Creative Tools for Needs Assessment: Appreciative Inquiry & Systems Mapping

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Title V Maternal & Child Health Federal-State Partnership Meeting

National **MCH** Workforce Development Center
Advancing Health Transformation

Welcome!

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The National MCH Workforce Development Center

- Supports MCH Title V professionals tackle complex challenges through training, collaborative learning, coaching, and consultation.

- Focuses on skills in change management, equity & engagement, systems integration and evidence-based decision making.

- Partners with states as experts of their own experience.

- Funded by MCHB, we have worked with 49 states and jurisdictions since 2014.

Roadmap for Today

- Overview of systems thinking in the context of needs assessment

- Brief introduction to 2 tools
    - Whole Systems Mapping
    - Appreciative Inquiry

- Opportunities for more learning

Context

What comes to mind when you consider needs assessment and systems thinking?

What systems methods have you used (if any) in your work?

What is your comfort with systems tools?
(1 = very low....5 = very high)

What is a system?

A collection of *parts* that interact with each other to form an *interdependent whole*

Examples of systems:

A **watch** is a system made up of gears & materials that work together to tell time

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A **family** or **household** is a system that works together to navigate the world

Examples of systems:

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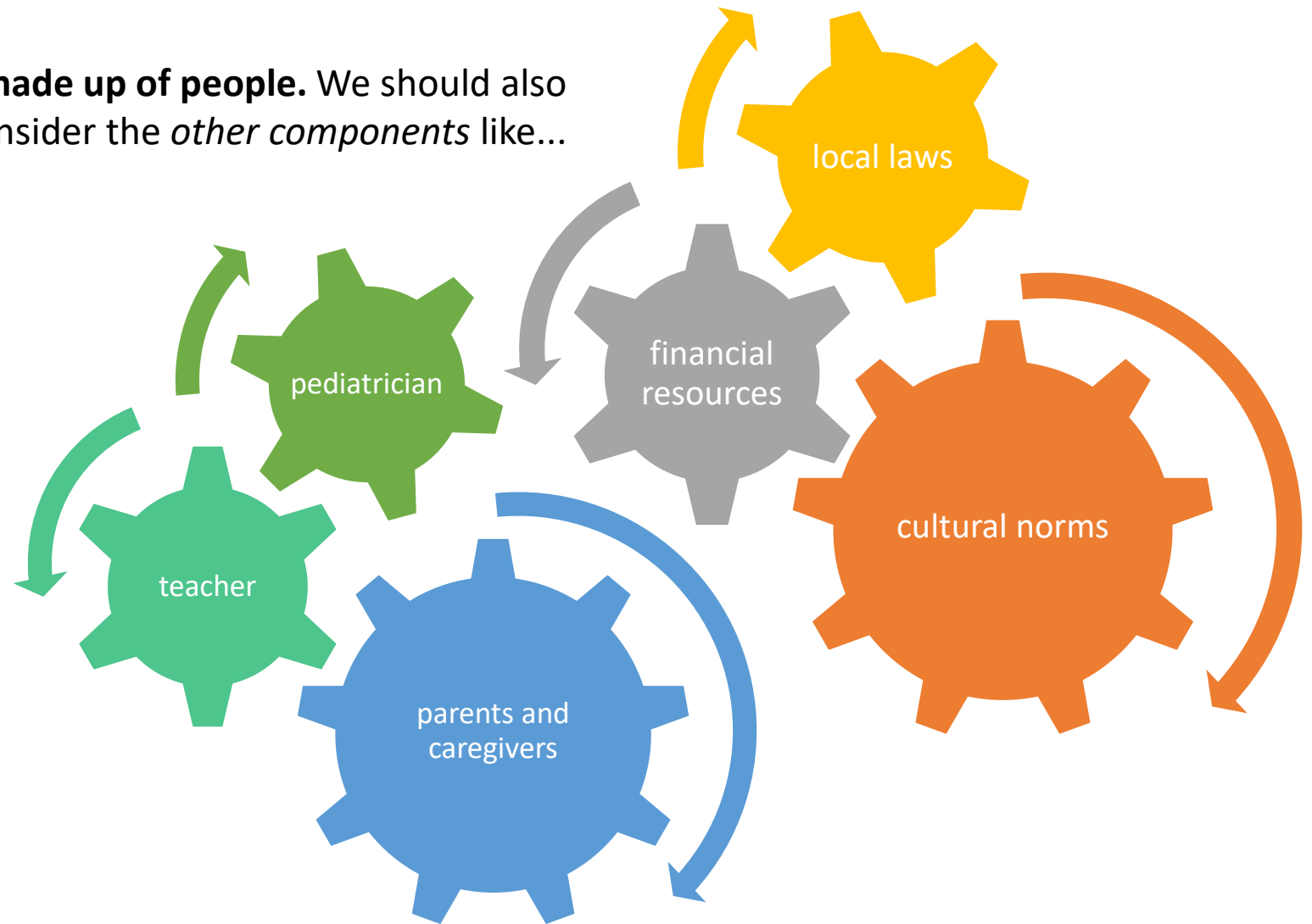A **family** or **household** is a system that works together to navigate the world

