ABLe Sense-Making Guide

What is sense-making?

Sense-making is a process to organize and understand information so it can be used for problem-solving. This guide provides ideas and recommendations for how to use a sense-making process to understand system scan data to inform strategy design.

Why is sense-making important?

The very process of assessing and making sense of collected data can be transformative for some stakeholders: increasing their awareness and understanding of local issues and sensitizing them to the diverse experiences and perspectives in the community.

Because the information coming out of the sense-making process is used to design strategies, engaging diverse stakeholders in the sense-making process can not only lead to better strategies but it can also support implementation by encouraging these stakeholders to support and champion proposed strategies.

SENSE-MAKING PROCESS

Step 1: Organize system scan data

Step 2: Engage stakeholders in Sorting Data

Step 3: Prioritize targets for change

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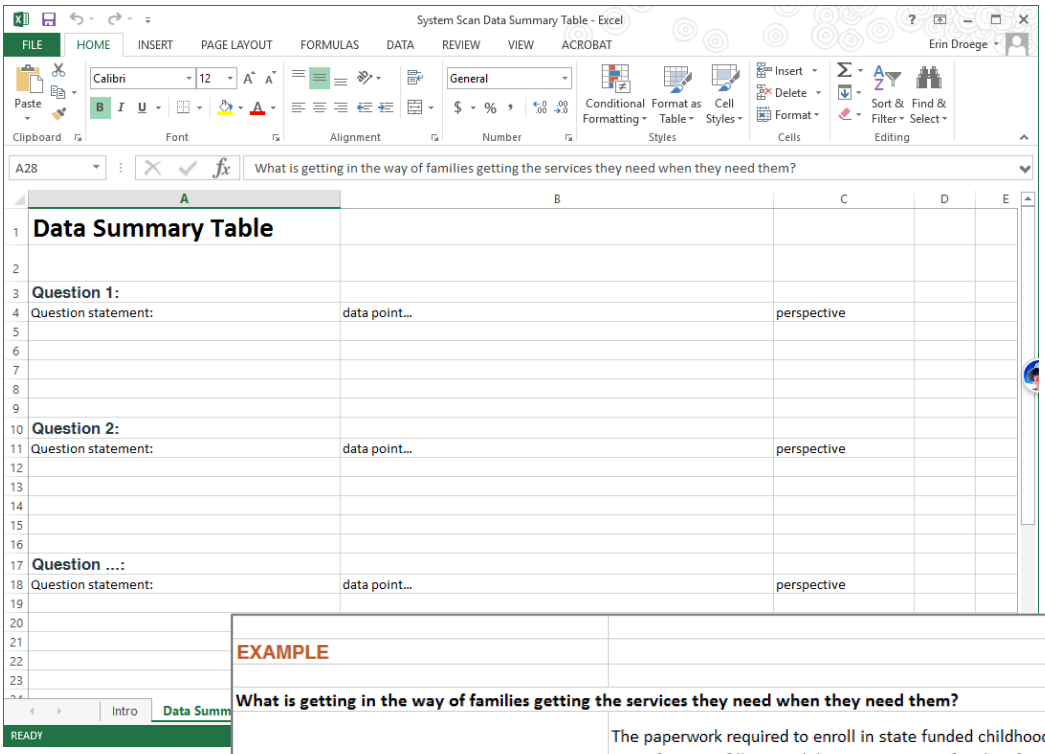
Step 1: Organize System Scan Data

As stakeholders collect data about the targeted problem, it is important to type up a summary of what has been learned so it can be used for sense-making.

Enter conversation notes into summary table

Ask stakeholders to try and write or type up their system scan conversation notes shortly (within 24 hours) after holding a conversation. This will help them to fill in more details from the conversation while their memory is still fresh, and if necessary allows time to check back with the individuals they spoke with to clarify their comments.

When stakeholders send you their conversation notes, type or enter them into a data summary table (see **example organizing table** below). Leave spaces to enter the questions stakeholders asked and the data they collected, including which perspective provided the information.



