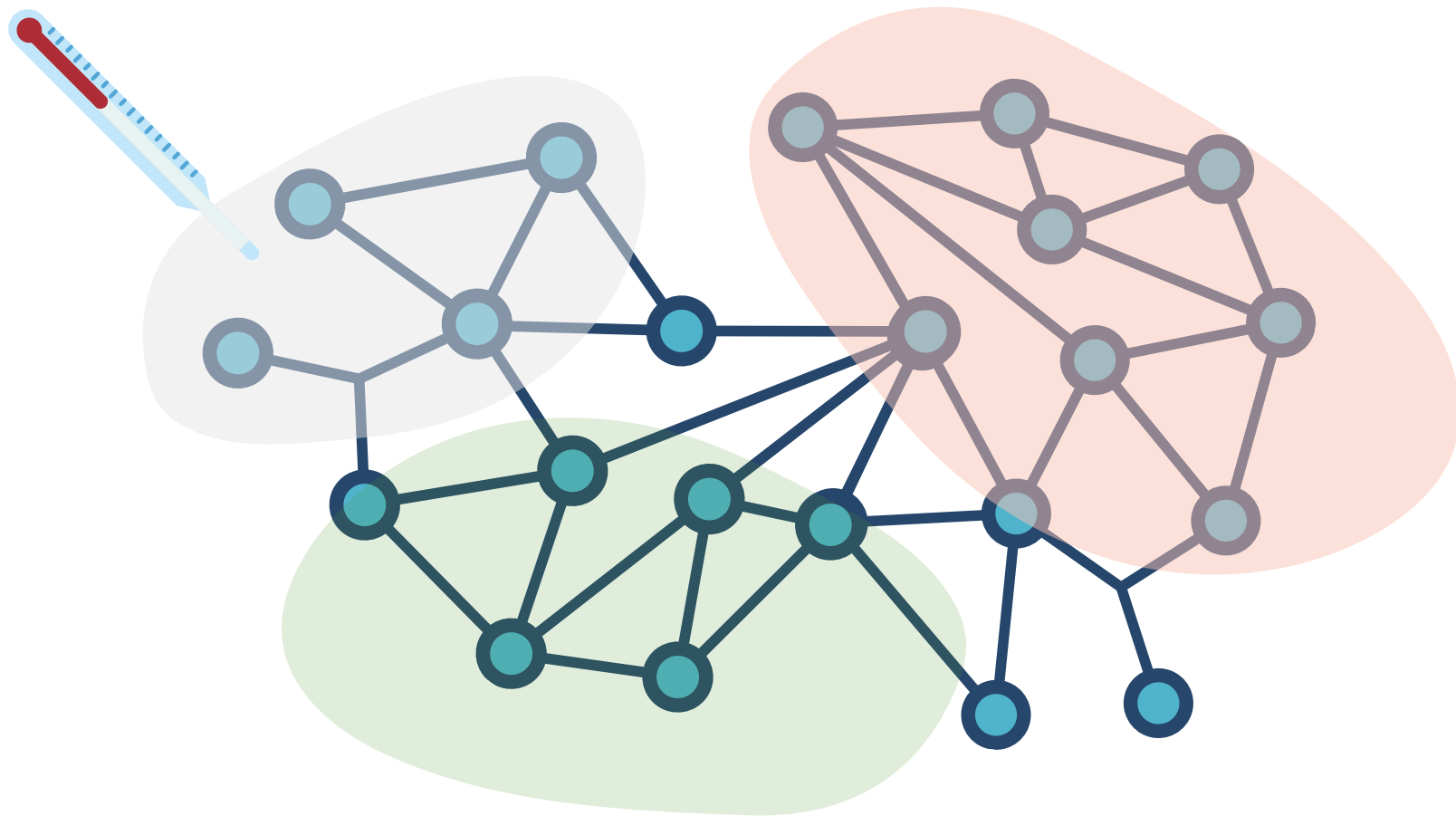


# Monitoring Systems Health





# About FPC

## Your Partners For Impact

At First Person Consulting (FPC) we specialise in evaluation, systems practice, and social research. We work with all sorts of clients across environmental, social justice and health sectors. We draw on a variety of techniques - at the core of which is a genuine commitment to collaboration and partnership.

We care about our clients, the work they do and the people and places they seek to serve. We recognise that meaningful change takes time, and that we all have a part to play. We pride ourselves in being a part of your team, and embed efforts to build capability through any engagement.

In addition to project-based consultancy. We offer professional development opportunities, including workshops, coaching and mentoring, and longer-term organisational growth and capability programs. Each project is a partnership, not a transaction.

If you would like to learn more, discuss your needs and what this might look like, or what it is like to work with us in general. Please get in touch!