A **state health department** is a system that organizes resources, activities, & people to promote health & wellbeing

The components or parts of this system might include *people* like…

pediatrician

teacher

parents and caregivers
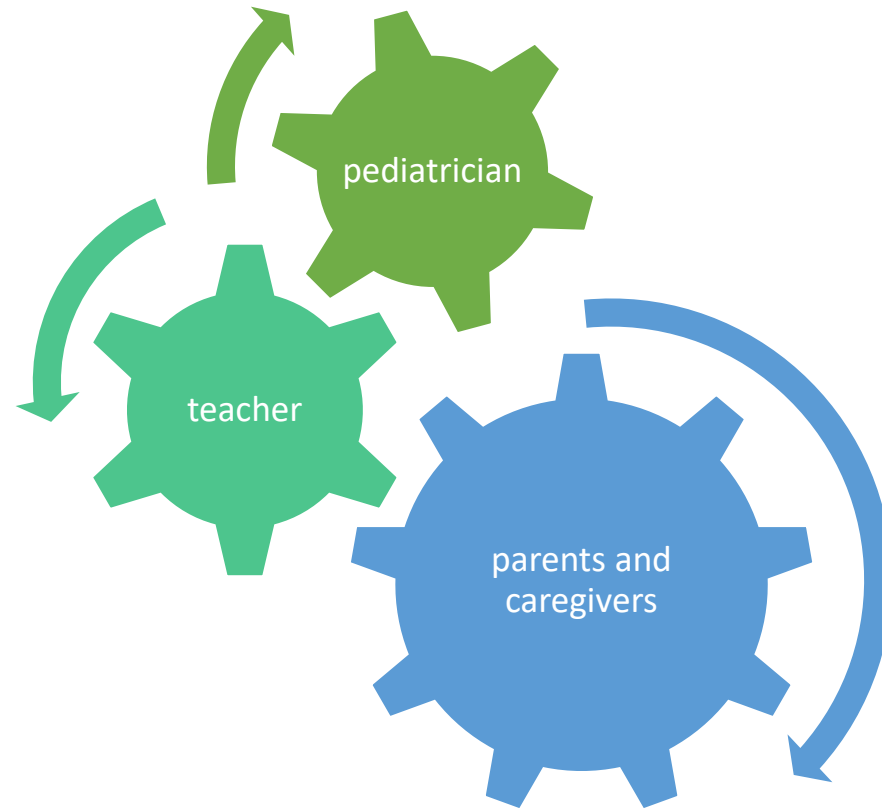
The parts of this system aren't just made up of people. We should also consider the *other components* like...

