



15 Days: The Toolkit

A resource for practitioners interested in adapting an accelerated, collaborative problem-solving methodology.



By Rhona Gaynor, Peter Thomas and Andrew Templeman

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Foreword from the Centre for Effective Services



This toolkit is one of the resources to be produced as part of the Goal programme for Public Service Reform. The Programme began in 2015 and involves CES partnering with government departments in Ireland and Northern Ireland, to support them to deliver on their ambitious public service reform agendas. The Youth Mental Health Pathfinder Project is one of nine projects in the Goal Programme to introduce and test new approaches in addressing some of the most pressing social policy challenges faced by public services in Ireland today.

A growing body of international and national data on the mental health of our young people is of huge concern to us all. Rates of youth suicide and self-harm in Ireland are among the highest in Europe. The '15 Days' report, which can be found on our website [here](#), tells the story of how a cross-government, collaborative approach was used to put a spotlight on the issue of youth mental health. This Toolkit provides valuable advice and direction on the tools and methods used in this collaborative approach. It is a practical, step by step companion to the '15 Days' report, which makes explicit what tools, tips and approaches can help implement an effective collaborative approach.

In reading and using this toolkit, it is important to keep in mind the idea of a pathfinder itself. Firstly, it involves carving a new route, or way through unexplored territory. The second purpose is to provide guidance for those who may make a similar journey, and that is the purpose of this toolkit. To provide practical advice, support and tools for those engaging in the often challenging work of collaborating across silos and boundaries to solve difficult problems.

The '15 Days' report and this toolkit are an honest account of the real challenges presented by collaboration, easy on paper but harder to execute in the busy, messy world of policy making. While the focus of this work is youth mental health, the approach and tools will be of interest and relevance to a wide range of policy challenges which require a collaborative approach.

We welcomed the opportunity to be part of the Pathfinder project team, to support colleagues in the public service in planning how services can work together to improve mental health outcomes for young people in Ireland. Our role involved providing access to both national and international expertise, knowledge of how the issue has been approached in other jurisdictions, practical tools and support in using and analysing data.

One of the commitments of the Goal programme is to share learning from the experience of new approaches in public services across government in Ireland and Northern Ireland. We thank the authors for capturing this experience and sharing these tools in a way that is insightful, engaging and offers practical guidance for colleagues and other government departments charged with collaborating on problems of similar scale and complexity.

Nuala Doherty

Director, CES

About the Authors



Rhona Gaynor is a senior manager in the Irish Civil Service. She joined the Department of Health in February 2016 as Head of the newly established Policy, Strategy and Integration Unit. Prior to joining the Department she was Head of the Civil Service Renewal Programme Management Office in the Department of Public Expenditure and Reform managing the development and implementation of the *Civil Service Renewal Plan* (Oct 2014) across 21 different civil service organisations and 38,000 staff. Before returning to Ireland, she worked as a Senior Policy Adviser in Cabinet Office advising on a range of domestic policy issues, including advising the Head of the Civil Service Sir Bob Kerslake on the development and implementation the *Civil Service Reform Plan* (June 2012). Immediately prior to this work, she was seconded for a period to the Institute for Government UK as a core team member on the *Transforming Civil Service* Programme. She began her Civil Service career as a policy adviser in the Prime Minister's Strategy Unit UK after a period of intense study securing a BA in History and Politics and an MA in Political Theory from University College Dublin and an MPA in Public Policy and Management from the London School of Economics.



Peter Thomas is an expert adviser to governments and public service organisations on delivery, capability, performance and reform. He also works with boards, management and teams to help them develop their strategy, business model and capability. He is an expert designer and facilitator of group collaboration and engaging workshops. He is a Senior Fellow at the Institute for Government, where he led the Institute's research on civil service reform, publishing numerous reports. Before joining the Institute he was Director of Strategy and Change at the Ministry of Justice. Previously, he developed and ran the Capability Review Programme in the Cabinet Office and was Head of the Prime Minister's Delivery Unit. Earlier in his career he ran public sector research programmes at the Audit Commission and was a senior leader in local government.



Andrew Templeman runs his own consultancy focusing on innovative forms of engagement that build capability, drive delivery and reinforce change in and across central and local government. He is a highly experienced facilitator and programme designer. Recent clients include the Irish Government, DFID, Cabinet Office, HMRC/HMT, Suffolk CC, Westminster CC, the Health Foundation, Crown Commercial Service and Department of Health. He has worked with LB Haringey and LB Barking and Dagenham to help establish internal units with "Delivery Unit" culture, routines, tools and techniques. He is director of the highly successful programme of Cabinet Office Policy Schools (COPS) and the different departmental versions of the programme that have flowed from this. Other projects include work with Border Force assessing their transformation plan, the Big Lottery Fund, Institute for Government, the Wellbeing "What Works" programme, LB Lambeth, Suffolk CC, the Office of the Rail Regulator and Serco. Previously he was a senior civil servant in the Cabinet Office and the Prime Minister's Delivery Unit. Outside the civil service he has been a director of Serco Consulting and a senior manager in the Audit Commission and local government.

Introduction to the Toolkit

Some of the toughest challenges facing governments seem intractable. They go beyond the capacity of any one organisation to understand and respond to; and, there is often disagreement about the causes of the problems and the best way to tackle them.

The challenge of improving mental wellbeing of young people in Ireland is one such complex issue. The Irish Government picked this topic to be one of three high profile Pathfinder projects at the heart of its ambitious Civil Service Renewal Plan.

A small team in the Department of Health was charged with finding new ways to work together on this issue. Convinced that there was a better model than establishing a two-year committee, they decided to use an accelerated, collaborative problem-solving model and a diverse team of frontline staff and policy makers.

The full report ['15 days: A practical guide to leading accelerated, high impact collaboration in the Irish Civil Service'](#) is the story of how the 12 Pathfinder group members used their 15 days of working together to get to the heart of the problem and come up with a small number of actions that would have a disproportionate impact on the underlying problem. This report also details how they engaged senior leaders to act on their findings and recommendations.

The report and this supporting toolkit provide a 'how to' case study and guide for public servants in departments and agencies who are trying to work across boundaries to develop and implement policies on 'wicked issues'.

The purpose of this toolkit is to support public servants who are interested in adapting and applying this methodology. The toolkit has four main elements:

1. A section that explains the origins and design of the project.
2. More detail on how we carried out each of the **6 phases of the project** and the thinking behind elements of the design.
3. An in-depth explanation of the tools used through those steps. We explain all **18 problem-solving and collaboration tools**, why we used them, with examples of the outputs they produce.
4. A section that reflects on **what worked well**, and what we would do differently next time.

The approach: Accelerated, collaborative problem solving

The Pathfinder approach uses an accelerated problem-solving approach modelled on methods and approaches used in the British Civil Service and by the Institute for Government in London. The Department of Health commissioned external support to help design and facilitate the main phases of the project. The Centre for Effective Services, Peter Thomas Ltd and Andrew Templeman Ltd provided this support.

Origins and adaptation of methods used in the Pathfinder project

The models and experience drawn on to design the project came from three main sources:

1. Models of collaborative problem solving that were developed primarily in Britain and have since been adapted and extended globally:
 - The British Prime Minister's Delivery Unit (PMDU) priority review model. These problem-solving reviews were used to develop the right actions for delivering key priorities – from developing the initial policies to solving practical problems of implementation.
 - The capability building model that was developed by Andrew Templeman in Britain to follow up the findings of the UK capability reviews of government departments. This model drew on civil servants from 5 or 6 departments to work together (for a day a week for 12 weeks) to acquire and use new skills to solve a key business problem sponsored by one of the departments.
 - British civil service policy schools designed to build the capability of policy makers to develop better, more innovative policy making by working openly across the system. Andrew Templeman pioneered these highly rated development experiences rooted in looking at policy issues from expert, frontline and practitioners' perspectives.¹
2. Accelerated learning principles drawn from cognitive science about how people learn best, augmented by research into capability building carried out by the Institute for Government in London.²
3. A workshop planning and design framework developed by Peter Thomas that captures accumulated learning from designing and running over 300 workshops at all levels of the public sector.

The shape of the project: 15 days spread across a mix of whole team workshops and work in three smaller groups

From the outset we planned a mix of working in smaller groups, around a spine of intensive one-day workshops with the whole Pathfinder group. This approach was designed to deal with the reality that all Pathfinder group members have demanding day jobs. Even though they had already committed a day a week to work on this project, it is always difficult to mix the demands of a day job with an additional project. In practice, they are not given any less to do in their day job by their line managers so we relied heavily on their engagement, commitment and discretionary effort. This remains one of the big barriers to effective, collaborative working across a system.

The rationale for working in three small groups was simple:

1. It substantially eases the practical challenge of coordinating diaries and planning work around demanding day jobs.

¹ <https://civilservice.blog.gov.uk/2016/03/15/what-weve-learned-from-policy-school/>

² Kidson (2013)

2. You get three different perspectives and angles which ensures challenge and triangulation.
3. You can cover more ground, more field visits, interviews and workshops.
4. It ensures everyone has to be active.

Each smaller group was picked to give a mix of backgrounds and departments, and each had one member from the core support team. The role of the core team member was to bring additional time and capacity to convene, facilitate and sometimes organise the work of the group. However we were very clear that they were to be a full and equal member of the team regardless of grade.

15 days - six phases

The 15 days group members gave were spread over six distinct phases

- **Phase 1:** A traditional analytical period reviewing current policy, data and evidence.
- **Phase 2:** An initial burst of two group days in two weeks – kicking off the project, getting a focus, sharing key tools and approaches, and bringing some stimulus in from the frontline. The smaller teams met up a couple of times during this phase.
- **Phase 3:** A period of five weeks where the small teams were carrying out their fieldwork. There were no whole-group days during this step.
- **Phase 4:** A period of analysis over four weeks to bring the findings together and develop outline solutions – organised around two whole-group days.
- **Phase 5:** A final, increasingly intense sequence of whole-group days over eight weeks, further processing findings, developing initial solutions – testing these with stakeholders and decision makers, and building a strong narrative case for change.
- **Phase 6:** Producing and presenting the final report, iterating and improving solutions. This flowed into continued engagement with system leaders to deepen buy-in and progress key decisions even after the formal end of the project.

The Pathfinder process: Six phases and eighteen tools.



Source: Peter Thomas

The external advisors designed the process, and facilitated the whole-group workshop days. They had regular review sessions with the core team to take stock of progress: what was working, and what wasn't. This included coaching the core team on using the pinpoint method and other tools so that they were able to better support their small teams – as well as testing the outline facilitation plans for each whole-group day.

About the tools

The core tools used throughout the Pathfinder are drawn from the playbook of the British PMDU of the 2000s. These tools have their origins in various disciplines of management science, advisory company practice, product design and innovation methodologies.

What was unusual about their use in PMDU was the quality and discipline with which they were deployed. Long after delivery units and strategy units are closed, these methods are the legacy of those interventions. Essentially, they are better ways of working, analysing problems - transformative routines in the jargon of the academic literature on capability building.

Tools help people and teams to work collaboratively

Our experience on the Pathfinder showed that tools can help teams to work more productively. Structured problem solving helps you focus on what matters most. Without an explicit and appropriate scope for the project, it is very hard to make progress. You need careful planning and design to enable productive team working. In the case of the Pathfinder, most of the team hadn't worked together before. Using tools ensured every individual made a significant contribution and had strong ownership of the recommendations.

To come up with better solutions you need to look at the issue from different angles. This can also help to energise and even inspire teams. Finally, we learned that in order to engage senior leaders with our proposals, we had to be creative and take risks in how we communicated. Throughout the project we drew on two types of tools – problem-solving tools and collaboration tools.

Problem-solving tools

The problem-solving tools we used are shown and explained in the step of the project when we first used them:

1. **System mapping**
2. **Journey mapping**
3. **Process mapping**
4. **Scope sheet**
5. **Issue Trees**
6. **Lines of Enquiry**
7. **Productive fieldwork**
8. **Pyramid story telling**
9. **Report slide pack**
10. **Visualisation**

Collaboration tools

Throughout the six phases of the project there were eight main collaboration tools that we used. Most of the tools can be used at more than one phase of the process:

1. Temperature test
2. Pinpoint open card call
3. Stimulus
4. 'Take a panel'
5. Rating and voting
6. Digging into an issue
7. Templates
8. Tradeshow

Each tool is explained and illustrated as we tell the story of each phase of the Pathfinder project.

Building lasting capability that changes practice and culture

Lasting reform inevitably demands the building of capability that outlasts the immediate reform programme. Research by the Institute for Government into successful reforms found that **specific reforms transformed the civil service by introducing new behaviours, attitudes, routines, assets and ways of working.**³

Any external advisers must design projects as means to co-develop powerful new ways of working, changing behaviour and acquiring tools that will build the wider capability of the government. Some of these may often be adapted from successful reforms elsewhere in the region or internationally. But they must always be adapted to the local context. To do this requires in-depth understanding of the context in which they were developed and successful, and how that differs from the context into which they are being adapted and adopted.

The relatively neglected literature on capability building draws significantly on behavioural studies of organisations and has coined the term '**organisational routines**'.

*...repetitive patterns of activity that constitute the ways in which the organisation has learned to co-ordinate its activities.*⁴

*Behaviours are based on routines; organisations learn these routines by encoding inferences from history into routines that guide behaviour - includes structure of beliefs, culture, codes that reinforce those routines. They are capable of surviving considerable turnover in individual actors.*⁵

Researchers have distinguished 'enabling routines', which underpin continuous improvement and even transformation, from 'defensive routines' which perpetuate the status quo.⁶ It is the degree to which people take on new (transformative) routines and apply, evolve and teach them to others that are most relevant to the design of change and capability building interventions.

A deliberate part of the design of the Pathfinder group was to introduce problem-solving and collaboration tools to the group, and for the core team especially, equip them to use these tools and build them into their personal practice.

³ Panchamia and Thomas (2014)

⁴ Tranfield, Duberley, Smith, Musson and Stokes (2000)

⁵ Levitt and March (1988)

⁶ Tranfield, Duberley, Smith, Musson and Stokes (2000)

A conscious effort to work together differently

A distinctive element of this Pathfinder project was the emphasis put on collaboration, group working and facilitation methods. Over time the ambition is to develop in-house capacity in the Department of Health to provide the design and facilitation capability to support this way of working. For this project, that expertise was provided by the external advisers.

