



Discover. Learn. Analyse. Shape. Repeat

COHORT SESSION 7: SHAPE



Today's agenda

Welcome & Check in

Problem Trees – causes and effects

11:05 Break

Using data to make informed decisions

1pm Lunch

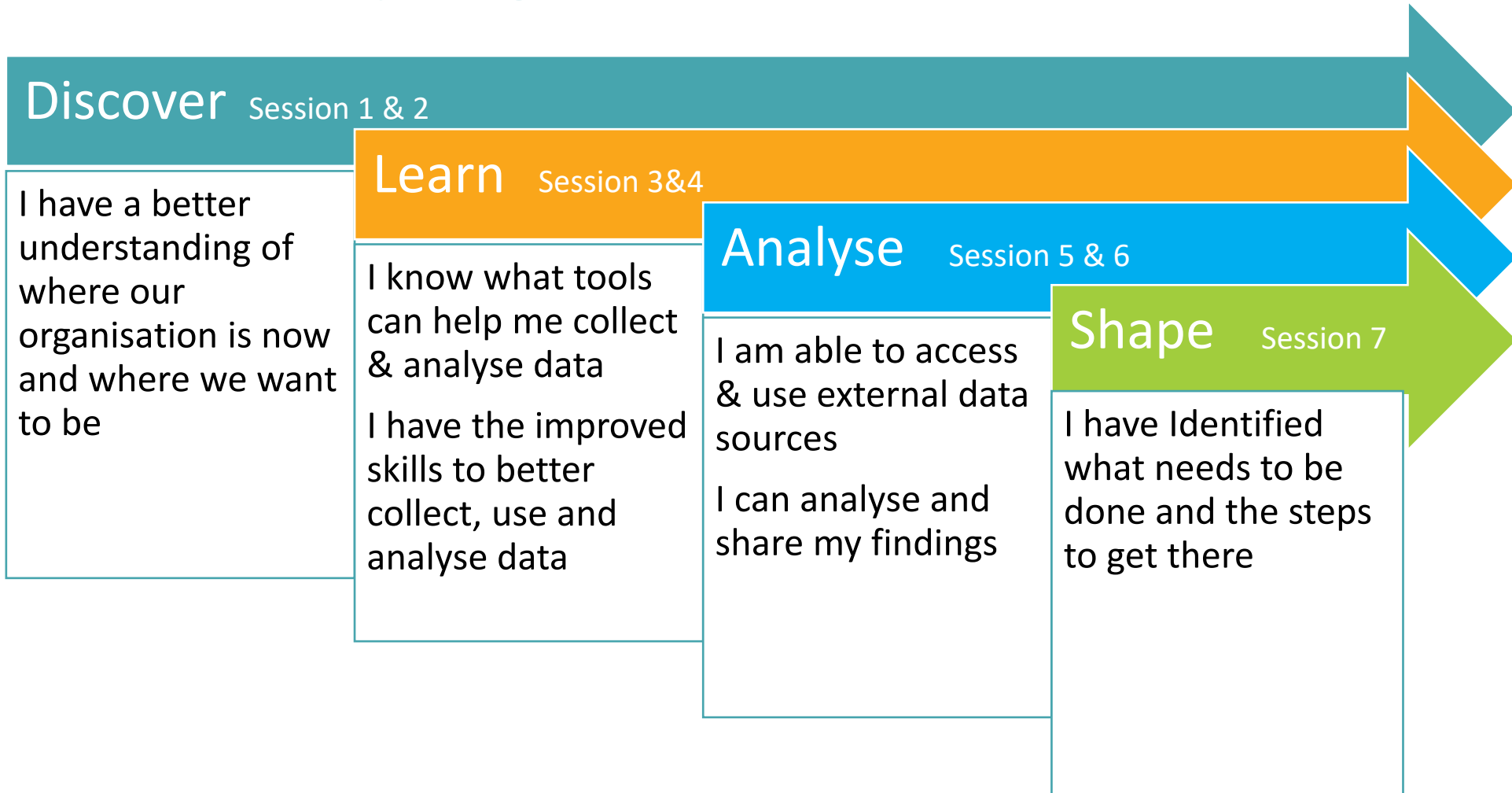
Makerble – reviewing goals

Systems mapping

Check out and Close



DWL Cohort programme



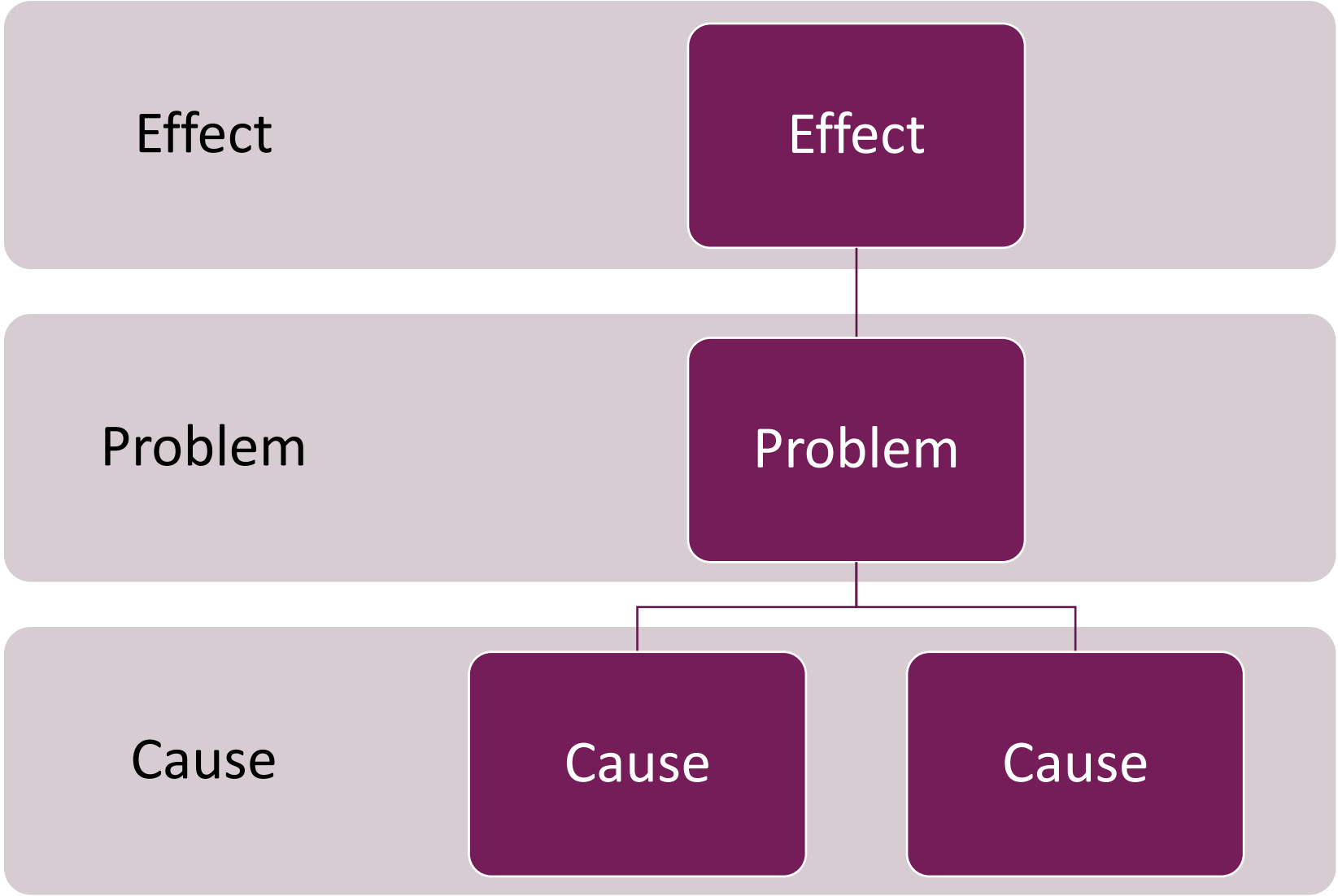


Problem & Objective Trees for planning & shaping Service delivery

MUSIC MENTORS HUNCH ANALYSIS



Problem Tree template



Why use a Problem tree?