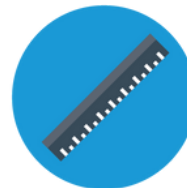
[admin@fpconsulting.com.au](mailto:admin@fpconsulting.com.au)



Systems Practice



Research



Evaluation



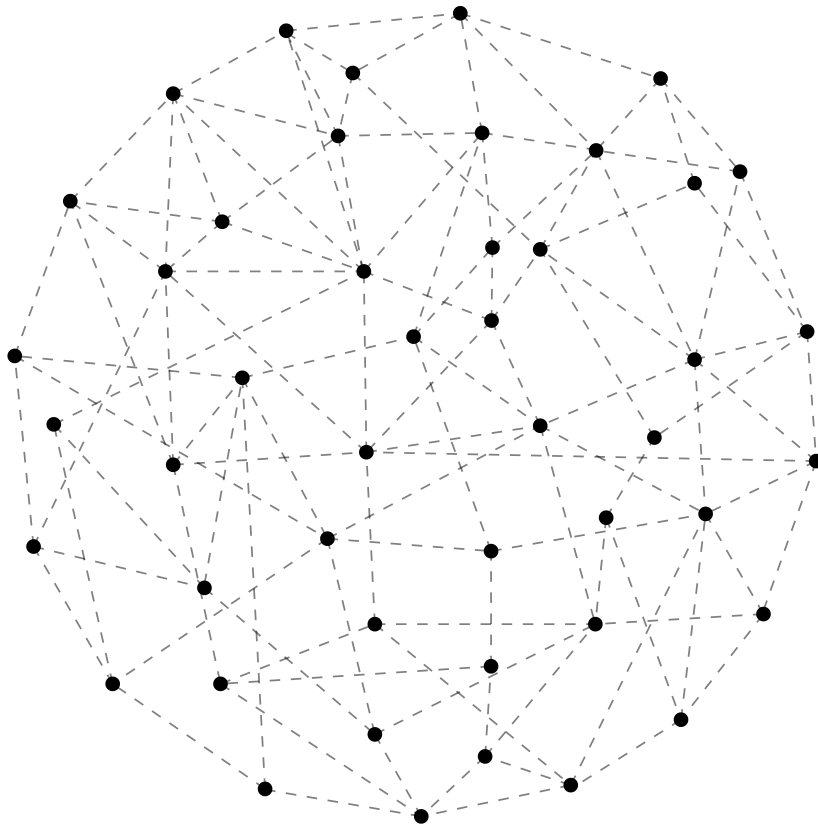
Design



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# What is a system?

A system is any set of components that have a relationship to each other, and whose interaction produces outcomes greater than the sum of their parts.



When we talk about systems, or systems change, we are talking about these complex networks that are shifting and changing.

Systems can relate to any of our day-to-day areas of work and span all sectors.

We see systems practice applied in relation to the environment, social justice and public health.

We see it applied in partnerships and collaboration, collective action planning and 'getting on the same page'.

This document outlines some steps to guide your thinking as to monitoring and evaluating the systems within which you work.

# What is System Health?

A way of thinking understanding the 'overall state' of the system. It is not diagnostic, but rather a starting point for informing decision making and consensus building.

We are very used to identifying indicators and measures for **each output and outcome** in a logic model.

In a systems context, this can grow unmanageable quickly due to their size and complexity. Individual elements might have a number of outcomes, each of which requires multiple indicators.

**This brings about a common question - how do we meaningfully understand the state of the system in a timeframe that is useful?**

We need to challenge our usual way of thinking - and so rather than 'measuring each part of the system' - how can we think about the overall health of the system?

Effective systems practice involves **zooming in and out** across boundaries. Applying this idea, zoom out from focusing on an individual component to a broader view of the system.

In simple terms - if we want to know how the system is 'generally' shifting, perhaps we think about it less as a diagnostic task and more as a 'tracking' task.

Think of the human body as a system. It is made up of many different parts that interact. If we start to feel generally unwell one of the first things a doctor might do is take your temperature.



Therefore, temperature checks are one of the first ways to check the health of our body. Other systems in our body (e.g. circulatory system,) have similar tests - like checking blood pressure.

**It does not provide a specific answer, but it is the starting point to a process.** Depending on the result, we can investigate further - our evaluation approach to systems can mirror this type of thinking.

# Principles for System Health

Reasonable and feasible is the aim.

As evaluators, the program logic or Theory of Change-type approach is a foundational part of our learning. We are taught to identify the various components - partly to understand it, but also to inform the development of indicators and measures.

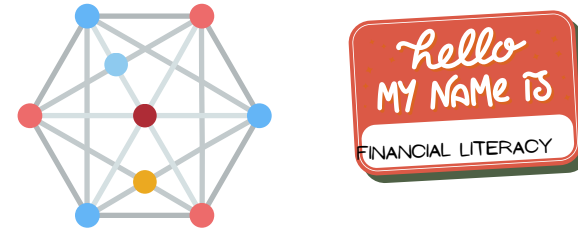
While complicated, this can generally be managed. The challenge with taking a systems perspective are broader than identifying indicators. They can include wide ranges of timeframes for indicators to change, organisational remit (it's a factor, but is it ours to measure?) and resourcing to capture and manage.