Our approach to design of group working is based on the principles of the accelerated learning movement in the USA. This takes a more person-focused approach drawing on cognitive science to break away from traditional workplace learning methods. Their approach is consistent with **the conclusions of capability-building research and boils down to five principles – in which people learn best:**

1. In a positive physical, emotional and social learning environment, one that is both relaxed and stimulating;
2. When they are totally and actively involved and take full responsibility for their own learning. It is not a spectator sport but a participatory one;
3. In an environment of collaboration. All good learning tends to be social;
4. When they have a rich variety of learning options that allows them to use all their senses and exercise their preferred learning style;
5. From doing the work itself in a continual process of real world immersion, feedback, reflection, evaluation and re-immersion.⁷

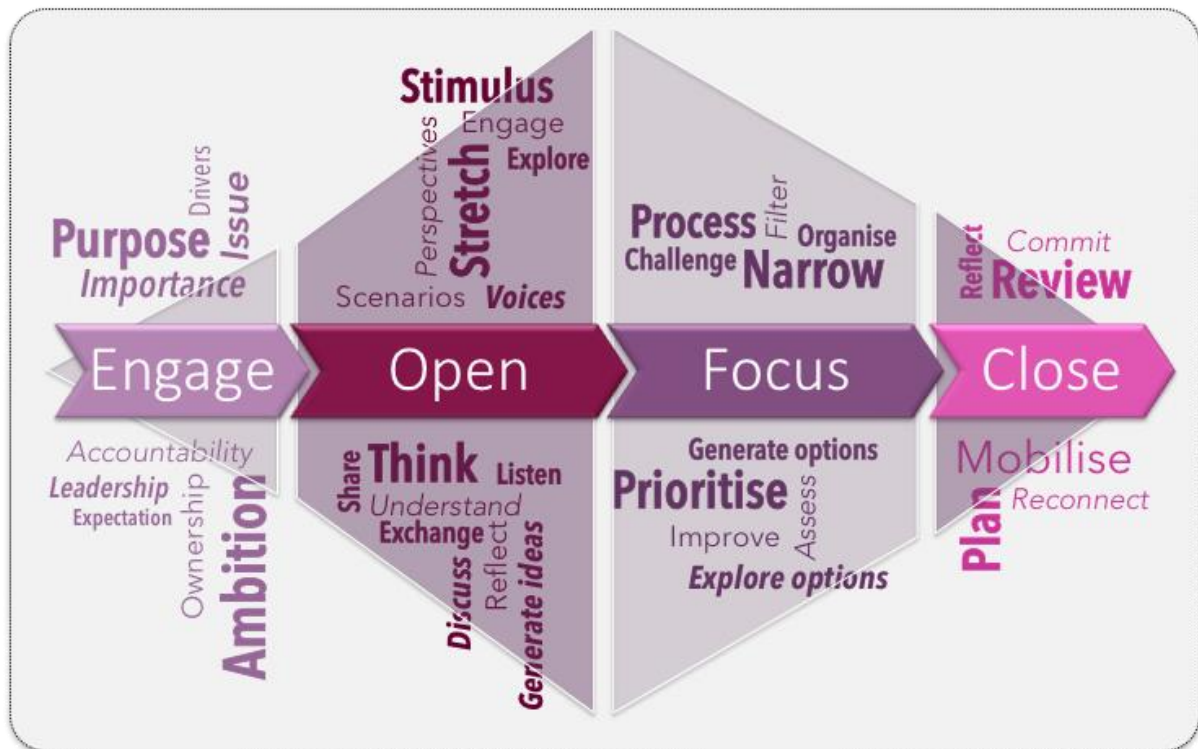
These principles encourage the use of peers and practitioners as a source of ideas and insights. They demand collaboration and dialogue between peers as equals rather than a lecture from one to another. They require time to stand back and reflect on progress and ways of working. We set out explicit rules of engagement and our intentions about how we would work together.

Designing the sequence of whole-group workshops

The final ingredient in the alchemy of collaborative group working is to think carefully about what sequence, shape and progression of workshops, and which tools will enable the group to make progress. The workshop design and sequencing was developed by the author Peter Thomas on the back of over 300 workshops and events run across the public sector, and experience of alternative methods used in business consultancy, policy labs, and design and innovation workshops.

⁷ Meier (2000)

Exhibit 4. The framework used to shape design of the 15 days process



Source: Peter Thomas

Resources and support for the project: The core team and external advice

The resource model for the Pathfinder envisaged external support to help co-design and deliver the programme. The Department of Health engaged CES (Centre for Effective Services) and two external advisors, Peter Thomas and Andrew Templeman, who were appointed to work to develop and support the way of working in Phase 2.

A core team was established and the external advisors worked closely with them to co-design workshops and tailor support to the smaller teams. The core team was an essential mechanism for:

- Ensuring we adapted the methodologies to the context, capability and culture of the local system;
- Transferring skills and building capability in the Department of Health; and,
- Ensuring external advisors were only used where they added value.

Top Tips - Setting up the project



Do

- Think carefully about how to bring the right skill and experience mix into the team
- Create atypical reporting lines – cross-boundary work requires cross-boundary leadership
- Communicate widely, transparently, clearly and regularly – don't hold emerging insights within the team only
- Pin down the governance model so you know who has 'clearing' authority and who does not
- Work hard to ensure the team gets recognition within their own organisation



Don't

- Worry if taking the time to identify and select the right people slows the process initially
- Recruit by seniority – skill and attitude is a better baseline
- Tolerate arms-length engagement with the process, key that staff recognise they are part of a team that depends on them
- Make exceptions for your 'home' organisation – critical to treat all participating organisations (and organisational structures/processes) equally

Phase 1: Ground clearing

Days 1, 2 and 3

The defining lines around ‘youth mental health’ are vast. One of the first challenges for the Pathfinder group before they could dive into solutions was to figure out where things stood. This first phase of the process had less structure and shape than later phases.

Main Activities in Phase 1

Table 1: Getting a Focus: Activities and outputs

| Activities | Outputs |
|--|--|
| 1. An analysis of the scope of policy commitments relating to youth mental health. | Draft Analytical Report |
| 2. An analysis of the public funding for youth mental health from central Government | A preliminary estimate of total spending |
| 3. An analysis of accountability lines for different youth mental health services | Draft Report |
| 4. An emerging picture of the qualitative and quantitative evidence around the experiences of young people accessing services in Ireland | Draft Report |

Source: Authors of this report

Clearing the ground

This 'ground clearing' phase was slow-going. Building a picture of what was happening across a complex inter-connected system was one thing, interpreting and drawing insight from that picture proved quite another. However, after a number of weeks this work had begun to emerge into four work packages:

1. An analysis of the scope of **policy commitments** (and documents) relating to youth mental health.
2. An analysis of the level of **public funding** for youth mental health from different central Government sources.
3. An analysis of the **complexity of accountability lines** for different aspects of youth mental health services.
4. An emerging picture of the qualitative and quantitative **evidence around the experiences of young people** accessing services in Ireland.

The picture that emerged showed that an already complex system was made more complex and harder to navigate by the volume of priorities and initiatives and the number of different government actors and agencies involved. However, it was the evidence review that created the time to seek insights – if Ireland had one of the highest rates of youth suicide in Europe then something was stopping, limiting or reducing the effectiveness of Government action.

At this juncture, the group paused for its first internal review. This was the first of several facilitated 'stepping-back' discussions during the process and aimed to let the team start to form a collective view around two things:

1. What does better look like?
2. And what's getting in the way of achieving it?

This thinking would continue to develop as the project continued and the team built a stronger evidence base with some consistent themes throughout the project.

At times, the far-reaching scope of this phase was challenging for the team. The process also felt a little uncertain without a firm sense of what the final products would be. However, the absence of specified outputs in these early weeks allowed the team to take the time to build a solid picture of the current approach to youth mental health. This meant that the group could lead purposeful enquiries in the next steps – really getting under challenging 'why' and 'how' questions with the groups they engaged with. And it helped them to engage with the frontline to develop constructive solutions in later phases.

This broad scope and somewhat fuzzy start had two positive side effects. It:

- Helped to level and equalise the knowledge and information across the group; and,
- Allowed time for team members to get to know each other.

The ground clearing phase is an immensely important prerequisite – however dull or mechanical it may feel. The discipline of an investment in understanding what is out there, what the landscape of government policy is, what has been learned from other countries experiences etc. pays back repeatedly. Returning to revisit the materials from that phase paid dividends through the later phases of the project.

Phase 1 - Top Tips in ground clearing



Do

- Put a timeframe on this phase – ok to let things grow organically but not forever
- Set broad parameters – the types of information needed; the types of questions to be thinking about
- Start the team working in small groups – this ‘dull but important’ leg work would be hard going alone



Don't

- Rush to define workstreams – let these emerge
- Panic if it's not that clear what it's all adding up to
- Waste time drafting or revising outputs in this phase – capture the information but focus team energy on generating insight

Phase 2: Getting a focus

Days 4 and 5

One of the key success factors for an accelerated problem-solving review is establishing the right scope. Without an explicit and appropriate scope for the project, you will be unable to make progress: either because the scope is so wide you are only scratching the surface with generalities, or because it is so narrow that you are likely to miss critical issues.

This is an uncertain phase and hard to plan. You cannot be sure how well each activity will go. It can be tempting to force an arbitrary specificity onto the group working on the problem to make sessions easier to organise and run. However, shoddy foundations will crumble later so you have to hold your nerve.

Main Activities in Phase 2

Table 2: Getting a focus: Activities and outputs

| Activities | Outputs | Tool |
|--|--|--|
| 1. Stimulus from front line to challenge thinking | Insights into different perspectives | Collaboration tool: External Stimulus |
| 2. Initial mapping of the system, process and client/service user journeys | Different perspectives on the system and client/service user experiences | Problem-solving tool: System mapping Problem-solving tool: Journey Mapping Problem-solving tool: Process mapping |
| 3. Establishing the scope of the review – the problem we are trying to solve | Problem statement | Collaboration tool: Temperature test |
| 4. Complete a scope sheet to clarify the scope | Problem scope | Problem-solving tool: Scope sheet |
| 5. Generating ideas about key drivers, issues | Longlist of issues for the Issues Tree | Collaboration tool: Pinpoint |
| 6. Creating Issue Trees to structure our thinking | Issue Tree and key hypotheses | Problem-solving tool: Issue Trees |
| 7. Thinking about what success would look like | Success criteria for the project | Collaboration tool: 'Take a panel' |

Source: Authors

Identifying the problem

For the Pathfinder group the dilemma they faced was that even with the ground clearing work they had carried out and their different professional perspectives and experience on the issue of youth mental health - they were conscious that they had only started to look at the issue. With all 'wicked issues' the scope and complexity of the issue is potentially overwhelming.

This phase was designed to enable the group to challenge and expand their perspectives on the area in focus, and to formulate a key issue (or problem statement) that was good enough to allow them to proceed.

The crucial test for the key issue that will frame the problem-solving review is that if it were successfully addressed would it have a disproportionate impact on the area we are looking at – youth mental health. It needs to be narrow enough to be tractable, yet cover enough ground to get to the key issues. Formulating such an issue is an art, not a science.

Problem-solving tool: External stimulus

For the Pathfinder group to take a fresh look at long-standing challenges, it is obvious that they will have to look differently at the problem and understand the perspectives of other people in the system. They did this by looking at customer experiences, mapping customer journeys, mapping the system – and hearing from people in different parts of the system.

Having a diverse group is a good start but the process must be designed to go further. Hence, the emphasis on service users, frontline staff, case studies, and hearing from practitioners and thinkers about the issues. Perhaps the biggest challenge is helping the group to be open to hearing different, challenging and sometimes upsetting perspectives that don't fit their own view or experience. **Open-minded listening** is a core value for this type of process.

At three of the whole-group days we used **small panels of frontline line workers to bring their experiences and perspectives**. This is an essential part of enabling the Pathfinder group to look at the issue from different angles, from outside the perspective of their day jobs. The Pathfinder team heard a variety of perspectives, including GPs, academics, psychotherapist and a school principal.

Using the stimulus

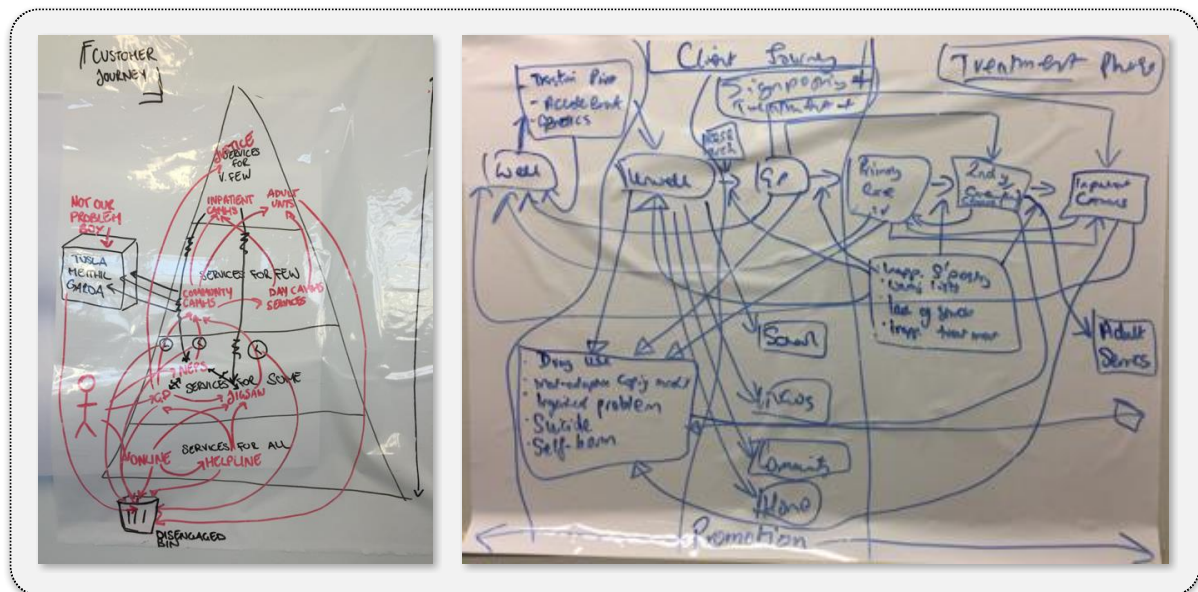
You need to help the group reflect on and process what they have heard from these panels in a way they can draw on later.

- We use the simple device of asking each person to reflect on what they have heard and write down 3 or 4 key points, each on a different post-it note.
- You then just cluster them and photograph.

Problem-solving tools: System, journey and process mapping

System, journey and process maps are different tools that can be used to illustrate different experiences and perspectives of the issue. The whole team started with an initial briefing on the concept of mapping with some worked examples; then each team met up and tried to work up some form of mapping. We were permissive about whether it was more service-user, system or process oriented. Finally, the whole group then came together, reviewing each map in turn – which generated valuable discussion. However imperfect the team felt their maps were, the value of them as fuel for thinking is shown by how clearly they were reflected in the Lines of Enquiry (see page 32) for fieldwork.

Using systems and journey maps



Source: analysis by Pathfinder group

The system map produced by one group was combined with a client/service user journey based on an anonymised case shared by one of our frontline 'stimulus' providers. It shows how the various transitions, breaks in communication and feedback, lack of clarity of responsibilities across the system can lead in some cases to a very poor response to one young person's distress.

Collaboration tool: Temperature test

The temperature test is a tool that can be used at different phases of the process. At the beginning of day 5 we took stock of how the group was feeling about the project. We used the temperature test tool to check:

- That we had the right focus;
- That the project was going to be manageable.