EXAMPLE		
What is getting in the way of families getting the services they need when they need them?		
Barriers to accessing needed programs/supports:	The paperwork required to enroll in state funded childhood programs is confusing to fill out and discourages some families from enrolling.	Parent
Barriers to accessing needed programs/supports:	Family literacy supports are located in neighborhoods that are difficult for families living on the west side of the region to get to without reliable transportation	Literacy Support Program Staff

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Clean Typed Up Notes

To prepare for sense-making, it is important to "clean" the typed-up notes to ensure they can be easily understood and sorted. Use the following suggestions to help clean the typed-up system scan data.

Separate out different ideas within the same comment.

For example, a comment may include observations about both limited transportation *and* a lack awareness of affordable childcare in the same point. Separate these different issue areas out so they are each separate rows in the data summary table.

EXAMPLE

Initial Data Point
It's hard for families to get to quality childcare if it's located outside their neighborhood and to figure out what early learning services are available in the community.

Separated Data Points
It's hard for some families to get to quality childcare if it's located outside of their neighborhood.

It's hard for some families to figure out what early learning services are available in the community and what can meet their needs.

Harvest any system observations out of strategy comments and move the strategies themselves into a parking lot document

You will draw upon these potential strategies later in the strategy design process.

EXAMPLE

Initial Data Point
We need to create more brochures to help families know what behavioral health services are available and how to access them.

Improved Data Point
Some families don't know what behavioral health services are available and how to access them.

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Cut Out Data Strips

Cut out the data points listed in each row of the data summary table into separate strips of paper. OPTION: to highlight differences in perspectives, consider printing each perspective group's data strips on a different color paper (e.g., data strips from family perspective printed on green, data strips from service provider perspective on orange, etc.) so stakeholders can easily see patterns.

> There is no shared agreement in the community about who (parents, teachers, care providers) is responsible for developing kindergarten readiness and providing early childhood developmental experiences. This leads lots of kids to enter school not ready. (Early Childcare Providers)

> People in a position of power who make decisions about how programs are designed or what services get funded think they know what's good for families who don't have resources – families like mine. But they don't know. It means services get designed or funded that don't meet my family's needs. (Parents)

> As a community, we haven't agreed upon common indicators that tell us if children are prepared for school, which makes it hard to have aligned preschool instruction and quality standards. (Early Childcare Leaders)

Select data for stakeholders to sort

Consider who should be engaged in making sense of the system scan data, and identify a cohesive subset of data strips for them to sort.

- **Count how many stakeholders will be participating in the sense-making meeting**. Divide these stakeholders into several small groups, with at least 3 people per small group
- **Select a sub-set of 35-40 data strips for each small group to sort** during the meeting. Select data points that are related to the same system scan question and are "self-contained - meaning there is no overlap with other groups or other sub-sets of data.
    - For example, give each small group 35-40 data points related to 1-2 system scan questions. That way they won't have to integrate data across tables.
- **Put selected data strips in envelopes** for each small group to sort at the meeting.

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Step 2: Engage Team in Sorting System Scan Data

1. Group Similar Root Causes → 2. Create Labels → 3. Create Design Challenge Areas

Split stakeholders engaged in the sense-making process into small groups, and give each small group their assigned envelope of data strips.

Have each small group look through their assigned data strips and **sort similar ideas, problems, or issues into clusters**.

- As they organize the data points into similar "buckets," ask them to think about how the clusters relate to each other.
- Have them move data points around until they have found clusters that make sense.
- NOTE: If one pile has most of the data points, try breaking it up into smaller clusters.

Note how the following data strips have been organized into clusters related to similar root cause issues. The boxes to the right indicate a general idea of what the shared issues are about.

- Many teachers have the mindset of "My way is best, I have 20 years' experience teaching preschool, I'm not comfortable changing the way I teach." This makes them resistant to adopt more effective teaching practices. (Funders, talking about early childhood teachers)
- Some preschool teachers who have been teaching for a long time think things have to be a certain way – they won't diverge from the long-standing curriculum, even when that curriculum is not evidenced based. (Public Early Childhood Providers).

