Public Health England

Protecting and improving the nation's health

Resource Q: Preparing for workshop 2[1]

The core working team need to complete five key tasks to prepare for workshop 2 which are outlined in the table below.

If using specialised software to create system maps, this will need to be installed on your computer in advance.

Task	Team Required	Time
Task 1		
Create a collated system map	2 core working team members	4 to 8 hours
Task 2		
Overlay current actions on the system map	1 to 2 core working team members	2 hours
Task 3		
Prepare the draft vision statement	1 to 2 core working team members and wider stakeholders	5 hours
Task 4		
Confirm workshop logistics with stakeholders	1 core working team member	1 hour
Prepare presentation for workshop 2	2 core working team members	2 hours
Task 5		
On the day requirements for workshop 2	All core working team members	N/A

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[1] This resource is part of Public Health England's wider whole systems approach to obesity programme. Please search to find the main guide and additional resources.

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Task 1: Create a collated system map

> To complete this task, you will need:
>
> - all individual system maps from workshop 1 (hard or electronic copies)
> - system mapping software
> - Microsoft PowerPoint

The first step is to collate the individual maps from workshop 1 into a single overarching system map. This collated system map is fundamental for the rest of the process. It is important that the core working team dedicate time to complete this task.

The collated system map:
- illustrates the complexity of the local causes of obesity
- creates a picture of the local system that causes obesity which can be updated over time
- helps to identify opportunities to intervene through actions
- enables all stakeholders to see where they can contribute in the system
- motivates all sectors to contribute to the 'big picture'
- helps to create a shared agenda and a collective vision for tackling obesity

Process

This section provides a step-by-step guide to create the collated system map. Figure 1 provides an overview of the process.

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Figure 1: Overview of the process for creating a collated system map

Organise the individual system maps

Choose an option for creating the collated map

Create the collated system map
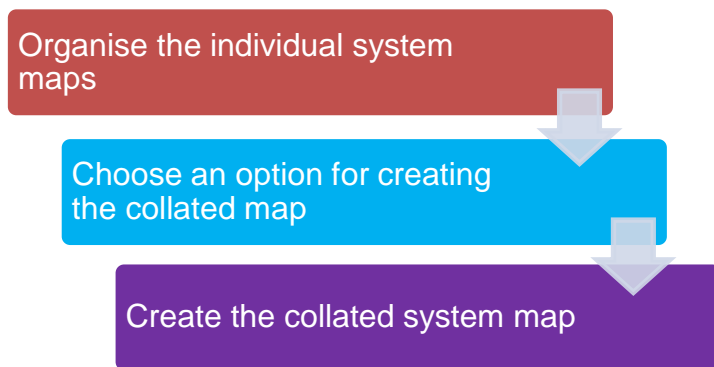
Organise the individual system maps

Steps to organise the individual system maps below:

1. Organise the individual system maps created in workshop 1 into groups (see figure 2 for an example). For example, you may have a map created on 'uptake of active transport' and another on 'walking routes to school'. These could be grouped into 'active transport' with other similar maps.

2. When individual system maps have been organised into groups, give each map a unique identification number. This will make it easier to collate the maps.

3. Create a spreadsheet similar to figure 3 to organise your individual system maps, their respective groups, and their unique identification number.

4. Take a picture of each individual map and save a copy of each one using an easily identifiable title - "such as: 1.1 Uptake of active transport map".

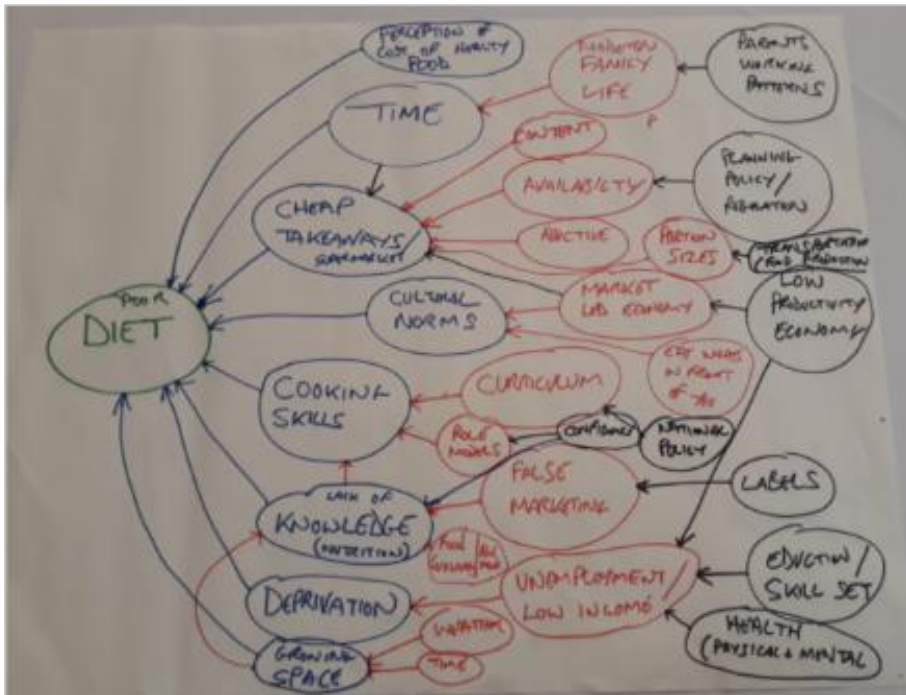**Figure 2: Example of 2 individual system maps**

Figure 3: Example of Excel spreadsheet to organise individual system maps

ID Number	Prioritised Cause	Group
1.1	Poor diet	Diet
1.2	Food access	Diet
1.3	Fast food consumption	Diet
2.1	Uptake of active transport	Active transport
2.2	Walking routes to school	Active transport
2.3	Confidence in cycling	Active transport

Choose an option for creating the collated map

The collated system maps can be created in 2 different ways:

1. **System mapping software:** There are numerous software packages to create system maps. Use of specialised software is recommended as they enable the system maps to be easily created and amended. Specialised software options include: Vensim (free download available), Microsoft Visio and Insight Maker. Generic software options include Microsoft PowerPoint (limited functionality for system mapping).
2. **Paper copy:** It is possible to create a collated system map on paper, but this does not offer the flexibility of manoeuvring causes and their relationships which software packages provide.

Create the collated system map

The following guidance is specific to Vensim. Other software can also be used to create system maps.