The first of our regular temperature tests showed that the team could see the value of the approach. People were worried about the scope and scale of work required and slightly awed by the review’s ambition. How realistic was it to aim for practical actions that would make a difference if accepted and implemented?

Using the temperature test

The temperature test is a great way to find out what the mood in the room is - which then lets you adjust and re-plan what you are going to do with a group for the rest of the session. It’s a very natural way to ensure everybody takes a position – and then feels relaxed about sharing why they feel as they do. There is something about the physical act of putting a dot on the board which gets engagement, and lowers the bar for then having a discussion. It is an excellent tool for opening any focus group.

Rather than have an open discussion shaped by whoever speaks first, you manage the plenary discussion by picking some of the dots on the chart and asking people who had their dots there to explain what was on their mind when they put their dot there. In some ways, where they put their dot doesn’t really matter – it’s just a device for allowing everyone to have a point of view. The key is that the facilitator of this discussion asks very open questions “*what did you mean? can you explain that a bit more?*” – rather than judging or arguing back against what people are saying. It also ensures the whole group has listened to how their colleagues are feeling, and can calibrate their own mood with that of the group.

We tended to have a temperature test at the start of most of the whole-group days - as it is a really good way to see what the mood is and what the group was happy or anxious about. Sometimes we reshaped the rest of the day to make sure we focused on what was of concern to the group and needed more attention.

How to do the temperature test

1

Ask people in pairs (or alone) to think about their answer to two questions (X,Y).
Once you have decided plot your dot.
4X4 is better than 3X3 – cant sit on the fence

2

Facilitator circles a few dots at one end of the spectrum and asks people who put their dots to say what they were thinking of when they put their dot there – capture a few key points on the board

This exercise really warms people up and provides valuable data – it forces people to take a view (uninfluenced)
The discussion is often very good – and has a solid structure

Establishing the scope

Getting agreement on the scope is critical to making progress. We discussed the criteria we were going to use to determine what a 'good' scope looks like for this project:

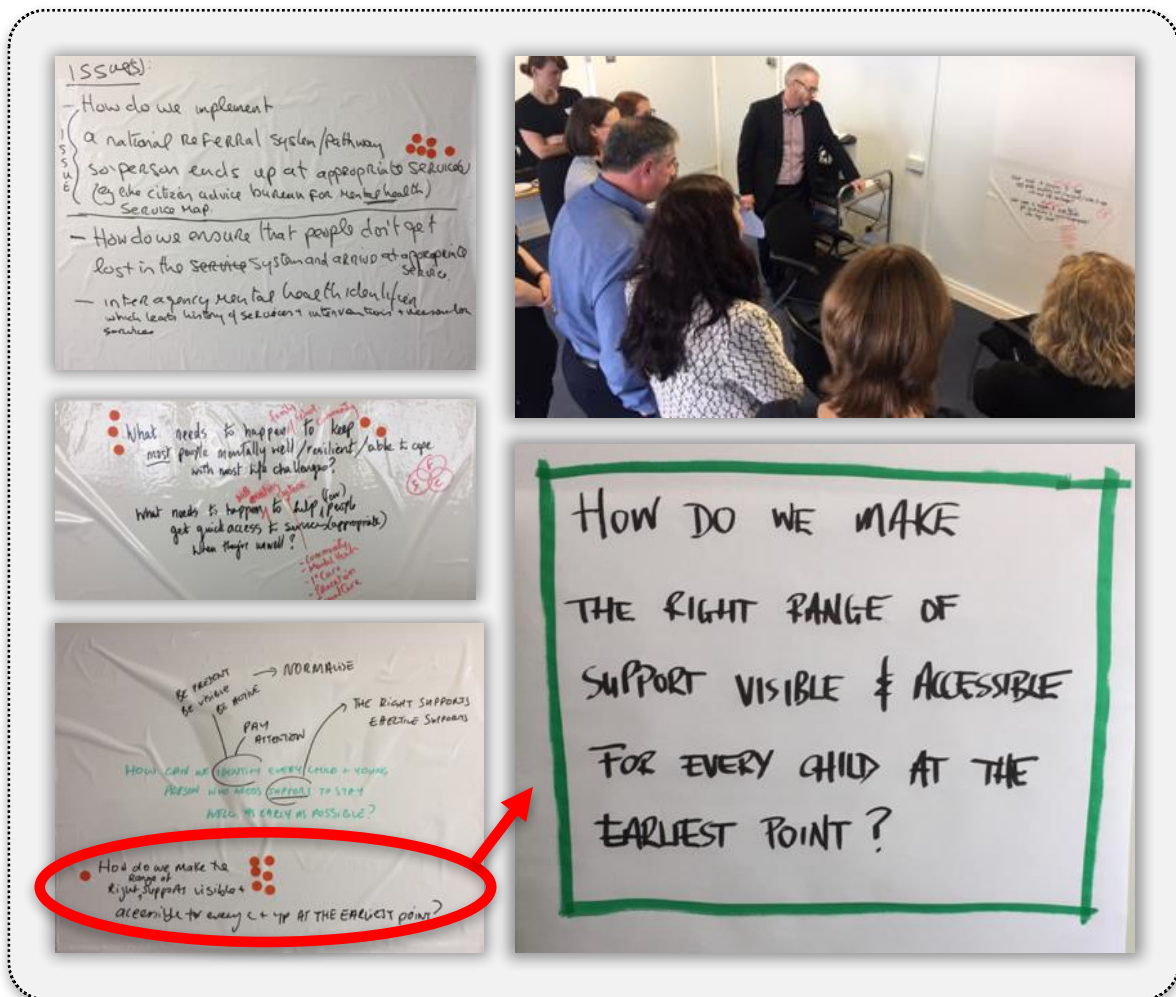
- It relates to the outcomes you want to achieve.
- It is framed positively and specifically... *'how do we...'*
- It is not so narrow that you could miss key issues.
- It would engage ministers, frontline staff, clients/service users and carers.
- It's a representative issue – your findings will be transferable and scalable.
- It encompasses pipeline (prevention) as well as pool (acute).
- It can be measured, albeit through proxies.
- The measure allows you to find variations across the system that provide insights.

Then each of the three teams worked by themselves for 20 minutes to try to propose a scope for the project that met the criteria.

We came back together to review and discuss each proposed scope. Following that, the elements that we liked the best from each of the proposed scopes was rated.

Then we started the tricky discussion to see if we could draw the different elements that had the highest ratings and turn them into a single scope that met the criteria. We opted for the **'how do we' formulation** to frame the issue because it is more positive and solution oriented.

Agreeing the scope for the Pathfinder project



Source: Pathfinder group

This discussion requires preparedness to listen to each other, to respect the elements that had the highest ratings, and to allow time for different member of the group to propose, or try to reframe a scope that might fit. In this case that took about 15 minutes. But if it needed to take an hour, then you must just stick with it until you get a scope that works for enough people. Or you decide you need a break to rethink and reflect on why it is not possible to get agreement. **You cannot move onto the next steps until there is a good enough framing of a scope that hits most of the criteria. It is the guiding star for the project.**

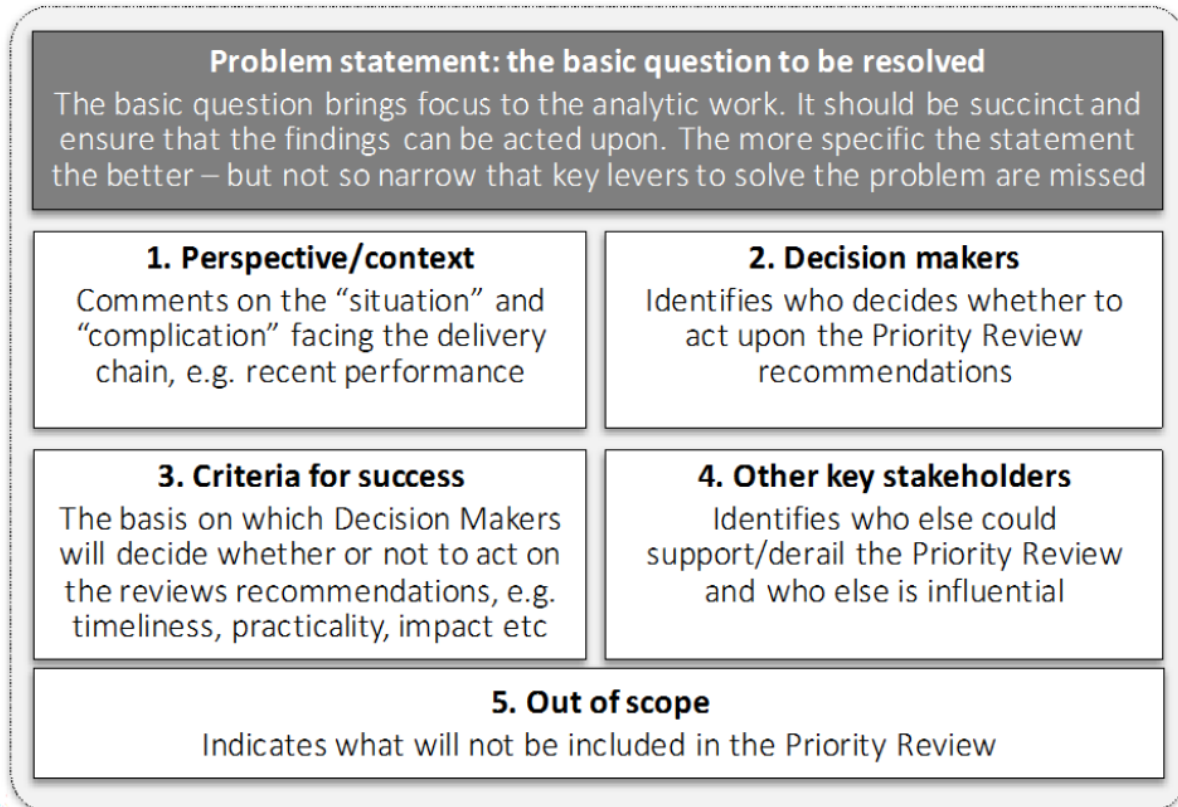
Problem-solving tool: The scope sheet

Following the first whole-group day, each smaller team took the key issue and used the scope sheet tool to clarify the scope and what that would mean in practice. This discipline of setting out the 'scope on a page' includes:

- **The problem statement:** the basic question to be resolved. The basic question brings focus to the analytic work. The more specific the statement the better – but not so narrow that key levers to solve the problem are missed.
- **Perspective/context:** Comments on the “situation” and “complication” facing the delivery system, e.g. recent performance.
- **Decision makers:** Who decides whether to act upon the projects’ recommendations

- **Criteria for success:** The basis on which decision makers will decide whether or not to act on the reviews recommendations, e.g. timeliness, practicality, impact etc.
- **Other key stakeholders:** Who else could support/derail the proposals?
- **Out of scope:** Indicates what will not be included in the project.

Problem-solving tool: The scope sheet



Source: Internal PMDU documents

Too often a team will fill in this sheet in a shallow way - not really challenging whether the question is framed right, or be explicit about what is out of scope. Thinking hard about who will make decisions to act on the findings of the review, or will need to accept the diagnosis can have a big impact on who you choose to engage through the project. The questions can seem quite simple to answer - but it is tough to really challenge whether your answers are meaningful.

Having an initial brainstorm on the key issues, drivers, levers and barriers

With the problem scope - ‘the issue’ - in mind, and thinking back to the ground clearing work as well as the initial frontline perspectives, the team downloaded their ideas on what they thought would be most productive to look at through the review. This is the necessary step before trying to construct a Logic Tree or problem structure.

Collaboration tool: Pinpoint

We used the Pinpoint facilitation method to ensure the whole group had time to download, contribute their own ideas, and feel ownership of the processing and clustering of the ideas that the group generated. The value of this tool is it ensures everyone understands and sees the connections between each other’s ideas and reactions.

Collaboration tool: Pinpoint open card call

The pinpoint facilitation technique was developed by Neuland in Germany, and is supported in the UK by Pinpoint Facilitation. It is a carefully designed method that ensures productive collaboration: idea generation, processing, and prioritising. It eliminates many of the pitfalls of conventional group working

1 In silence write down as many cards as you like on the set question/s. 5-7 mins

2 In pairs: talk your partner through your cards – pick the top X cards between you. 8-12 mins.

3 Facilitate sharing and clustering the cards in plenary. 20-30 mins.

4 Ask vote for their top X clusters using dots. Count up and rank. In plenary discuss why people voted how they did. This is often the most valuable part of the whole workshop. 10-40 mins

Source: Pinpoint Facilitation UK, adapted and augmented by Peter Thomas

This tool can look disarmingly simple - and it is depressing to see people use it who have not been trained in the key principles and factors that make it productive. A crucial part of working in the way we did through the Pathfinder project is to invest in building the capability of your own staff to design and deliver workshops and use tools like pinpoint effectively. There are some crucial do's and don'ts to using Pinpoint card calls:

Top Tips for using Pinpoint



Do's

- Give people enough time to write cards – don't prattle on
- They can write as many cards as they like
- Explain each step when you get to it
- Hold out the card so it faces the group when you read it out
- Let them decide what name to give to the cluster
- The discussion around cluster labelling and what belongs where can be phenomenally valuable



Don'ts

- Don't tell them that you will be only taking their top X cards
- Don't allow discussion of cards – only 30 second clarifications – register violent reaction to card (thunderbolt) and move on
- Don't suggest to them where a card goes
- Don't suggest your own cluster title.
- Don't panic if it takes time for clusters to emerge – or you end up with lots of single cards initially

Problem-solving tool: Using Issue Trees to structure the problem and focus further research

The next step in the project was to try to bring some more structure to our thinking about the issue by using the **Issue Tree tool**. Issue Trees help you structure and focus your thinking, and shape the analysis and fieldwork that will deliver most value. There are two variants:

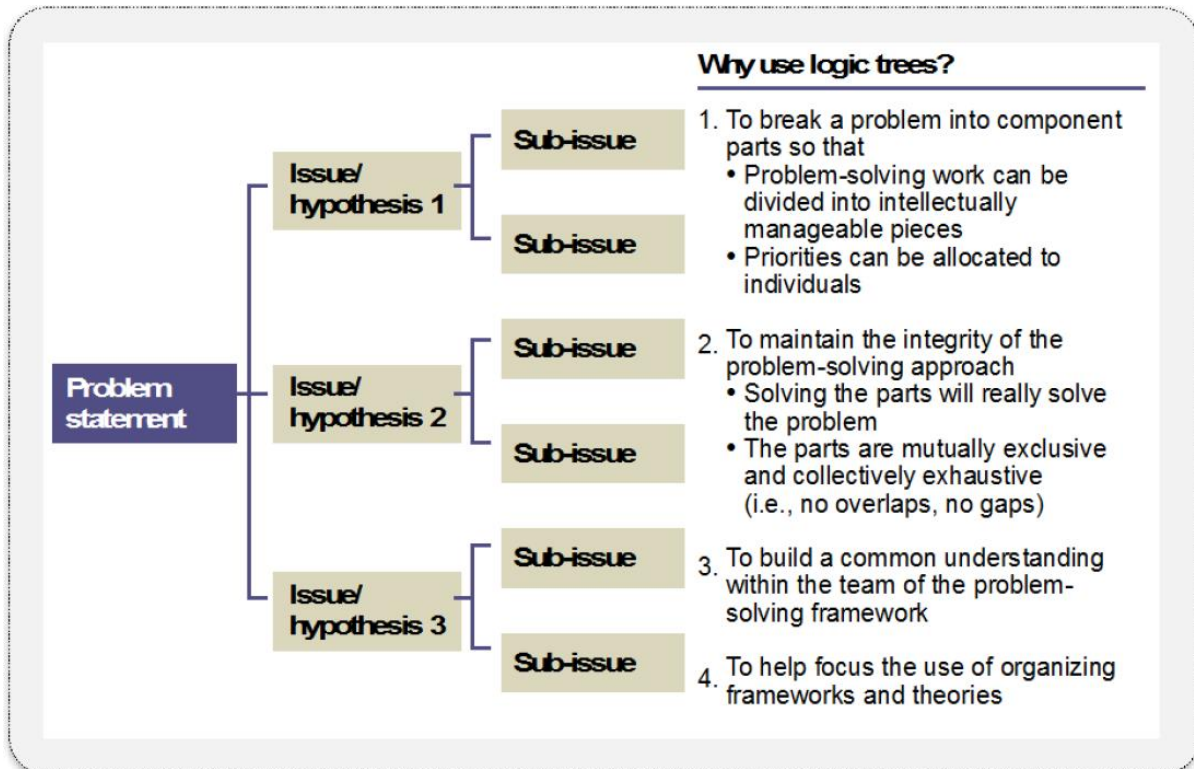
1. **Data driven – Why?** This starts with the problem and decomposes it to arrive at a solution
2. **Hypothesis driven – How?** Starts with a potential solution and develops a rationale to validate or disprove it

Issue Trees are the link between a problem statement/scope sheet and a list of manageable questions that can be explored through fieldwork and research.

