initiatives to get there

Major desired outcomes

Empowering People to Advocate → Utopian Outcomes

Lobby TCHC Seniors Div. for buildings

Fed + Prov Lobbying → Full access to health care

human rights commission case

Share empty space, intergenerational → Housing Utopia

Add LGBTQ to LTC Bill of Rights

treat residents respectfully

SPN be direct advocate individually + media shaming

HR Codes

Policy change → Education → Care providers aware of 2SLGBTQIE+

→ Add to Curricula → Central Training Continuing Ed. → Safety

Regulatory colleges + Accred. Africa Canada

Govt Funding awareness of care providers → Social Inclusion + Family Support

2SLGBTQI+ community culture

Acad. Research Studies

SPN strategic direction for netwo. [?]

Need staff person

Causal Modelling

- Too far a leap

- Needs multiple iterations to connect concepts

- Discussion exposed & resolved differences

- List of initiatives implied causal model, not visualized

- They got what they needed, but not what we planned

Stakeholder Mapping
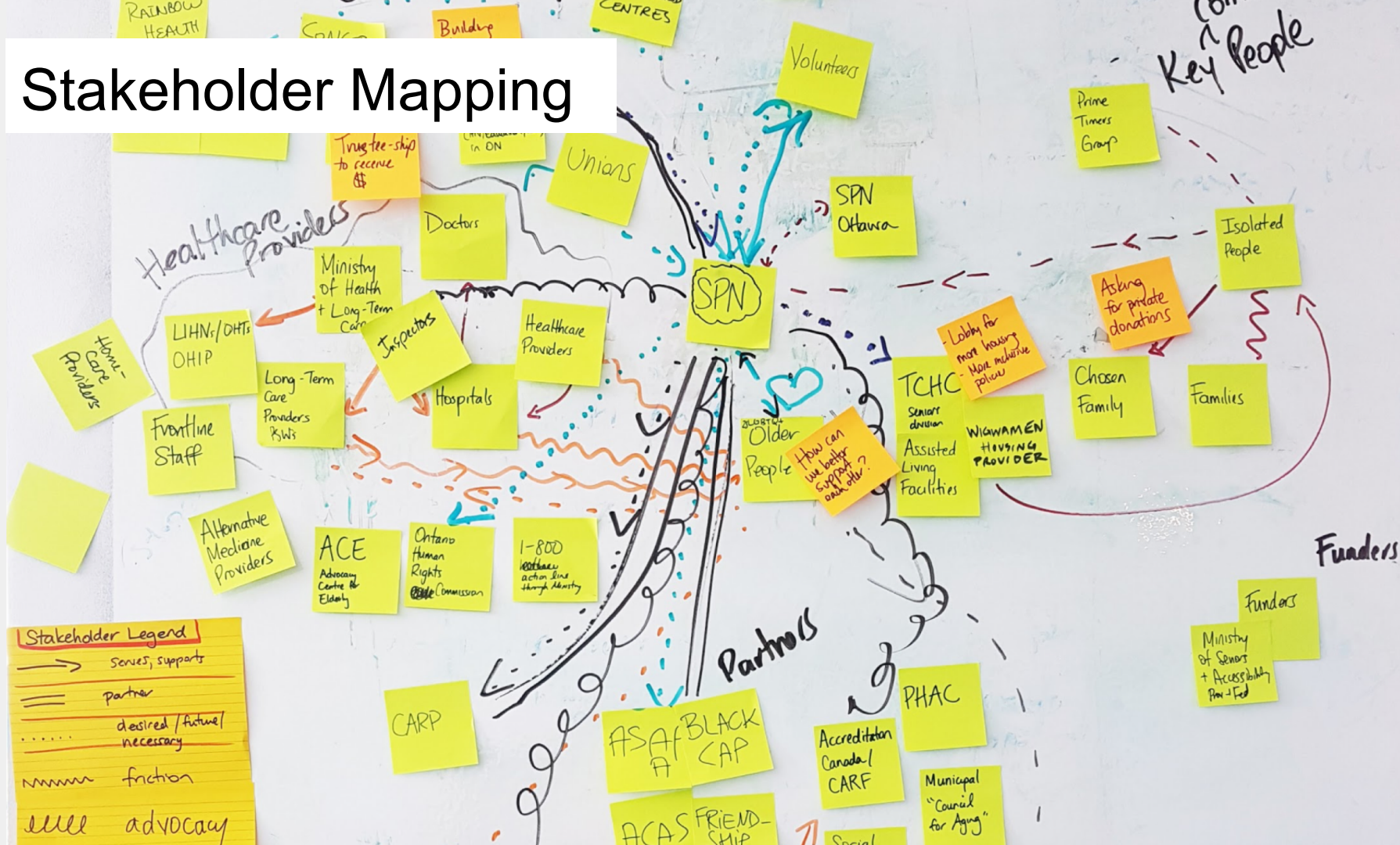
Stakeholder Mapping

- Understand who stakeholders are

- New ideas for partnerships

- Clarified strategic partnerships

- Made initiatives tangible

- Showed need for prioritization

Workshop Insights

❖ Rich Picture (aka drawing what you think) is a powerful tool that can be used beyond strategic planning

❖ Need more time for iterating causal model

❖ Systems thinking can be easier with playful art modality

❖ Provides a process for prioritizing, organizing, hearing from each other

❖ Creates explicit alignment across the team

Insights From Participants

"I gained some new insights and challenged in my own understanding in some of the issues that SPN faces, and how we might go about advocating"

"Getting to know each other through drawing"

"It brought more clarity to the strategic planning process to be on the same page...or closer to being on the same page"

"The mapping used a different dimension of my brain"