The following steps help you to create your collated systems map:

Input the first individual system map into Vensim
1. Lay out your individual system maps on a table or open the photos of these maps on your computer. These maps/photos should be organised into groups (see organise the individual system maps above).

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2. Open Vensim software on your computer and create a 'New Model'. This should present you with a blank canvas (see figure 4).

Figure 4: Vensim blank canvas
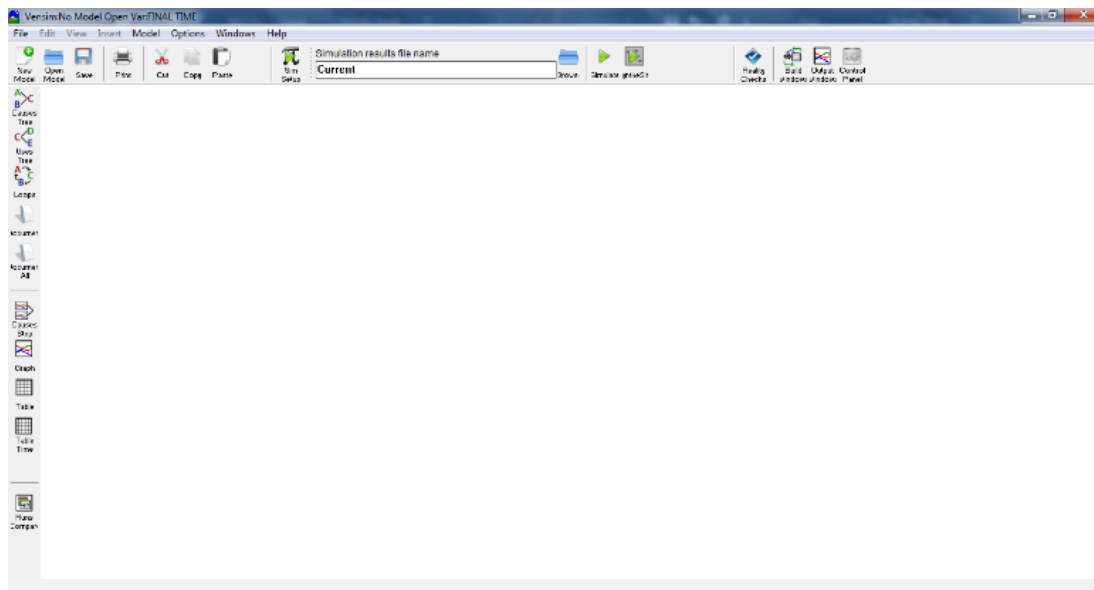
3. Starting with an individual map from the group with the most causal maps, you are going to recreate this map in Vensim. Start by inputting the prioritised cause into Vensim. See resource K- Workshop1 and resource N- Workshop 1 presentation notes for information on how prioritised causes were developed. To input a cause (called a variable in Vensim), click on the 'variable' button on the toolbar and then click on the blank canvas (figure 5). This will allow you to create and name your variable (remember that variables should be neutral- for example: 'volume of cars' rather than 'high volume of cars'). Insert this variable on the left of the canvas.

Figure 5: Vensim toolbar highlighting variable

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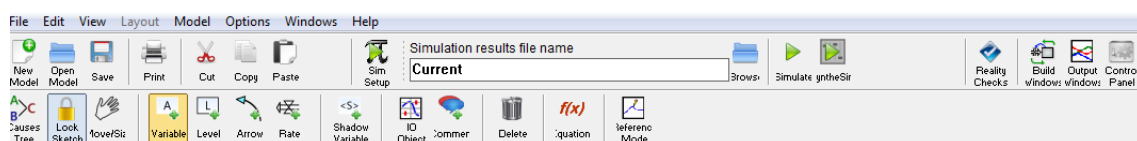
4. Using the same process, create a variable for the next identified cause. Once you have clicked on the 'variable' icon in the top toolbar, Vensim will allow you to continue inputting your causes.

Tip: You can also move the variables around the canvas by clicking on the variable and dragging it to another space.