It is essential to keep the effort on the Issue Tree proportionate. You are looking to get the starting point of the problem 80% right, then explore further and iterate – it is pointless and wasteful to seek perfection. The aim is to focus your efforts on what is most important. You should challenge your tree by asking 'so what' but also ask what you have forgotten.

As you develop your tree you will be continually iterating it – by switching between hypotheses, theories and data. You are aiming to eliminate non-essential issues in order to focus your research and analysis on what is most likely to add the most value.

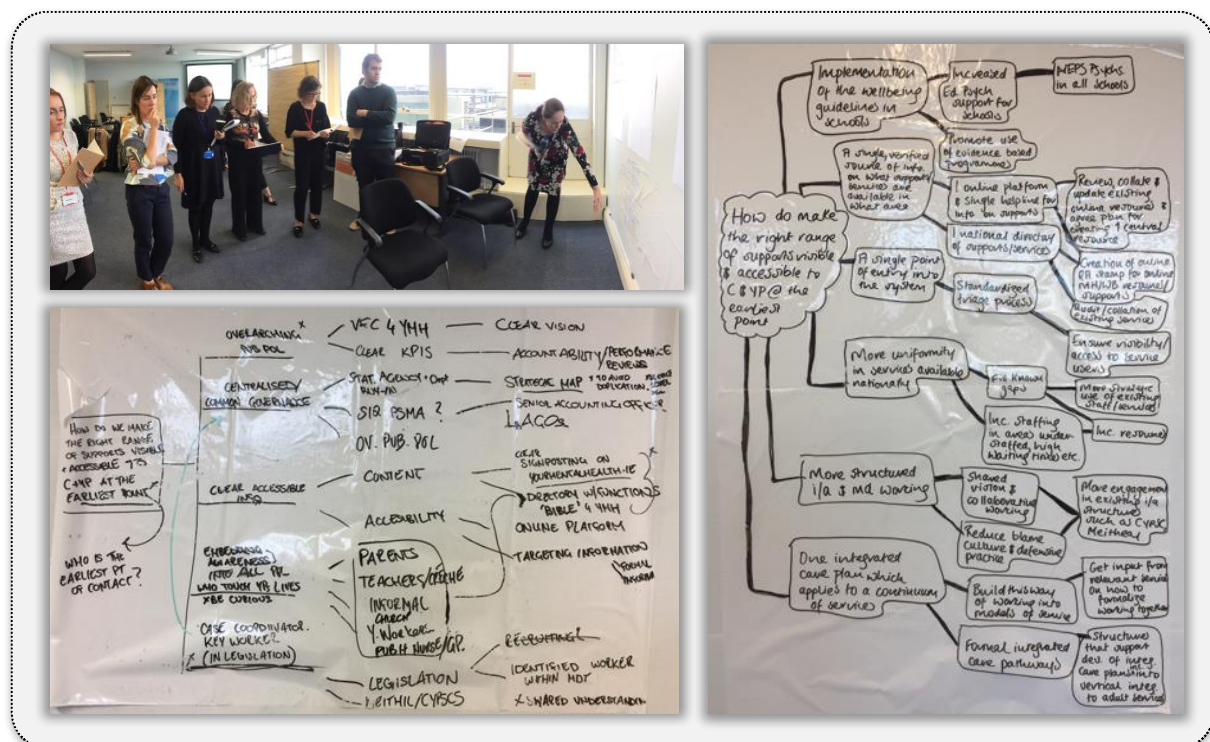
Issue (or Logic) Trees and why to use them



Source: Internal PMDU document

Each team worked up an Issue Tree in order to bring it back to the next whole-group workshop. This was perhaps the hardest tool for some to use. We needed to spend longer than we did introducing the concept and letting people practice with a more simple version before trying to apply to an issue as complex as mental well-being.

Producing and discussing Issue Trees



Source: Pathfinder group

The Issue Trees were discussed and compared in turn at the second whole-group workshop. Despite the mixed feelings about this tool, it fuelled a productive discussion. Many of the seeds of the ideas that ended up as the 5 areas for action were sown in this extended and informal group discussion. The Issue Trees and system maps enabled the group to process and reflect in a fruitful and thoughtful way.

Something we would do differently when we run this method again is to spend formal time training the core team in the main tools, and have a 'core tools' day for the Pathfinder group before they start the project proper. This would have helped those who found the tools less easy to grasp and apply. The Issue Tree and Lines of Enquiry were the two tools that would most benefit from this pre-training.

What would success look like?

Having immersed ourselves in scoping the issue, thinking about key drivers and structuring the issue, we deliberately stood back from that and asked ourselves the questions:

- What are we trying to achieve with this project?
- What will the system be like in 18 months' time if we were successful?

The reason for doing this - is to keep reminding ourselves what the point is. It also is a good way to re-energise the group after some tough sessions trying to bring structure to the problem and our work. We used the 'take a panel' tool for this exercise.

Collaboration tool: 'Take a panel'

This is a great way to give people time to reflect individually – and then understand some of their colleagues' perspectives whilst drawing out common themes and areas of difference.

'Take a Panel' in action

1 Reflect by yourself on a few questions (scenarios eg. its 2025 we've fixed it, what does it look like? How did we get there; or more analytical eg why does this issue matter? What are the three key barriers to change. 10-20 mins

2 Share your thinking: 3 mins to talk through your board with the others nearby. 10-20 mins
Listen and analyse. Draw out the common themes; or areas of difference – capture them on proforma. 10-20 mins

3 Share and compare across the whole group (its hard to do much more with the outputs from each group)
Card generation in pinpoint is very productive after this point – the group work acts as great stimulus

Source: Peter Thomas

Everything needs to be written down on the panels, making analysis easy after the session. Too often you can have a good session and conversation but have lost all the detail and language of the conversation in a few scribbled lines on a flip chart. Templates fix this problem in a natural and easy way. They also allow people to think and reflect on their own. Again, too often workshops are designed for the 50% of people who like to talk and develop their ideas through interaction - but they are no use to those who like to think before they speak. Their ideas are often better, so give them time and space to think.

The other advantage of this method is it ensures everyone must take a position - it is very rare that someone refuses to fill up their panel - they look around and see others participating and do the same. It means that everyone in the room has a point of view, and position. It is a really good way to lead into group discussion where people share their answers and identify common themes and patterns. So, people are also listening to each other's point of view.

If after the 'take a panel' exercise and group discussion you then use the Pinpoint tool to generate ideas - they will be much richer and different from what people would have produced if you asked them for their ideas when they came into the room.

What we thought success would look like in 18 months' time:

Children and families at risk are identified early, resulting in better outcomes.

No wrong door - system working together. Clear pathway of care - triage-single point of entry.

And what we hoped people in the system would say in 18 months' time:

I felt like I had ownership, some means of control of the situation - I could see there being a positive ultimate outcome.

The drop-in clinic in school allowed me to have a quick chat with psychologist/guidance counsellor - it was user friendly.

Phase Two: Top Tips in getting a focus



Do

- Spend time up front coaching the team on using the trickier tools, starting with a simple example before tackling more complex issues
- Listen carefully to each other and look for common ground that connects the different perspectives within the team
- Make time for discussion and reflection – this is the value that comes from using the tools
- Accept that some people will find these tools hard, and it is fine to rely on other team members whose thinking styles mean they find this approach easier.
- Apply the discipline of answering the question: what would success look like. This vision is the common motivation of those you engage with throughout the project



Don't

- Short circuit the discussion of scope – it's your foundation
- Worry if you couldn't get the scope right at first – pause, discuss why it seems hard, and reconvene later to allow time for people to think
- Expect everyone to find this easy

Phase 3: Digging into the problem – Fieldwork Days 6, 7 and 8

This phase of the project required tough choices about what elements of our issue we most needed to investigate: our key Lines of Enquiry. We had to make that call on the basis of what we thought most likely to provide insights into the most significant problems and generate ideas about potential solutions. Following that, we had to work out the most productive but practical mix of further research and fieldwork that would shed light on those elements. With only three whole days for fieldwork we had to use it wisely.

The clarity of our project scope and the quality of the initial Issue Trees were the crucial foundation for this phase. But it is inevitably an uncomfortable moment. You are forced to prioritise on the basis of imperfect knowledge in a way that can feel arbitrary and rushed for some. Those who found the idea of Issue Trees harder to grasp, also found this phase hard.

Main activities

| Activities | Outputs | Tool |
|--|--|--|
| 1. Identifying key Lines of Enquiry and planning the fieldwork to examine them | Lines of Enquiry and plan of the fieldwork and research needed to examine them | Problem-solving tool 7: Lines of Enquiry |
| 2. Setting up and carrying out Interviews, focus groups, workshops, secondary analysis | Choice of interviews, field visits, interview and topic guides | Problem-solving tool: Productive fieldwork |
| 3. Setting up field visits – creating case studies | Evidence, examples, case studies, stories | Problem-solving tool: Productive fieldwork |
| 4. Analysing evidence | Refined hypotheses, emerging conclusions and solutions | Problem-solving tool: Productive fieldwork Collaboration tool: Pinpoint |

Source: Authors

Developing a focus and plan for our fieldwork and analysis

Too often fieldwork degenerates into a series of opportunistic visits, with lots of interesting conversation with whoever is available. After a whole series of such visits - the team get together and try to make sense of what they have heard. Such open visits can have some value in the earlier explorative phase of a review - but the whole point of the discipline of establishing a problem scope, and developing Issue Trees it to be very clear what we already have enough evidence and insight on to allow us to confirm or refute hypotheses from our Issue Tree, and instead focus on where we need additional information or validation.

The discipline of Lines of Enquiry - and approach of purposive sampling ensure that the limited resource we have available for research is used to greatest effect. You are talking to people, visiting projects and organisations with a specific purpose in mind. Of course, you still use open questions and remain open to finding different insights and new Lines of Enquiry.

Problem-solving tool: Lines of Enquiry and purposive sampling

The term *Lines of Enquiry* was confusing for some – it's a higher-level focus than specific questions we might frame for particular interviews. **The idea is to focus on the most important issues that you have identified in your exploration of the problem in scope**, often drawing heavily on the Logic Tree. Then you ask how far we already have data and evidence that can address Lines of Enquiry – and spot where we lack evidence or need greater insights. Then we can target our field work on the most valuable Lines of Enquiry that will focus and guide our further research and fieldwork.

Using Lines of Enquiry and sampling to focus research

Work through the hypotheses from your issue tree to plan your analysis

| | Issue | Hypothesis | Analysis | Source | Responsibility/ timing | End product |
|--------------------|--|---|---|--|--|---|
| Description | <ul style="list-style-type: none"> An issue is typically an important unresolved question, phrased so that it can be answered "yes" or "no" | <ul style="list-style-type: none"> The hypothesis is a statement of the likely resolution of the issue; it includes the reason for answering yes or no | <ul style="list-style-type: none"> The analysis defines the work necessary and sufficient to prove or disprove the hypothesis or resolve the issue | <ul style="list-style-type: none"> The source identifies the likely location or means of obtaining data to undertake analysis | <ul style="list-style-type: none"> Responsibility identifies the person who will obtain the data and undertake the analysis. Also the completion due date | <ul style="list-style-type: none"> The end products is a statement of the output from the analysis |

Use purposive sampling to get maximum insight from your fieldwork

For fieldwork a purposive sample can help to gain insights quickly

A purposive sample is deliberately designed to capture information on the subject area of interest

It assumes that by focusing on the 'extreme' deviants of the subject area, you can gain an understanding of more regular patterns of behaviour

Source: Implementation Unit - basecamp induction materials, Cabinet Office, 2016

This was where the value of the ground clearing phase became very clear, along with the different perspectives and experiences of the Pathfinder group members themselves. The

wider this exploration, and more diverse the perspectives on the whole system, the better the Lines of Enquiry are likely to be.

Different teams found creating key Lines of Enquiry easier than others. This tended to reflect the state of development of the Issue Tree – Issue Trees are sometimes a hard concept to turn into practice and it can take time before they make sense. Once the Tree has reached a reasonable point it is very helpful in enabling the team to identify key Lines of Enquiry.

We were also working under time pressure which made it harder. However, we made a strong progress in all teams with some very good Lines of Enquiry. We encouraged each team to borrow or draw on Lines of Enquiry generated across the group, and then return to their Issue Tree to narrow it down and make it tractable in the fieldwork.

Some felt uncomfortable that they were narrowing things down before they had a chance to explore things more thoroughly, but it's essential to remember the 80:20 rule at this point.

The priority at this point is:

- To pick a focus for your further research and fieldwork that clearly fits into the overall issue we are addressing;
- To test the fit/overlap with other groups – and make sure you know what each other are doing – duplication of issues is fine – as it will provide useful triangulation and additional examples, but we need to avoid approaching the same people or areas for interviews and fieldwork.

Generating the key Lines of Enquiry

Drawing on the ground clearing work, perspectives from the frontline, work mapping the system and customer journey - each team worked up the lines of enquiry to pursue the issues they found most interesting. We tested that these all fitted together with our issue tree, and that there was not too much overlap.