A problem tree analysis helps to illustrate the links between a set of complex issues or relationships by fitting them into a hierarchy of related factors.

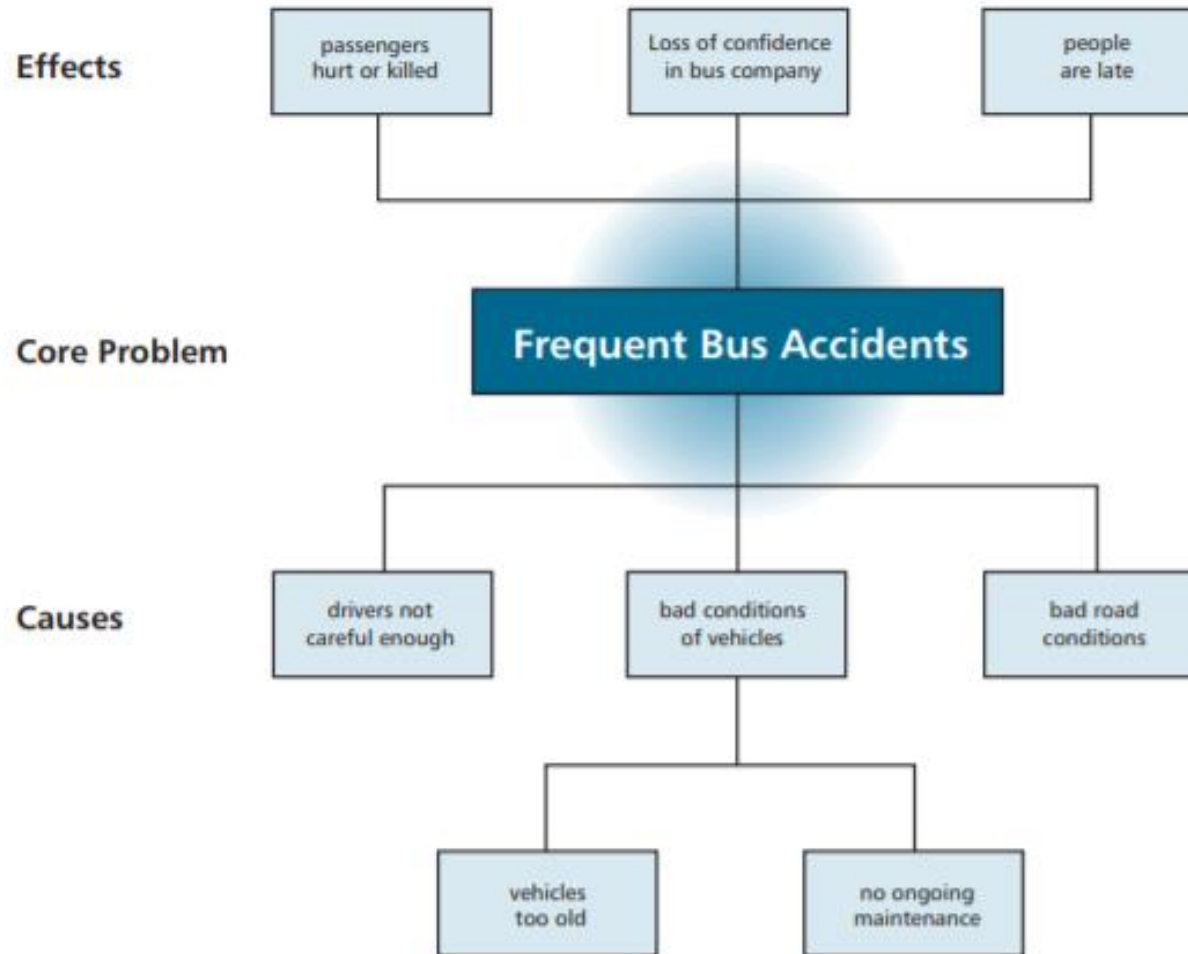
Using a Problem Tree can help to:

- Link together the various issues or factors which may contribute to problem.
- Identify the underlying or root causes of a problem.
- Break the problem down into manageable and definable chunks
- Focus on current issues, rather than dwell on apparent, future or past issues
- When used with an objective tree, it helps to identify & prioritise solutions
- When done as a team, the design process help build a shared sense of understanding, purpose and action