5. Create a variable for each cause identified on the individual system map. Move the variables around the canvas, to create the different branches of causes, so that they resemble the individual system map (figures 6 and 7).
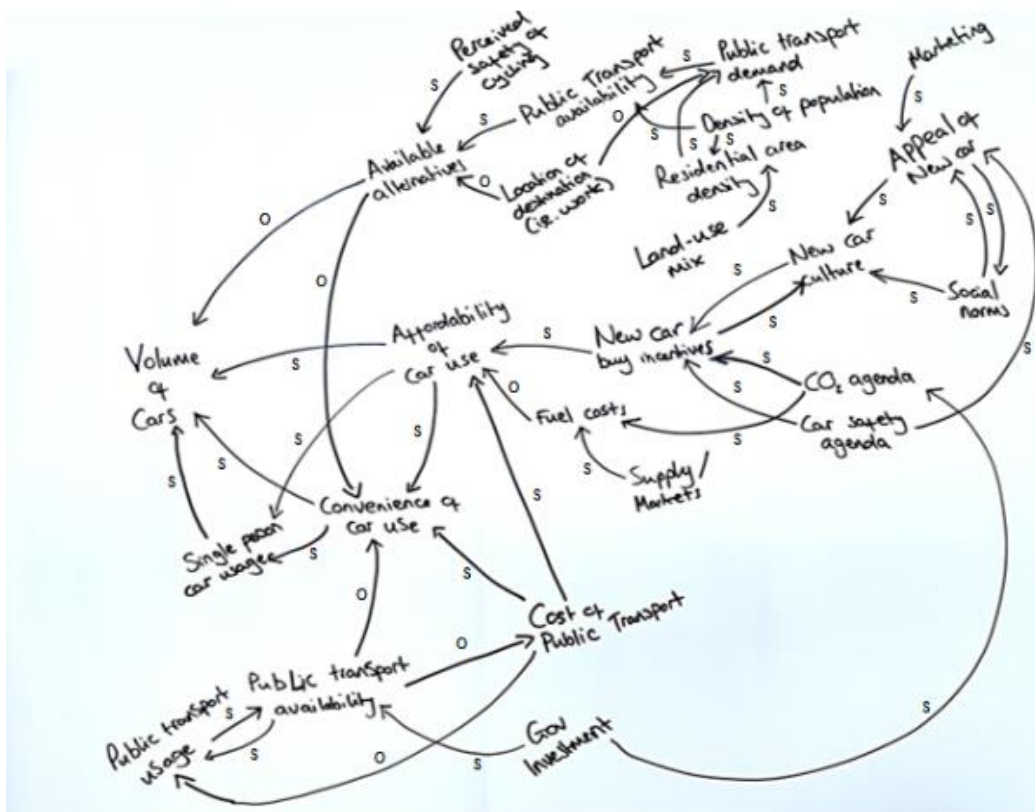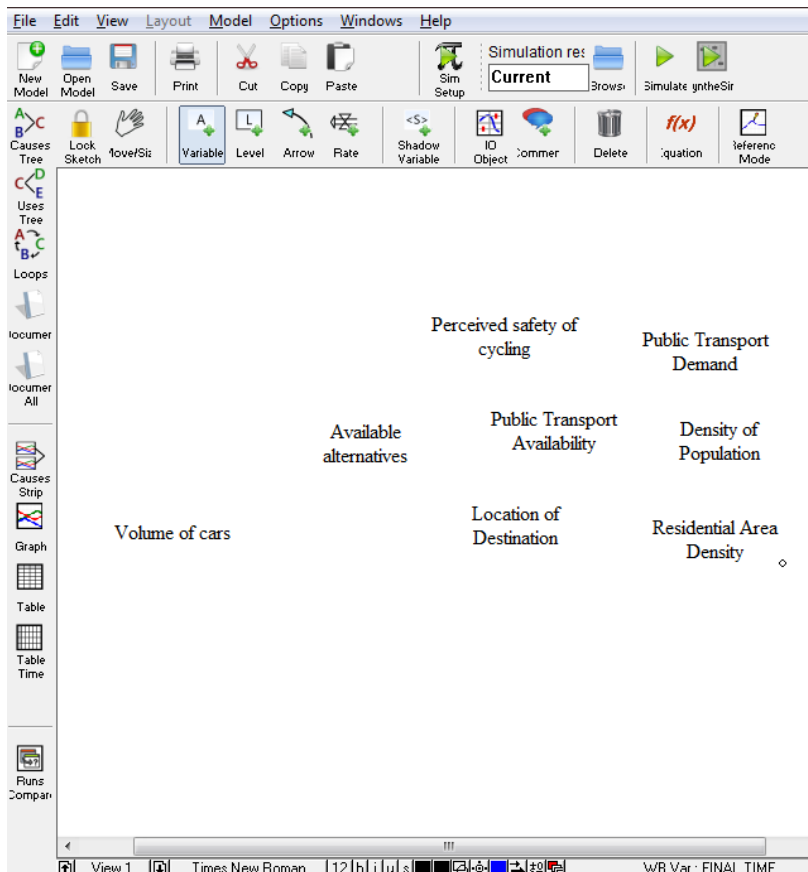
Figure 6: Individual system map

Figure 7: Inputting variables into Vensim

6. Now add in the arrows which denote the relationships between the variables. For the collated system map, you only need to add the direction of the relationship. Select the 'arrow' icon from the top toolbar. To create a relationship, click on the cause which is perceived to have a direct impact on the second cause. Then click on the second cause to create the relationship link. Follow this process to add all the links (see figures 8 and 9).

Tip: Other features are available on Vensim (Delete, Select All, Move, Rename, Recolour, Curved Arrows) (see YouTube video: https://www.youtube.com/watch?v=Wvsmico0yEs