The team reflected that this was too many lines of enquiry and they needed to make some further choices.

Key lines of enquiry:

1. Structures and systems (integrated)
2. Triage/single point of entry
3. Streamlining and QA of programmes
4. Collaborative working
5. Self help-build capacity
6. Bottlenecks – understanding
7. Bottom up/feedback on experience
8. Client journey empowerment



Sources: Pathfinder group

The advantage of working in three different groups, was that they generated connected but distinctive Lines of Enquiry and by reviewing each other's Lines of Enquiry the group could reflect and acknowledge where there was some fieldwork or Lines of Enquiry that would

overlap and therefore where the teams needed to manage the planning of their field work carefully.

Problem-solving tool: Planning and carrying out productive fieldwork

Practicalities of time, diaries and availability are crucial in a time limited project – so once you make an initial call on where and with whom you need to see to explore your Lines of Enquiry, it is important to briskly get on and set up fieldwork sites and some key interviews, and focus groups. You can refine your questions and issues you want to raise in specific interviews and focus groups nearer the time.

Because the core team was embedded in the smaller working teams they were able to ensure there was no duplication of activity, and that joint field work could be planned where it could support Lines of Enquiry from more than one group.

You can do more than just interview people as part of fieldwork, for example:

- View the front-line/operations of the organisation/service
- Talk with service users/clients/people
- Do focus groups
- Talk to key delivery partners
- Get a tour of the geography, location, facilities, function
- Interview people who are not the usual “suspects”: including front-line, middle managers as well as the “senior” people
- Wander around, have a look, listen and observe

Getting the most out of fieldwork

It is essential to plan fieldwork with a purpose that will add value: you want to collect, test, and challenge the data and get the sorts of data and intelligence you can't get elsewhere. Policy may be national, but delivery is always local. Our three key messages to the teams to bear in mind were:

1. You want to know more about how services are delivered, what things look like and feel like for patients, young people, their families, their support networks, the people and organisations working with them.
2. You want a sense from them of what's working, what's not and why. You want to capture case studies, effective practice and interventions, great quotes, new and better ways of working, inspirational stories, key insights, unforeseen consequences and all the local flavour and texture “hard” data can't give you.
3. You want to know more about what helps makes real change and improvement happen locally, in a faster, more effective, efficient way.

Some simple disciplines and structures are crucial to the successful capture of evidence during field work:

- Do headline write-ups of visits for the record and share with other team members and your other teams when you get back to base.
- Make time to process and reflect on what you are seeing as you go – for example note down the top five things that strike you immediately after each interview; or schedule a one hour download each day.
- Keep interview notes for every session, type up as bullet points, they are more accessible and shareable.
- Agree a naming protocol for files you all understand and use.

- Capture key quotes, insights and illustrations in your notes.
- Always produce “product” from workshops - photographs save time and effort.
- Make sure your team is sharing the load on evidence capture across your visits and interviews.
- Make time to test against the key Lines of Enquiry and the Issue Tree.

The team needs to be careful to plan enough time to enable them to:

- Share, reflect and iterate across the team
- Share tips, techniques and learning with colleagues
- Work up their emerging story and key finding/reflections
- Assign the critical pieces of evidence that illustrate and support the story as they pull the story together
- Prepare what the team will share with/reflect back to your host before you leave site.

Developing case studies

Part of the fieldwork involved looking deeper at specific cases. This was done through a mix of desk research, field visits and interviews. These cases were picked as examples that appeared to be successful efforts to deal with some of the core issues and problems we had identified in our problem structure and Lines of Enquiry. The challenge in the development of case studies is to get under the skin of the alchemy of the successes they have had, as well as understanding the problems they faced and how they have been overcome. This helps avoid the danger of assuming that something which worked in one place will work in another place. Context, key individuals and other drivers are often a crucial factor that is hard to replicate.

Phase 3 – Top Tips for fieldwork



Do

- Have a strong sense of purpose and clear lines of enquiry to guide your choice of fieldwork sites, and what you do on them
- Respect the people and organisations you are meeting – listen and try to clarify and understand what they are saying,
- Be flexible with your lines of enquiry – they are a prompt, not blinkers. If something new or interesting comes up – follow it up
- Make time for simple working routines that ensure you are reflecting on your findings and adjusting your lines of enquiry as you go
- Record key points as you go in a form that is intelligible to other colleagues who were not on a visit, in an interview or workshop.
- Ask open questions – leave space for people to say what is on their mind



Don't

- Just talk to senior people - chat to frontline staff and customers or clients where appropriate, walk around the site and observe what is going on.
- Panic if the issue seems to be becoming more complicated rather than clearer
- Be judgmental or critical – you are trying to understand and clarify, not resolve
- Make it too formal – these are fact finding discussions not formal meetings.

Phase 4: Analysis and outline solutions

Days 9 and 10

This is a pivot point in the project. Over the previous four weeks the group had spent three or four days each in their smaller teams exploring their Lines of Enquiry. This outward looking and interactive phase is invariably a highlight of the project for most people.

But having worked in smaller teams creates a challenge of how best to come back together and look across what the three groups have done. How do we pick out the patterns, contradictions and insights that could inform our thinking about solutions? Will it make sense as a whole? Or have groups gone off in different directions that can't be pulled back together?

We had to move on from gathering evidence and insights to analysing, processing and challenging our findings – and then start to assemble the single story they need to tell.

Main Activities in Phase 4

Table 4: Bringing it all together: Activities and outputs

| Activities | Outputs | Tool |
|--|---|---|
| 1. Each group prepare a visual 'tradeshow' that summarises their fieldwork and the insights and conclusions that are emerging. | Whole group knows about the fieldwork each other have done | Collaboration tool: Tradeshow |
| 2. Explore, review and discuss the emerging findings of each group. | Group makes connections, identify patterns and contradictions | Collaboration Tool: Tradeshow Collaboration Tool: Pinpoint |
| 3. Start to create a single story of our findings. | Skeleton of the story of our findings | |
| 4. Produce a first cut of most promising areas for taking action that would have an impact on the problem we've identified. | Outline of potential areas for action | Collaboration Tool: Pinpoint |

Source: Authors

With everyone back together for the first time in four weeks it was important to:

- Allow time for initial reflection on how people feel about their progress;
- Help them reconnect with each other; and,
- Gauge their mood.

The second of our regular temperature tests showed how much people had got out of the fieldwork, and that they were feeling positive about getting clear enough on the key issues to start thinking about solutions.

There were three elements to this demanding six-hour workshop, but we had to be flexible about how long each would take. There was no certainty that the findings would come together in a way that made sense as a whole. There was a danger that some people would become detached or disengaged if they did not feel ownership of the overall picture.

Preparing a visual tradeshow

Each team had prepared a visual ‘tradeshow’ of what they did and what they found in advance of day nine. We toured each group in turn, taking three hours in total to hear from each small group about what they had done, what they had found - clarifying, discussing and adding ideas to their boards. This generated plenty of additional insights, reflections and connections between different groups work. It is important to let these discussions flow without imposing too much structure - and judging when there is enough value from the discussion and moving on is the key role of the facilitator. Part of this judgement comes from keeping a close eye on the energy and engagement of the whole group. Listening carefully and thinking can be surprisingly tiring.

Bringing it all together – a six-hour workshop

1 We spent 2 hours hearing and discussing each groups field work and findings.

2 After discussing the emerging findings we agreed how to unite them in a single story.

3 We then went back into our teams to reconstruct our key findings around the new story structure – and to test whether it worked.

Source: Internal Pathfinder evaluation report

Collaboration tool: Tradeshow

The idea of tradeshow is to get stimulus that stretches the thinking and perspectives of the work of the group. This is done by carefully selecting people with a valuable story to come and talk through their perspective, project, experience or point of view. Ideally you want

them to bring some visual materials, or examples and pictures of what they are talking about. However, in other cases, simply allowing people a safe space to tell their story is sufficiently compelling.

For large group events, you will often run as many as six to eight tradeshows in parallel, multiple times - with the audience able to go to three or four of the tradeshows. This is an energetic, efficient, physical way to introduce people to get stimulus that extends their thinking and ideas - and gives them some choice to pursue their own areas of interest. They will generally run from 20-30 minutes - with at least half the time for discussion and conversation.

By running multiple shows at one time you break what might be a large group into smaller, more personal and engaging conversations. You don't use PowerPoint, and aim to capture the key points of a conversation as you go by jotting them down on the boards.

Creating the skeleton of the unifying story about our findings

Next, we addressed the difficult task of trying to work out a framework or structure that could apply to our three sets of findings and unite them in a single story. This was again quite loosely facilitated once we had established clarity about the purpose of the discussion. After 20 minutes a productive plenary discussion we reframed our story into 'four buckets':

1. We have an army of people involved in this but no-one is directing it
2. We need to reach into homes, families and communities and we know how
3. We can make services smarter by managing them as a system
4. Schools can be a hub for the cultural transformation that is needed

This is a tricky moment in the project that cannot be rushed or over managed. Potentially, it could have taken us the rest of the workshop to try to come up with the right overarching story. If that is how long it took, we would have had no choice but to keep going until we had something good enough, that most of the group agreed did the job. The story evolved further as we worked over the following weeks – but this version was good enough for the group to be happy to move onto the next steps and feel clear about the whole story.

Then we returned to our smaller teams in order to re-shape our findings under the new four headings of our overall story. After about 30 minutes we shared progress in plenary and tested whether it worked well enough – and it did. The role of our smaller teams was clarified to now taking forward the development of the story in the 'bucket' that best fit what they had done so far, with the core team taking on a fourth bucket which straddled the others.

The speed at which we were able to re-shape our findings in the new story structure reflected the quality of the 'four buckets' that came out of the previous step.

Developing a first outline of areas for action that could address our findings

Having assembled a reasonable re-hanging of our overall story, the final challenge was to download our early ideas about the sorts of actions that would address our key findings and have the impact we sought on our 'key issue'. We used the 'Pinpoint' method to generate, process, cluster and prioritise ideas we had to give us an initial view on key areas for action that would address our findings.

Our first cut at the key areas for action

We prioritised three areas for action:

1. Being smarter and better
2. A family approach
3. Who is in charge of making the system work better

And we combined two clusters to create a 4th areas for action:

4. Prioritise inter agency working and delivery



Source: Internal Pathfinder evaluation

Lessons and Top Tips

The key discussion seeking to frame a single story that pulls our findings together can be difficult. How well it goes reflects the strength or otherwise of early foundations created in the project – both of content and way of working. This project was able to make that step quickly for four main reasons:

- *A common foundation.* Each team's Lines of Enquiry started life connected to the same 'problem statement' and each team was conscious of the high level problem structure.
- *Understanding each other's perspectives.* The previous task of sharing ideas and listening to each other's perspectives had provided stimulus for everyone, so their ideas were evolving.
- *Analytical capability.* It is no coincidence that the member of the team who had previous experience of using the 'structured story telling' tool allied with a very strong analytical brain was able to reflect on the discussion and propose a single story – which after a fairly short discussion we decided was good enough for us to move on and test.
- *Respect, trust and open-minded listening.* By now the group had a good level of mutual respect, and was good at listening to and responding to each other's perspectives. The structure proposed was not one person's opinion – instead it was their intelligent synthesis of the different ideas people in the group had put forward. People accepted it because it reflected their own ideas and those of the rest of the group.

Phase 4 - Top Tips for fieldwork



Do's

- Allow time for people to clarify and understand what each other have found.
- If there is a valuable discussion emerging around a point – stick with it – it will help people process the findings, and generate ideas for common themes and solutions.
- Be flexible about timing. You need to get to a good enough point to move on after each step. If you can't – stop, reflect on why you are stuck and reconvene on a later date.
- Try to have a mix of skills and capabilities in the team: strong analytical and logical thinking; good connectors with wide networks; facilitators and brokers; perspectives from different parts of the system different ways of seeing the world; open listeners interested in and respectful of others views.
- have one or two key people assigned to "stand back" from the content and think about what it is adding up to



Don'ts

- Don't worry if the pivot discussion trying to pick out the common threads and structure for the whole story is difficult. Take a break for coffee to allow people to re-group if you get stuck.
- Don't try to 'pre-cook' the structure and impose it on people. The whole group needs to understand and accept it. Instead emphasise the need for open listening and brokering of ideas.

Source: Authors

Phase 5: Developing the story and the areas for action Days 11, 12 and 13

Highly structured slide packs can be a powerful way of communicating stories based on reviews and findings. Slide packs should tell a very clear story and use compelling evidence and data visualisation to support the story. We used the tools behind these approaches to ensure the Pathfinder project would convey its findings and conclusions.

Main Activities

Table 4: Developing and testing the story and areas for action: Activities and outputs

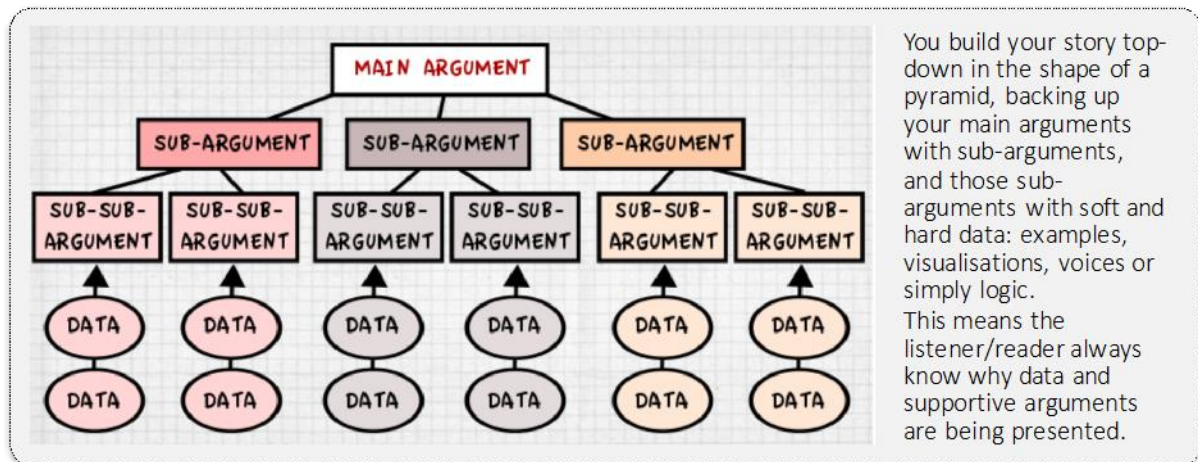
| Activities | Outputs | Tool |
|---|---|---|
| 1. Pulling the story and actions together | Draft 'story pack' | Problem-solving tool: Pyramid story telling Problem-solving tool: Report slide pack Problem-solving tool: Visualisation |
| 2. Testing the story and outline actions with senior stakeholders | Feedback on story and outline areas for action, what needs to be better explaining, or justified. | Collaboration tool: Temperature test Problem-solving tool: Report slide pack Collaboration tool: Templates |
| 3. Refining the story, more intensive work to develop the areas for action. | Revised 'story pack' more granular articulation of proposed areas for action | Collaboration tool: Digging into issues |
| 4. Planning how to land the report | Design for session with senior leaders | N/A |

Source: Authors

Problem-solving tool: Pyramid story telling

Most private sector and public sector applications of structured story telling draw their structure and logic from the same source, 'The pyramid principle: Logic in writing thinking and problem solving' by Barbara Minto.⁸ The structure of S-C-Q-A: Situation, Complication, Question and Answer helps you structure your argument and engage an audience's attention so that they are interested in your answers.⁹

The pyramid principle: Stacking up the story



Source: handbookofawesome.com accessed 11-2016

1. Situation – where are we now? “For a long time we have been...”

Start by telling your audience something they already know. This helps establish relevance. As soon as they are asking themselves “I know this – why are you telling me?” you have them hooked. You now have an opening for the Complication. Typical situations are “we have a task to perform”, “we have a problem” and “we took an action”.

