

## **Script: System support mapping using Paper**

### Context:

Used when it is important to understand the role, responsibilities, needs, resources, and wishes of individual participants navigating and/or supporting a system. This tool has been particularly useful in the context of care coordination or coaching. It is also useful when studying a fragmented system in which many stakeholders shape outcomes.

### Purpose:

Used in order to elicit the role an individual plays in a system, their responsibilities or objectives/goals, needs for meeting each, resources used to support needs (and notes on whether they were helpful and why/why not), and wishes for being better supported in the system.

### Status:

Experimental

### Primary nature of group task:

Divergent – we are attempting to understand each individual's experience in and/or shaping the system being studied.

### Time:

Preparation time: No preparation time needed

Time to walk through activity: 60 to 80 minutes

Follow-up time: No follow-up time needed (unless you want to turn maps into electronic files for data analysis or update the maps over time)

### Materials needed:

Post-it notes (ideally purple, blue, aqua, yellow and gold), paper, thin sharpies (black, red, and green), and wall/size post-its or butcher block paper and blue painters tape

### Preparation:

Please create one packet of post-it notes for each map. A packet should include: two purple, 5 blue, 10 aqua, 8 yellow, and 3 gold post-it notes.

### Inputs:

Nothing. However, if this script is being used in a meeting with stakeholders supporting a system, it is very helpful to have 1-3 consumers prepare system support maps ahead of time so that they can raise awareness of what it's like to experience the system as well as to familiarize participants with the structure of system support maps.

### Outputs:

Completed system support map

### Roles:

- A guide to lead participant through system support mapping process and answer questions
- For large groups, it is helpful to have multiple facilitators circulating to answer questions and ensure maps are being completed as intended
- A participant/stakeholder (or someone who speaks for the person that the system support map is being filled out for, as appropriate)

#### Steps:

1. It is critical that this exercise begin with a clear boundary around the system being studied. Examples of systems that have been studied using this tool include:
  - a. Supporting a child/children with special health care needs and/or developmental disabilities;
  - b. Above, but in a specific life-course (i.e., transition to adulthood);
  - c. Family outcomes in the 3 months post-partum;
  - d. The social-emotional health of a child/children;
  - e. Migraine self-management;
  - f. Community-academic partnerships working to improve population health;
  - g. Efforts to address isolation among individuals in a community;
  - h. Efforts to increase inter-generational cohesion in a community;
  - i. And, efforts to reconnect with one's landscape/environment.

If the system under study is not clear, this exercise will be unclear and potentially overwhelming. It is very important to emphasize the focus on the this system, or else individuals will have a hard time limiting/focusing on their responsibilities. This step may require conversation and consensus-building. It's a good time to establish shared definitions of the system.

2. *Guide: "This exercise will walk you through reflecting on and documenting (diagrammatically), your role in the system under study, your responsibilities/objectives/goals (choose the most appropriate term), and what supports you in meeting these responsibilities/objectives/goals. This exercise will require you to really think about your priorities and what supports you, what doesn't, and what you need. We will ask you to talk through your map, so keep that in mind as you write."*
3. The planning team should decide if it is best to walk participants through the exercise step by step, or to present the overall process and then let them work at their own pace. While it is far more complex to present the whole process, it can be better with a large group as participants often spend more/less time on different steps and re-convening the group for each step can be challenging. If the whole process is going to be shared at once, it is preferable to illustrate the map first with a participant (often the consumer in the system under study) telling their story through their completed map. This familiarizes others with the task, and also illustrates the power/value of storytelling with a map. Either way, the steps to complete a map are as follows:
4. Each participant should be given a large sheet of paper, a sharpie, post-it notes and enough space to work (on a table or a wall). They should be asked to draw 4 concentric circles with the marker, each large enough for a post-it note (inner

- circle) or ring of post-it notes (all other rings). You should create an example map to show them. If time permits, it's helpful to pre-draw the rings for participants.
5. Ask the patient to identify their role in the system under study. Repeat the agreed upon description of the system to reinforce the focus. If multiple systems are being studied at once, we recommend working through one at a time, completely.
    - a. *Guide: What role do you play in this system? Are you a patient, a family member, a teacher, an organizational leader, a legislator, a community member, etc? (Guide should fill in examples relevant to the system being studied.)*
    - b. When they identify their role, ask them to write it on a **purple** post-it note, and place it in the innermost circle (in the center of the map).
  6. Ask the participant to think about whether they want to describe any context or clarify their role in any way. For example, they might describe the kind of organization they lead, another role that complicates this one, or the context in which they practice primary care.
    - a. *Guide: Now further clarify your stakeholder role by providing any context that will help others understand your unique situation. For example, if you are a provider, what is your specialty and what kind of patients do you typically see (i.e., uninsured patients in a primary care community health center)? If you are a parent, what shapes your experience (i.e., describe your child or your community).*
    - b. This information should be written on a second **purple** post-it note and slipped under their role (make sure it's partially visible so we know it's there)!
    - c. Note that participants who feel uncomfortable defining their role only in relation to the system under study should feel encouraged to document additional/broader roles here (e.g., "I am a mother of 2 other children in addition to the one with special health care needs; I am also a wife, a person of faith, and a person with a career.")
  7. Ask the participant to describe their responsibilities/objectives/goals in the system being studied. Write one per post-it note.
    - a. *Guide: "In your role in \_\_\_\_ (fill in the system being studied), what do you see as the main activities you are responsible for/objectives you are working toward/goals? Identify the 4-8 most important responsibilities, and write one per post-it notes."*
    - b. Ask them to make a list of the 4-8 (or a reasonable number given the project at hand) most pressing responsibilities that come to mind. Write each responsibility on a separate **blue** post-it note, and spread these around the second ring (the one surrounding their role). Review the list together and encourage them to reflect on what is missing from it.
    - c. Next, ask them to draw arrows from their *role* to each *responsibility it creates for them*.
  8. Ask the patient to identify what they need, in general terms, to meet each responsibility/objective/goal.
    - a. *Guide: Next, we want you to consider each responsibility, one at a time, and identify what you need – in general terms – to get it done. Think about*