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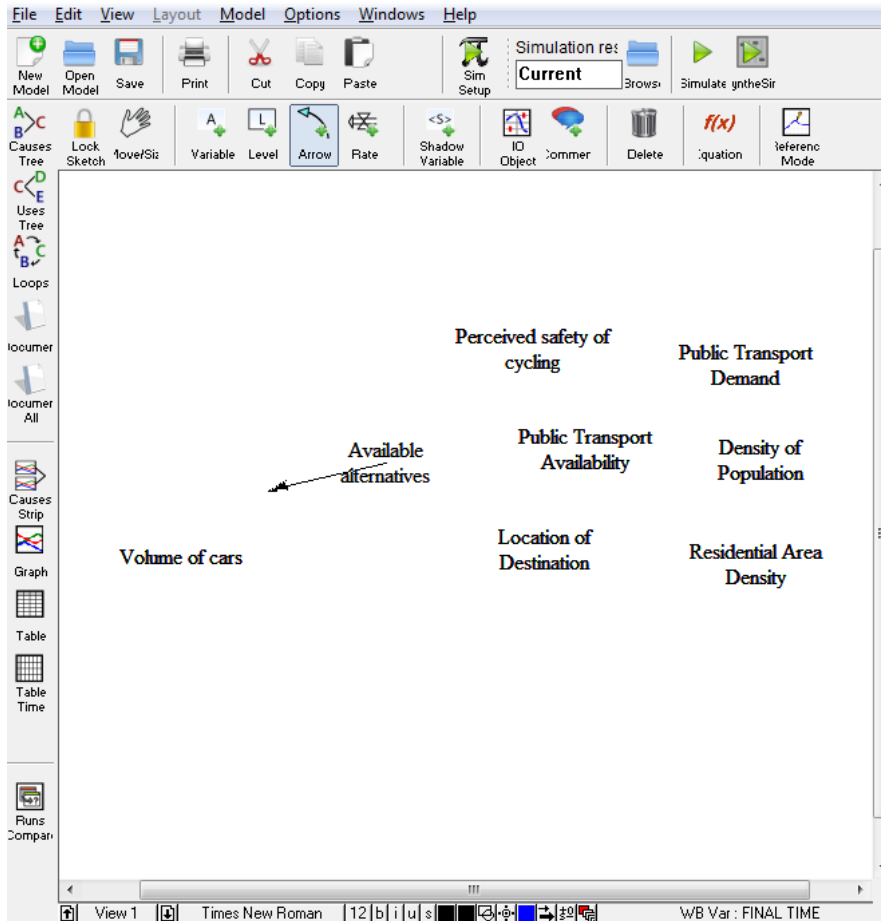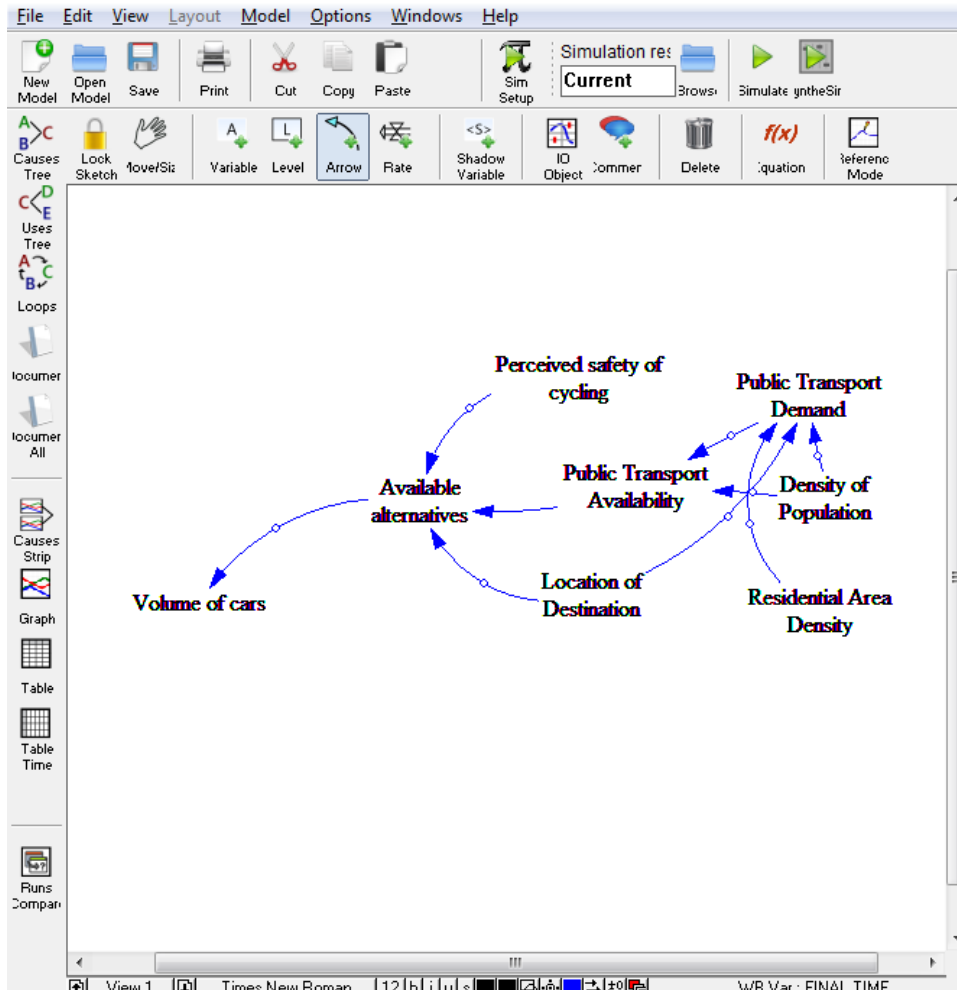## Figure 8: Adding arrows in Vensim

Figure 9: creating system maps in Vensim

7. Follow this process until the individual map is recreated in Vensim. You are then ready to input the next individual map.

Input other system maps for one group

8. When adding the second individual map, it is likely that some of the causes will have already been included in the first map. Where there is duplication across individual maps, the maps should be linked together. The same variable should not be inputted twice.

9. Repeat the process above until all individual maps, which are associated with one group, are inputted. This will create a map for one of your groups.

Tip: If you fill all the space on the canvas, you can zoom out. This will provide you with more space to input all the variables.

Input individual system maps for all remaining groups

10. The above process should now be repeated for the next group of individual maps. Start the process in a separate section of the canvas so that you have sufficient space.

11. As you input the individual maps, you can try to organise the collated system map so that it is as clear as possible. You can move single variables (causes), or single arrows (relationships), or move whole sections of the map. System maps are messy and complex, but how the map is organised can make it clearer. The groups provide a simple way to begin organising your map.

Tip: To move a whole section of the map, rather than a single variable or arrow, click on the 'Move/Size' icon. With this icon selected, you can click and drag your cursor over a section of the map. Once the cursor is released, you can then click on the selected variables and move the whole section.

12. Discuss your collated system map with other members of the core working team to ensure it is comprehensible and clear. See figure 10 for an example of a collated system map created in Vensim.

Figure 10: Complete collated system map in Vensim
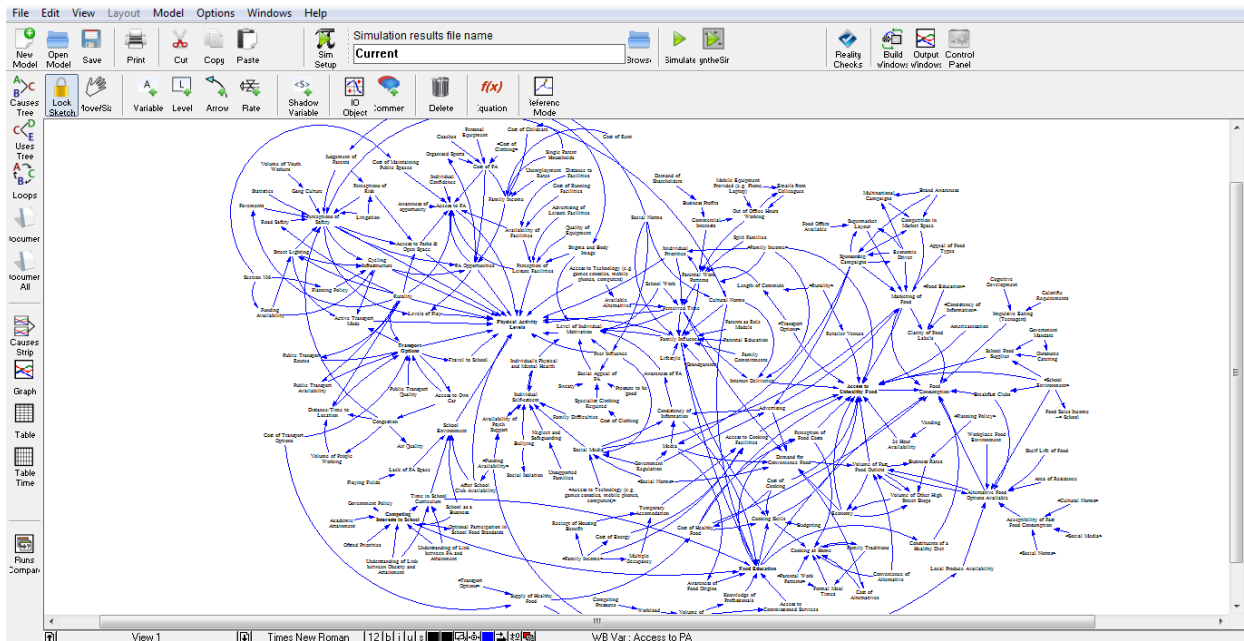

Highlight themes in the collated system map

13. The final step is to identify and highlight themes in your collated system map. A theme is a group of causes which share a commonality. Themes are likely to be similar to the groups you identified earlier but may be more generic (for example: *Group*: Fast Food → *Theme*: Food Options Available). The themes will simplify the process of explaining the collated system map in workshop 2 and will also help your stakeholders prioritise areas for action.