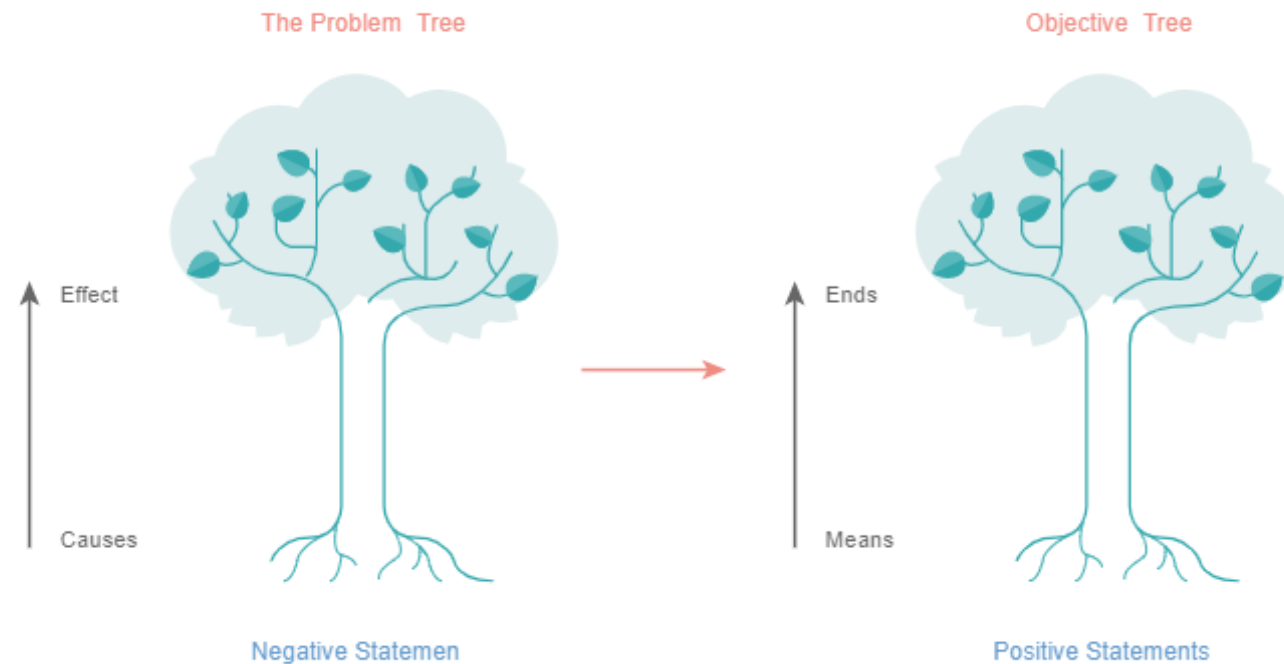
Problem Tree example

PROBLEM ANALYSIS: Bus Example

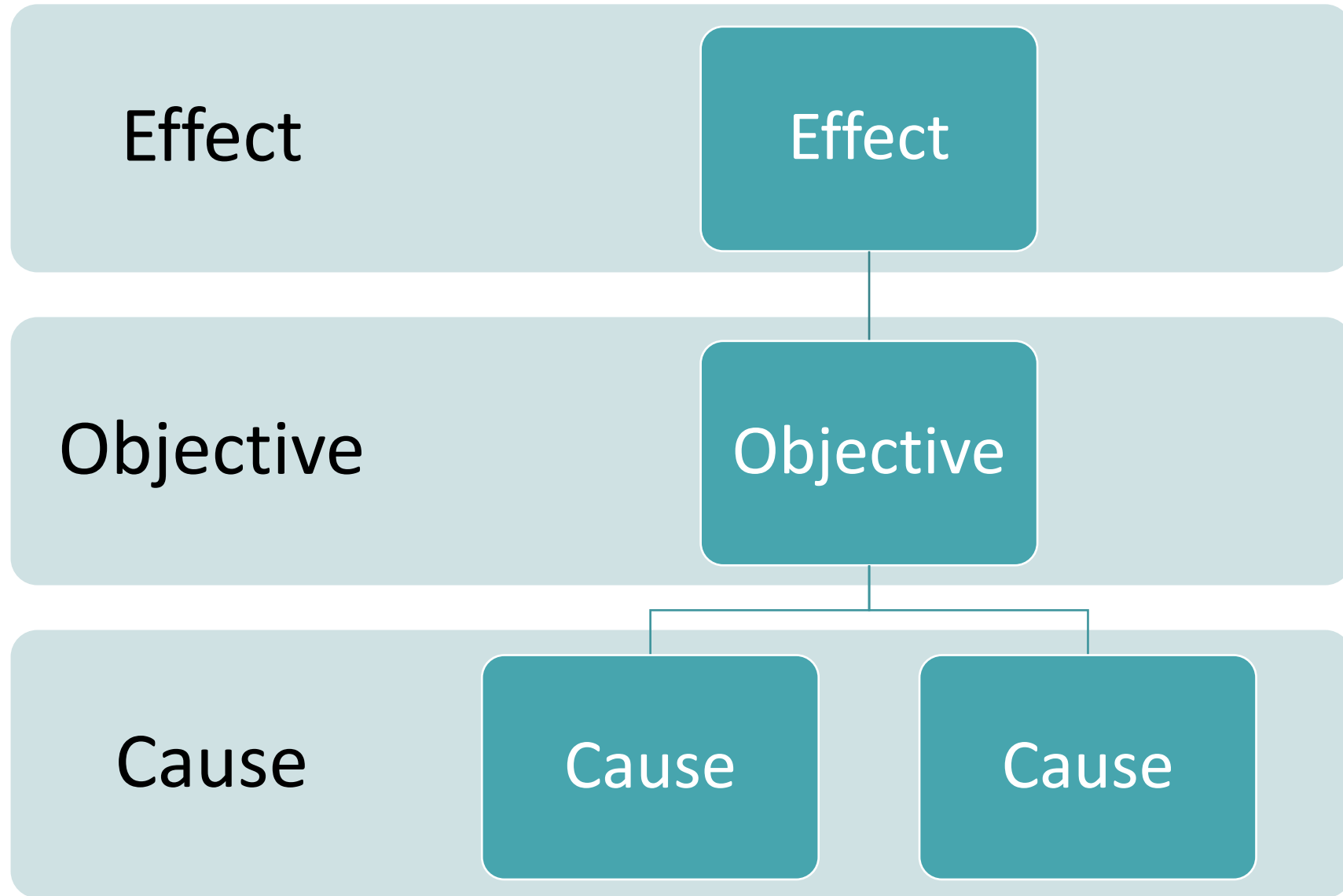


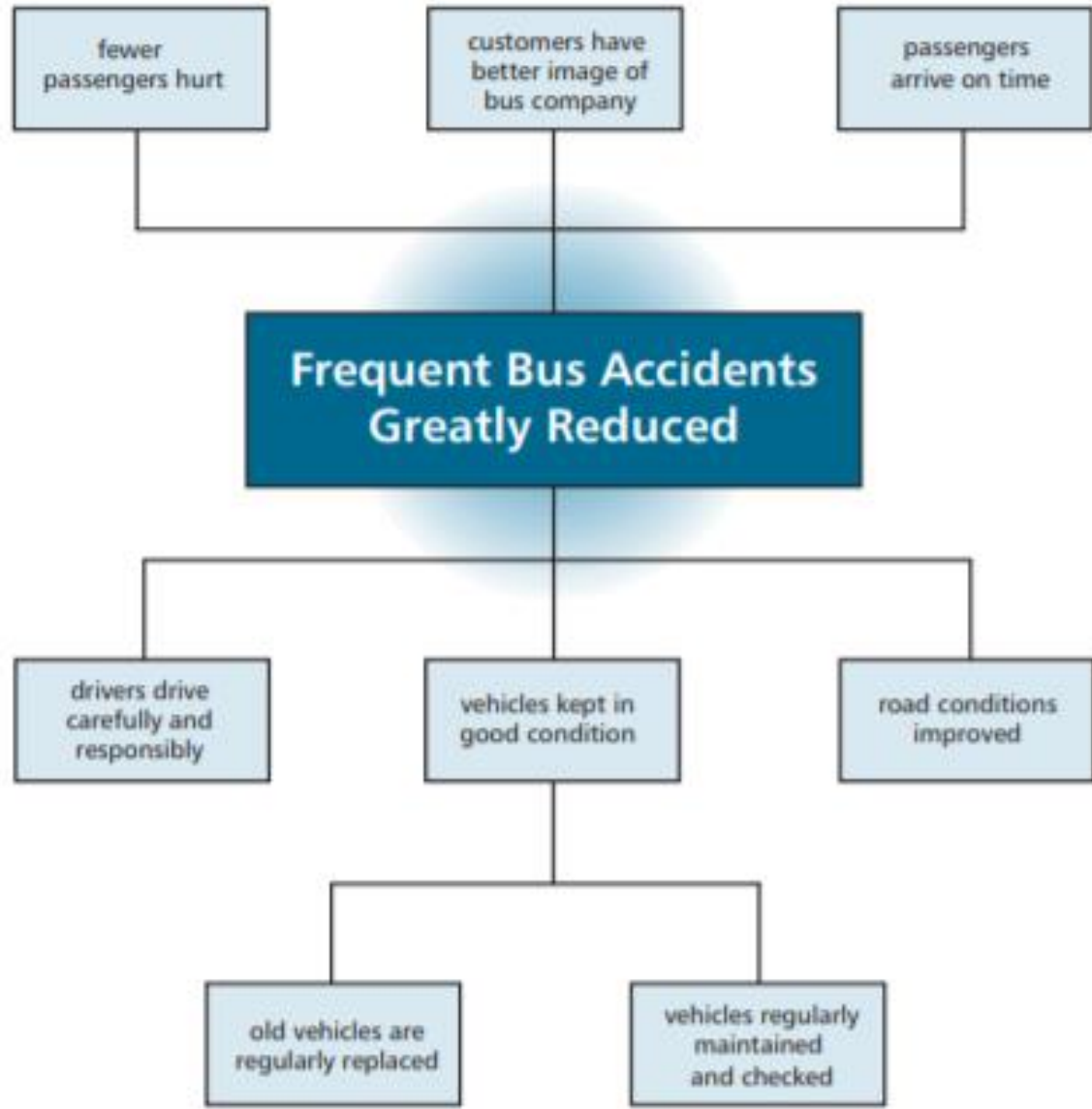
What is a Objective (Solution Tree)?