Issue Tag: some teachers don't think they need to shift current teaching practices

- Many providers have the mindset of "I know what's best for families, I know what services are needed to meet the community's needs" and don't value asking the people experiencing the problem what they actually need and want. (Funders)
- Some people in a position of power who make decisions about how programs are designed or what services get funded think they know what's good for families who don't have resources – families like mine. But they don't know. It means services get designed or funded that don't meet my family's needs. (Parents)

Issue Tag: some providers and leaders don't prioritize family input

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1. Group Similar Root Causes | **2. Create Root Cause Labels** | 3. Create Design Challenge Areas

Have stakeholders create a descriptive label for each cluster of data strips they have sorted. These labels represent the key root causes in the data.

One way to help stakeholders think about these labels is to ask them to imagine they are writing a **headline** for a newspaper article. Help stakeholders ensure their labels are descriptive and provide enough detailed information for others to take action on the issue (see next page for more details on how to create descriptive labels).

The following examples show how data strips from the previous page were sorted and given root cause labels in **bold.**

Root Cause Label: Some early childhood teachers don't think they need to shift their teaching practices

Barriers to shifting teaching practices: Many teachers have the mindset of "My way is best, I have 20 years' experience teaching preschool, I'm not comfortable changing the way I teach." This makes them resistant to adopt more effective teaching practices. (Private Early Childhood Providers)

Preschool teachers who have been teaching for a long time think things have to be a certain way – they won't diverge from the long-standing curriculum, even when that curriculum is not evidenced-based. (Public Early Childhood Providers).

These data points are about local mindsets about teaching practices

Root Cause Label: Enrollment processes for some early childhood programming are cumbersome and difficult for families to use

There is a lot of paperwork for families to fill out in order to enroll in early childhood programs, and this is especially discouraging for people with low literacy skills. (Family)

There are a lot of steps families have to take to enroll in early childhood programming – this discourages some families from enrolling. (Agency Staff)

These data points are about cumbersome intake processes

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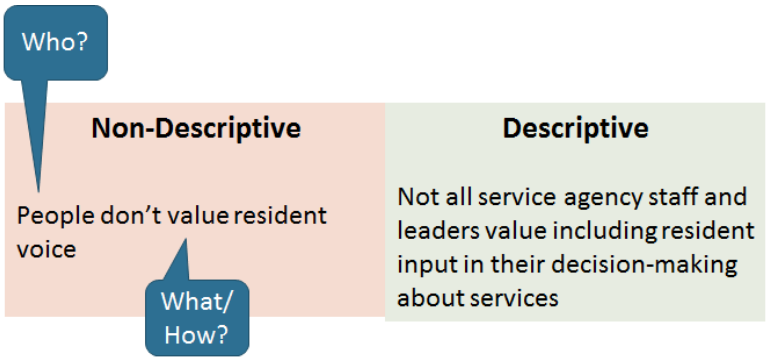
Tips for Creating Clear Root Cause Labels

Make Root Cause Labels Descriptive

- Make labels actionable by capturing WHO/WHAT details
- Use words that will give a picture of all data points underneath



Don't Make Assumptions

- Only describe the data, don't make assumptions about WHY this is happening.

Avoid Stating a Strategy

- Word labels to describe the problems stated in the data - not as a recommendation for what *should* happen.

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Review Root Cause Labels

Have stakeholders check their root cause labels for clarity and logic using the guidance below, and help them make needed adjustments.