local laws

financial resources

pediatrician

cultural norms

teacher

parents and caregivers

Finally, we should think about how these individual parts connect with one another. For example…
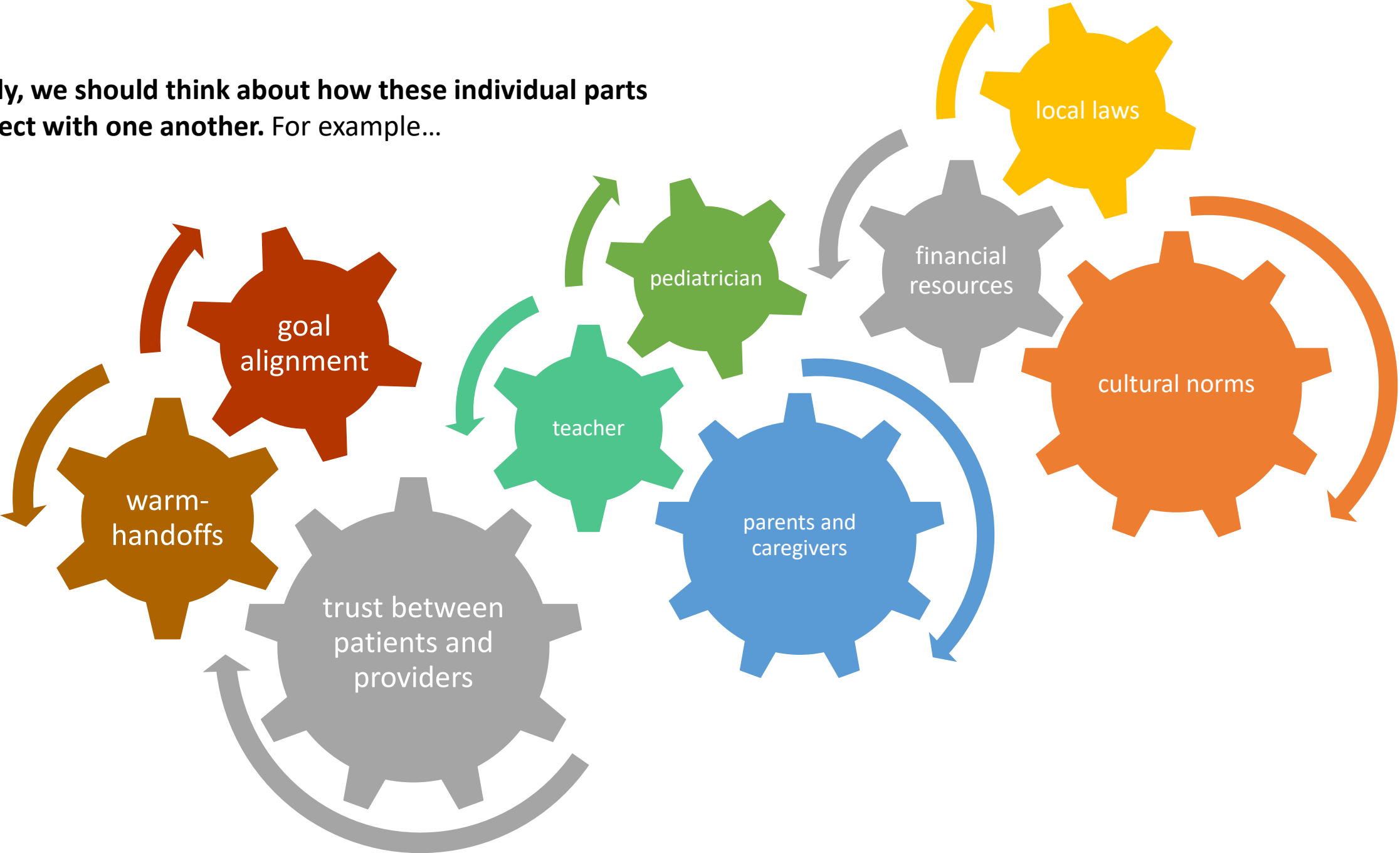
A systems perspective...

No matter what your challenge is, it is **affected by a system** of interconnected elements

Photo source: http://sagarkitchenware.in/services.php

A systems perspective…

We want to expand the way you see "the system" that you need to assess in your needs assessment, starting with thinking about "scoping" your frame over time.

Two Tools

Whole Systems Map

Appreciative Inquiry

Whole System Mapping

Whole System Mapping

A set of questions to elicit a high-level view of the system

- Can also help your team to identify
  - If groups of collaborators are missing from your assessment – and why
  - Ways that your needs assessment process might improve gaps
  - Potential duplication of services

What Is A Whole System Map?