The other component is that - in some instances, even an individual element or small set of relationships could involve a multitude of individual indicators (process and outcome) for both the factors, but also their relationship outcomes. So even if we can articulate them all - do we have the capability and capacity to capture, manage, analyse and use this information in a timely way?

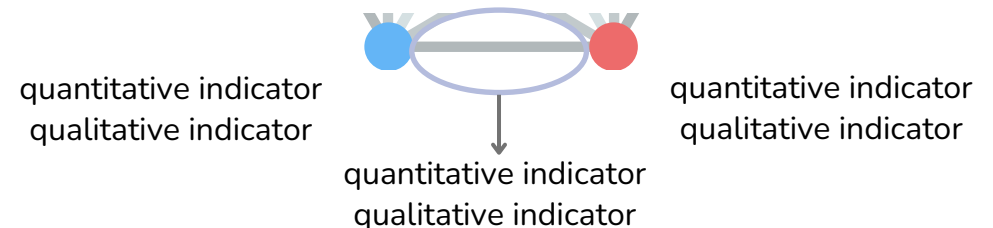
Your answer might be - “**yes**” - if so, congratulations! That means what we are about to share is of interest, but maybe not necessary.

**Let's take an example.**

One of our usual rules of thumb when talking about systems is to 'name it'. So, let's call our example the ‘**financial literacy**’ system.



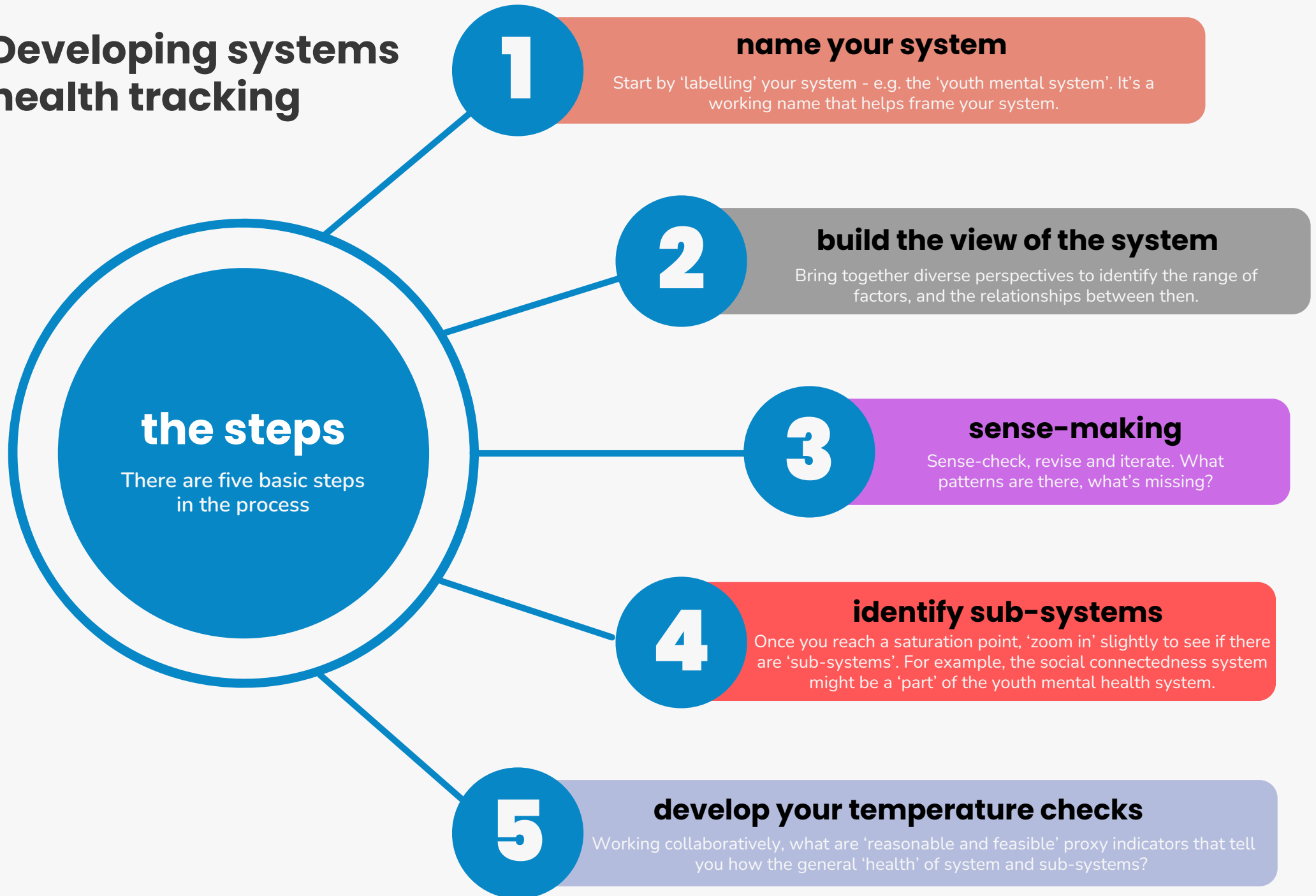
In this map you can see there are nine different factors. Some of these are drivers, some are outcomes of those drivers, and are in turn drivers themselves. Let's zoom into the two factors at the bottom. To monitor these, we will need at least two indicators - **but we also need to monitor the outcome / interactions of the relationship - the line between them.**