Add detail Add any missing details into the label to fully describe the issue	**Initial label:** Some health providers have limited knowledge. **Improved label:** Some health providers have limited knowledge **of the community supports available to meet clients' basic needs**.
Focus labels Separate out different ideas within the same thematic label. Each idea should be its own label.	**Initial label:** Some Farmers' Market locations are difficult for residents without transportation to get to and are scheduled during hours that are difficult for working residents to attend. **Improved labels:** • Some Farmers' Market locations are **difficult for residents without transportation to get to.** • Some Farmers' Markets are **scheduled during hours that are difficult for working residents to attend.**
Look for strategies (and set them aside for now) Ensure labels are not worded as solutions; make the label about the current reality, not how to change/fix it.	**Initial label:** Use community outreach to build cross-sector providers' awareness of local resources available to help meet residents' housing needs. **Improved label:** Some cross-sector providers have **limited** awareness of local resources to meet residents' housing needs.
Check Logic Make sure root causes are logically clustered under each label.	**Initial logic:** Label: Some food retail venues do not accept food assistance vouchers • Convenience stores in Creekside community don't accept WIC. • No grocery stores located in Creekside community **[this doesn't logically fit with the label]** **Improved logic:** Label: Some food retail venues do not accept food assistance vouchers • Convenience stores in Creekside community don't accept WIC • **Many Farmers' Markets do not accept SNAP or Double Up Food Bucks vouchers.**

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Integrate Existing Data into Root Cause Labels

Stakeholders may have additional data (i.e., census or local assessment data) on the targeted problem other than what they gathered through the system scan. This data can be integrated with the sorted data strips to create a more robust story of the local conditions affecting the targeted problem.

See below for an example.

Root Cause Label: Limited availability of affordable housing for residents making under 150% of poverty

Input from Residents on the limited availability of affordable housing…

Summary of Local Assessment Data on the limited availability of affordable housing…

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1. Group Similar Root Causes | 2. Create Root Cause Labels | **3. Create Design Challenge Areas**

Ask the following question: "Do any of these root cause labels have to do with similar higher-level ideas, problems, or issues in our community?"

Support stakeholders to group similar root cause labels into higher level Design Challenge areas. Use the same strategies on page 7-8 to develop the Design Challenge areas. The following are some typical Design Challenge areas with example root cause labels.

Example Design Challenge Area	Example Corresponding Root Cause Labels
Lack of shared value for targeted outcomes	• The community lacks a shared definition for *(school readiness, health equity, youth engagement, etc.).* • Some organizations/groups do not share the same goals related to improving ___ outcomes for children and families. • Some *(organizational leaders, businesses, local government, etc.)* do not prioritize improving ___ outcomes for children and families.
Some early childhood services and opportunities are not easy to access or reaching all individuals who need them	• Some _____ services/programs are located in areas that are difficult for youth to get to without personal transportation. • Some service providers from ___ organizations are not referring families to available _____ services/programs • Eligibility policies related to *(income, diagnosis, etc.)* prevent some families from accessing ___ services/programs. • The *(intake, enrollment, etc.)* processes for some ____services/programs are cumbersome and difficult for families to use.
Not all early childhood services and opportunities are coordinated	• Some *(healthcare, early childhood, etc.)* service providers are not exchanging information about shared cases. • Some *(organizations, funders, collaboratives, etc.)* do not have ___ policies in place to support coordination of services, supports, and opportunities. • Some (*leaders, managers, direct service workers, etc.)* don't believe *(sharing information across organizations, referring families to available*

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Example Design Challenge Area	Example Corresponding Root Cause Labels
	services, partnering with families, etc.) is within the boundary of their professional role.
The service delivery system is not always responsive to family needs	• Some *(organizations, funders, collaboratives, etc.)* do not have policies or practices in place to use family input to guide decision-making about how to effectively _____. • Some service providers lack the knowledge and skills they need to effectively *(deliver services, make referrals, authentically engage diverse youth, etc.)*. • Some youth/families lack the knowledge and skills they need to effectively engage in local decision-making processes. • Some *(organizations, funders, collaboratives, etc.)* are not sharing data or evaluation results to promote shared learning
Community conditions are not in place to support family health and wellbeing	• Limited availability of affordable housing for families with low-incomes • Healthy food is not available or accessible in all neighborhoods of the community • Public transportation is not accessible in all neighborhoods of the community • Healthcare is not accessible to all families

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Example Pathway Table

The following Pathway Table shows how themed and labeled root causes have been organized under a Design Challenge goal area related to service access. A Pathway Table is used to guide stakeholders' prioritizing processes and strategy design.