An Objective Tree is a Problem Tree that is transformed into a set of future solutions to the problems. Each negative problem is converted into an objective by rewriting it as a positive future statement

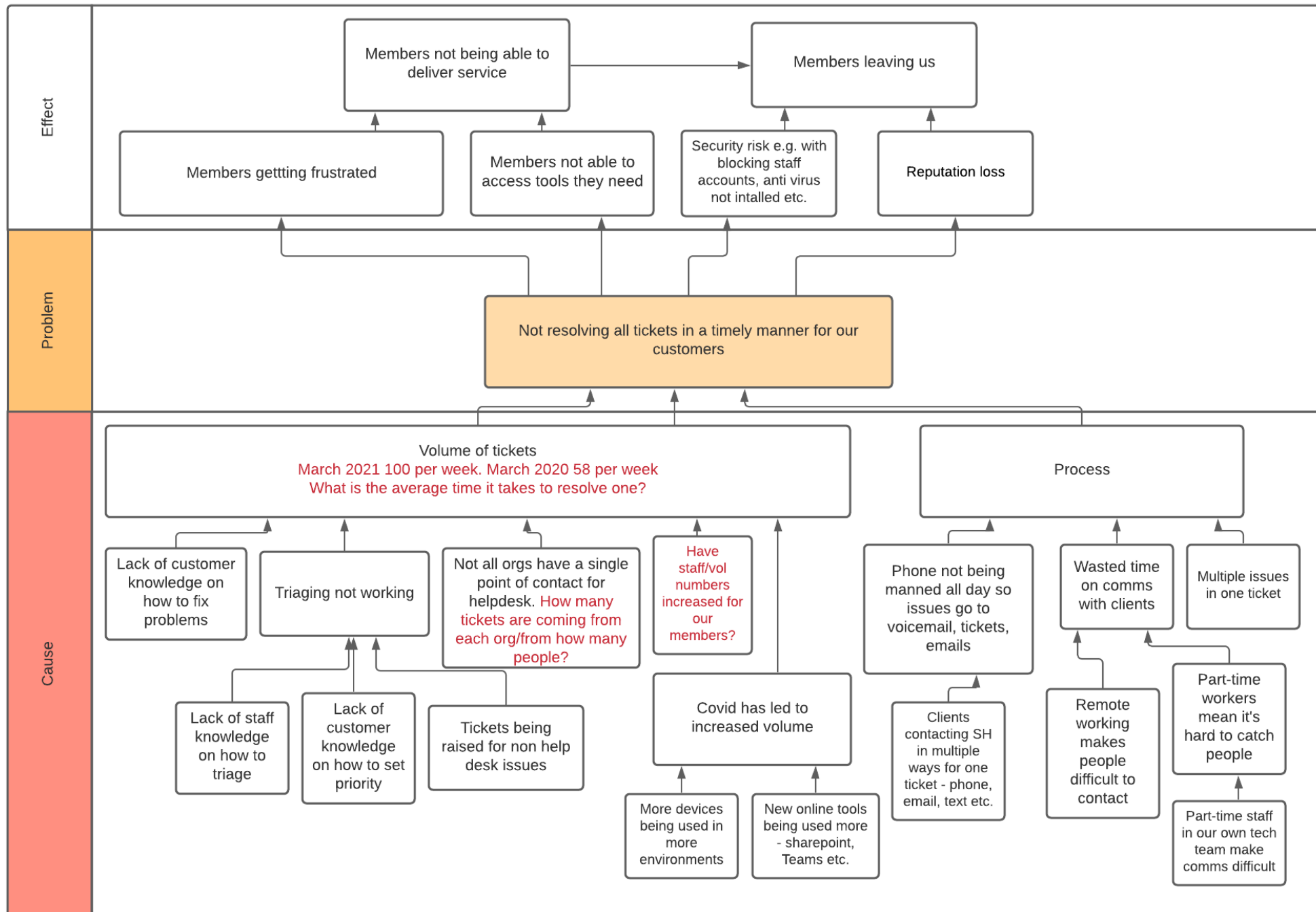


Ojective (Solution) Tree template





Superhighways Help Desk problem tree



Group exercise

Create a Problem Tree for the Music Mentors charity



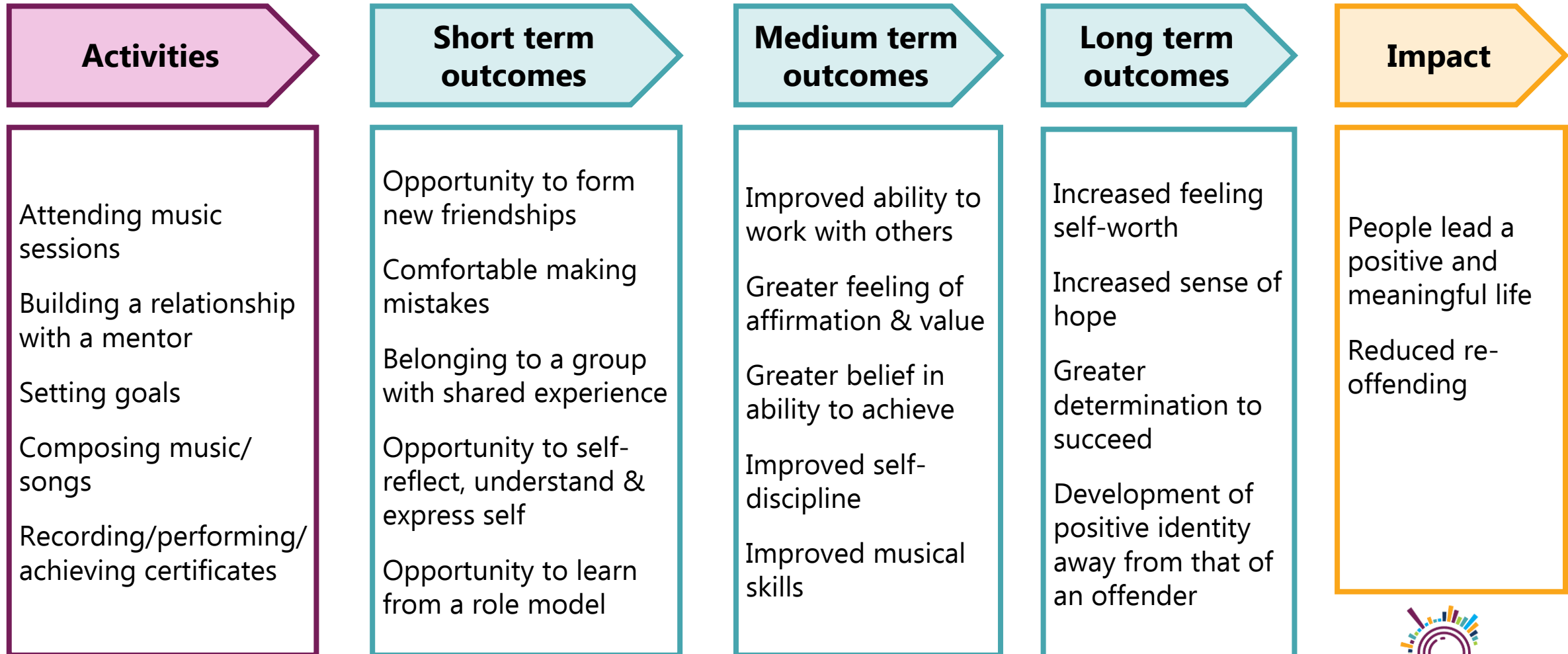
Music Mentors

Music Mentors work with people in prisons. People sign up to take part in group sessions where they work together with mentors to write, play and record music with other participants

The data we are using today is fictional data for the programme which we have created for training purposes.