14. To highlight themes, firstly transfer your collated system map into Microsoft PowerPoint. Using the 'Move/Size' function, select all the variables and arrows in your collated system map and then press 'CTRL + C'. Open a blank slide on PowerPoint and press 'Paste'.

Tip: Ensure that the PowerPoint slide is set in landscape and in A3. This can be done by clicking on the 'Design' tab in the top toolbar, then 'Slide size', then 'Custom Slide Size'.

15. With the collated map in PowerPoint, and having decided where your themes are, on the top banner select 'Insert' → 'Shape' → 'Lines' → 'freeform shape' (see figure 11). This will allow you to draw a shape around the causes within a theme.

Figure 11: Selecting the freeform shape
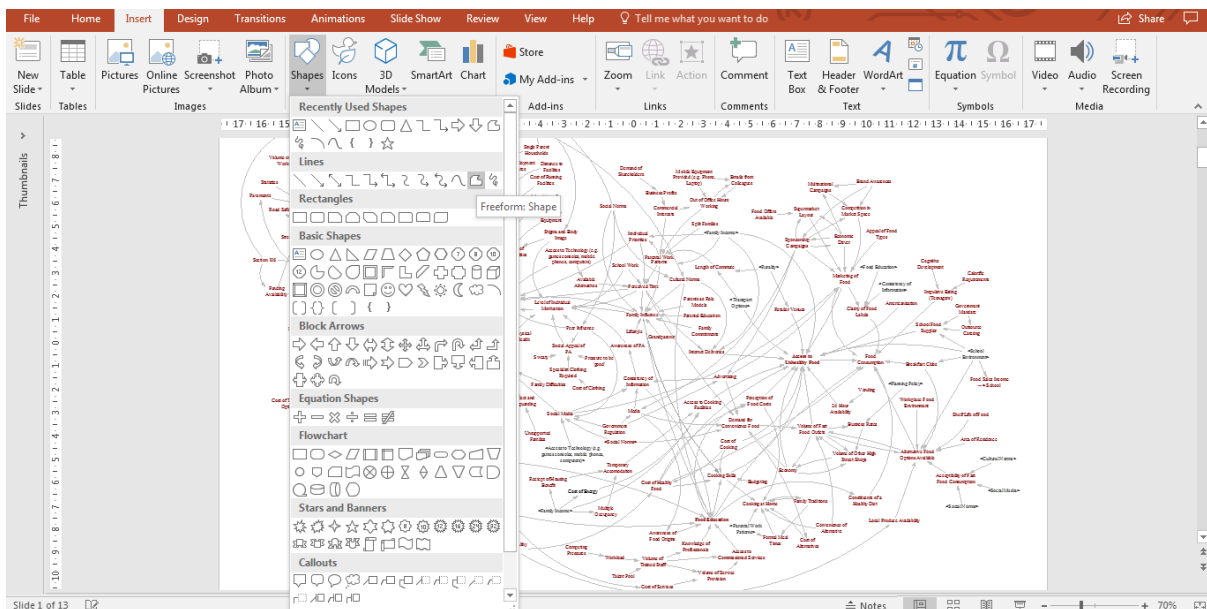
16. Left click to start creating the freeform shape around your identified theme. Then left click on another point of your map, drawing a line between where you first clicked and your second click. Then move the cursor and click again. This will start to create edges to the shape. Continue to follow this process to create a shape around the causes within a theme. To complete this shape, you will need to click on the same place where you began the shape. It may take a few attempts to get your shape right. It does not have to be perfect, just sufficient to cover the causes within the theme. By double clicking inside the shape, you can then name your theme. See figure 12 for an example of a freeform shape.