This is an oversimplification, but reflects that attempting to track individual indicators across each component of the system is very challenging. It also doesn't tell us the 'overall' picture - and relying on the usual population-level data / ABS statistics can lack timeliness for some uses.

**So where does this leave us?**

# Developing systems health tracking



# Name your system

## Sound easy?

In some ways the first step can be simultaneously the easiest and the hardest.

**The question that often comes to our minds when people reference 'systems change' is "which system?"**

This is an important question - because systems are not objective. Their complexity is informed by both their structure (the actors and factors), but also the experiences of those that interact with the system.

This means that - in many ways - we will never end up with an **objective view of the system**. It is dynamic, meaning it is constantly shifting, and one perspective of the structure and experiences may be radically different to another.

This is not a barrier though. This about coming to collective interpretations of the **general experience**. If we can accept at the outset that there will be differences, and that one view or experience may not be the same as another, we can make progress.

The first step then - is **the name**.



We do not suggest a fixed process for this - nor would we suggest that you spend a long time on this. Oftentimes our instinctive reaction is going to be the right one - or at least 80% of the way there!

That said - here's some ideas to inform the discussion. It is good to do this as a group / to involve at least some of those that will be involved in subsequent stages.

**Keep it simple.** A short title that requires no explanatory text is your aim.

**It is there to focus your conversations.** It acts as a **boundary** by focusing people's thinking on a particular topic or subject area.

**Subsequent steps will set more boundaries.** Avoid further detail unless its highly relevant, or if it is felt that the 'system' looks very different. An example would be the 'mental health system', vs the 'youth mental health system'. Both are correct, but we might choose the latter if there is a need or desire to focus thinking.

**Frame it as an area of 'work' or an outcome area.** For our example, we are going to call it the **Youth Homelessness System**.

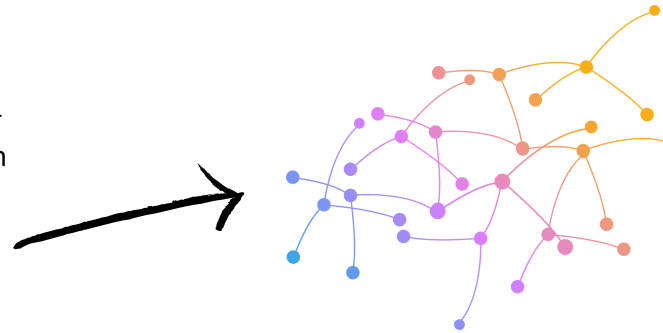
**Importantly, this is not fixed.** You can change it later - it's a starting point only and should be seen as the name, until its no longer the right name.

# Build the view of the system

Sound easy? There's three steps.

There are many different techniques for building a systems map. Some are more technical, others more free-flowing. Like evaluation, if you take a systematic approach you'll be on the right track!

This is a simple process to construct something like this



First, some foundational things:

- You can do this virtually or in-person. Regardless, you need some **materials to write with** (e.g. a Miro board, or sticky notes and butchers paper, and markers).
- **Bring people together.** Best practice would be people with different perspectives or 'views' (AKA experiences) of the system. What this means for you will vary.
- **Ensure there is general agreement on your system's name.** Again, this is just a starting point. It may change - and that's fine.

1

Start by focusing your system. This can involve geography, particular communities (e.g. youth) or something in line with your organisational remit. Sometimes we focus it as a 'vision' - like the ideal future state that we want the system to 'be', For example, let's assume you are a Victorian-based youth homelessness organisation.

**Young people in Victoria live in a safe and thriving home.**

It's intentionally a bit aspirational - after all, this is what we're trying to work towards! Try not to wordsmith it too much at this stage - again, this can change later. Think of this as the first 'element' in our system:



Young people in Victoria live in a safe and thriving home



# Build the view of the system

2

**With the 'focus' in the centre of your workspace we now need to build out the map.** Notice that the key boundaries identified are 'young people', and 'Victoria'. Keep these aspects in mind.

Your next task - determinants.

Think of determinants like **barriers** or **enablers**. These are the things that help or hinder **progress towards the vision**.