Logic model / theory of change



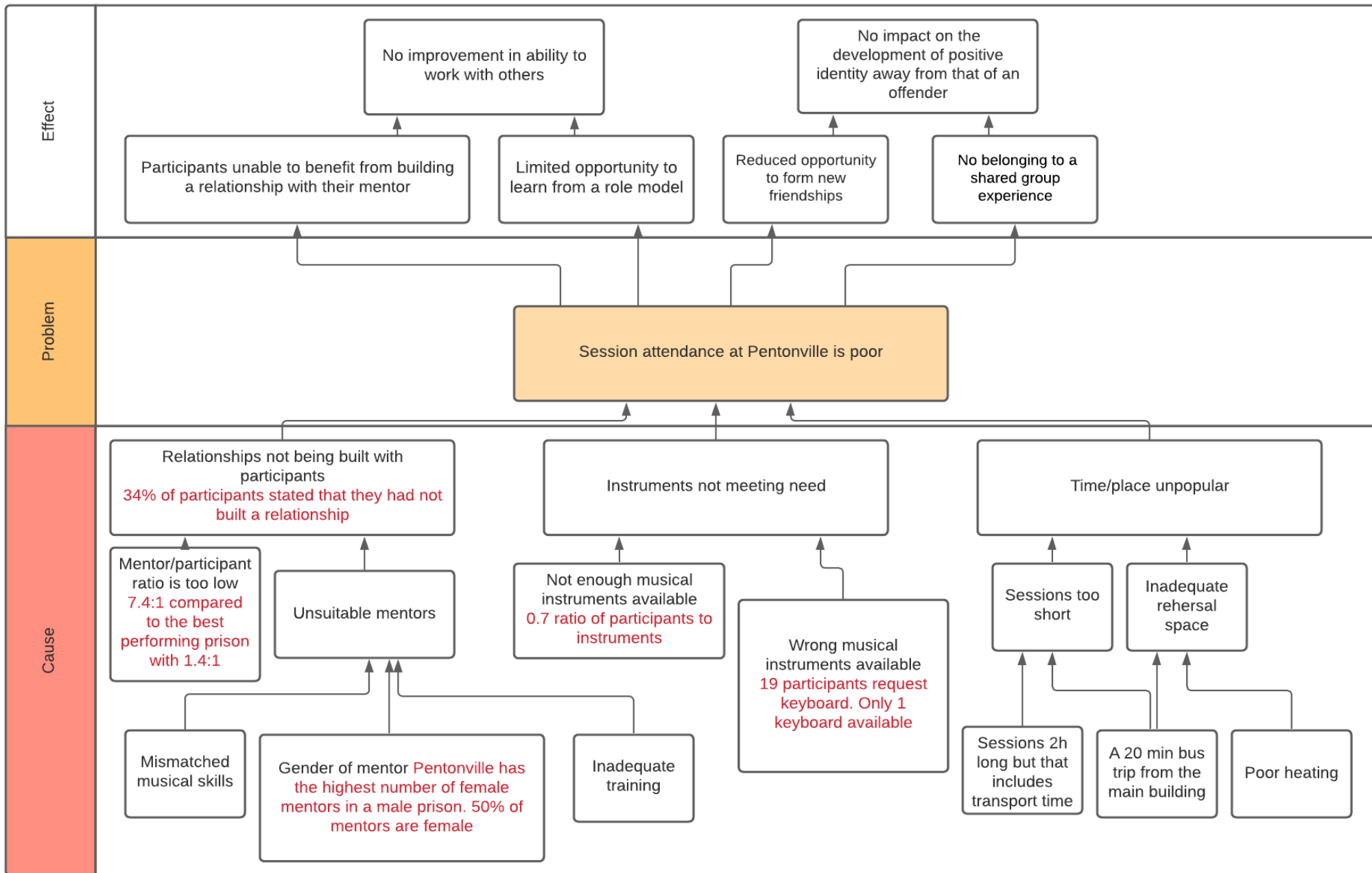
Exploring a hunch

Despite the overall success of the programme, the Programme Manager has a hunch that the music mentors programme is proving less of a success in some prisons.

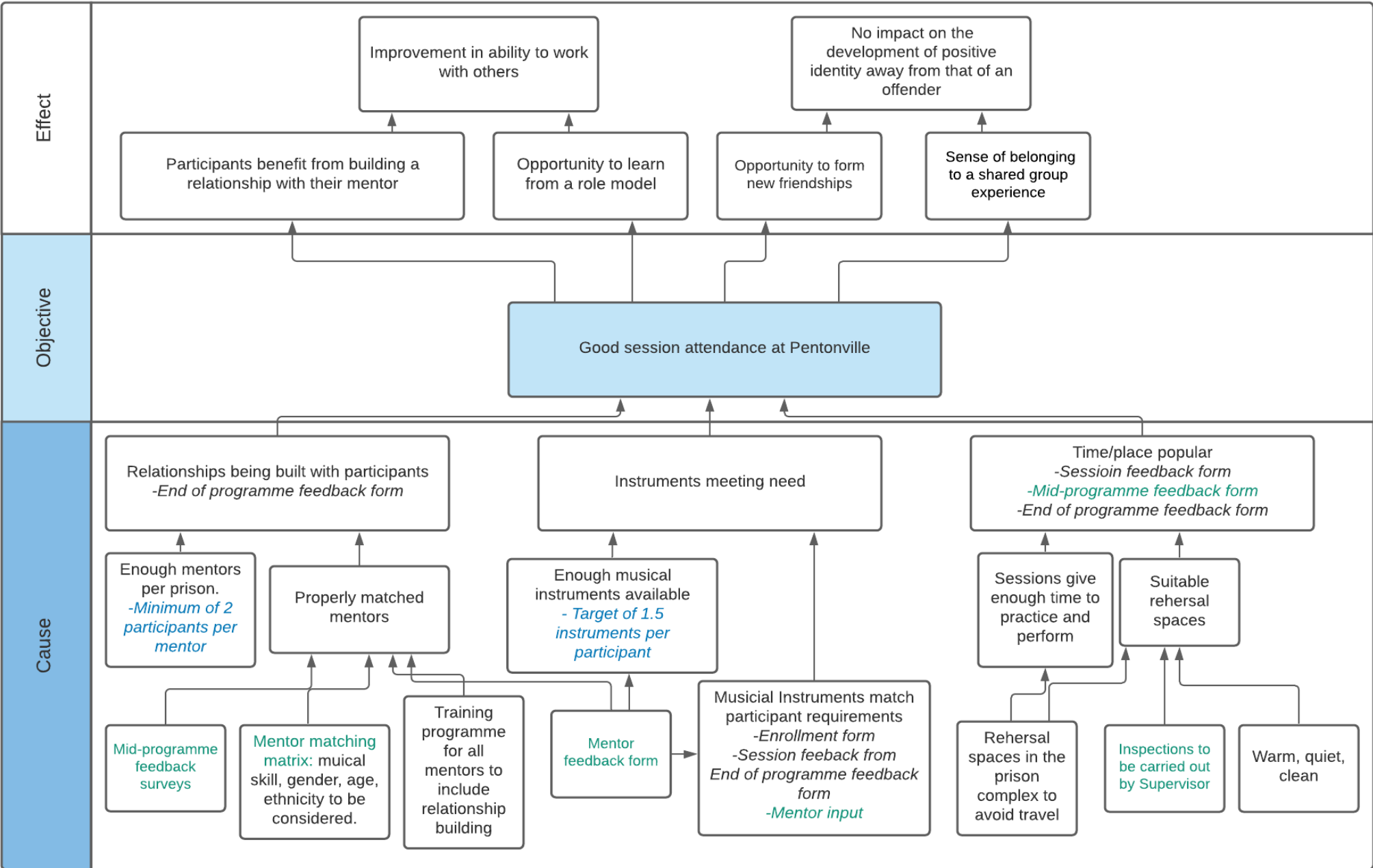
Having done some research she has identified that the attendance at HMP Pentonville is poor and has some done some work into exploring why. Using the data set provided create a data informed problem tree to explore the problem :“Session Attendance is poor at Pentonville”