2. Complication “Recently the situation has changed...”

What happened next? The Complication creates tension in the story you're telling. This triggers the Question you will ask. Typical complications: “something is stopping us performing the task”, “we know the solution to the problem”, “a solution to the problem has been suggested” and “the action we took didn't work”.

3. Question “So what should we do?”

The Question arises logically from the Complication and leads into the Answer. Typical questions: “what should we do?”, “how do we implement the solution?”, “is it the right solution?” and “why didn't the action work?”

4. Answer “We need to...”

The Answer to the Question is the substance of your main point. Summarise it first – complete your introduction – then break it down into details and write the main body of your presentations.

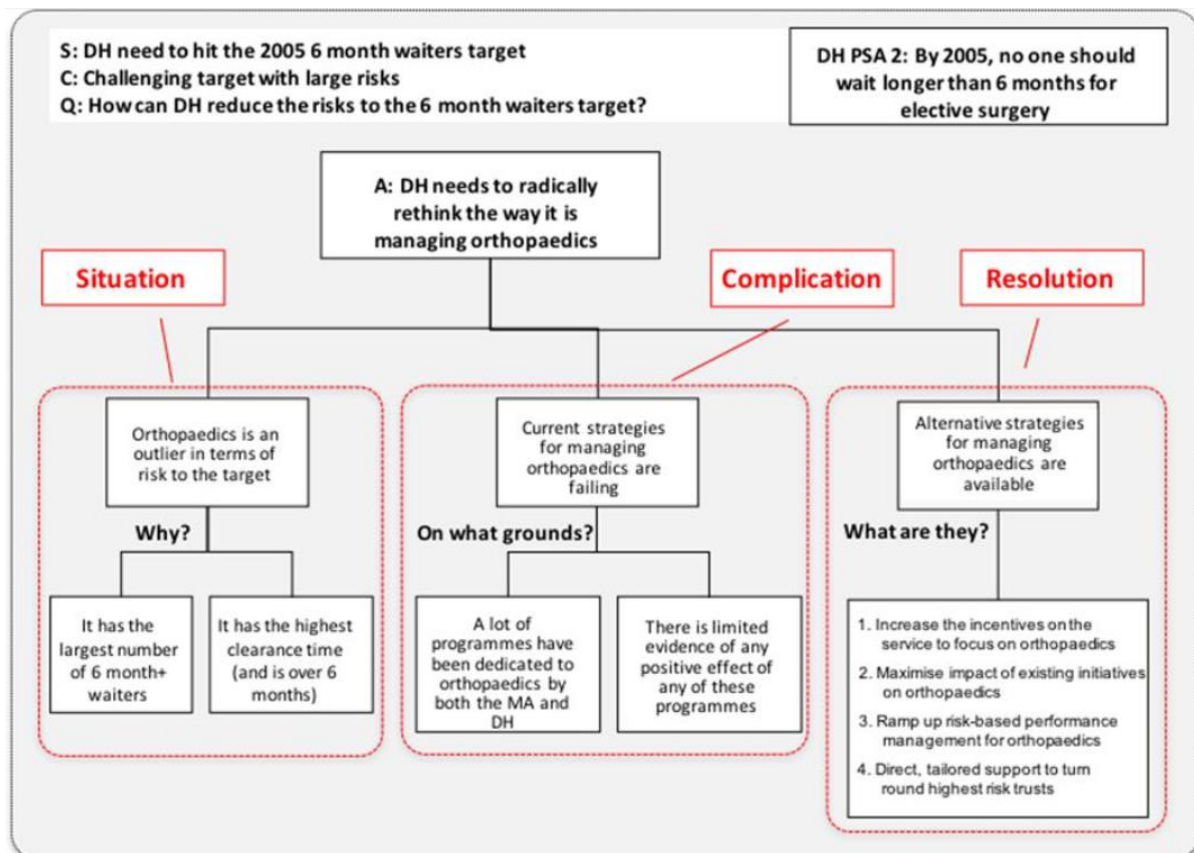
This structured approach tests and challenges the logic of the story very hard, as well as questioning the quality of the key evidence and analyses that underpin it. It is a very different discipline from the standard drafting and crafting of prose in civil services. The

⁸ Minto (2008)

⁹ handbookofawesome.com

example from a project PMDU supported in the Department of Health in Britain shows the different levels at which the situation, complication resolution applies in practice.

Structured story telling: Example from NHS waiting times project



Source: Adapted from internal PMDU documents

Applying this approach to the Pathfinder story was helped hugely by the fact that the core team had one member who had used this approach in the UK.

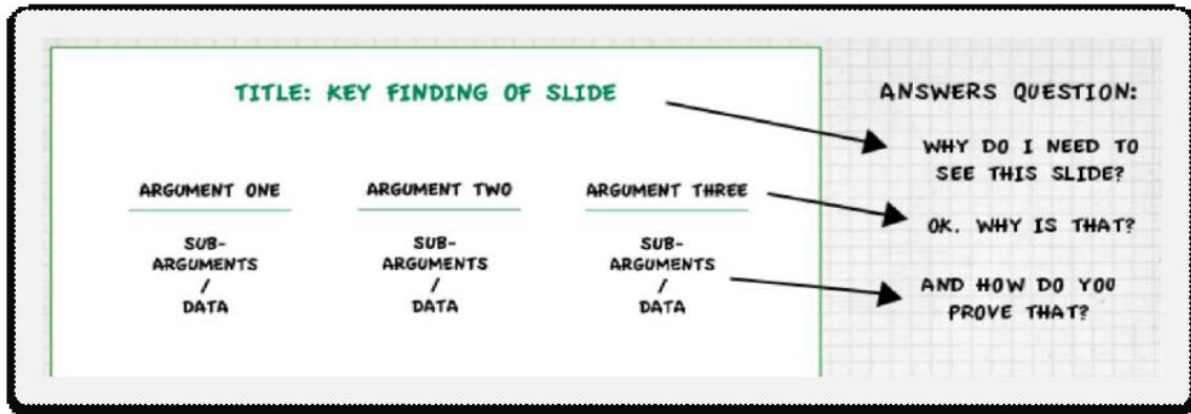
Problem-solving tool: Report slide pack

Telling this story through a slide pack, rather than the usual prose report, reinforces the discipline of clarity of flow of the story and the pyramid principle. This can easily get lost in a conventional report.

On the level of the entire presentation, you want to state your main message and key findings on the very first slides, and say that you will be justifying these throughout the show. Think about why people are listening to the presentation in the first place and what the vital pieces of information they need are. Present these first.

On the level of individual slides, you always put the most powerful argument as the title of the slide, and then justify it in the slide itself with sub-arguments and data.

Every slide has to do a job

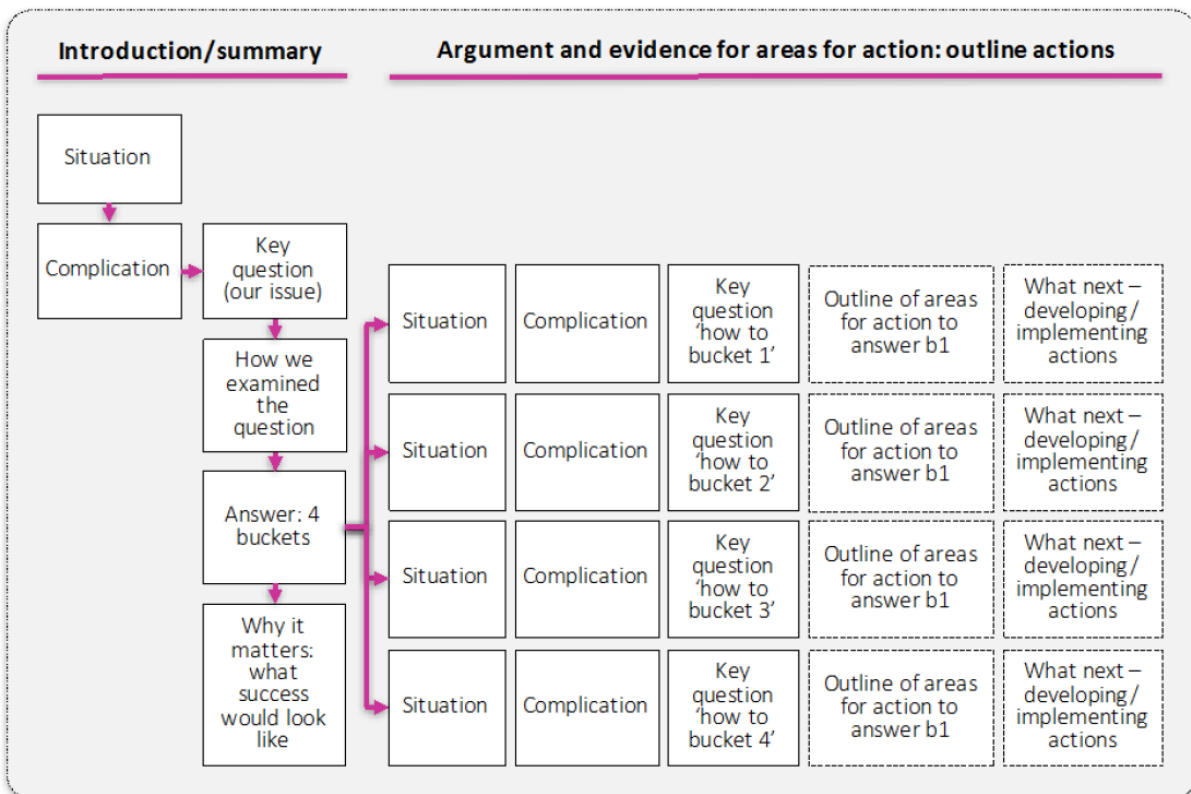


Source: handbookofawesome.com

Basically, the titles should be so insightful and self-contained that the audience could understand the key findings of your presentation just by reading the headings! A good way to approach this is to start out by writing only the titles of the slides, then seeing if they form a coherent and convincing storyline.

In each case, make sure you group your sub-arguments logically so that they relate to each other and actually back-up your main statements. Ideally, they will pre-empt the most obvious questions from you audience.

The structure we used for our report slide pack



Source: Pathfinder Group

This approach works well in prose. If you write down the key points from each slide you produce a summary of the entire report. This example is taken from a report summary by

the now defunct Audit Commission in London, which used the pyramid principle with great enthusiasm when producing its research reports.

Problem-solving tool: Visualisation and 'killer slides'

Using visuals, colour, quotes, key analyses and so called 'killer charts' are all part of the alchemy of producing an impactful, coherent and compelling story.

The discipline of pyramid story telling demands that they support the crucial turns in the story or bring to life the key point being made in that part of the story.

This feels more natural when done as part of a slide pack, rather than a civil service written report, which can tend to encourage authors to default to usual civil service drafting norms and lose the discipline of pyramid story telling.

The group used highly visual slides to convey the key messages

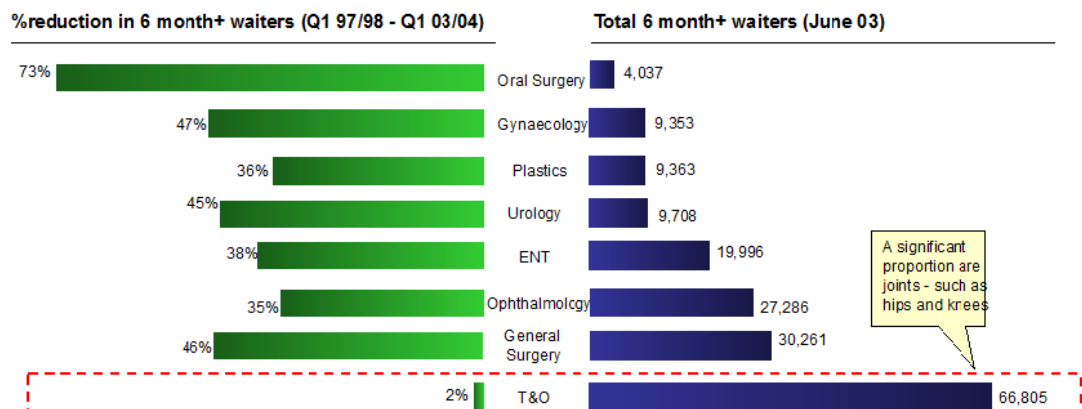


Source: Pathfinder group

The characteristics of a 'killer chart'

1. Appears at a crucial point in the storyline: Is the turning point in the story; Contains surprising information; Is the essence of the argument.
2. Passes the ten second test: Is clear enough for the reader to understand in ten seconds or less; Contains no unnecessary information.
3. Is memorable and talked about: Sticks in the mind; Referred to as "that chart"

6 MONTH+ WAITERS (TOTAL AND % REDUCTION SINCE 1997)



A significant proportion are joints - such as hips and knees

In contrast to other specialities, T&O has remained a significant problem despite the considerable efforts of several recent programmes covering over 70% of trusts

- 'Action on' Orthopaedics - 67 trusts
- Better Care Without Delay - 43 high risk trusts
- Orthopaedic collaboratives - 20 teams, 100+ trusts so far

"Impact on inpatient / daycase waits has been limited to date"
Mod Agency, Nov 03

Planning, preparing and delivering a 'pitch'

However good the story pack, it can all be lost in the failure to make the best use of the time you have with your audience. Some key points from the guidance for the group on preparing their 'pitch' and making the most of the session with stakeholders included:

1. **Run to time.** It is always better to finish early. It is important to structure around the time you have and your core coverage. Rehearse to test content and timing.
2. **Sort out a strong opening** and think how you get and keep attention
3. **Evidence, illustrate, support.** Support your argument with the killer stat, the key quote, the telling insight...
4. **Closing.** Know what you're going to say. Don't just fade away...
5. **Choreography.** Think hard about your audience. Who presents? Room set up and acoustics? Prepare for, manage and use questions.

Finalising and testing our story pack with stakeholders

The Pathfinder group now only had a few days to work up a substantive 'story pack' that they would present to a panel of senior stakeholders to get feedback, and a reality check on findings and emerging solutions.

Each small team was allocated part of the story, and the area for action that most resonated with their work so far. The core team played a crucial role in preparing, editing, challenging and quality checking the emerging material, but even so when we reached the morning of the day on which they were to present the story to the stakeholder the team was under pressure to knit the different parts together.