**These should be things that are currently happening, not things that could happen if there's change.**

Tackle each one in turn. So - barriers first:

**What are the barriers to [insert focus]?**

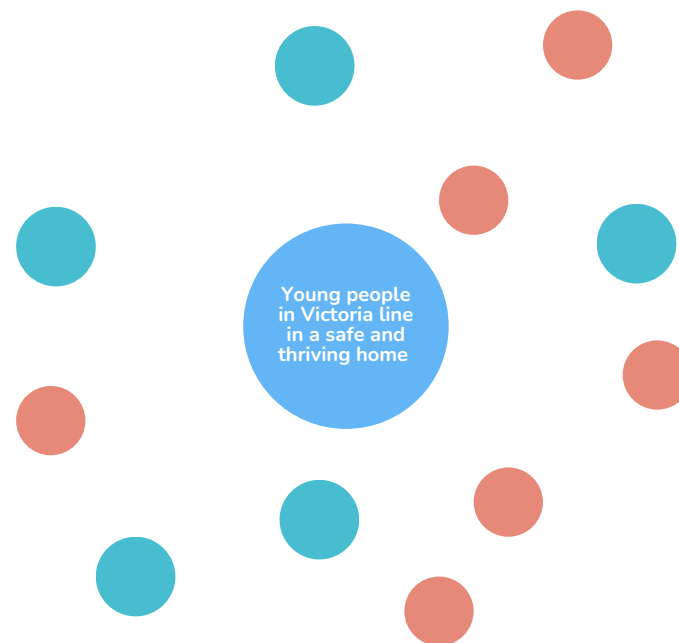
Individually, write each one down. After a period of time (e.g. 15 minutes), share what each of you came up with. Then repeat with enablers:

**What are the enablers to [insert focus]?**

What you may notice is that you have a particular factor that is both a barrier and an enabler (i.e. 'it depends' on something else). The way you can filter this is by asking 'is this actually happening'? If they are both happening, then it means they are both true and need to go on the map.

**Place them all on your map. Consolidate any duplicates.**

Your page or workspace will look something like the below. It can be good to colour code between the two types (barriers or enablers). If there is one that is both then feel free to introduce a third colour. **This needs to work for you.**



# Build the view of the system

3

The next task is to look across your factors and identify **relationships**. Relationships do not occur for no reason - there is some sort of dependence or 'reason' for the connection.

In this case, it will usually be that the factor influences another factor

Look at an individual factor and ask yourself the following:

**What causes [this factor] to happen?**

In effect, what you are doing is identifying the root cause or next level 'down' for that factor. If that factor already exists on your map, draw a directed line between them to reflect the flow of influence.

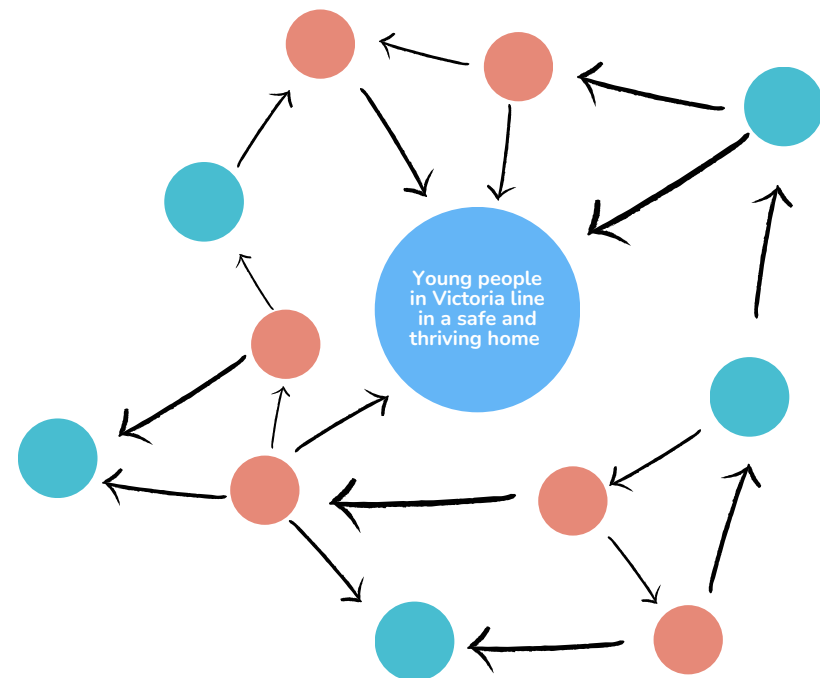


If the factor is not already on the map, now is your chance to add it on.

Now, **repeat this process with all factors**. Keep questioning if there are 'deeper' drivers or determinants. This is a good group exercise, but can also be done individually.

Your page or workspace will look something like the below. It can be good to colour code between the two types (barriers or enablers). If there is one that is both then feel free to introduce a third colour. **This needs to work for you.**

Eventually you will end up with a bit of a mess - something like this very simplistic example:



# Sense-making

Time to sense-check yourself.

You now have a draft 'view' of the system. **Remember, we call it this because it's an interpretation.** This is the summation of our understandings of the world, our own experiences and how we interpret change.

Think of this like a 'caveat' - systems are not objective. That doesn't mean this isn't useful - we just need to be careful about any language that might present it as so.