Music Mentors problem tree



Music Mentors Objective tree



Systems audit recap



Refining our processes with a systems audit – recap and refine





Systems audit template



System name e.g. registration form, member list or client	Application used e.g. Word/ Excel/ Access/ CRM etc	Description of what it's used for including type of data collected / stored e.g. names, attendances, work carried out	Who uses it – are there restrictions as to who can access, modify etc?	Can you produce reports from the 'system'? (as appropriate)	What are the risks/benefits to using this system (for example security, ease of use, etc.)	Are there any challenges / issues you have using this tool or 'system'?	What would make use of this tool / 'system' more effective?
Helpdesk	WebHelpDesk	For our Tech support service. Holds contact details of all our members and other organisations accessing this service. Enables us to log tech support provided - for reference and also monitoring access against support package (used to check service level at annual renewal). Emails to helpdesk@superhighways automatically creates a ticket	Restriction of 5 licences. Tech team + generic tech support.	You can filter different views and produce various reports as pdf or download as CSV	Client data secure	Staff not always updating in real time. Users creating new tickets not adding to existing ones.	Better reporting to track Membership service used. Need to explore further what's possible. Potential automation of invoicing? Would an app on mobile phone be useful for quick updates on the go? Need more licences.
Digital support request form	O365 Form	Collects new digital support requests (non members) Functions as an initial enquiry form with contact details and further information of issue. (Provides more structure information and a reference point in one place than ad hoc emails to different staff)	Sorrel, Kate, Philippa	Form responses create a real time updated Excel spreadsheet. We can then filter etc	Free. Quick and easy to use	Only one person gets alerted when a new response comes in (but none worked out how to use Powerautomate to alert other emails too)	If this information could be brought together with Helpdesk info and other spreadsheets / Eventbrite data where we've potentially provided other services to that organisation & for easier reporting to funders etc
Training Excel sheet	Excel	Downloaded from Eventbrite for monitoring & evaluation. Links into Power BI for analysis and sharing.	Everyone	In theory everyone but it's tricky to use in Excel as the file is so huge so we've linked it to Power BI so we can share interactive dashboards internally & externally	Free. Quick to set up new templates for new projects/workstreams. Team all have good Excel skills. Data security not watertight. No audit trail.	Not a real time link with Eventbrite so we have to download manually. The high load of training we're doing during Covid is making this a challenge to stay on top of.	A real time link with Eventbrite using Zapier or Microsoft Flow. A centralised database to link the two workstreams together.



Refining your systems template

- ✓ Complete / refine your template
- ✓ There's new info to add





Process & systems mapping

What is it and how can it make a difference?

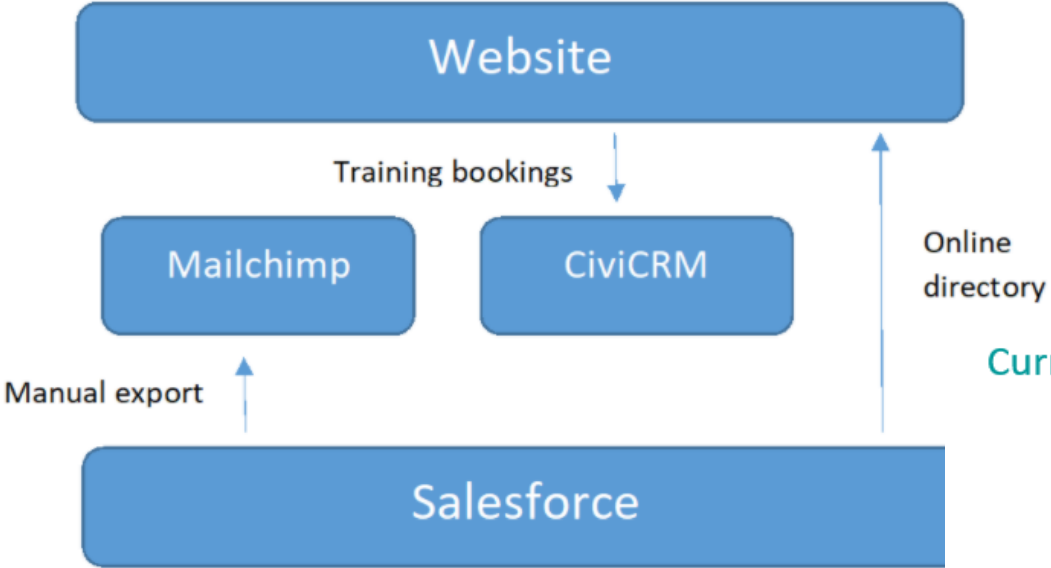


Advantages of process & systems mapping

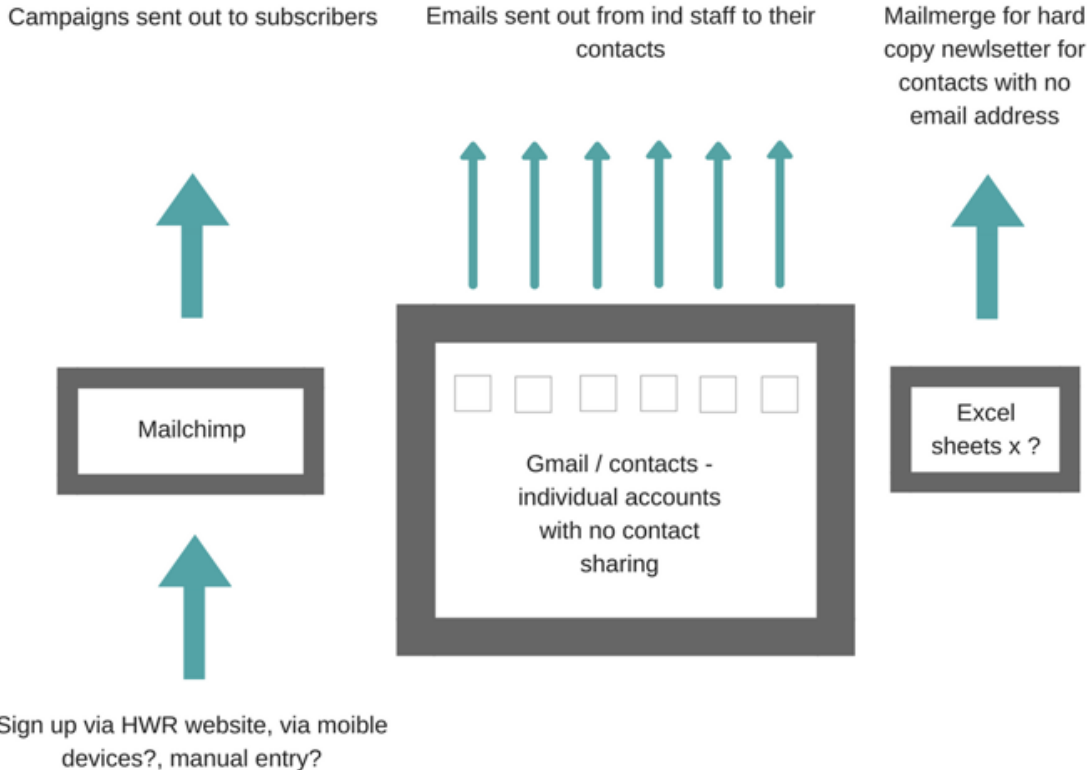
- ✓ Identifies fragmentation – multiple systems employed by multiple teams
- ✓ Identifies missing or inaccurate data – the team might not know the importance of collecting certain data or make assumptions or guesses to complete unknowns
- ✓ Identifies bottle necks e.g. too much information being asked at the first contact resulting in gaps that aren't ever completed
- ✓ Identifies inefficiencies – duplication of data collection and data entry