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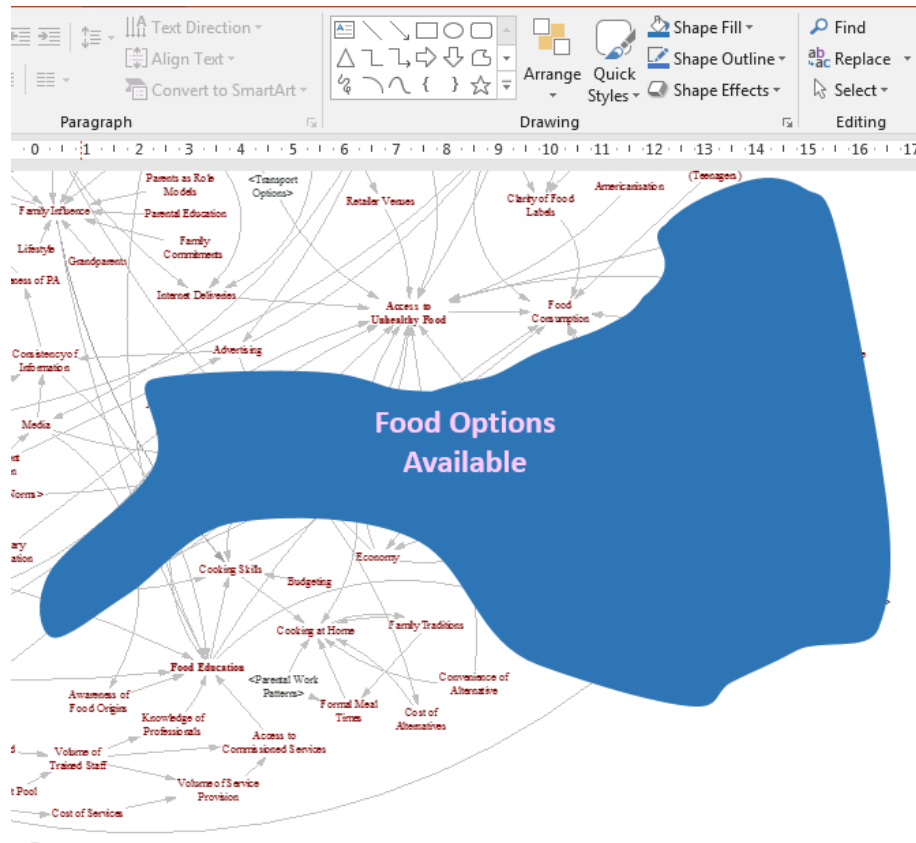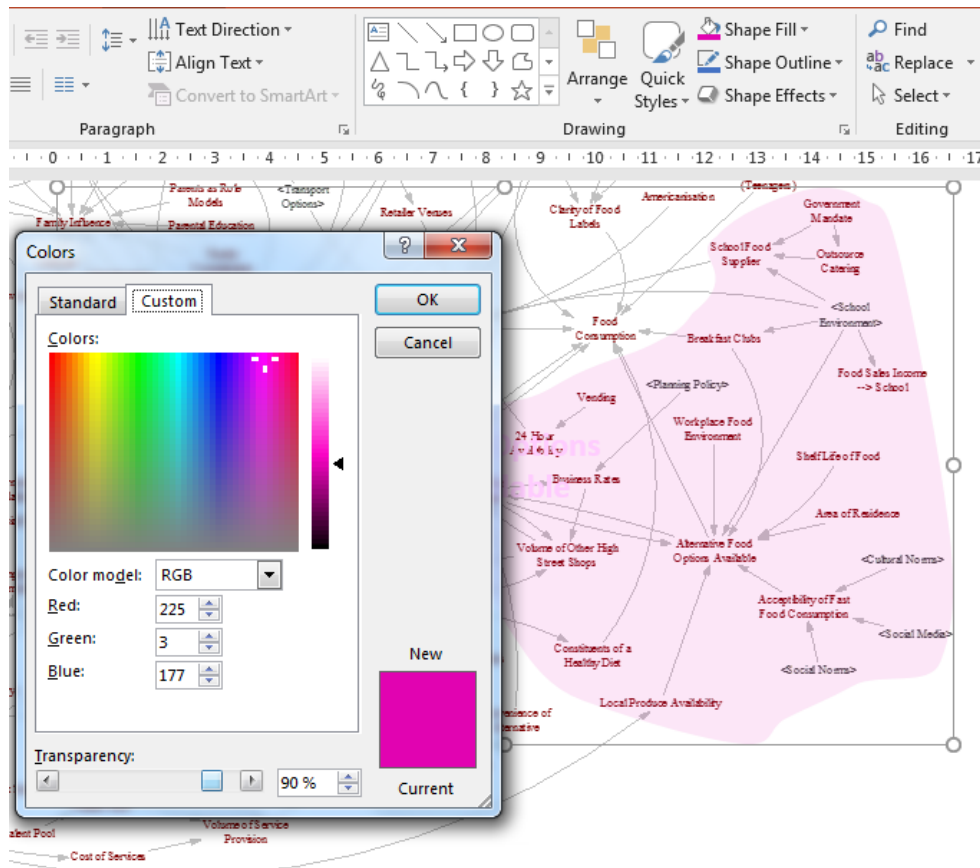**Figure 12: Freeform shape created in PowerPoint**

Figure 13: Changing the colour and transparency of the freeform shape in PowerPoint

17. Right click on the shape and select 'Fill' → 'More Fill Colors'. You can then change the colour of your shape. To make it transparent, change the 'Transparency' setting to 90%. See figure 13.

18. Repeat this process for all other themes. The final version of an example collated system map is presented in figure 14 below. This collated system map is central to the process going forward.