Design Challenge Area: Some Early Childhood services and opportunities are not easy for some families to access or reaching all individuals who need them		
Root Cause Label: Some early childhood programs and opportunities are offered at times that don't work for many families	**Root Cause Label:** Some eligibility policies prevent many families from accessing affordable early childhood supports/services	**Root Cause Label:** Many families are unaware of available early childhood supports, and how to access them
Data points: • The hours for some parenting trainings and parent supports are inaccessible for families, for example a lack of evening hours (Parents) • Some early childhood programming is not scheduled at times that are accessible to working families (Early Childhood Providers) • There are a lack of health and educational supports available when parents can attend, for example in the evening after work hours. (Early Childhood Leaders)	**Data points:** • Eligibility policies for many early childhood programs or services exclude parents whose income is above the poverty line but who still do not make enough money to afford the qualify early childhood programs or services they need. (Parents) • The eligibility policies for many health and early educations supports are so narrow that it leaves many families without access to the programs and resources they really want and need. (Early Childhood Providers)	**Data points:** • Many parents just don't know what early childhood resources are available to them in our community (Parents) • Families who could use the early childhood services don't know about them. (Early Childhood Leaders) • Many families do not understand how to tell the difference between a quality preschool center and a non-quality center. (Parents)

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Step 2: Prioritize Targets for Change

The following pages outline a process to help stakeholders prioritize Design Challenge Areas and sorted system scan data for strategy design. This includes how to:

- Prioritize Design Challenge Areas & Root Causes
- Locate Root Causes
- Identify Deep Root Causes

1. Prioritize Design Challenge Areas → 3. Locate Root Causes → 4. Identify Deep Root Causes

Engage stakeholders in prioritizing which Design Challenge areas they want to focus on in the strategy design process.

- First, ask stakeholders to determine how many Design Challenge areas they want to tackle. If they want to tackle more than one, use sticky dots to select which Design Challenge areas they want to tackle.
- Once the prioritized Design Challenge Areas have been determined, ask stakeholders to prioritize three root cause labels (and corresponding data) related to each Design Challenge Area.
- See next page for the prioritizing criteria the stakeholders can use for these two steps.

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Prioritizing Criteria

Select priorities by identifying targets that are **powerful** and **feasible.** The following describe these two criteria in more detail.

POWERFUL Root Causes

- have a big influence on the Targeted Problem and/or Design Challenge Area
- affect or involve multiple settings and/or individuals (especially those experiencing current inequities) at different ecological levels in the community
- play a unique role in influencing other root causes and outcomes in the system
- contribute to local inequities in the community

FEASIBLE Root Causes

- are within the scope of work
- motivate local stakeholders to take action
- are seen as important by local residents
- can shift quickly

ABLe TIP:

Effective change efforts tackle **multiple types of community conditions** (e.g., mindsets, connections, policies, power dynamics, resources, service components). If you notice stakeholders have prioritized root cause labels that are all related to the same type of condition, point this out and support them to identify some additional root causes from other system characteristics to boost the effectiveness of their change efforts.

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Facilitator Tips: Test the Power of the Prioritized Root Causes

Before moving to strategy design, help stakeholders pause and test the power of the root causes they prioritized under each Design Challenge to ensure their efforts will bring about needed changes in the community.

Below are questions you can use to support this process:

If we change these root causes, will they be sufficient to shift our Design Challenge Area?

- ☐ If yes, move to the next question.
- ☐ If not, what other root causes from our System Scan do we need to prioritize to create the desired change?

If we change these root causes, will we ultimately reduce inequities in the community related to the targeted problem?

- ☐ If yes, move to the next step in sense-making process.
- ☐ If not, what other root causes from the System Scan do we need to prioritize to address inequities in local outcomes?