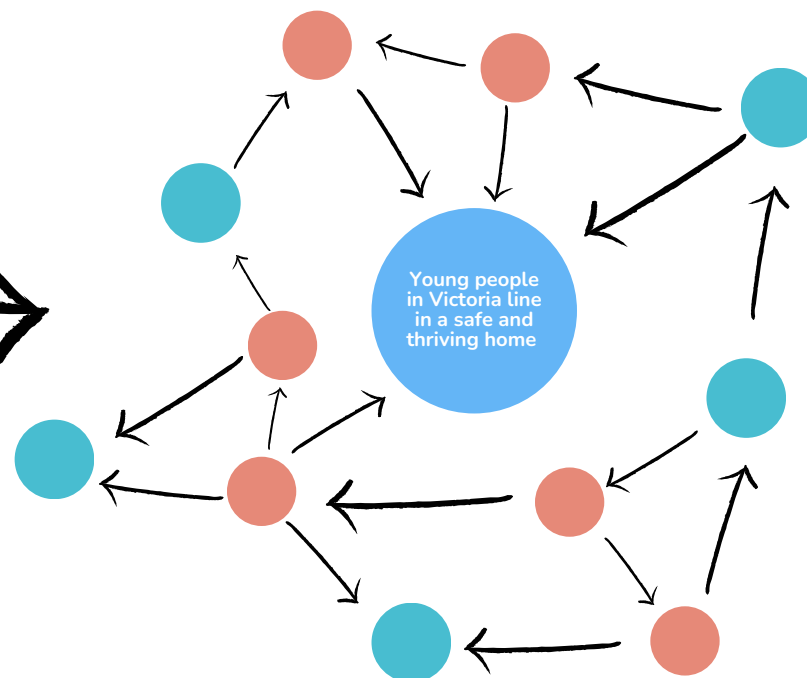
OK - here's our draft map.

At this stage, your task is two-fold:

- **Discuss and question your evidence (i.e. how you know) or your assumptions (i.e. you don't have evidence, but it 'makes sense') for elements and connections.**

Evidence is not just peer-reviewed literature. People's lived experience, our own work experiences, and other forms of data are all useful evidence to bring to this. **Importantly, if you don't have evidence but can agree that something 'makes sense' - keep it!** It's an assumption, but we make assumptions all the time. Consider adding a small flag to the element or connection - you can always test it later.

- **Identify patterns.** Another term for this is things like feedback loops, or where there is something 'higher' than a single connection. These clusters or other manifestations are good to be aware of for later (write them down). If you don't see any, don't stress!

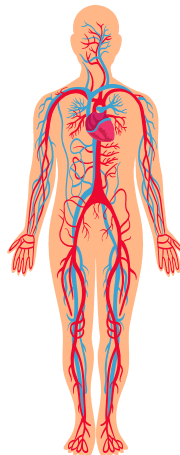


# Identify sub-systems

Time to zoom in!

The next step is to see if we can identify any 'smaller' or **sub-systems** that sit within the broader youth homeless system that we have mapped.

If we go back to the analogy of the human body - this is like **identifying the other systems that sit within the human body (e.g. circulatory, skeletal, etc.)**



Sometimes these are referred to as 'nested systems'. Regardless of term, this reflects the idea that there are systems within systems, within systems.