*this as a recipe. To meet a given responsibility/objective/goal, what ingredients would you need? Common responses include time, money, reimbursement, buy-in from my organization, information, access to \_\_\_\_\_, etc. Please be creative here – it really helps if this list is complete. Also consider internal needs – like patience, empathy, energy, creativity, etc. Here is an example for a parent/caregiver of a child with special health care needs supporting the physical health of their child: a doctor who “gets” us (my daughter and our family) and who is open in the evenings or weekends, child care for my other kids, transportation, and money for the copayment).*

- b. Instruct participants to write each need on a separate **aqua** post-it note, and stick them in the ring surrounding responsibilities/objectives/goals – close to the item generating the need.
  - c. They should then draw arrows that link *each responsibility to the needs it generates*. Repeat for each responsibility. If a need repeats, you can draw multiple arrows to the single post-it, or duplicate the post-it (to keep your system support map cleaner). It’s ok to duplicate – needs repeat (flour is an important ingredient when cooking; time is an important need for getting many things done)!
9. Ask the participant to identify specific resources that they have tried in the past (decide on a unit of time – ever, year, month, week, etc).
- a. *Guide: The next step is to think about the needs you listed. Are there any specific resources that you have tried (whether or not they have helped you) to get that need met? What supports you? If needs were ingredients in a recipe, resources might include things like a favorite recipe, particular brands of an ingredient, a store that sells many ingredients on your list, etc. Back to system support maps, resources might include websites, information/brochures, training programs/classes, organizations in your community, providers, books you read to build a skill in yourself (e.g., communication skills, mindfulness, the ability to relax). Here we also want to know about your experience with each resource. Did it help you? Why or why not – what about the resource worked/didn’t work?*
  - b. Write each resource on a separate **yellow** post-it note, and place it in the ring surrounding needs, close to the need(s) it targeted.
  - c. Put a **green**, **black**, or **red** star on the post-it to indicate whether the resource helped, was neutral (or in the middle), or did not help/support you, respectively. If you can, make a note in that color of marker explaining.
  - d. Please draw an arrow from each *resource* to the corresponding *need* they targeted.
  - e. Note that some participants might be concerned about judging the usefulness of a service based on their own experience. Remind them that this map is meant to reflect only their own experiences, and would never be used on it’s own to evaluate services. It will be used as one piece of the overall picture.

10. NOTE: A good order is to fill in role/context and responsibilities first. Then, as the participant to rank their priorities in terms of importance or time spent on each (the team should decide and ask participants to rank consistently). They might put number in the corner of each responsibility post-it. Then, ask them to work through the responsibilities in their rank order. For each one, push out in the diagram – fill in needs and resources. Work through all the responsibilities before moving to the next step.
11. Ask participants to reflect on their whole map. Are arrows drawn? Is anything missing?
12. Ask them to add their wishes
  - a. *Guide: In the area outside the resources ring, we now want you to add your top three wishes for what would most help you meet your responsibilities/objectives/goals.*”
  - b. Ask the patient to reflect on what they are trying to do, what they need, and resources they have tried. What would most help them meet their responsibilities? How could the system better support them? Are there any responsibilities they just can't begin to get their head around that they'd like help with? Is there a need not currently met? Do they wish a current resource was different in some way?
  - c. Write one wish on each of three gold post-it notes. Draw an arrow from the post-it note to whatever the wish targets in their map.

Evaluation criteria:

- Participants complete a system support map
- Participants are primed to share their responsibilities/objectives/goals, what they need, resources they have tried (and how they helped) and their top 3 wishes
- Participants feel this exercise has helped them think about what they are trying to do within the system, and how well the system supports them

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History:

Adapted from “Gabe’s Map”: [http://www.huffingtonpost.com/2013/01/18/gabes-care-map-special-needs-children-caregivers\\_n\\_2469564.html](http://www.huffingtonpost.com/2013/01/18/gabes-care-map-special-needs-children-caregivers_n_2469564.html)

AND

<http://www.childrenshospital.org/care-coordination-curriculum/care-mapping>. Also inspired by ecomaps typically done in social work. The goal was to capture more information about system supports and guide improvement.

Revisions:

No revisions

References:

Notes: