Facilitator Guide & Supplemental Resources

Coordinating to Improve Family Experiences Toolkit: Resources for State and Local Human Services Agencies

This guide is designed to support facilitators' use of the **Coordinating to Improve Family Experiences Toolkit: Resources for State and Local Human Services Agencies**. Guidance provided in this document includes:

- **Resources, examples, and worksheets** to help complete Toolkit activities
- **Support in facilitating conversations** about Toolkit elements with program sites
- **Sample messaging** to help frame topics when working with sites
- Recommendations for helping sites **navigate conflicting ideas and perspectives** when working through activities

Activities do not need to be completed in the exact way outlined in the Toolkit or this guide. This guide is solely intended to provide suggestions, examples, and support to facilitators. Feel free to adapt resources to fit your style and the needs and goals of your site. *The worksheets provided are intended to be used within the group setting and to facilitate discussions amongst team members.*

Navigating this Guide

This guide builds on **Coordinating to Improve Family Experiences Toolkit: Resources for State and Local Human Services Agencies** and provides supplemental information for facilitators, but it is not a standalone document. For each resource, we will note which part of the Toolkit it corresponds to (i.e., which module) so that you can reference that section for further information. The content of this guide is as follows:

The chart below also crosswalks the tools and resources in this guide with which modules they relate to in the Toolkit:

Resource	Module 1	Module 2	Module 3	Module 4	Module 5
Worksheet 1: Family Experience Reflection	♦				
Worksheet 2: Defining a Shared Vision	♦				
Worksheet 3: Journey Mapping	♦				
Journey Mapping Facilitation Guide (**Appendix A**)	♦				
Service Blueprint Facilitation Guide (**Appendix B**)	♦				
Worksheet 4: Five Whys	♦				
Worksheet 5: Program Action Map		♦			
Worksheet 6: Choose and Prioritize Strategies		♦	♦		
Worksheet 7: Strategy Implementation Roadmap			♦	♦	
Worksheet 8: Metric Development Planning					♦

Setting the Stage

The Role of the Facilitator

Facilitators are **process specialists** who:

- Design and guide group interactions
- Enable full participation and connection
- Foster shared understanding and ownership
- Remain neutral, timely, adaptive, and observant

They help groups **think, decide, and act together**—versus telling them what to do and how to do it. To the extent possible, facilitators need to remain neutral parties who help the group make decisions that are best for them and their programs. Facilitators build trust by creating a safe, respectful, and inclusive environment where participants feel heard, valued, and empowered.

Trust doesn't happen overnight—it's cultivated through intentional behaviors before, during, and after group gatherings. To build trust, a facilitator should:

- Set a safe, inclusive tone early with clear goals, norms, and welcoming activities.
- Listen actively and respectfully, ensuring all voices are heard.
- Remain neutral and fair, applying processes consistently.
- Follow through on commitments and agenda items.
- Model authenticity and vulnerability to encourage openness.
- Address conflict and power dynamics constructively and equitably.
- Build relationships over time through empathy and responsiveness.

The following resources provide more information on the roles of a facilitator:

- The 8 Roles of a Facilitator
- What is a facilitator and what do they do?
- Facilitation Skills (multiple modules)

Navigating Conflicting Perspectives

As a facilitator, an important first step when working with a site is to set the stage for what to do when conflict or disagreement inevitably comes up. Even the most seemingly aligned teams have different perspectives, which is an important part of the work and one that you should lean into instead of avoiding. Here's one way to talk about conflict:

Here are some helpful resources to use to help navigate conflict:

- Understanding and Managing Workplace Conflict: Categories and Resolutions
- 10 ways to handle disagreements effectively
- How to Cope with Team Disagreements

Co-Creating a Vision and Goals for Whole-Family Experiences (Module 1)

Most programs have some kind of vision. But often, it's not co-created across teams or organizations—or it doesn't speak to what families actually experience. **Our goal here isn't just to update a statement**. It's to pause, look at things from the family perspective, and ask: What kind of experience do we want families to have when they engage with our services—across programs?

Even if the site you are working with already has a vision, this is a chance to revisit it together. If they feel confident that their vision is strong and aligned with their coordination approach, you can still suggest that they walk through the tools and questions in the worksheet below to test and refine it.

Step A: Understanding Family Experiences and Goals

Start with **Worksheet 1: Family Experience Reflection**. This helps you surface what is already known about how families experience services—and where systems have gaps. Before talking about what the ideal should be, sites and implementation teams need to ground themselves in reality: What are families really going through (and how do we know that)?

As a facilitator, you'll want to work through the reflection questions together with the site. You can do this as a group brainstorm or breakout discussion, or use a tool like Mural if some or all of the group is not in person. Don't worry about perfect wording—focus on insights. Be honest about what perspectives may be missing or what isn't known.

Step B: Drafting Your Vision

Now that you've worked with the site and reflected on what families experience and what they want, you'll begin crafting a **vision statement** with them for whole-family experiences using **Worksheet 2: Defining a Shared Vision** to guide this step.

Have the site think about the future—1 year out, 5 years out, even 10. What do they want families to say about their services? What will they feel? What will be different because of system collaboration and coordination?

This doesn't have to be final. The goal is to align on a shared direction—what they're ultimately trying to accomplish through coordination efforts.

Bridging the Gap Between Current and Ideal Experiences

Once you've helped your site draft their team's vision, the next step is understanding what's standing in the way. Where are families having poor (or good) experiences today? Where do internal processes make it harder—for families, frontline staff, or both?

This is where tools like **journey mapping** and **service blueprinting** come in. Sites might already have made journey maps. Service blueprints take that one step further by also including staff actions and back-end processes so we can spot disconnects between intent and experience. In short, journey mapping looks at individual experiences, and service blueprints reflect how systems work. You can coach sites through one or both tools depending on how much time you have, what resources they are bringing to the table, and how deep the site wants to go in visualizing what coordination will do for programming.

Journey Mapping - Mapping Current Experiences

While the Toolkit does not contain a section on journey mapping, this can be a useful first step in coordinating services, especially if one or more programs involved have never done it before, to help understand the current state of the participant's experience and identify pain points. The information you gather from the journey map can also help inform a later service blueprint, if they choose to do one.

To start, go to **Worksheet 3: Journey Mapping**. This worksheet gives an overview of the steps of journey mapping and helps set the stage for your work as a facilitator. You will help sites think through what questions they want answered, which personas or points of view to focus on, what information to gather, how to use that information, and how to validate their findings.

For more help walking through the process of facilitating journey mapping sessions, you can use the **Journey Mapping Facilitation Guide** in **Appendix A** of this guide, which gives step-by-step instructions on the three phases of journey mapping: preparation, workshop(s), and outputs. It also provides an example of a completed journey map visual you might produce from this activity.

Service Blueprinting

Now you'll move into talking about service blueprints and what they are, why they are useful, and most importantly, how sites can create and use them.

Service blueprints are a practical tool that help us map out how families and staff experience a program, from the very first interaction all the way through to the last step.

Given that sites may have just completed journey maps (or may have done them before), you can use that as an anchor to understand service blueprints.

For more help walking through the process of facilitating service blueprinting sessions, you can use the **Service Blueprint Facilitation Guide** in **Appendix B** of this guide, which gives step-by-step instructions on preparing for and leading a service blueprinting workshop, as well as next steps and suggested timing for the session(s).

Identifying Pain Points

In both journey mapping and service blueprinting, you discussed pain points and saw areas where processes broke down. A pain point typically has the following characteristics:

- It is **persistent**, so it tends to recur until it is solved or addressed.
- It causes clear, noticeable **discomfort, inefficiency, or inconvenience**.
- It **can be solved or addressed** through a change in process or service delivery.

When working with teams, you will want to help them understand that *identifying and discussing pain points is a crucial step in the process of moving from insight to action*. Taking the information gathered from the mapping activities, you can ask questions like:

- Which of the pain points you identified feels most significant to you?
- If we could solve one pain point, which do you think would have the most impact?
- What patterns, if any, do you notice in these?
- How do the pain points for families and staff differ? Which pain points are similar?
- Which pain points, if any, are typically experienced by specific populations or subgroups of program participants? Which are experienced by all families?
- How would the program operate if we solved these pain points?

The answers to these questions, and the discussion that they generate, will prepare the team to begin a **root cause analysis**. From what you hear, you can begin to group pain points into categories if you are using the **fishbone tool**, or you can choose the most impactful pain point/problem and use that to begin the **"five whys" exercise**. Pain points that are similar across families and staff may be considered the most impactful to address, but this may not always be the case.

Examples of pain points for families include, but are not limited to:

- **Inefficient appointment scheduling.** Long wait times and inflexible hours make it challenging for working parents to attend in-person appointments.
- **Fragmented application processes.** Families must apply separately for each service they need, repeating the same information on similar forms without a way to reuse or auto-fill information.

Examples of pain points for staff include, but are not limited to:

- **Redundant data entry.** Inputting the same information into multiple systems leads to increased burden and frustration.
- **Inefficient referral processes.** Methods for referring clients to other services or partners are manual or outdated.

Root Cause Analysis - Validate Your Problem Statement

The problem statement that teams developed earlier will be validated in this next step by assessing the root cause(s). This is an important step so teams can identify the key factors driving the issue and, therefore, can target the true problem and ultimately decide what they are solving for.

As a facilitator, you may encounter teams feeling stuck in not knowing the root cause or wanting to only look at surface-level problems. If this happens, consider posing these questions:

- "What might be contributing to this that we don't see on the surface?"
- "If this issue keeps happening even after we've tried to fix it, what else might be going on?"
- "Who's impacted by this problem, and what's their experience telling us?"
- "Are there policies, habits, or assumptions that might be contributing to this issue?"

Storytelling can also be a powerful tool. Ask participants for examples of times when the problem occurred and have them think deeply about who was affected, how they felt, etc. Thinking in this way may help them tap into the deeper issues that led to the problem statement. An important thing to remember is that root cause analysis is not meant to solve a problem; it's meant to help get a deeper understanding of it.

The Toolkit offers two tools—the **fishbone** and the **five whys**—that can be used to conduct root cause analysis. Please note that there are other types of tools and exercises that can help teams conduct root cause analyses. These two tools are offered as recommendations, not mandates, and can be adapted for the teams you work with.

While the Toolkit shares guidance for completing the fishbone tool and the "five whys" exercise and includes Mural and Miro templates for facilitating these activities in a virtual setting, this section provides additional guidance and recommendations for facilitators supporting these activities. If you are facilitating these exercises in an in-person setting, you can use chart paper and sticky notes so teams can write their thoughts down and share them easily on the appropriate diagram.

Fishbone tool

To facilitate a session on root cause analysis using the fishbone tool, begin by clearly stating the problem at the "head" of the fish, all the way on the right—this is the effect you're trying to understand. Then,

guide participants to identify broad categories of potential causes, such as People, Process, Technology, Policy, or Environment—these form the main "bones" of the diagram. Under each category, encourage the group to brainstorm specific contributing factors (primary sub-causes) and then dig deeper by asking "why" to uncover secondary sub-causes. As facilitator, your role is to create a supportive space for curiosity, ensure equal participation, and probe vague responses to move the group from symptoms to root causes. **Module 1** includes an example of a completed fishbone tool. Given the complexity and unique structure of each fishbone tool, you will want to either complete this activity with your team in person using a white board or similar format, or virtually using a Mural or Miro board as referenced in **Module 1**.

While facilitating this exercise, you may run into issues including hesitation, vague statements, an unwillingness to go deeper without offering solutions, etc. Here's a quick checklist of common problems that arise and suggested actions:

Issue	Signs	What to Do
Problem Statement is too vague or broad	Participants are unclear or diverging in focus	Pause and ask: "Is this specific enough to analyze?" "How would we know if it were solved?"
Group jumps to solutions	Suggestions like "we just need to hire more staff"	Gently refocus: "Let's hold on solutions—we're staying in the *why* phase for now."
Superficial or surface-level causes	Statements like "communication is the issue"	Ask probing questions: "What about communication?" "Why is it breaking down?"
Low participation	Long silences, same people talking	Use warm-ups, pair-shares, or round robins. Encourage all voices: "What are others seeing?"
Redundant or repeated causes	Same idea in different words	Group or reword overlapping causes. Ask: "Are these really different, or can we combine them?"
Confusion over categories	People unsure where a cause fits in the diagram	Reassure: "The categories are flexible—let's place it where it makes the most sense."
Blaming or finger-pointing	Comments targeting individuals or groups	Reframe: "We're not here to blame—let's stay focused on systems, processes, and causes."

Five Whys tool

Another root cause analysis tool is the five whys activity. This activity starts with a problem statement, so you will want to refer back to the problem statement the group defined earlier or draw from the pain points uncovered in mapping or blueprinting. **Worksheet 4** includes a blank graphic that you can use with teams (either individually or as a group). This worksheet is designed for your team to complete together, but team members could complete it separately and the facilitator could combine and synthesize them later. If you are doing this activity in person, another option is to set up five posters/large pads (one for each "why") and have participants put their answers on sticky notes. This allows them to contribute without seeing what others are writing as they go.

In addition to the completed Five Whys example in **Module 1**, another example is included below, with prompts for digging deeper with the team.

> **Example Five Whys Activity**
>
> **Problem statement**: Participation in the county's free parenting class is very low.
>
> - **Why** is participation low?
>   → Because few people are signing up for the class.
> - **Why** are few people signing up?
>   → Because many people don't know that the class exists.
> - **Why** don't they know about it?
>   → Because outreach has only been done through the county website.
> - **Why** is outreach limited to the county website?
>   → Because there's no dedicated outreach plan or staff for promoting the class.
> - **Why** is there no dedicated outreach plan or staff?
>   → Because outreach wasn't included in the original program budget or planning.

To start, have the group write down and focus on their agreed-upon problem statement and confirm that everyone has a shared understanding of what it is. Then, take the following steps to complete the activity:

- Ask the first "why is this happening?" Record the group's response (either on the worksheet or on a Mural/Miro board virtually).
- Use the previous answer as the basis for the next "why is this happening?"
- The number five is just a guidepost for the exercise but not a requirement; you may need more or less than that. Ultimately, you will have to be flexible and recognize when the group has gotten to the root of the problem.
- Each iteration should dig deeper into the problem to see what is behind it—but not jump to solutions.
- Specific and evidence-based answers will be the easiest to work with as you dig deeper into the root cause.

Once the group is in agreement, summarize the root cause and discuss if it is something that can be addressed through follow-up actions. Be clear in assigning ownership of tasks and next steps (e.g., Mary will meet with IT next week to see if they can make changes to the data system now that we have identified that our infrastructure is a root cause, and we will reconvene in 10 days).

Final Considerations for Module 1

While the teams you are working with might be focused on service coordination, there could be other, more pressing problems that service coordination would not help solve. In these cases, the Toolkit may not be the most relevant resource, and other resources should be gathered to support this work. Alternatively, the group may focus on other, non-coordination related solutions first and then revisit the Toolkit later.

You may also find as you begin doing this work that you need to bring in other people to ensure that you are hearing a mix of perspectives. Don't be afraid to bring in other people, whether in the long-term or for only one of the exercises, as more voices tend to lead to more nuanced problem identification and insights.

Identifying the Right Solution and Planning for Implementation (Modules 2, 3, and 4)

Now that teams have identified their vision, problem statement, pain points, and root causes, it's time to translate that into what they will do next to address these issues.

Moving from Vision to Action

It is likely that the team you are supporting will not be covering all this material at once, so you may need to take time when you meet to recap what you worked on in the last session and ensure everyone is grounded in the same understanding. For this series of activities, you will start with a reflection on the initial activities that define where the program is now and then help the team move toward what actions they will take. You can use the guide below to facilitate these conversations in person or virtually or use **Worksheet 5: Program Action Map.**

Step 1: Framing the Problem & Vision

- Have the group revisit the agreed-upon vision for coordination from **Module 1**. This can be pulled from **Worksheet 2,** if completed, or from other group work that resulted in a clear vision statement related to coordination.
- Write the pain points identified in journey mapping, service blueprinting, or in the root cause analysis. As a reminder, these are the issues experienced in programming that are persistent and lead to less optimal experiences, frustration, and/or inefficiencies.

Step 2: Connecting Pain Points to Solution Areas

- Taking the pain points identified above, have the group map these to the solution areas outlined in **Module 2** of the Toolkit.
- **Module 2** gives examples of what pain points, for both families and staff, each solution area may address. The group can use these examples to help map which strategy areas that the pain points are associated with and that they can explore further.

Step 3: Map Solution Areas to Appropriate Strategies

- With pain points listed and corresponding solution areas identified, the group will now look at which strategies within the solution area are most responsive to the specific issues and context of the team, based on information in **Module 3**.
- Have the group choose strategies that are aligned with their vision and will ideally alleviate the identified pain points.
- For example: An identified pain point is that program participants must go to three different locations to get services, and transportation options are limited. This would map to the co-location solution area. This directly relates to the pain point and, if successful, would make program participation easier.

Step 4: So-That Chains to Check Strategy Fit

Now that the team has identified one or more possible strategies for coordination, it's helpful to check that these will truly align with their intended vision and impact. **So-that chains** are a straightforward way to help teams articulate the logic behind their proposed model. As a facilitator, you will set the stage that this activity is focused on the identified strategies (one at a time), not the entire program or agency. For this, use page two of **Worksheet 5** and fill out the chain as a group, or in small groups.

Start with activities or inputs.

- Ask: "What do we do?"
- Write each activity on a sticky note.
- Example: "We provide sector-based training."

Keep asking "so that what?"

- Place the next outcome to the right (or above, if building vertically).
- Example: "We provide training **so that** participants gain credentials."

Push to higher-order outcomes.

- Don't stop at the first answer—probe until you reach impact.
- Example: "And they gain credentials, so that what?" → "They get stable jobs." → "They achieve financial security."

Encourage plain language.

- Avoid jargon. Keep outcomes written in terms a family or community member could understand.

Balance detail with flow.

- Too much detail can bog things down. Focus on key links, not every sub-step.

Surface assumptions.

- Ask: "What needs to be true for this link to hold?"
- This helps identify risks or missing strategies.
- Example: Training only leads to jobs if employers are hiring.

Validate with the group.

- At the end, walk through the full chain aloud: "We do X so that Y happens, so that Z happens, so that families achieve stability."
- Check for agreement and adjust as needed.

Step 5: Prioritize Strategies

When selecting strategies that will address the problem statement and pain points documented previously, completing an activity such as an **Impact vs. Feasibility Matrix** (as shown below) can help prioritize strategies and drive collective decisions for moving ideas forward. Strategies should be plotted in one of the four quadrants of the matrix. The higher the estimated impact, the closer to the end of the y-axis the strategy should be plotted. The higher the estimated feasibility, the closer to the end of the x-axis the strategy should be plotted. **Worksheet 6** is an Impact vs. Feasibility Matrix template that can be printed out for users to write on directly.

If facilitating this activity virtually, a Mural template could be useful to capture ideas in the matrix. If facilitating in-person, chart paper and sticky notes can be used. If needed, refer to the Navigating Conflicting Perspectives section for guidance in preparation for facilitating the activity.

IMPACT

High Impact, Low Feasibility

High Impact, High Feasibility

FEASIBILITY

Low Impact, Low Feasibility

Low Impact, High Feasibility

Impact refers to the potential benefits or positive outcomes of implementing a strategy. Questions to consider answering when determining the impact of a strategy include:

- What are the **potential benefits for families** if this strategy is implemented?
- What are the potential risks or negative consequences for families if this strategy is implemented?
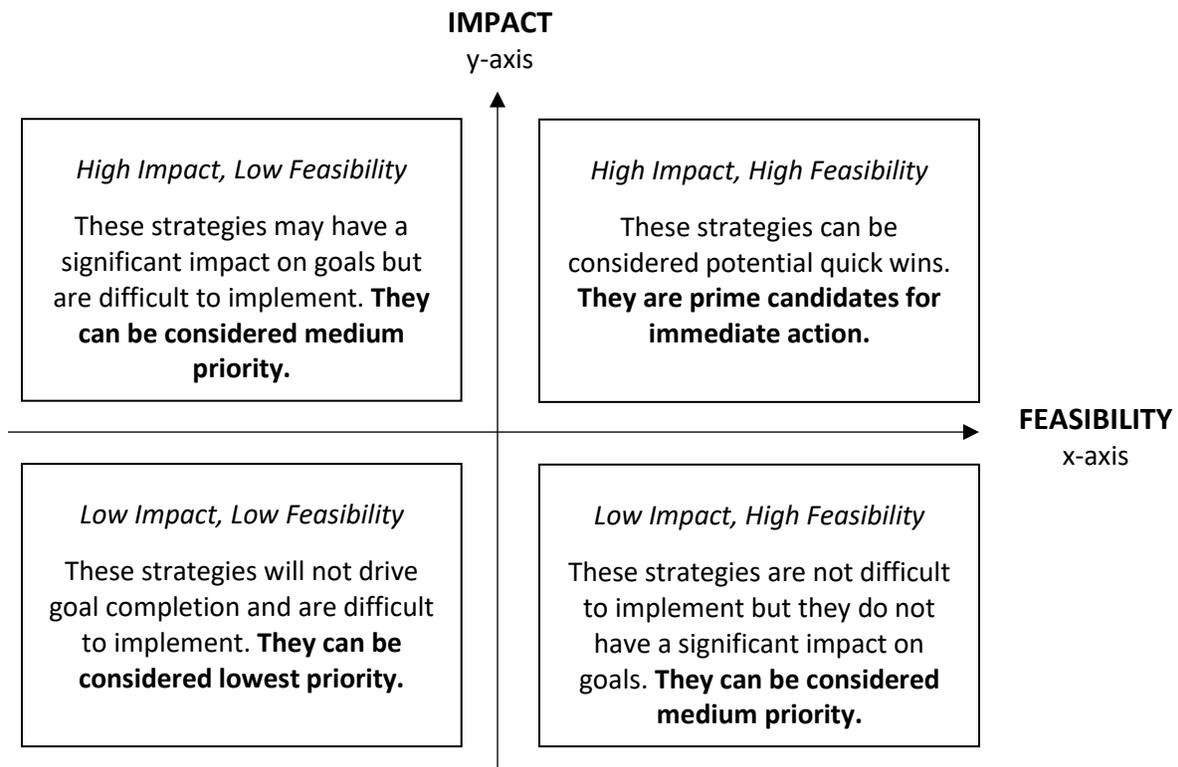- Are there populations that may experience more positive or more negative consequences than others?
- What are the **potential benefits for staff** if this strategy is implemented?
- What are the potential risks or negative consequences for staff if this strategy is implemented?
- How significantly will this strategy **contribute to achieving the overall goals** of the coordination effort and the organizations involved?
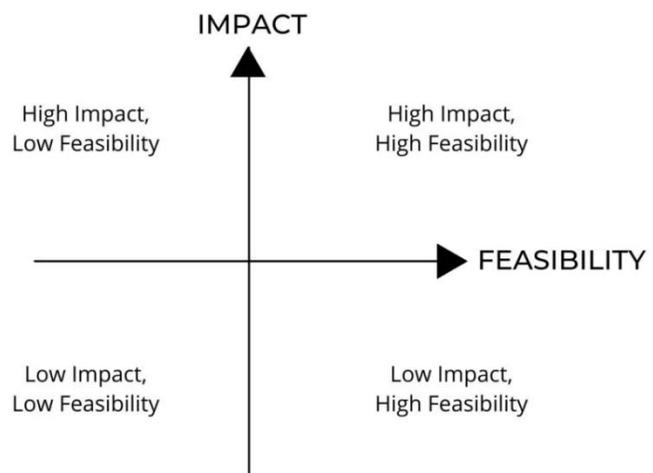
Feasibility refers to the likelihood of successful strategy implementation. Questions to consider answering when determining feasibility of a strategy include:

- What **resources** (time, funding, personnel, expertise) will be needed to implement the strategy?
  - What is the timeframe required to implement the strategy?
  - Is the necessary funding currently available to implement the strategy? Would additional funding need to be secured?
  - Does the required number of personnel already exist? Will new personnel need to be hired?
  - Do the required skills and capabilities already exist with staff? Will staff need additional training?
- What is the team's **readiness to implement** the strategy? Use the discussion questions in the Readiness Thinking Tool to assess readiness.
- What are the **potential barriers or challenges** to implementing the strategy?
- What **external factors or dependencies** could affect implementation of the strategy?
- Does **buy-in** already exist from relevant staff to implement the strategy? If not, what steps would need to be taken to gain buy-in?

Once strategies are plotted in the matrix, analyze the results and begin to prioritize strategies using the guidance below. For many teams, it may make the most sense to prioritize strategies that have high feasibility but use the questions above to guide decision making.

IMPACT
y-axis

High Impact, Low Feasibility	*High Impact, High Feasibility*
These strategies may have a significant impact on goals but are difficult to implement. **They can be considered medium priority.**	These strategies can be considered potential quick wins. **They are prime candidates for immediate action.**

FEASIBILITY
x-axis

Low Impact, Low Feasibility	*Low Impact, High Feasibility*
These strategies will not drive goal completion and are difficult to implement. **They can be considered lowest priority.**	These strategies are not difficult to implement but they do not have a significant impact on goals. **They can be considered medium priority.**

Step 6: Plan for Action

Once the impact and feasibility of each strategy is assessed and strategies have been chosen, a plan for action with a timeline can be developed using **Worksheet 7: Strategy Implementation Roadmap.** Strategies may be categorized into the Now, Next, or Later phase based on where they were placed in the Impact vs. Feasibility matrix. Strategies do not need to be listed in every phase if teams are focused on a smaller number of strategies, and multiple strategies may show up in the same phase (i.e., you might plan to do several things "later").

IMPACT
y-axis

LATER

High Impact, Low Feasibility

These strategies may have a significant impact on goals but are difficult to implement. **They can be considered medium priority.**

NOW

High Impact, High Feasibility

These strategies can be considered potential quick wins. **They are prime candidates for immediate action.**

FEASIBILITY
x-axis

Low Impact, Low Feasibility

These strategies will not drive goal completion and are difficult to implement. **They can be considered lowest priority.**

Low Impact, High Feasibility

These strategies are not difficult to implement but they do not have a significant impact on goals. **They can be considered medium priority.**

FORGET IT

NEXT

When creating an action plan, consider the steps that will be required to implement the chosen strategies. Think about what it would take for the strategy to be successfully implemented and work backwards to figure out all the necessary steps to achieve it. This can help ensure the roadmap is clear and serves the end goal. These steps should be listed in the Key Activities column in **Worksheet 7: Strategy Implementation Roadmap**.

There is also space on the worksheet to list the staff member(s) who will lead each activity and a proposed timeline for each activity to be completed. The roadmap can be revised over time. When listing the key activities, consider steps such as:

- Necessary training of staff
- Updates to standard operating procedures that may be required
- Buy-in that may need to be gained from staff
- Required updates to technology or data systems

Monitoring Coordination Efforts and Continuous Improvement (Module 5)

Once the team you are supporting has identified their implementation plan, the next step is to think about how they will know if their plan has been implemented successfully and if it had the intended impact on families and staff. Monitoring coordination efforts should ideally be a continuous and iterative process so issues can be addressed in a timely manner, and refinements can be made to help prevent future challenges.

When selecting appropriate metrics, it may be useful to revisit responses captured in **Worksheet 1: Family Experience Reflection** from **Module 1**. This worksheet captured families' goals when interacting with the program or service, current versus desired family experiences, and the data sources informing the understanding of family experiences. When re-examining those responses and viewing the information shared in the Toolkit, consider asking the questions below to guide the team in selecting metrics for continuous improvement and developing a continuous improvement plan.

- What are we trying to learn or demonstrate through the metrics?
- How will the selected metrics help us track progress toward goals?
- Have we selected a balance of output (process/activity) and outcome (results/impact) metrics?
- What qualitative and quantitative data do we already have access to?
- What new sources of qualitative and quantitative data should we consider collecting?
    - Do we have the capacity and resources to collect and analyze these new sources of data?
- Are we measuring outcomes at all relevant levels (system, program, staff, families)?
- Are we capturing family and staff experiences and not solely administrative processes?
- How can we avoid over-reliance on a single data point to represent impact?
- What is our plan for tracking these metrics over time to see trends or improvements?
    - How often will we assess each metric (e.g., monthly, quarterly, annually)?
    - How will we ensure consistency in data over time?
- What is our plan for our metrics if the context or coordination strategy evolves?

Metrics can be documented in **Worksheet 8: Metric Development Planning**.

Appendix A: Journey Mapping Facilitation Guide

Purpose

This guide outlines an approach to conducting journey mapping sessions with human services staff to examine either client (participant) or staff experiences with a particular service or process. The goal is to identify strengths, pain points, and opportunities for improvement in service delivery. **Worksheet 3: Journey Mapping** includes a template to complete this activity.

Facilitator Tips

- Stay neutral and encourage honest input.
- Use underline empathy mapping to deepen insight: "What is the participant thinking, feeling, doing, and saying?"
- Allow for silence and discussion.
- If you can't have program participants attend, get creative in thinking about how to capture participants' experiences. In some sites, there may be staff who were former participants who can contribute to that effort.
- Have a notetaker and timekeeper, if possible.

Phase 1: Facilitator Preparation (at least 3-5 days before)

1. Define the Scope

- Choose the journey to explore (e.g., applying for and receiving TANF including child support cooperation requirements, intake and enrollment for services at a multi-program workforce services site).
- Decide if you're focusing on the **client journey**, **staff experience**, or **both**.

2. Gather Tools and Materials

- Journey map template (paper or digital)
- Sticky notes, markers, flip charts, whiteboard or MURAL/Miro boards
- Copies of commonly used program documents (if available)

3. Select Participants

- Include a mix of frontline staff, supervisors, and (if applicable) program participants (former or current)
- Aim for 5–10 people per session

4. Set Expectations

- Send an agenda in advance
- Clarify that the goal is improvement and understanding
- Clearly state whether this will be virtual or in person, with the expectation that it might take place over multiple sessions

Phase 2: Journey Mapping Session Sample Agenda (2-3 hours)

1. Welcome & Framing (15 min)

- Welcome and introductions
- Purpose of journey mapping: What question are you trying to answer? How will you use this information?

2. Define the Journey (15 min)

- Name the specific process being mapped and the persona (whose journey, with as much detail as possible around their needs and characteristics)
- Clarify the start and end point of the journey (e.g., "from application to first benefit issued")

3. Create the Journey Framework (10 min)

- Using **Worksheet 3: Journey Mapping,** write the stages of the journey in the first column (e.g., Awareness → Application → Eligibility/Enrollment → Program Participation → Program Exit)
- Add details in the subsequent columns for each stage:
    - **Stages** are the ways that actions are commonly grouped for the programs involved (e.g., awareness, application, eligibility and enrollment, participation, program exit)
    - **Actions** are the specific steps a client takes at each stage
    - **Emotions** are the client's feelings and sentiments (e.g., satisfaction, frustration, excitement) based on direct perspectives provided by families with the program or otherwise hypothesized
    - **Touchpoints** are the points where a client interacts with a service such as a website or interaction with a staff member
    - **Pain points** are challenges, obstacles, or areas of frustration that a client encounters
    - **Opportunities** are ideas for enhancing the client experience or streamlining processes

4. Populate the Map (60 min)

- Talk through each stage
- Ask and have workshop participants write on stickies: What happens in this stage?
    - What are staff doing?
    - What are clients doing?
    - What tools/forms are used? Who else is involved?
    - How do people feel? What have we heard?
- Use color-coded sticky notes for each category, with each discrete answer on its own sticky

5. Identify Pain Points & Bright Spots (30 min)

- Highlight parts of the journey where:
    - Clients or staff experience delays, confusion, frustration
    - There are known gaps or duplication
- Also name what is working well—these are bright spots (things you should aim to keep in place!)

6. Reflect and Prioritize (20 min)

- Use voting dots or digital polling:
    - What are the top 2–3 areas of the journey we want to improve?

- What should we be sure not to change?
- Ask:
  - What's within our control?
  - Where can we test small changes?
  - Who would we need on board to make changes?

7. Close and Next Steps (20 min)

- Summarize top insights and check for understanding
- Discuss a plan to validate findings/insights, particularly if families with experiences with the process that was mapped were not included in the mapping process
- Explain what happens next: report back, testing changes, further sessions as needed (especially if you want to dive deeper or didn't get to map all necessary personas)

Phase 3: Facilitator Creates Outputs

To maintain momentum with the team, the suggested timeframe for developing and sharing final outputs is 2 weeks following the workshop. These items can include:

- A completed journey map based on products from the workshop. An example completed journey map is included on the following page
- List of priority pain points and bright spots
- A summary of established next steps and timeline for addressing them.
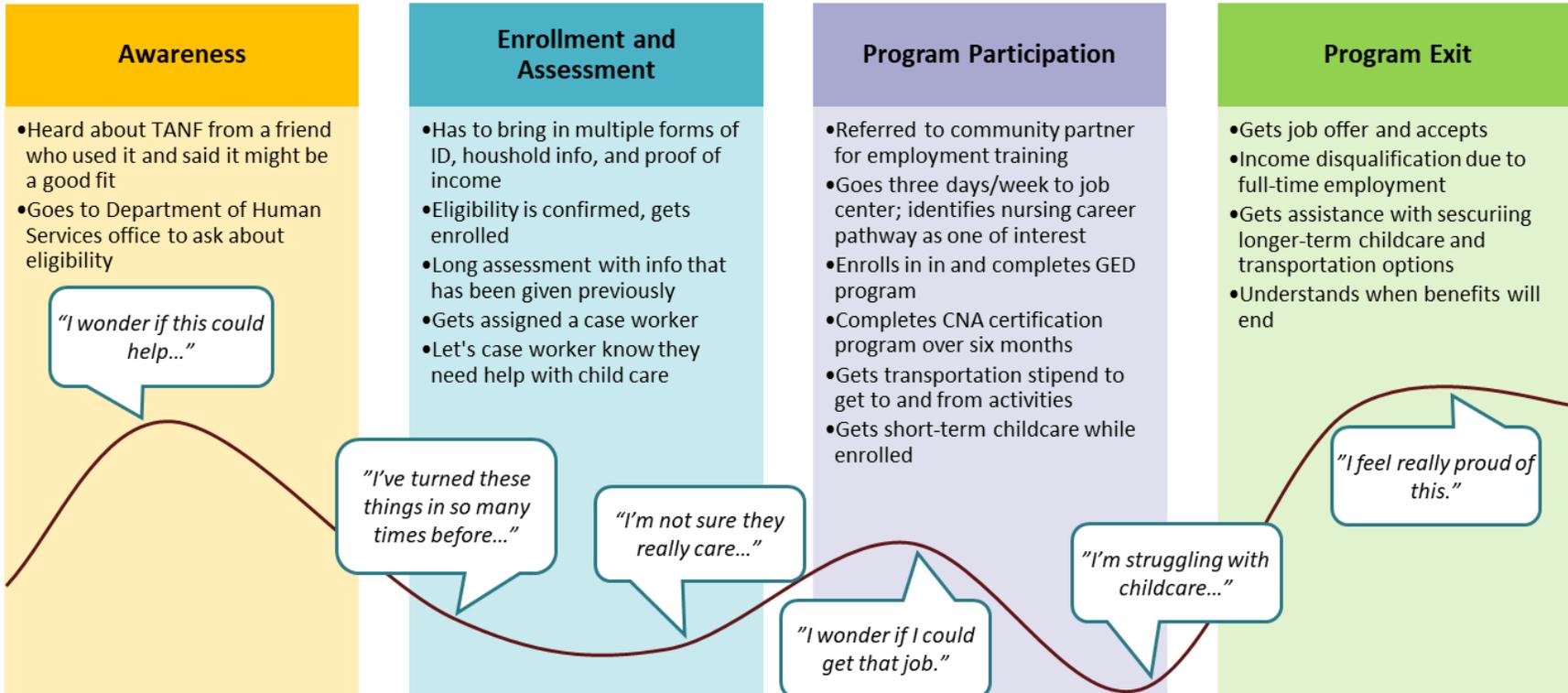
Example Journey Map Visual

Example Persona:
Phillis is a single mother with two children under the age of five who is interested in TANF, and possible WIC services

Expectations:
- They will need to bring lots of paperwork to enroll
- They will end up getting assistance with cash and employment, but it will be hard
- It will be stressful to sign up for more than one thing right now

Awareness
- Heard about TANF from a friend who used it and said it might be a good fit
- Goes to Department of Human Services office to ask about eligibility

"I wonder if this could help…"

Enrollment and Assessment
- Has to bring in multiple forms of ID, houshold info, and proof of income
- Eligibility is confirmed, gets enrolled
- Long assessment with info that has been given previously
- Gets assigned a case worker
- Let's case worker know they need help with child care

"I've turned these things in so many times before…"

"I'm not sure they really care…"

Program Participation
- Referred to community partner for employment training
- Goes three days/week to job center; identifies nursing career pathway as one of interest
- Enrolls in in and completes GED program
- Completes CNA certification program over six months
- Gets transportation stipend to get to and from activities
- Gets short-term childcare while enrolled

"I wonder if I could get that job."

"I'm struggling with childcare…"

Program Exit
- Gets job offer and accepts
- Income disqualification due to full-time employment
- Gets assistance with sescuriing longer-term childcare and transportation options
- Understands when benefits will end

"I feel really proud of this."

Pain Points:
- Forms with repetitive information and lots of requirements around acceptable forms of ID
- Office location is inconvenient for people taking public transit
- Unclear information upfront about childcare options
- Took a while to get notice of approval for benefits
- It will be stressful to sign up for more than one thing right now

Opportunities:
- Provide clear information about transit options and maps
- Linking data systems with other department programs to reduce burden on client at time of application
- Clearer information on childcare options while enrolled
- Set expectations about timing for first benefit payment

Appendix B. Service Blueprint Facilitation Guide

Purpose

This guide outlines how to lead service blueprinting sessions with human services staff. A service blueprint is a structured visual tool that maps both the client-facing and behind-the-scenes elements of a service process. It helps teams identify misalignments, pain points, and opportunities for process improvement across people, systems, and touchpoints.

Facilitator Tips

- Keep the group focused on systems and processes
- Validate contributions across all roles (frontline and backend)
- Stay neutral and encourage honest input
- Use empathy mapping to deepen insight: "What is the participant thinking, feeling, doing, and saying?" to deepen insight: "What is the participant thinking, feeling, doing, and saying?"
- Allow for silence and discussion
- Consider using real participant stories or data to ground the discussion. You can also bring in insights from journey mapping (if done previously) to help ground you in participants' actions.
- Have a notetaker and timekeeper, if possible

Phase 1: Preparation (3-5 days before)

1. Define the Scope

- Choose a specific process to blueprint (e.g., child support cooperation requirement process for TANF, SNAP recertification, workforce onboarding)
- Identify the start and end points of the service (e.g., "initial contact to employment referral")

2. Gather Tools and Materials

- Sticky notes, markers, and flip charts, or MURAL/Miro access
- Service blueprint template adjusted to fit your scope and context (paper or digital)
- Process documentation, policy manuals, and SOPs from relevant programs/agencies. Note: you may do blueprinting together with other programs/agencies and work collaboratively in a workshop on how systems are aligned, or you may build out a blueprint draft with one program/agency and then bring in others to add on or act as reviewers/validators.

3. Select Participants

- Include frontline staff, managers, support staff (IT, admin, etc.), and others who interact with or support the service process
- Aim for 5-10 people

4. Set Expectations

- Share the agenda and sample blueprint (from **Module 1**) and template in advance
- Clarify that the blueprint reflects **systems**, not **individual performance**

Phase 2: Workshop Session Sample Agenda (2–3 hours)

1. Welcome & Framing (15 min)

- Introductions and session purpose
- Define what a service blueprint is and why it's helpful
- Ground rules: openness; curiosity; identifying gaps, not blaming

2. Define the Service Process (15 min)

- Clarify what part of the service is being mapped
- Confirm start/end points, key milestones, and decision points

3. Build the Blueprint Framework (20 min)

- Create rows for these lanes and explain each of them to participants:
  – Family (Client) Actions (what clients do)

  – **Frontstage Actions** (what staff do in direct contact with clients)
  – **Communication Channels** (how staff and families interact)
  – **Backstage Actions** (internal work not visible to clients)
  – **Support Processes** (IT systems, policies, external partners)
  – **Family Emotions/Feelings** (how the family feels about steps they have to complete/actions taken)

4. Map the Current State (60 min)

- Walk step-by-step through the process. It may be useful to have workshop participants focus on the first lane (i.e. write out all the family/client actions they can think of). Once those actions are ordered, the related processes can be mapped out.
- Prompt with questions:
  – What is the client doing?
  – What are staff doing?
  – What supports that step (e.g., software, paperwork)?
  – Where do delays or confusion occur?
  – What are clients likely to feel?
- Use color-coded sticky notes to distinguish lanes. Have participants write one thought per note and initially do not worry about having them in order or about duplication.
- Once all the "lanes" are complete and the agreed upon end point is reached, draw arrows between steps/actions that have dependencies. For example, if a family fills out enrollment paperwork, what happens next? Draw an arrow to the corresponding frontstage actions (e.g., handing it to a front desk staff member, who inputs information), backstage actions (e.g., case is assigned to a worker, who reviews the information), and support processes (e.g., information is stored in a secure case management system), and then continue the flow until the agreed-upon end point is reached and all supports are mapped.

- Note: you may not be able to fully fill out the "Family Emotions" lane immediately. This may require meeting with families or an advisory group to get input or using information from prior journey mapping.

5. Identify Gaps, Pain Points, & Opportunities (30 min)

- Work with the group on the following questions:
  - Where do handoffs break down?
  - Are there unnecessary steps or duplications?
  - Are systems misaligned with client needs?
  - Where are staff and client experiences disconnected?

6. Prioritize for Action (20 min)

- Use voting dots or polls to rank:
  - Top 2–3 issues to address
  - Quick wins vs. long-term fixes
- Ask:
  - What is solvable with minor changes?
  - What changes require leadership, policy, or IT involvement?

7. Wrap-Up & Next Steps (10 min)

- Recap what was learned
- Discuss ways to validate information and get input on family actions and emotions
- Share how the blueprint will be used (e.g., redesign efforts, staff onboarding, performance improvement)
- If planned, discuss next steps to create a future/ideal state blueprint

Phase 3: Facilitator Creates Outputs

To maintain momentum with the team, the suggested timeframe for developing and sharing final outputs is 2 weeks following the workshop. These items can include:

- A completed service blueprint of the current process
- List of top pain points, gaps, and improvement opportunities
- Action items or recommendations for next steps in coordination and process improvement

Acknowledgements

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