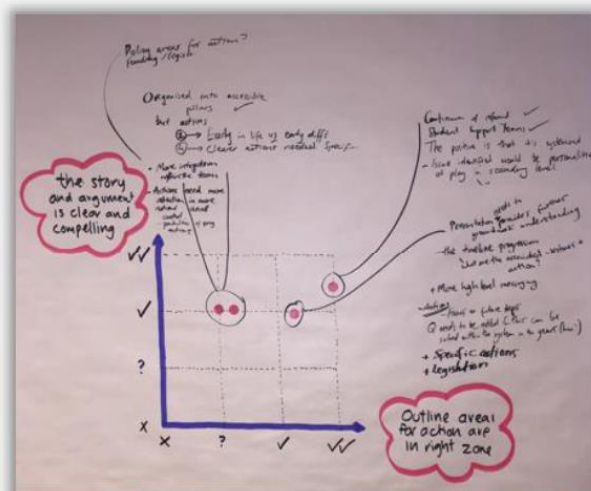
The four hours before we were due to present to stakeholders was spent finalising and preparing to present the story. This was a high-pressured session with many group members feeling they did not have enough time to work through the material and polish the slides we were using to tell the story, but they got everything prepared in the end.

Testing our story pack with senior stakeholders

- ① The team presented the pack to a challenge panel drawn from across the system.



- ② Next, we used a temperature test to get overall reactions from the panel.



One of the tools we used in this session was to give each panel member a simple form - a template - and asked them to log their thoughts as they listened, and asked them to rate each element of the story as we paused at the end of the story. This ensures they are encouraged to listen with a purpose, and articulate their reactions and provide some explanation on why they thought what they did. It makes them take a position, and help us understand that position. By writing it down as they listen they are less likely to be overly influenced by other panel members.

Collaboration tool: Templates

We developed templates based on the different tools, and used them in group work. Templates work really well as they give people some time to reflect and think on their own. Everyone has a point of view or a position to take into the next stage of discussing or sharing their thoughts. The huge benefit of templates in a problem-solving project is that they create a record, so you can do further research and analysis, and be sure you captured each person's own words and position. You can include ratings, rationales for ratings - or use the frameworks you might also use in the 'digging into an issue tool' to get people to reflect on an issue, problem or solution using a particular framework or perspectives. It is important to remember to collect up everyone's completed templates before they leave the room.

Reflecting on the stakeholder session and discussing how to respond to the feedback

By now we had a firmly established routine of making time to reflect, allowing people to take stock of what went well, what didn't go so well, what we heard, and what we should do with what we heard.

The group felt encouraged whilst remaining self-critical about what they thought could be done better in the future. They were to apply these reflections when they planned the final report back to decision makers four weeks later.

Then we mapped out the steps that needed to be taken between now and the next whole-group session. One important task was for the core team to check back through earlier work including ground clearing and fieldwork to check that we have carried the critical stuff and our best evidence and examples into the slide packs – have we got the vital 3-5 things covered in each part of the story.

Phase 5 - Top Tips for developing the story



Do

- Think about how you will communicate the story as well as finalising what the story is
- Be creative with new formats and approaches
- Be open and transparent it is critical to create opportunities to test and challenge thinking through "critical friends" at a couple of key points
- Take time to get the "look and feel" right - remember style supports substance
- Pre-brief critical friends make sure they understand that robust challenge and feedback is more helpful and important than politeness or tiptoeing around difficult issues
- Use PowerPoint to make the story visual in report and presentation format
- Get started and give it a go - it will take iteration to develop a strong, structured, logical story



Don't

- Rely on usual suspects - critical friends should bring diverse, fresh perspectives
- Rely on internal review - external voices important to eliminate group think
- Be nervous about sharing ideas before policy or recs "fully worked through" or signed off - purpose is to prep for and test the thinking before sign off stage
- Apologise if story imperfect or work draft
- Start with a draft and condense, instead start with the straplines and build the story up

Phase 6: Final reporting and planning implementation

Day 14 and 15

The core team continued to edit and revise the story pack pulling together additional comments and content from the whole group. The group had identified six to seven ‘areas for action’ which were in essence the main recommendations emerging from the groups work. Three open sessions were run for anyone who was available to thrash through each of the areas for action – duplication and overlap in the story was dealt with, and the clarity of argument from conclusion to areas for actions was improved.

Main Activities

Table 6: Final reporting to decision makers: Activities and outputs

| Activities | Outputs | Tool |
|---|--------------------------------------|--|
| 1. Final test of the story | Agreement that it is fit for purpose | Collaboration tool: Temperature test |
| 2. Iterate areas for action | Stronger, clearer areas for actions | Collaboration tool: Rating and voting Collaboration tool: Digging into issues |
| 3. Plan how to engage senior leaders | Session plan | Collaboration tool: Tradeshows |
| 4. Present final report to senior leaders | Agreement to act on findings | Collaboration tool: Tradeshows |

Source: Authors

Finalising the story and improving the areas for action

When we reassembled as a whole group, we started off by running through the latest version of the full slide pack. We then paused to take the temperature of the group to see how they felt about progress and the further work needed before being ready to present to the six Secretaries General a week later.

The group then prioritised which areas for action they thought we should spend the rest of the day working on. We used a very simple rating tool to ensure that the group was working on what they thought mattered most, and was clear why they had chosen those areas to work on. This approach ensured continued ownership and engagement of the group.

Collaboration tool: Rating and voting

There are a wide range of tools to help groups filter, then prioritise or evaluate. We only used a very simple variant of these tools in the Pathfinder, but such tools are always a very good way to flush out the different criteria that are in people’s minds. You get them to vote or rate a number of ideas or issues and then explore why they voted how they did, in a short plenary discussion afterwards. That final discussion is often so valuable it is worth running for as long as 30-40 minutes. Other times 5-10 minutes is plenty before moving on. Making these judgments in real-time is the real value of the facilitator’s role. If you are not sure you can throw the question back to the group *'have we got enough from this discussion or should we keep going/move on?'*.

You can take a slightly different - and more thorough approach - start off by getting people to generate ideas about criteria for rating options, then get them to rate which criteria are most important. Finally, you get them to apply those criteria to rate a number of options, actions or solutions they may have identified, then discuss why they rated them how they did.

Collaboration tool: Rating and voting

Rating options using a difficulty scale

| Option | Minister friendliness | How well set | Importance |
|--|-----------------------|--------------|------------|
| 1. Reduce legal aid | 11 | 9 | 2 |
| 2. Insure legal aid | — | 6 | 1 |
| 3. Focus on core courts | 6 | 3 | — |
| 4. HMCS / TS merger | 8 | — | — |
| 5. Courts demand mgmt | 2 | 8 | — |
| 6. Reduce prison pop/pt | — | 20 | — |
| 7. Reduce spend on public protection | — | — | 8 |
| 8. Focus on core probation | 1 | 6 | 2 |
| 9. NMHS workforce reduction | 6 | 4 | 1 |
| 10. Judicial pensions reform | 4 | 6 | 2 |
| 11. Expand prison competition | 4 | 8 | — |
| 12. Abolish Y7B | 10 | 4 | — |
| 13. Alternative court & family tribunals | — | 2 | — |
| 14. Reduce HM size 20-502 | 30 | — | — |
| 15. Prioritise policy portfolio | 16 | — | — |

Voting on importance, and then on 'how well set' and explore rationale for scores

Rating options on 'minister friendliness' then testing rationale and implications

Source: Peter Thomas

We spent most of the rest of day working on actions. Initially in smaller groups to improve the action; then in plenary we reviewed each action. This took more than an hour for each area for action.

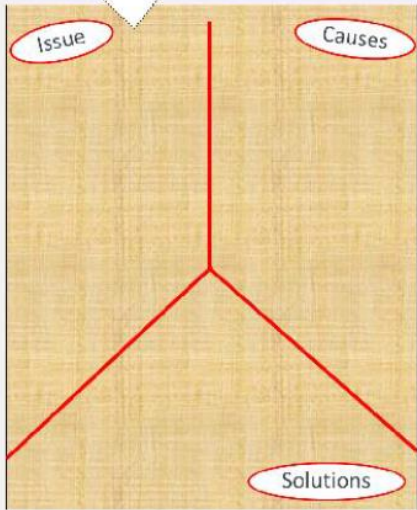
Collaboration tool: Digging deeper into issues

This collaboration tool is nothing more complicated than a clear framework or perspectives from which to test our understanding around an issue or proposed area for action. The real value of this tool is making time to iterate, question and develop our collective understanding of a problem, an issue or a proposal. There are a large number of potential templates and frameworks that can be used to structure this work. The template used by the Pathfinder team is presented below.

Collaboration tool: Digging into issues

You want to deepen your view on the issues - and shift to thinking about actions and options'

There are lots of different templates for group work on issues, options, actions, solutions. This is taken from a 2 day event on reducing reoffending



| 5. Community Justice | |
|---|--|
| <p>Description</p> <ul style="list-style-type: none"> -Credible community sentences -Problem solving -Overarching multi-agency care plan with key care worker -Community impact statements -Community payback <p>Benefits</p> <ul style="list-style-type: none"> -Take public with us, localised -Root cause of low level offending -Meets clients' needs | <p>Critical Success Factors</p> <ul style="list-style-type: none"> -Increased confidence CJS – those outside and in -Joint targets, shared service provision owned by agency -Funding alignment <p>Questions & Concerns</p> <p>Duplication: we already have/had it to some extent (178 reviews) but this is broader out + coordinated/governed across services</p> <p>This wouldn't take much (funding/ structural change) to make it happen</p> <p>This is about integration of services</p> |

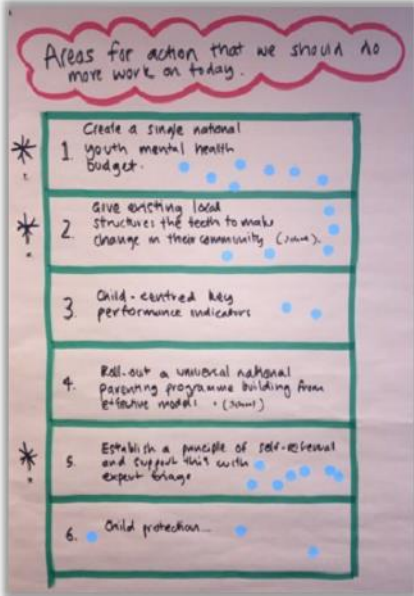

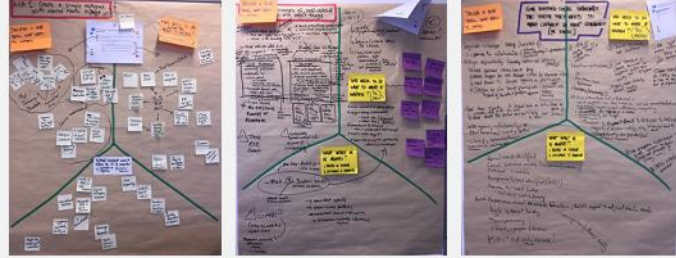


Source: Authors

Further work to refine the areas for action that need further development

① We prioritised the three areas for action we most needed to work more on.

② In smaller groups we revised and iterated the areas for action:

③ In plenary we reviewed and discussed the revised areas for

Source: Pathfinder group

At the end of the day we spent 30 minutes planning how to run the session with the Secretaries General in a week's time, who would do further work to revise the pack – mainly the areas for action we had been working on. We agreed it was essential to pre-circulate the story pack to allow the Secretaries General time to read beforehand. This left just two working days to finish and proof the pack. The core team took responsibility for this final push.

Presenting our final findings to senior leaders

There is a well-established style and format for presenting proposals to senior leaders in most civil services. That format tends to be static, passive, unengaging and too often, unproductive. Our group agreed that we should have the courage to run these sessions as we have run the rest of the project – active, innovative and engaging. Resolving to make senior leaders stand up, move around the room, vote with sticky dots, and sit on chairs in a semi-circle for discussions without a table felt risky and unusual.

The team started by presenting the Pathfinder process, analysis and findings – five members of the team did this with tremendous discipline (they had practiced and timed themselves). This was made much easier by the fact that all senior leaders had received the report three days before the meeting, and all had read it.

We then ran two tradeshows in parallel (where two team members talked through the key elements of the area for action in 6 or 7 minutes, and then discussed, answered questions and engaged with two of the senior leaders). We did this to allow a more intimate discussion and to avoid the reactions of one senior leader colouring the reaction of all of them. This was done standing up – with notes captured on the tradeshow boards as we went emphasising to the senior leaders that their thoughts and reaction were being heard and taken seriously. The two tradeshows then flipped to do the same thing again with the other two senior leaders. Keeping everybody standing up makes it more like a conversation and less like a passive presentation.

We used a similar approach - but in plenary – for the final two areas for action.

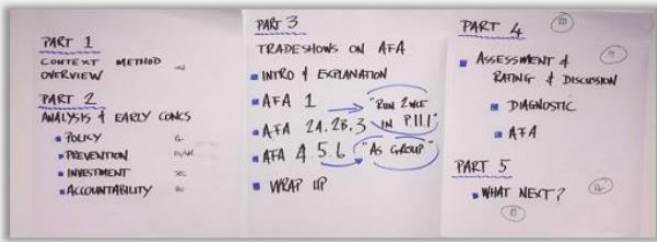
Finally, we asked each senior leader to rate:

- The overall story on a scale of 1 to 4, where 4 was ‘spot on’.
- Rate each area for action as to whether it was:
 - In the right direction
 - Had the potential to make a difference to the key issues
 - Worth investing more effort in to develop further.


We then explored why they rated the actions how they did – to make sure we understand why they liked what they did, and what their reservations were on some of the actions.

Engaging senior leaders in our findings


We had developed the plan on whole group day 5.




① The team presented the pathfinder process, analysis and conclusions in plenary in an impressive 20 minutes.



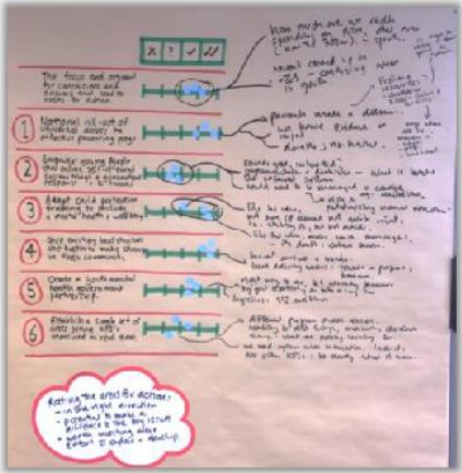
② Then they ran two tradeshow in parallel on areas for action 1 and 2.



③ And a plenary tradeshow on areas for action 3-6.



④ Finally we got each sec gen to rate the overall story and each of the areas for action. We explored the rationale for their ratings.



Source: Pathfinder group

The use of the ratings device proved an effective way of flushing out their thoughts on what we had shared with them. Once the senior leaders had left, the group reflected on what had went well, and needed to happen next.