- Table with a set of questions in columns
    - These questions do not always have to be the same
    - The questions should be driven by what you are trying to understand about the system
        - *Who delivers child health services in our state?*
        - *What do we want to define as "child health services?"*
        - *Which partner organizations are focused on social determinants of health for children?*
- In each row, there is a different partner organization listed with the information about their organization

Steps for Whole System Mapping

1. Set boundaries for the system you want to map

2. Identify types of information you want to include and develop the questions

3. Use a survey/row of table to gather info from all organizations/service providers

4. Combine into a single visual table

5. Analyze the results *together* – what do you notice? Gaps, duplication, improvement opportunities?

6. Plan next steps

Example - telehealth services for mental health

Organization Name	What service is provided?	Where is the service?	Who receives the service?	How are they connected to the service?	How many people are served each year? Please describe the population.
University Telehealth	Telehealth services, including counseling and psychiatry	We have a 40-county area where we provide services	We provide services to the adult population	Referral by one of our university-affiliated providers	1200 – primarily individuals aged 18-48 – currently working on improving connectivity issues
Caring Counseling	Counseling services with a telehealth option	City One	Individuals that are, have been, or trying to become pregnant	Self-referral, sometimes connected by a primary care or ob/gyn provider	80 per year – about 40% use telehealth option
Others?					

Example – Housing for families with children

Organization Name	What service is provided?	Where is the service?	Who receives the service?	How are they connected to the service?	How many people are served each year? Please describe the population.
Housing Org A	Vouchers to support rent payment on a sliding scale	Statewide	Individuals over age 18 with an income less than 200% of the FPL	Can directly contact agency or receive a referral from other organization	28,000 – report with demographics of those served available
The Housing Group	Work with families to obtain low interest mortgages and support down payments	Tri-county area	Families with 1 or more children under the age of 18	Must reach out to the agency directly	28
Temporary Housing Solutions	Provide temporary housing to individuals and families	Three major metro areas in the state	Individuals and families	Connected through partner organizations	750

Housing, continued

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Housing Coalition Group	Affordable Housing Coalition made up of Neighborhood Associations and citizen advocacy groups to promote local government investment in building affordable housing for low wealth families	County A	No direct service – conduct education, outreach, and advocacy	Do share information about agencies that support affordable housing in County A	476,853 (County A population)

Equity Considerations

- Consider who is being asked to provide information about their organization as part of your needs assessment
  - Is this an inclusive list?
  - How will you know if you are missing a group or population in your needs assessment?

- Do the questions collect information that would identify opportunities to achieve more equitable outcomes?
  - Do they describe who is being served? Where services are available? Do they describe outcomes for different populations?

Considerations/Next Steps

1. How might you use a whole systems map in your 5-year needs assessment?

2. Sketch out a "starter" Whole System Map for one aspect of your work, or one BG domain

   What happens? For whom? When? What triggers? Who delivers? Who funds? Outputs? Likely to improve or exacerbate inequities?

Appreciative Inquiry

Appreciative Inquiry
(the other AI)

Definition: **A change management approach and tool that focuses on how to build on existing strengths and how to engage stakeholders to create change.**

- "Search for the best in people, their organizations, and the world around them"