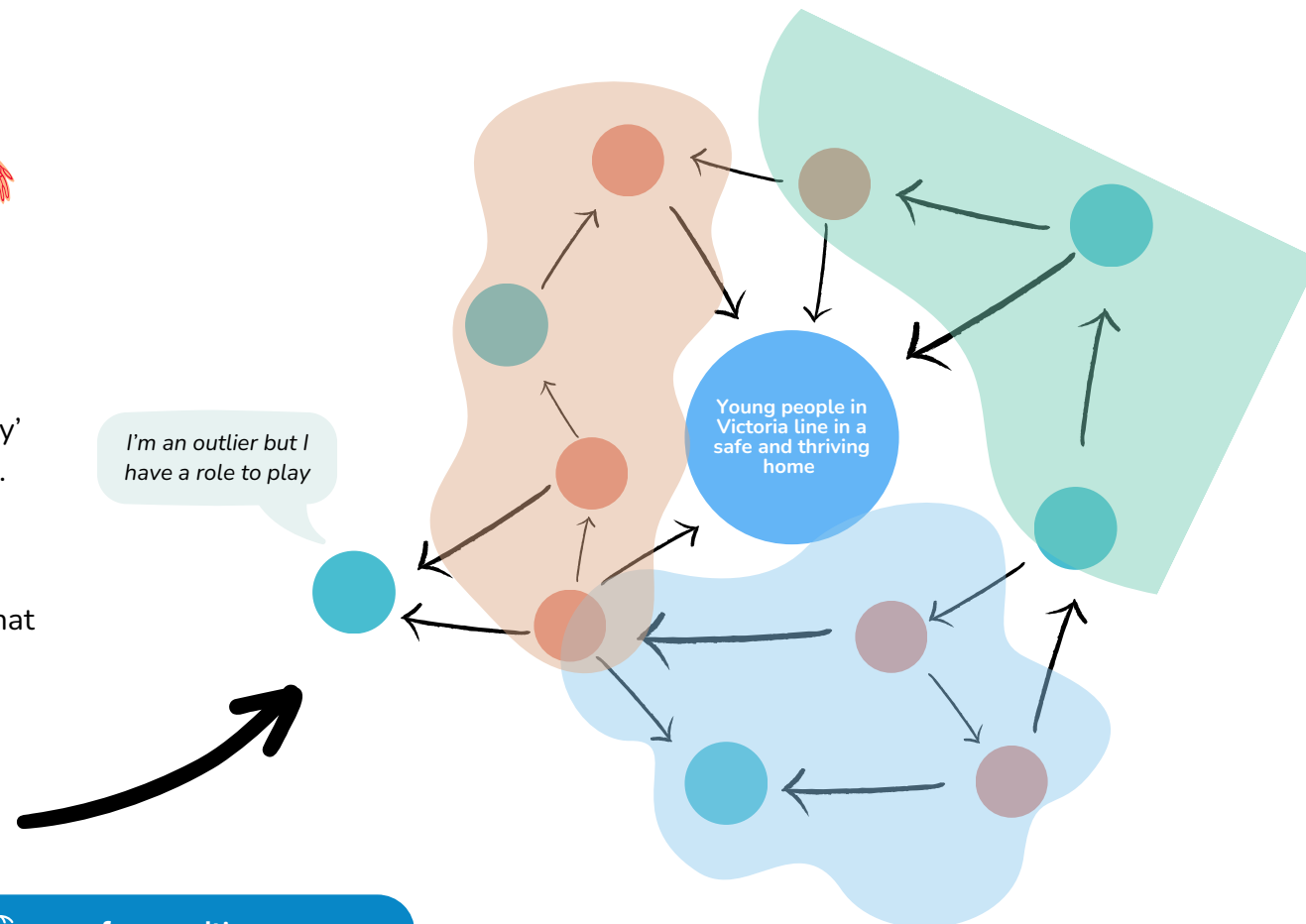
The easiest way to think about this is as the 'category' or thematic area that your different factors sit under.

**To date, our systems map reflects a view of the Youth Homelessness System.**

Looking across the elements, we can actually see that **mental health factors** feature prominently. **Employment factors** are also present. **Family dynamics** are also present.

**We now need to overlay these on the map. Something like this:**

See the transparent coloured shapes as those three systems. It now helps build a more nuanced picture of the different drivers related to youth homelessness. Similar to 'naming the system' - **our goal is to identify and name these sub-systems.**



# Temperature checks

**Remember: Reasonable, feasible and timely.**

Up to this point we have focused on **clarity**. That is, **clarity of our system, our purpose (vision), the structure, and sub-systems**.

Now the goal is to find ways to track how we are going.

One traditional approach - say with youth homelessness - would be to look at the **rates of homelessness**.

This measure tells us the **overall state** - but does it meet our criteria:

- **Reasonable** - does it provide a 'good enough' insight into the state of the system?
- **Feasible** - can we collect / manage / analyse or access the data? Is it resourced / resourceable?
- **Timely** - does it provide us insights in a quick enough way that we can use to take advantage of unexpected opportunities, or pivot if things are not going well?

Typically we would see the first two as 'likely'. The challenge is the last one - timeliness. Reliance on large-scale public sector statistics like the Australian Bureau of Statistics is beneficial in some contexts, but there can be large time lags. The other element is the necessary nuance in measure itself for it to be useful in your particular organisational and delivery context.

If that's not the case - great! This part is basically done for you. If you're not so lucky, then here's some techniques to identify your temperature check (AKA sub-system proxy indicators).

- 1** Take one of your systems, and discuss the patterns of interactions that you see happening. This is where you can use notes from earlier.
- 2** Are there any big **influencers**? That is, is there a factor or two that have lots of **outward arrows and a limited number of inward arrows**? If so, these are a great shortcut - because if that factor changes, it will have flow-on effects to others. Start there! Are there indicators around that meet our three criteria?
- 3** If this is not apparent, or if there are no big influencers, then we need to try and identify the **emergent outcome**. Think of this as the 'greater than the sum of the parts' result of that sub-system.

For example, we might look across the **family dynamics** sub-system and identify that (like in a logic model) that the coalescing outcome (i.e. the overarching result) relates to **young people's feelings of self-efficacy**.

Thus, this would then act as our overarching 'temperature check'. It doesn't tell us specifically where action is needed, but implies that some is required.