The Pathfinder group had now reached the end of the programmed project, but they were clear that more work was needed and were concerned about what would ensure that the project didn't fizzle out.

Making time to reflect on the Pathfinder process

Following the trade show in the morning, the rest of the whole-group day was dedicated to ensuring we reflected on the experience of the Pathfinder project whilst we were still together. Using a variety of tools, we worked individually, in small groups and in plenary to:

1. Reflect on where we have got to and what's next.

2. Reflect on the process, different phases, ways of working, tools etc., so that we are capturing our learning and reflections on this way of working to inform our additional report/conclusion on the 'Pathfinder' methodology.
3. Personal reflections on what we have got from the experience so far, what will take away, how has it added to our perspectives, how might our own personal practice change as a result?
4. Would we like more practical skills type development or other support/resources on any of the tools/frameworks we skipped through?

The outputs of that session and other review work are presented in the 15 Days Guide. The amount of reflection we generated in that short two-hour session demonstrates the productivity of these tools, and how well they capture the groups work without having to find someone to take and write up extensive notes.

The commitment of the group to making sure the work continued was clear. They thought they were at the end of the project, but it turned out that they weren't.

Wrapping up and supporting a successful transition to implementation

The momentum created by the project was kept up by the demand at senior level in the civil service. Even though we were now out of time on the project the group welcomed all opportunities to do more work and more engagement on the areas for action. This had been one of their key concerns after their last presentation to the Secretaries General. We used a variety of approaches that built on the tools, and set up an intensive two-day action lab to test actions with a range of stakeholders. These activities built up significant interest in the project.

The recommendations from the report were presented to the Minister for Mental Health and the Youth Mental Health Taskforce. Engagement and feedback was very positive.

Moving to implementation

What happens next to implement the core actions is vital to prove the benefits of this approach. The team produced some **principles that they thought must shape a successful transition from the project to implementation:**

- Critical to maintain pace and momentum during transition
- Sustaining senior sponsorship and involvement
- Finding creative ways to keep some cross-over with original core team
- Resourcing transition and implementation with right people – paying attention to skills, experience, and aptitude to collaborate...
- Not losing the 'culture' and 'method' that defined the approach.

Phase 6 - Top Tips for reporting



Do

- Insist team lead session and speak/showcase output and logic/rationale for themselves
- Give senior sponsors enough time to engage with substance in advance (3 days minimum) - do this even if final report not perfect
- Engage senior sponsors regularly – not just informal, irregular meetings (e.g. Pathfinder built in 3 key milestones to check in with sponsors)
- Pre-brief senior sponsors ahead of each engagement so that they understand where the group is at, what they are nervous about and what they need from them
- Create a format that allows both individual and collective reflection from senior sponsors - dividing them into smaller groups at key points particularly effective



Don't

- Fill the room with line managers or senior bods who have just come to listen – the session should be focused on team directly accounting for their work to key decision makers
- Insist on instant decision making - gather feedback, perspectives and direction but allow space for ideas to percolate after the session (i.e. Be careful not close down routes too quickly and balance this against meaningful direction)
- Rely on best or most senior presenters - ensure shared ownership of session and story telling where everyone plays a part
- Squeeze your time if you can avoid it - 90 mins to 2 hrs ideal for a collaborative review session

Source: Authors

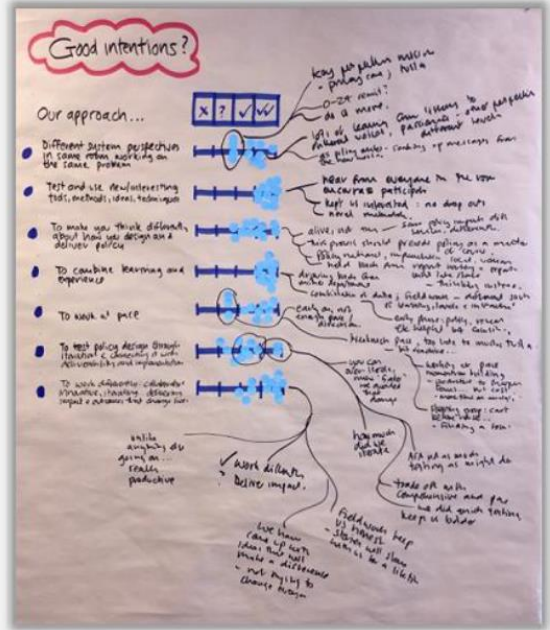
Conclusions about the process and using the tools

Throughout the project we made time to reflect on progress: to discuss what was working and what wasn't. At the end of day 13 we used some of the by now familiar tools to help us evaluate the project from a number of different angles. The sheer productivity of these tools, and the impressively high engagement of the group meant we were able to do all of this in about two hours.

From the first three activities some strong patterns emerged about the factors that were critical to the success of the project. There were also some clear messages about what should be done differently or better next time.

Did we put our guiding principles for our way of working into practice?

Our ratings were largely positive. Key points from our discussion:



- The way of working especially collaboration tools ensured everyone in the room was involved, we had no drop outs, it kept us all interested.
- We held back from starting writing a report too early - which gave us time to think instead.
- The mix of learning and experience allowed us to draw back from our mother departments and see things from different perspectives
- We reflected that we were short of some key perspectives – that would ideally have been represented with our group – for example, TUSLA and primary care. We wondered whether we would have focused on the younger group we did if we had had the wider perspectives.
- Working at pace was a double edged sword, it was key to us focusing, prioritising and getting to a conclusion, but at some points it just felt too rushed.
- We have iterated our conclusions and findings – but we have not yet really tested back our areas for action with the frontline and other stakeholders. But we can still do that. And perhaps in the ground clearing phase we could have worked faster to create more time later?

Source: Pathfinder Group

We used this ratings exercise for two reasons:

- It would help people reflect back to how we tried to approach the project, so that they had it in mind as they reflected on the success factors in the next exercise.
- To validate those way of working principles for the next time we use them.

Next, with a tweak to the basic pinpoint idea generation method, we generated ideas on the key factors that drove success, and on what could be done better.

Critical factors in the success of the project

These are outlined in more detail in the 15 Days Guide. The six most positive factors were:

- Mandate from seniors¹⁰
- Openness to team think
- Fieldwork
- Whole-group days
- Internal support (core team)
- External support

There were five success factors which received more mixed views about whether we had them sufficiently in place for this project:

1. Clarity of expectations

Whilst very positive about the shared vision, and clarity of process and expected outcomes, the issue of time and expectations of making rapid response when under pressure in their day jobs surfaced again.

2. Pace

Most of these comments echo the points on time that are covered in expectations above. There were some specific well-founded observations on points in the process that needed more time, for example: preparing the final presentation; a few days more to do some of the key analytical steps; more time to focus and set up fieldwork; and that a block of four or five days at the beginning and end would be more realistic alongside the standard one day a week.

3. Group composition

Whilst comments were positive about the mix, energy and commitment of group members, and especially the inclusion of members with frontline experience, the group questioned whether the project might have been stronger and even taken a different path if there had been a more deliberate mix of skills and stronger input from some parts of the system:

4. Issue Tree/problem structuring

- *Hadn't worked this way before – it forced us to focus on important things without long winding explanations – can see the scope at a glance.*
- *Needed a bit more time on this but it helped with analysis.*

These comments reveal that this is a tough tool to grasp, but once you do it is invaluable. We needed to create more time to introduce this tool – both to the core team and the whole group. Teaching them to use it on a simple example would have helped them see the value before applying it to a very tough topic.

5. Small group working

- *Helpful but difficult given competing priorities. Found this challenging – small group and one person did not contribute. Sometimes dominated by professional agendas.*
- *Communication issues and productivity – promises didn't always materialise. Good idea but have a sense some teams worked better than others.*

These comments emphasise the importance of helping teams to function as well as they are able. In small teams of three or four, different personalities will find it harder to gel. The core team members were crucial in helping them work as well as they did. We should have

¹⁰ All comments in italics are verbatim quotes from the group's feedback.

done a little more to help people get to know each other beyond the usual work roles, so that there was a stronger base of empathy, understanding and respect that would help them to handle any tricky moments in the team. By the end of the project this was achieved - all the teams worked well, and no-one was left behind or disengaged. Every single member of the team played in a key role in one or more engagements with Secretaries General.

Personal development and learning

The nervous but positive energy that the group felt at the end of the first workshop turned into excitement, pride, hope and enrichment by the end of the process.

We captured this at key points simply by asking each group member to write down three words that capture how they feel (about the day, about the project etc.) on post-its. You then turn these into **word clouds** – where the frequency of the words is reflected by the size of that word in the word cloud. People are often surprised to be asked how they feel, but it gets them to take a different perspective, and reflecting on the words they have written down can lead to a different conversation about where the group is, and what we need to do differently. This takes about five minutes and is a great way to help capture people's mood - and see how it changes through the project.

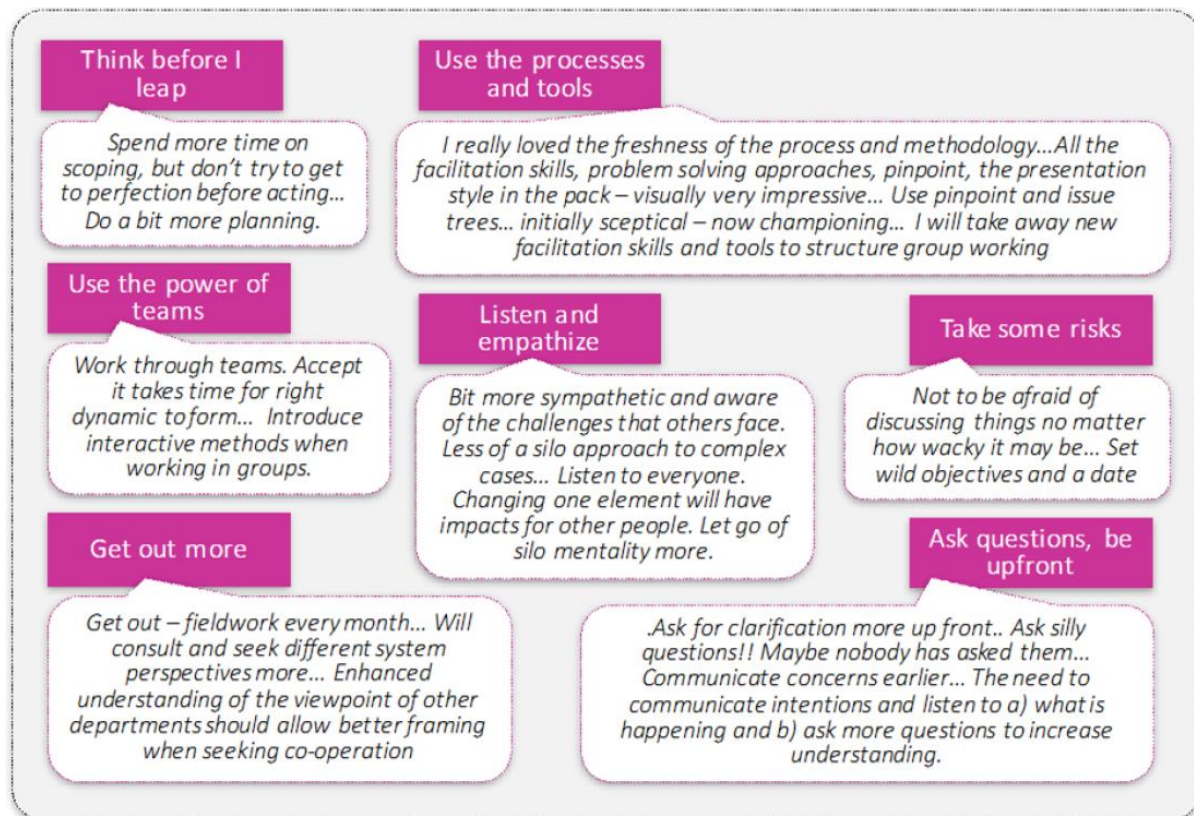
Using the 'take a panel' tool we asked the group to address two sets of questions:

1. What have you got from the experience so far? What will you take away? How has it added to your perspectives and the way you see the system?
2. What will you do differently as a result? How might your own personal practice change as a result?

What will group members do differently? How will their personal practice change?

The reflections of the team members below are a tribute to the power of learning by doing. They are the principles of accelerated, collaborative problem solving.

What will group members do differently?



Source: Pathfinder group

Final thoughts

The Pathfinder began with two objectives - to make progress on the urgent policy challenges in improving youth mental health outcomes in Ireland; and, to produce a new template for how to engage and work productively across a complex network of actors operating in a complex, inter-dependent system.

Although it remains too early to judge the impact on outcomes for young people, the quality of the report and recommendations, allied with the positive support it has received across the leadership of the Civil Service and the appetite to keep going, provides strong assurance that the product of just 15 days working together might lay the foundation for positive and lasting change.

However, what we can tell now is that the story of the Youth Mental Health Pathfinder shows the value of closely designing and supporting collaborative processes within Government. It also highlights the time and attention that is required to planning 'how we work' as well as 'what we work on'. A part of project management that can often be rushed or under-valued.

There can be a tendency to skip-over 'process' when we evaluate the impact of a particular project focusing only on objectives and outcomes. However, oftentimes the secret to success and replicability lies in the process – how good it was and why, what were the critical ingredients.

Real team work requires great skill and attention. Achieving this within traditional reporting lines and organisational structures is challenging. Achieving it across boundaries is rare.

While we hope that in the final telling, the story of this Pathfinder will show the difference that working in better, more productive and collaborative ways within the Civil Service can

make to critical public policy issues – in this case to the wellbeing and health of young people in Ireland we are confident that, at least in the first telling, the story of the Pathfinder shows the promise of a new template and a new way of working through groups that has the potential to truly maximise the sum of its parts.

This report is intended to support those who hope to learn, apply and replicate a process which the authors are satisfied at this juncture, can be labelled a success.

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Links and resources on the tools, methods used in the Pathfinder and other interesting resources:

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Collaboration tools

For explanation, resources and training on the pinpoint method, see: <http://www.pinpoint-facilitation.com>

NESTA in London has produced a brilliant, free-to-download DIY toolkit that draws on the research of hundreds of design, innovation and group tools – explaining them and giving examples of how and why they were used. <http://diytoolkit.org/media/DIY-Toolkit-Full-Download-A4-Size.pdf>

The Wheel in Ireland has developed an online Collaboration Hub which is targeted at community and voluntary organisations but is applicable to any organisation interested in collaboration. The hub includes a step-by-step guide to collaboration, resources on how to collaborate to support innovation and other useful online tools. <http://www.wheel.ie/collaboration>

The campaigning group Seeds for Change has a great, open-access set of easy-to-understand tools for group working. <https://seedsforchange.org.uk/resources>

The Facilitator Tool Kit from the University of Wisconsin–Madison is a comprehensive, easy-to-use guide to tools, methods and techniques for assisting groups with planning and improvement projects and interactive meetings. <https://oqi.wisc.edu/resource/library/uploads/resources/Facilitator%20Tool%20Kit.pdf>

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