- Support and build on what is already working

- Inquire, Imagine, and Innovate (vs. negate, criticize, diagnose)
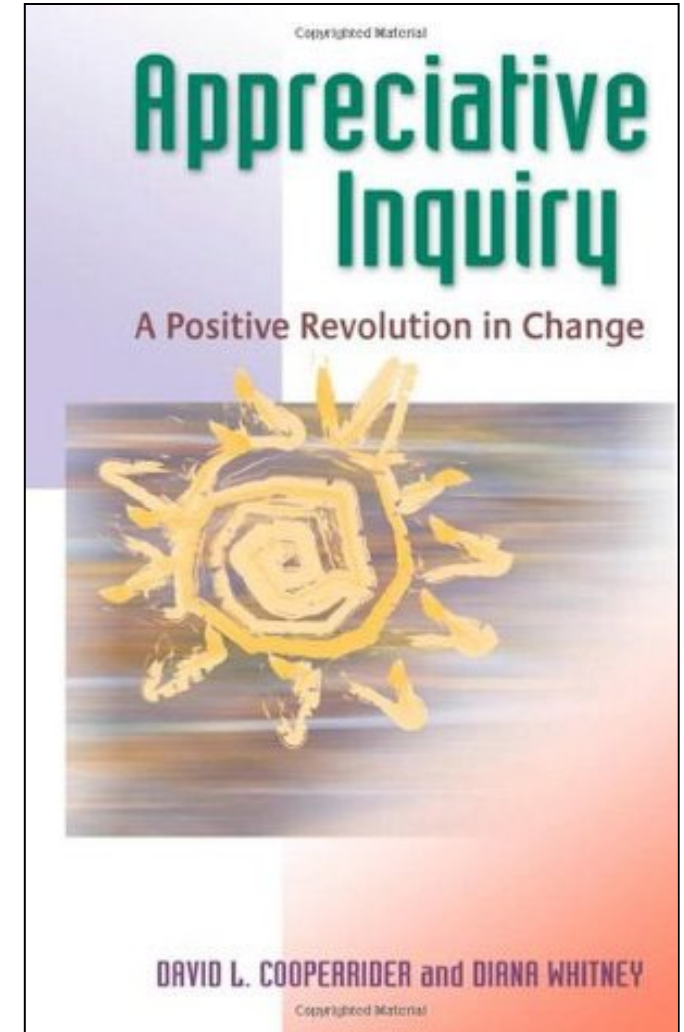
Underlying Assumptions

- Human systems grow in the direction in which they persistently ask questions

- When individuals share personal perspectives, powerful bonds form

- Dreams and wishes are powerful engagers and draw out creative energy

- If we do more of the things that are working well already, outcomes will improve

- Action follows attention

Identifying Needs vs Appreciative Inquiry

Identifying Needs

- Focuses on "the ***problem***"
- Analyze causes, set performance measures
- Discuss ways to address the problem and meet measures
- Plan actions

Appreciative Inquiry

- Identify ***successes***, recognize what is working
- Envision what might be; dream and wish
- Discuss ways to support success and achieve dreams
- Plan actions

When Should You Use Appreciative Inquiry?

- When the need/problem/challenge is complex
- When the need/problem keeps coming back
- When the attempted fixes make things worse
- When there is no clear path forward

Benefits of Using Appreciative Inquiry

- Builds relationships across a group

- Encourages a sense of pride and belonging by starting focusing on strengths and achievements

- Encourages people to express commitments and ambitions without self-limiting

- Sets a high level for groups that need inspiration

- Creates space for people to engage with each other and rewards that engagement by highlighting individual dreams and strengths throughout

- Builds on the full range of thinking and communication styles

- Ensures that those most impacted are involved in developing plans and solutions

DEFINE

The **DEFINE** step precedes the main four steps.
It provides a frame for the discussions that follow.

The frame should be AFFIRMING.

- Frame the work as a positive statement.

- Agree on the wording before you begin the first dialogue.

Define: Choosing an AI Topic

- Reframe the "need" or "problem" in the **affirmative**

- Flip the problem in a positive direction

- Define what is **desirable**

- What is it you want more of related to XX..??

- Cultivate **genuine curiosity**

- "I want to know more about this topic"

The topic takes you where you want to go

Define: Example

Problem Solving

○ Reduce a "bad" thing

○ Address a problem

"Identify and manage lost luggage promptly"

Appreciative Inquiry

○ Increase a "good" thing

○ Name a successful future state

"Maximize the passenger's arrival experience"

Define: Your Need/Challenge/Problem

Your Turn

DEFINE a common need that emerges from your 5-year needs assessment, using an affirmative statement.

Example: Reduce racial disparities in maternal health deaths in our state.

Affirmative statement: All pregnant individuals in our state will experience a joyful birth.

DISCOVER

In the **DISCOVER** stage, people talk about what is working with regard to the affirmative goal.

- Engage **EVERYONE** in the system in dialog about what is working in specific areas

- Ask, listen, share

- Appreciate what is

- Uncover new perspectives; find overlap

DREAM

DREAM is a broad conversation about the specifics of the future we desire. These are the kinds of questions to explore:

- What do we want? What can we imagine?