Group Activity
Make and use a Rich Picture

Scenario

Imagine we are the Friendly Neighbour Association (FNA), founded 15 years ago to reduce social isolation.

We are setting a strategic plan to renew the FNA after a period of difficulties and conflicts. New leadership is open to changing the organization's name, vision, mission, goals and activities if needed.

FNA members agree that **social isolation** means: ***The absence of social relationships and contact.*** People of all ages can be socially isolated if they have little or no contact or support from family, friends and other people.

We need to discuss which kinds and aspects of social isolation the FNA could work on, and how.

Rich Picture instructions (5 minutes)

1. Draw how you see the situation surrounding social isolation.

2. Include people, places, things, resources, issues and relationships between them.

3. Tape your rich picture to the wall.

4. We'll ask a few people to describe your rich picture for 60 seconds. Please volunteer if you drew different things from others who have spoken.

Friendly Neighbour Association (FNA)

Founded to reduce social isolation. Open to changing name, vision, mission, goals and activities. Which kinds and aspects of social isolation the FNA could work on, and how.

Social isolation means: *The absence of social relationships and contact.* People of all ages can be socially isolated if they have little or no contact or support from family, friends and other people.

Reflections...
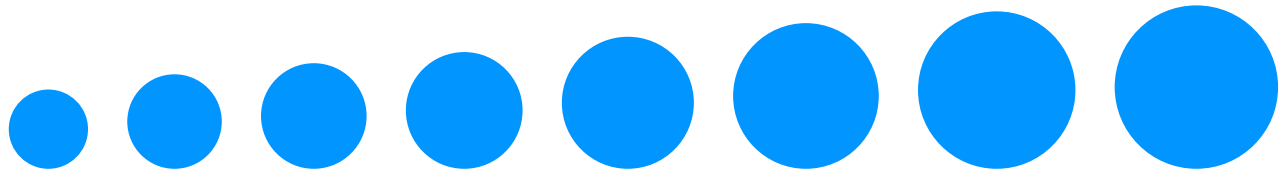
Next Steps

- Test the method in a complete strategic planning process

- Find rapid facilitation method for cause-and-effect modelling

- Incorporate system mapping with large group consultation

- Test system mapping with organizations at different stages or situations

Fran Quintero Rawlings
fran.rawlings@sinaihealthsystem.ca
Designer, Health Commons Lab
@frawlspace

Alana Boltwood, MDes
alana@metimea.ca
Certified Management Consultant