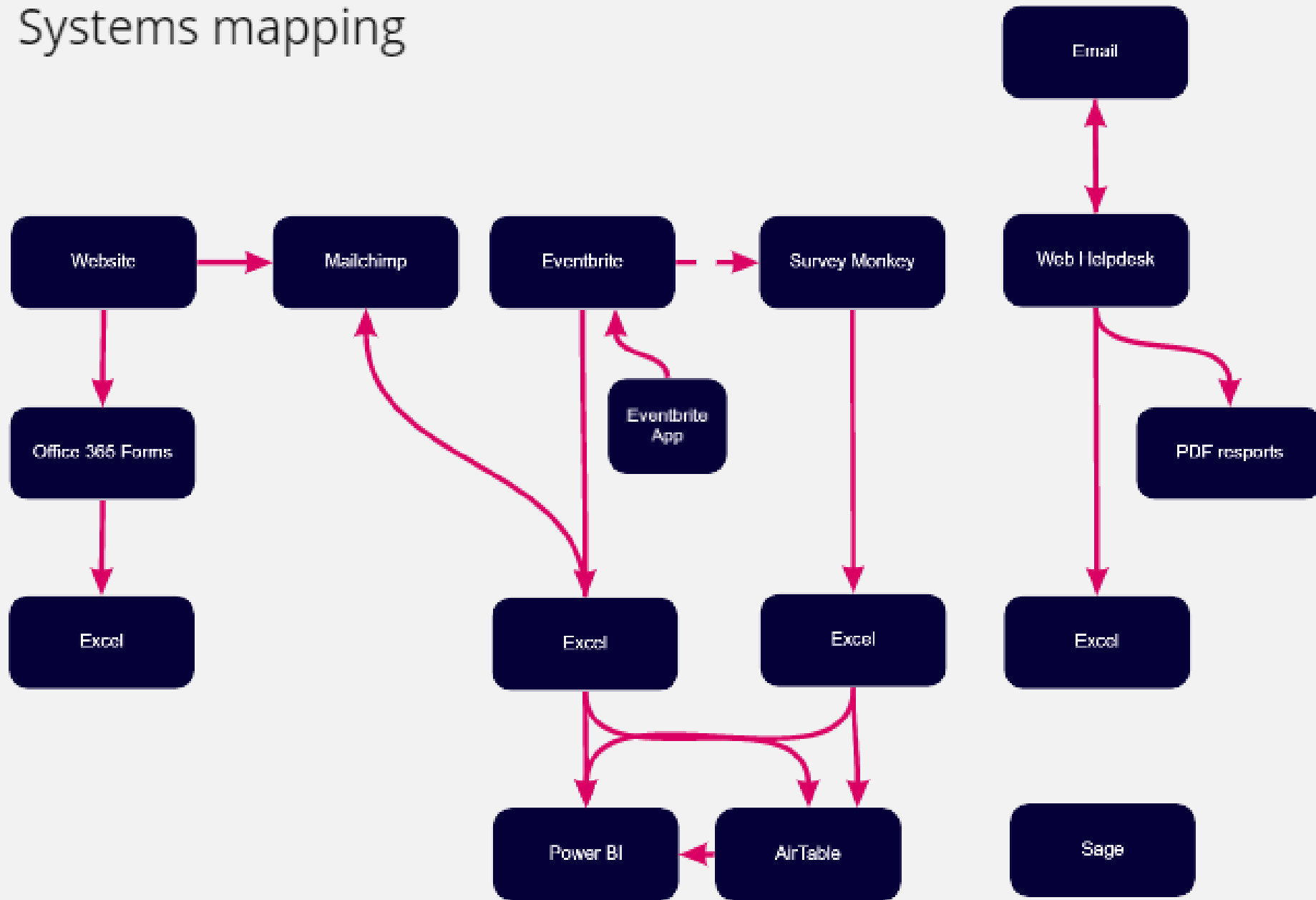
Representation of current systems and link between them.