Note to Facilitators: The priority root causes should target different types of system conditions (mindsets, connections, policies, power dynamics, resources, service components) across multiple levels in the community. Design Challenge Areas have more potential to transform a community when they include diverse root causes spanning a range of ecological levels and settings.

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1. Prioritize Root Causes | **2. Locate Root Causes** | 3. Identify Deep Root Causes

Because of the complexity of most social problems, any one root cause can often be found in multiple places or settings within a community. An important step toward designing powerful systems change strategies is to identify WHERE in the community system the root causes exist. This information helps to identify what to specifically target for change during strategy design.

Below is an example of how a community identified which organizations, departments, settings, efforts, and actors were involved in the root cause "limited affordable housing units being developed near employment and schools":

Root Cause Label: limited affordable housing units being developed near employment and schools	
Ecological layers affecting root cause	**Actors and settings involved with this particular root cause**
State	• Policy-Makers • HUD office
County	• Housing Advocacy Groups
Community	• Housing Developers • Housing Commission • City Planning Departments
Organizations & Service System	• Schools (principals, superintendents) • Businesses
Neighborhood	• Neighborhood Associations
Residents	• Residents opposed to new affordable housing

Help stakeholders clarify their prioritized root causes, including:

- Where the root cause is happening in the community
- Who is involved

Some of the system scan data stakeholders collected and sorted will most likely already describe what the root cause looks like in the community. If the system scan data doesn't provide this level of detail, help stakeholders identify what other information they might have about these details and/or consider how to gather additional information.

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1. Prioritize Root Causes | 2. Locate Root Causes | **3. Identify Deep Root Causes**

It is important to note that sometimes the root causes identified in a system scan are not deep enough to inform strategy design and effective action**.** Take for example the following root cause:

> Limited affordable housing (including rentals) being developed near employment and schools

This root cause is not deep enough to inform effective action because there are potentially several underlying reasons **WHY** affordable housing is not being developed in these locations. Each of these reasons or root causes would require a different strategy or action. For example:

- Developers have limited incentives to build affordable housing
- Public opposition to building affordable housing in targeted areas
- Zoning regulations limit affordable housing developments near employment and schools

Before moving to designing strategies, it is important to identify if there are any **deeper root causes** that should be identified.

Help stakeholders identify any other reasons why their prioritized root causes are happening in the community. Stakeholders can add this information directly onto the data strips.