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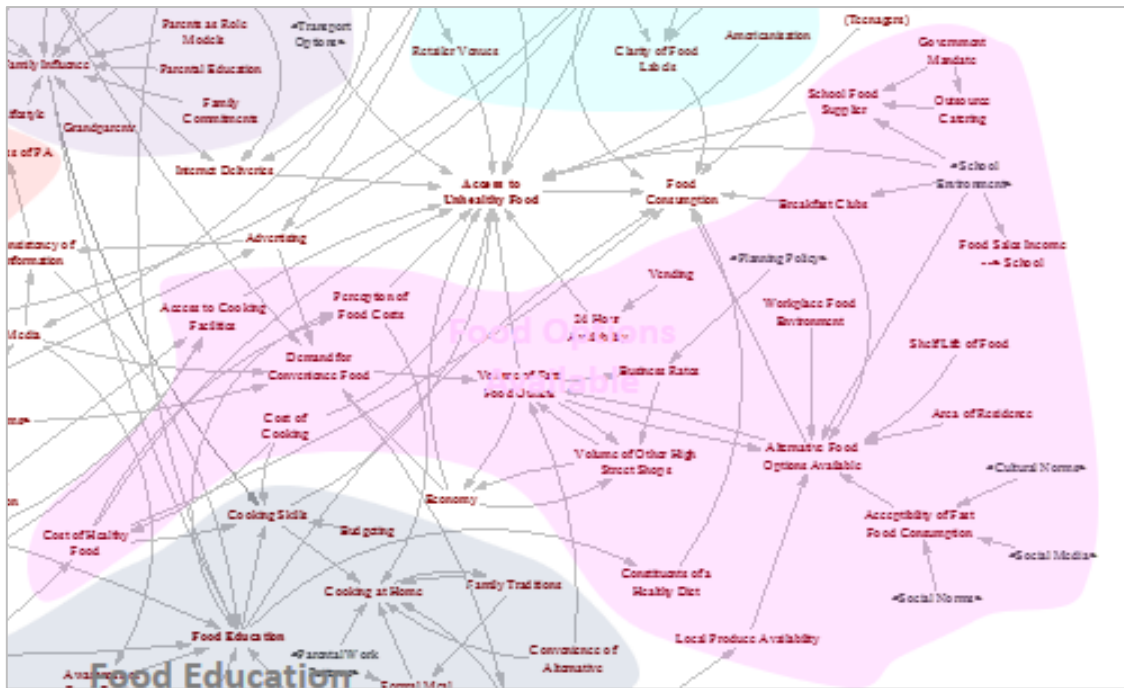**Figure 14: Collated system map**
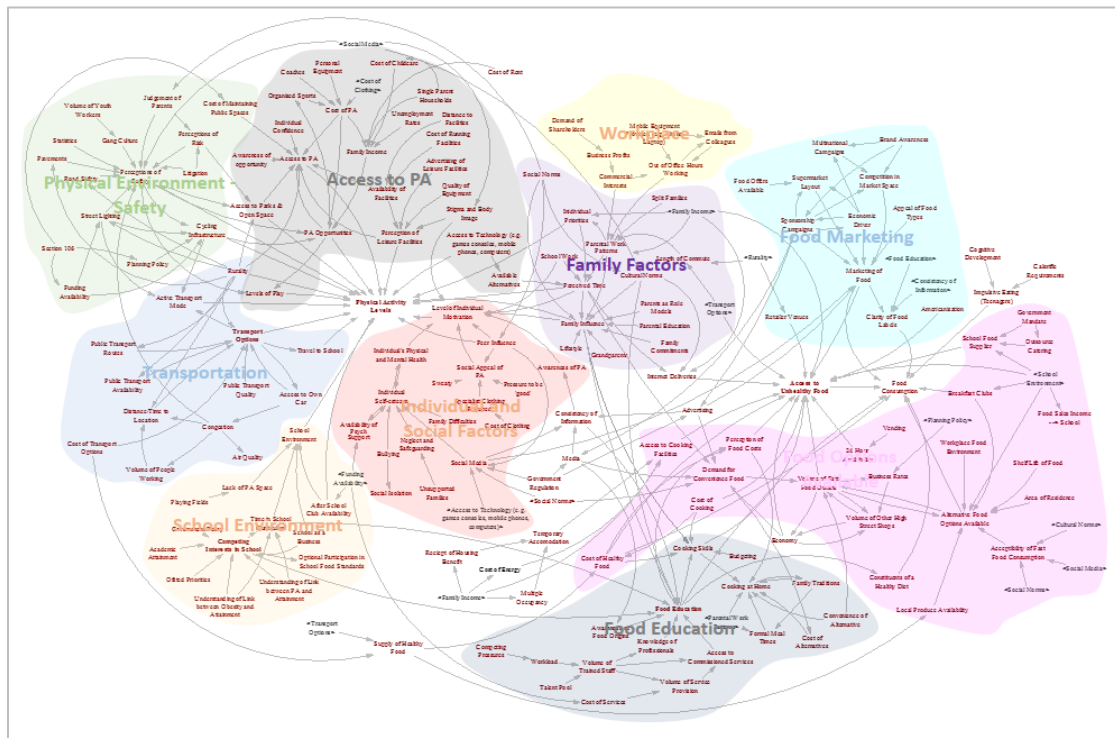
No system map is completely comprehensive There may be gaps depending on the breadth of stakeholders who attended the first workshop. This can be addressed later in the process.

19. To prepare for workshop 2, take a screenshot of each individual theme within the collated system map. To do this, view your PowerPoint collated system map in full screen mode (press F5). Then, hold down 'CTRL', and zoom into your map so that only a single theme is visible (note, there may be overlap with other themes). Press 'PRINT SCREEN', 'ESC' to leave the full screen mode, and on a new slide in PowerPoint press 'PASTE'. This should give you a zoomed in version of the theme. Repeat this process for all themes. See figure 15 for an example.

Figure 15: One theme within system map zoomed in

Task 2: Overlay current actions on the system map

You will now have a collated system map. The map will be shared with stakeholders in workshop 2 to highlight current actions across the system and identify gaps in the current approach. This helps to create a shared vision of the local reality.

To complete this task, you will need:

- the collated system map (without highlighted themes) in Microsoft PowerPoint
- the action mapping tool (resource D)

Process

The process for completing this step is simple. In phase 2 (building the local picture) you used the action mapping tool to create a list of current and planned actions. This task overlays these actions onto the collated system map.

Overlay actions onto the system map

The following steps help you to overlay actions onto the system map:

1. Open the collated system map in PowerPoint and the completed action mapping pro forma in Microsoft Excel (resource D). Save another copy of the collated map using a different name (for example: collated system map-actions).

2. You will need to create a text box in PowerPoint for each of your current and planned actions. Ensure that the text for current and planned actions are in different colours.

3. As a core working team you should agree where you believe the current and planned actions best fit in your collated system map (see figure 16). If an action fits in multiple areas, create a duplicate text box for this action.

Tip: To make the actions easy to see, ensure that the text is large and in a different colour to the text used for the causes (see figure 16).

Figure 16: Collated system map with current actions
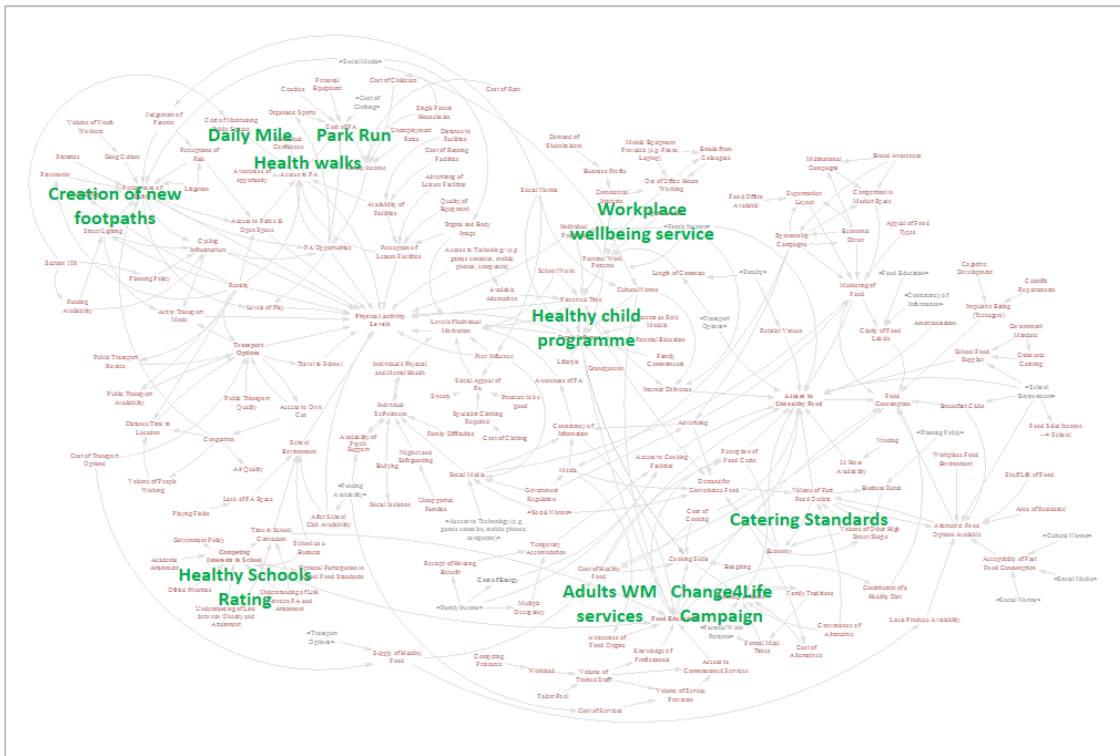
Task 3: Prepare the draft vision statement