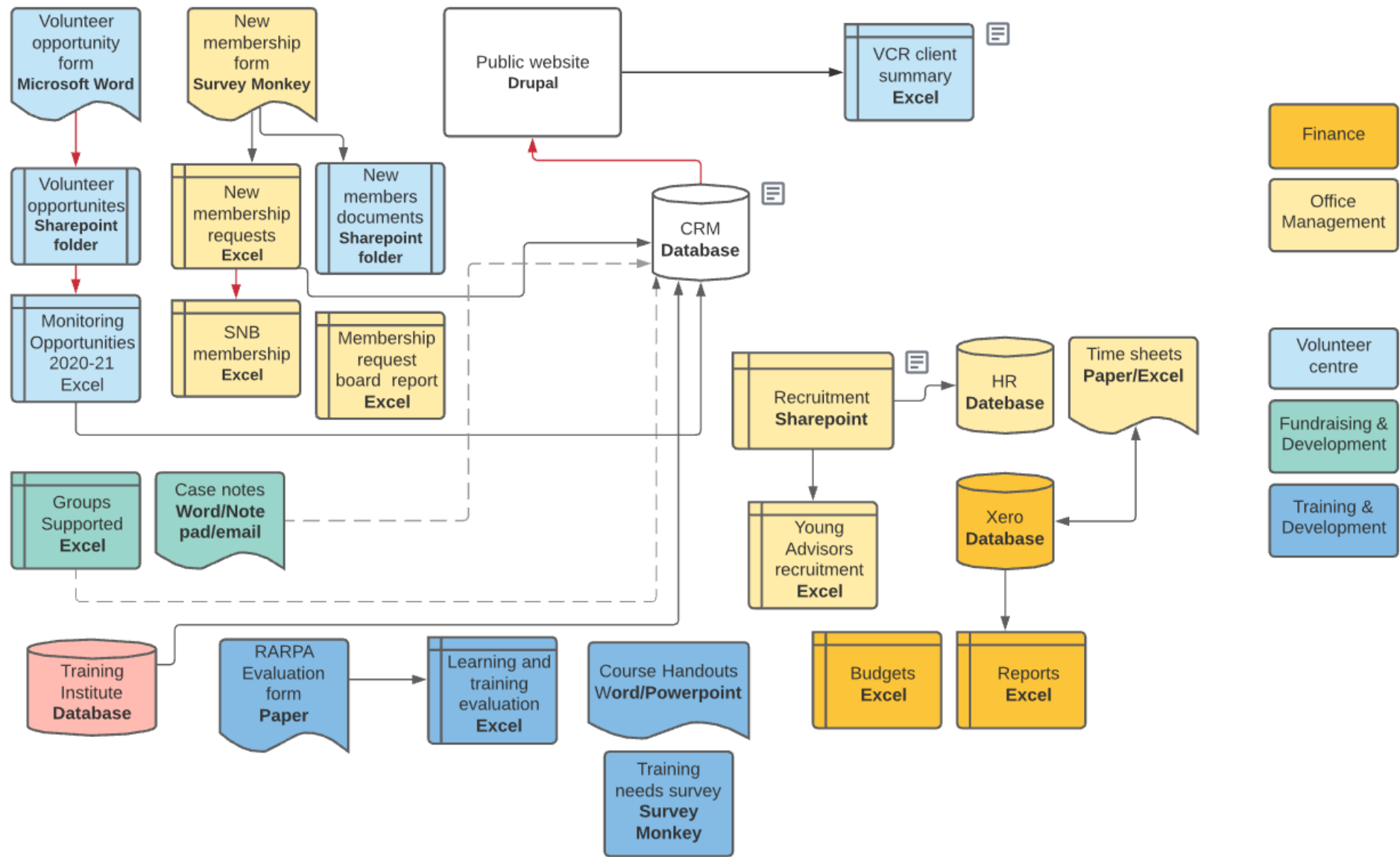


Current set up



Systems mapping



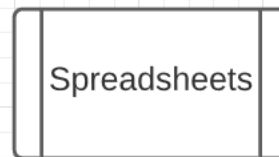
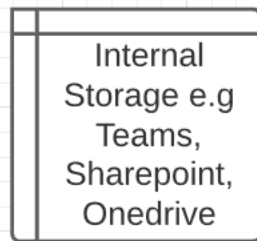
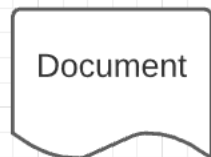


Map your own
system

 **Lucidchart**



Common shapes to use in Systems mapping



Tip: Double click in a box to amend text

Lines to connect



One way automated connection



One way manual connection



Two way automated connection

Tip: Right-click to add a note

Shapes

- Standard
- Flowchart
- Shapes

Share your map

- ✓ What have you found?
- ✓ How easy is it to access your data?
- ✓ And to analyse it?



Client journey – who, what and when?

Housing Advice Agency

Putting outcomes into practice: data gathering opportunities

Tracking a client's journey through your organisation can help you to identify information collection points that should inform the way you develop your system.

Client's journey

Information recorded

Client makes first contact with your organisation

- Client's name
- Referral source
- Type of contact
- Action taken

Client is registered /accepted as a client

- Data from initial needs assessment data, for example, background of client (demographic profile)
- Client's presenting needs (i.e. baseline outcomes data)

Client meets with a key worker on a regular basis

- Data from initial needs assessment data, for example, background of client (demographic profile)
- Client's presenting needs (i.e. baseline outcomes data)



Community Mental Health Cafe

1

- **GP Referral Form**
- Basic details about individual including contact details and reason for referral

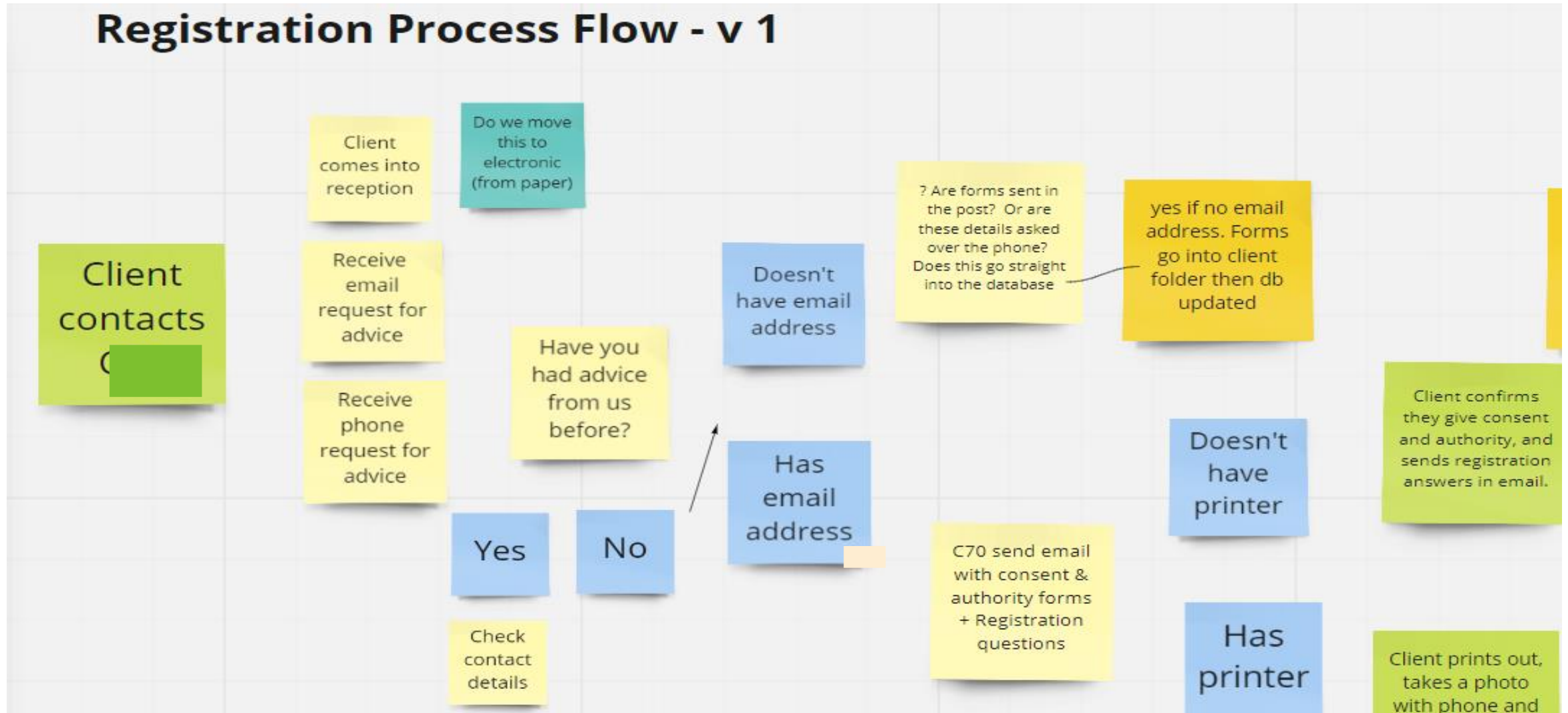
2

- **Mental Health Assessment Form**
- One to one meeting with individual before first attending a Café
- Further demographic data capture

3

- **Weekly routine data collection**
- Attendance register
- Mood scale for attendees – on arrival and when leaving
- Debrief with volunteers – observational data

It doesn't have to be perfect!



Building a data culture

- ✓ Skills training for staff – what should be the standard?
 - ✓ Training in internal systems e.g. sharepoint, teams, outlook. The assumption is that people know how to use these building blocks by some sort of osmosis and that leads to things going wrong.
 - ✓ Training in core office tools - Word/Presentation tools
 - ✓ Spreadsheets!! This are the backbone of most organisations data collection, storage and analysis
 - ✓ Internal databases – not just how to use them but what “good” data entry should look like and why you need it.
 - *Create an onboarding template to share?*
- ✓ Collaborative digital tools for comms & planning
- ✓ Agile/iterative approach to change
- ✓ Bringing the whole team with you