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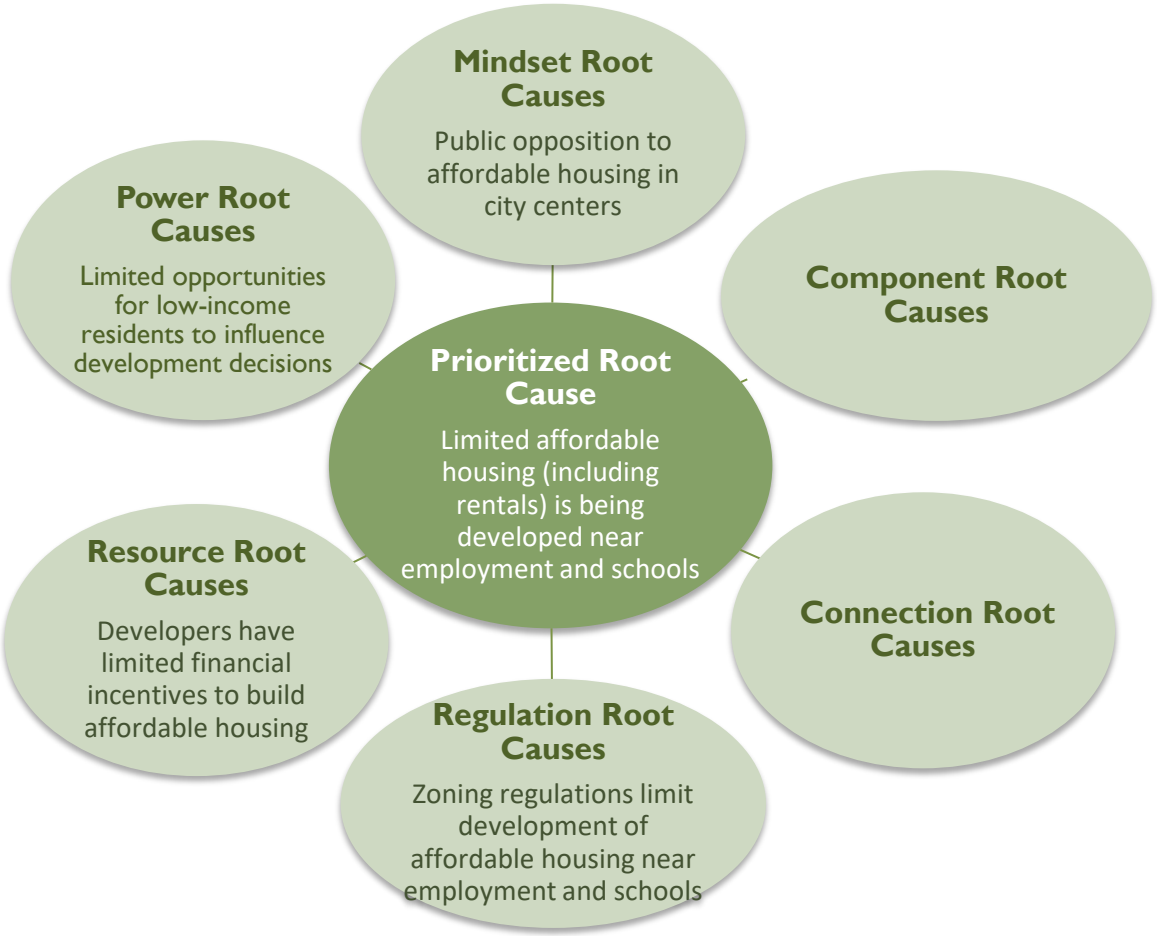
Example of identifying deep root causes

Below is an example of how stakeholders identified underlying root causes using the ABLe system characteristics. NOTE: there may not be underlying root causes associated with all six system characteristics. In this example, the group only identified deep root causes related to four out of the six characteristics.



Facilitator Note: help stakeholders prioritize root causes representing different system characteristics affecting multiple settings and individuals across the community.

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Partner to address root causes not feasible for group to tackle

There will likely be some root causes the group is not in the best position to target – but are critical to the success of addressing the overall targeted problem. For these root causes, help stakeholders to connect with others in the community who may be better positioned to do so.

CONNECT

- Check in with the community to find out who (if anyone) is currently addressing the root cause the group is not able to target.
- If no efforts are addressing this root cause, consider how future efforts could address this issue.

SHARE INFORMATION

- Support organizations or efforts currently working on this root cause by sharing relevant information (e.g. data on the problem, evidence based practices or community experiences to draw on, etc.).

DRAW ATTENTION

- Bring this root cause to the attention of other organizations or efforts in the community that are uniquely positioned to address it, but are not doing so yet.

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Partnering to address root causes not feasible for group to tackle.

Use the table below to plan out how to partner to address root causes that are not feasible for the group to tackle.

Root causes group is **NOT** targeting	Which other efforts in the community are currently working on this root cause?	Which other efforts in the community are uniquely positioned to address this root cause, but are not doing so yet?	How can you connect with these efforts to support them in addressing these root causes?

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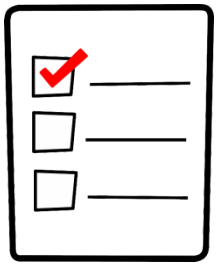
Sense-Making Check List:

Are you Prepared for Strategy Design?



Your group will be ready for strategy development when…

- ❑ The system scan data has been sorted and themed.
- ❑ The group has identified a subset of powerful and feasible root causes to target in its Design Challenges, located these root causes in the community system, and identified any deep causes to target with strategies.

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