This task involves preparing one or several draft vision statements using ideas generated in workshop 1. See resource K- workshop 1 and resource N- workshop 1 notes for information on how the ideas for the vision statements were generated in workshop 1.

Process

The following steps will help you prepare your draft vision statement:
1. Look for common themes for the three key elements that inform the development of the vision statement: destination, purpose and values.

2. Develop the ideas into a number of draft vision statements.
2. Sharing and develop your ideas until you arrive at something that is inspiring, meaningful, and compelling for all stakeholders.

3. Review the drafts with key colleagues including those who were not at the workshop 1. Particularly consider colleagues outside public health and community representatives.

Task 4: Preparation for workshop 2

This task involves preparation for workshop 2 (phase 4: Action). This includes confirming logistics for the workshop with stakeholders and preparing the presentation slides.

To complete this task, you will need:

- list of stakeholders to invite to workshop 2
- workshop 2 presentation template
- images of the individual system maps
- collated system map
- collated system map with actions
- information collected during phase 2 (building the local picture)

Process

Confirm workshop 2 logistics with stakeholders

The following steps will help you confirm logistics of workshop 2 with stakeholders:

1. Invite all stakeholders who attended workshop 1.

2. Invite additional stakeholders who you would like to be part of the system network. Update new stakeholders on the process followed and the outcomes achieved to date through sharing slide packs, collated system maps and/or briefing notes. Consider also sending a recap of workshop 1 content and outcomes to the rest of the systems network.

Tip: Considering asking a senior member of the local authority to send these invitations (such as, Chief Executive, local elected member, a senior champion Director of Public Health or Head of Service).

3. Consider sending a reminder to all stakeholders a week prior to the workshop.

Prepare presentation for workshop 2

The following steps will help you prepare for workshop 2:

1. The PowerPoint template for workshop 2 (resource R) includes slides for you to amend- please also change these into your local area template.
2. There are a number of slides in the template which require you to insert information prepared in this or earlier phases as follows:

    *   images of the individual system maps and the collated system map
    *   close up images of the themes from the collated system map
    *   the collated system map with current actions
    *   the results of the action mapping tool and information on local assets (optional)
    *   additional results from phase 2 (building the local picture)
    *   draft vision statement(s)

3. The core working team and the workshop facilitators should understand the process and tasks associated with workshop 2. This includes becoming familiar with the presentation slides and the included content (see resource P- action scales model and resource U- action register). This will ensure that during the workshop team members can answer any questions from stakeholders.

Task 5: Workshop 2 - On the day requirements

Resources required

*   PowerPoint slides for workshop 2 presentation- whole system approach to obesity: identifying opportunities to change the current system (resource R)
*   workshop 2 agenda for the day- 1 copy per invited participant (resource T)

- collated system map with themes- 1 copy per invited participant (Size: A4)
- collated system map with themes- 2 copies per table (Size: A2 or A3)
- maps of the individual themes- 8 copies of each theme (Size: A2 or A3)
- action registers (resource U)- 5-6 copies available per table (Size: A2 or A3
- summary of workshop 2 activity (resource V)- 2 copies per table (Size: A4)
- any other materials that you think will be useful for participants (for example: slide printouts, results of action mapping and network analyses)
- pens, sticky-tac, name badges plus blank badges, signing in sheet and feedback forms (optional)

Setting up the venue

The following will be required on the day of the workshop:
- facilities with a screen and projector for showing slides
- table and chairs set up with no more than 6 to 8 people on any table

- re-create a version of your collated system map with themes on the largest wall in the room. Use the large printouts (the A2 or A3 copies) of the individual themes from the system map to do this. This map should be a few meters wide

Each table will require the following:

At the beginning:

- an agenda per participant
- A printout of the collated system map with themes (A4) per participant
- 2 printouts of the collated system map with themes (A2 or A3)
- 5-6 printouts of the action registers
- 2 printouts of the Summary for workshop 2 activity (resource V)

After prioritising themes:

- 5-6 printouts of a prioritised theme from the system map (dependent on which themes are prioritised, each table should be assigned a theme of the system map)

Seating plan:

Participants can sit anywhere in the room initially. They will be required to move around tables when taking part in the activity. This is explained in the workshop 2 presentation notes (resource S).

Staff roles

Members of the core working team will run the workshop. Experienced facilitators should be used who have developed a good understanding of the whole system approach; be familiar with the purpose of each workshop task; and know how these fit into the whole systems process. These may be members of the core working team, but they could also be from another department or an external organisation.

It is important for a senior local authority figure (senior officer or elected member) to attend and at a minimum introduce and/or close the workshop. The benefits of this are two-fold:

- delegates feel that someone is listening to what they say and that the issues being discussed are important
- the senior figure is actively involved in the discussions and what is being produced

Tip: It is helpful to have a facilitator on each table. If facilitators are from outside the core working team, a member of the core working team should move between tables to assist where required.
The importance of facilitation
For more information on facilitation please refer to resource M- Facilitation Tips.

Asking for feedback

You may have a standard evaluation template to use. If not, here are some suggested evaluation questions:

1. After today's workshop what, if anything, will you do differently?
2. What was good about the event and what could be improved?
3. How has the event increased your understanding of obesity and its impacts?
4. Has the event helped you understand what systems thinking is and the type of mind-set that it requires?
5. Did you find the event useful for networking?