- What is the world calling us to become?

- The goal of this discussion is to:

- Describe our desired future state in DETAIL

- Articulate what we WISH for

DESIGN

DESIGN is the practical, immediate stage of the process. It asks these questions:

- How can we use what we have right now to build a path to our Dream?

- What can we design right now, to help us achieve the Dream in the future?

Focus on the outcomes of the previous discussions. The goal is to find action steps that:

1. Support, grow, amplify or expand things that work.

2. Use resources we have now to create something we need in the future.

3. Build capacity now to do work we want to do in the future.

DELIVER

The **DELIVER** stage is about putting learning into practice.

In this stage, commit to processes that will result in sustainable effort. In this stage you are planning to adapt over time.

Expect changes in the context, changes in your own capacity as you learn and develop, and changes in the people.

- *Key Question*: How do we affirm the capabilities of the whole system and each person in it?

- *Sustainability*: Put plans in place that will drive/extend our progress toward the future state over time
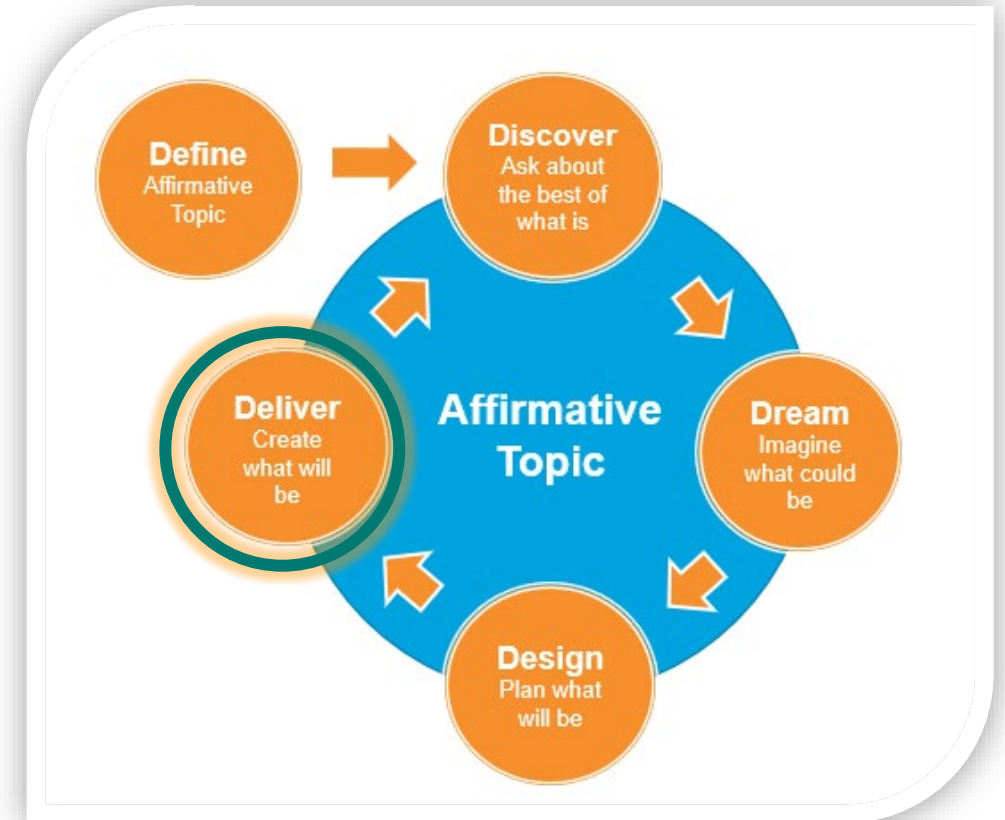
Equity Considerations

- Consider who is invited to the Appreciative Inquiry process as part of a broader needs assessment

- Does the process help to identify opportunities to achieve more equitable outcomes?

- Is there an intentional focus on equity or reducing disparities in outcomes in your process?

Resources for Needs Assessment

- MCH Navigator
- mchneeds.net
- MCH Evidence Center
- National MCH Workforce Development Center

Thank you!

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