# Temperature checks

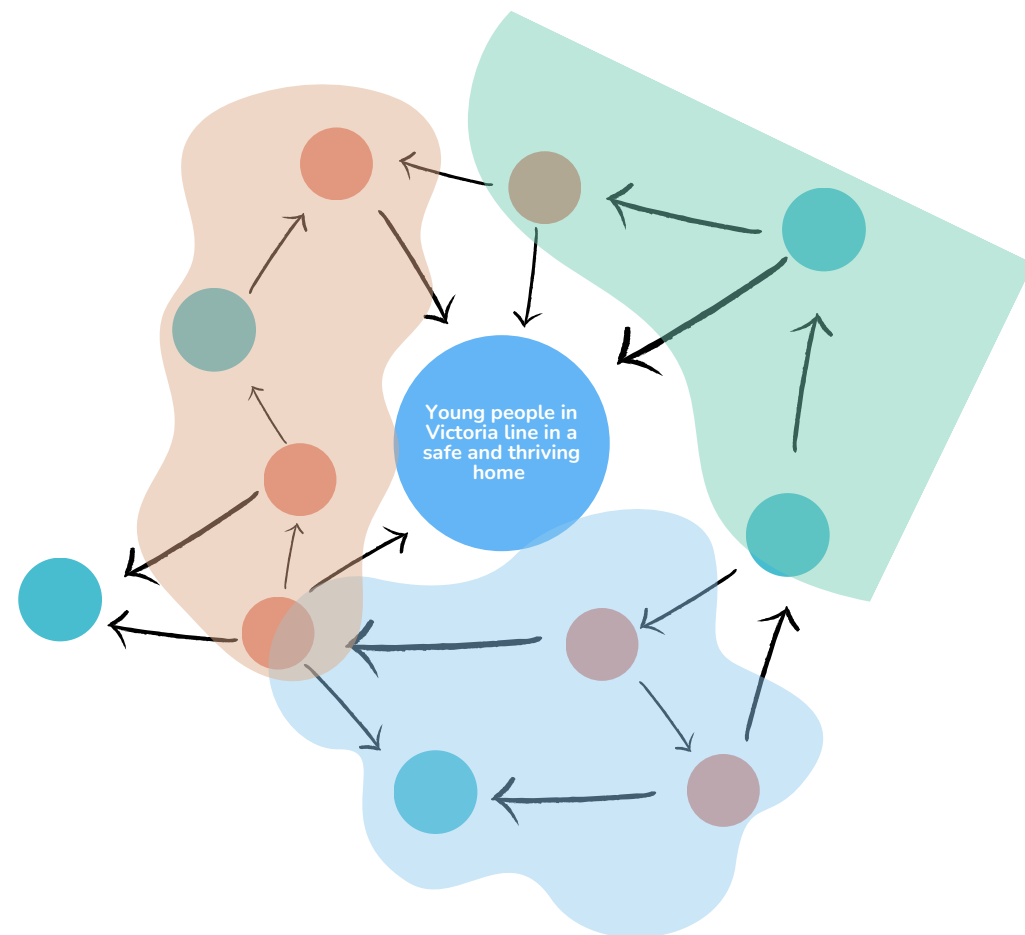
Repeating this process will result in a targeted set of sub-system measures. Depending on the nature of your system, sub-systems may not be obvious. Remember, they don't have to be a 'formal' system like a service system.

For example, in one project we undertook using systems techniques in the homelessness and family violence context, the individual experience of people was its own 'system'. It heavily intersected with other systems (e.g. the justice system), but warranted being called out as its own area of complexity.

So, we have a set of **proxy indicators** that we can use at the sub-system level. At the 'system' level - Youth Homelessness System the questions still apply. If you can access youth homelessness data that is timely enough for your purposes - great!

If that is not possible, there are two options. The first is repeat the same process again - when those sub-systems coalesce is there a proxy indicator that we feel is a 'good enough' measure? Does it fit the 'narrative' of the system?

The other option is to **develop proxy indicators for the 'vision' or focus that was used to start the mapping process**. This is no different to forming any other indicator - but provides an alternative frame for you to work through this process.





# Wrap-up

At FPC we pride ourselves on our willingness to approach challenges differently. The increasing emphasis on systems approaches to tackle complex problems means we need to be willing to question our practices.

For us - this also means going back to basics and thinking about how we understand and represent 'what changes looks like'. This primer on our current thinking about systems health is a starting point on this. Hopefully you have found it helpful - or at minimum, a point of discussion or reflection.

This primer has tried to provide guidance for you to apply this in your own contexts. It doesn't have all the answers - as we often answer to most questions - **it depends!**

The parting advice we offer is to recognise that you are experts within your own system. You can see the parts moving, you have your own experiences, and through collaborative efforts across that system we can build up our understanding of how it's shifting.

Systems is a 'broad church' - there's no one right way to do it or think about it. In that vein, adapt or adopt this in ways that make sense to you.

And as always, if you have any questions - please reach out. We're always happy to help however we can.



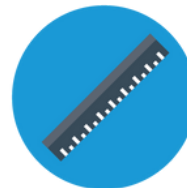
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Systems Practice



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