Activity Preparation and Facilitation Guide: Site Team Mapping Exercise

Site Team Mapping Activity Preparation

<table>
<thead>
<tr>
<th>Time</th>
<th>1 hour and 45 minutes</th>
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| Objective | • To set an overarching goal for one prioritized outcome of interest in your community.  
• To review your project goals with respect to your overarching goal.  
• To conduct a gap analysis with respect to your health equity activities.  
• To identify redundancies with respect to your health equity activities.  
• To map your current and ideal states. |
| Advance Preparation | • Photocopy your most recent CHNA  
• Create Project Cards using the Project Cards from the Cards Template  
• Create Domain Cards using the Domain Cards from the Cards Template  
• Create Internal Partner Cards using the Internal Partner Cards from the Cards Template  
• Create External Partner Cards using the External Partner Cards from the Cards Template  
• Label the butcher paper according to the guide below  
• Bring a flash drive or load the meeting room computer with your Health Equity Inventory  
• Load the Site Team Mapping PowerPoint on the meeting room computer  
• Photocopy the Project Goal Analysis Handout (below)  
• Photocopy the Preparation and Facilitation Guide (below) |
| Materials Needed | ☐ Community Health Needs Assessment (CHNA)  
☐ Project Cards  
☐ Domain Cards  
☐ External Partner Cards  
☐ Internal Partner Cards  
☐ 4’ Piece of Butcher Paper  
☐ Black, Green, and Red Markers  
☐ Cell Phone Camera  
☐ Laptop or Computer with Excel 2013 or higher loaded with your Health Equity Inventory  
☐ Project Goal Assessment Handout  
☐ Facilitation Guide  
☐ Site Team Mapping PowerPoint |
| Room Set | A meeting room with a table large enough to accommodate your team and the 4’ piece of butcher paper. |
### Activity Facilitation

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<th>Resource</th>
<th>Activities/Notes/Considerations</th>
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| 15 minutes | Slide 1 | **Goal Review**  
**Directions**  
1. Lay out all of your Project Cards (pink) in a column, goal side up, under the Project heading on your butcher paper.  
2. For each project, review the project goal and evidence of impact as follows:  
   - Assess the project goal with respect to the overarching goal written on the top of the butcher paper.  
   - Use the checkboxes on the other side of the Project Card to record your assessments of the project’s goals.  
   - Make any additional notes in the space provided on the Project Card.  
**Time Allotted:** 15 minutes |
| 10 minutes | Slide 2 | **Gap Analysis: Current Domains**  
**Directions**  
1. Lay out your starred Domain cards (yellow) in a column under the Domain heading of your butcher paper. Set the remaining Domain cards aside.  
2. For each Domain, assess the following:  
   - Are the associated institutions and departments at the correct level of specificity?  
   - Make corrections to the level of specificity as needed.  
   - Add any missing departments, centers, and/or people (e.g., students, faculty, etc.) related to your current domains who should be listed as partners but aren’t.  
**For example:** If the School of Nursing is listed, are you partnering with the entire school or one department within the school?  
**Time Allotted:** 10 minutes |
| 5 minutes | Slide 3 | **Gap Analysis: New Domains**  
**Directions**  
1. Look at all the Domain cards that were set aside. For each Domain assess the following:  
   - Should this domain be contributing to your overarching goal?  
   - Write a plus sign (+) on the top right corner of the Domain card if it should be involved.  
   - Add the departments, centers, and/or people related to the new domain who should be partnering with you.  
2. Set your new Domain cards aside.  
**Time Allotted:** 5 minutes |
|           |          | **Directions: Goal Review**  
Animations: Yes  
- Give the instruction to lay out the pink Project Cards. Emphasize placing the cards **goal side up**.  
- Once the cards are in place, click to advance to step 2.  
- Call attention to the Project Goal Analysis handout.  
- Watch the time and prompt the room when there are 5 and 2 minutes left.  
- Move to the next slide if the team finishes early. |
|           |          | **Directions: Gap Analysis Current Domains**  
Animations: Yes  
- Give the instruction to lay out the yellow Domain Cards. Emphasize that **only the starred cards should be laid out**.  
- Once the cards are in place, click to advance to step 2.  
- Watch the time and prompt the room when there are 5 and 2 minutes left.  
- Move to the next slide if the team finishes early. |
|           |          | **Directions: Gap Analysis New Domains**  
Animations: No  
- Give the instruction to look at the Domain cards that were not starred.  
- Watch the time and prompt the room when there are 2 minutes left.  
- Make sure that the newly created Domain Cards are set aside.  
- Move to the next slide. |
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| 15 minutes | Slide 4 | **Gap Analysis: Internal Partners**  
**Directions**  
1. Lay out your Internal Partner cards (blue) in a column under the Internal Partner heading of your butcher paper.  
2. For each Internal Partner, assess the following:  
   - Are any departments / centers missing that should be contributing to your overarching goal?  
   - Make new Internal Partner cards for them.  
   - Review your starred and (+) Domain cards. Are these new Internal Partners listed on your starred and (+) Domain cards? If not, add them to the appropriate Domain cards.  
3. Set your new Internal Partner cards aside.  
**Time Allotted:** 15 minutes  
**Directions: Gap Analysis Internal Partners**  
**Animations:** Yes  
- Give the instruction to lay out the Internal Partner Cards.  
- Once the cards are in place, click to advance to steps 2 and 3.  
- Call attention to the instructions to **clear all filters** and to sort the Internal or External column of the **Partners** tab from **Z to A**.  
- Watch the time and prompt the room when there are 5 and 2 minutes left.  
- Make sure that the newly created Internal Partner Cards are set aside.  
- Move to the next slide if the team finishes early. |
| 10 minutes | Slide 5 | **Gap Analysis: External Partners**  
**Directions**  
1. Lay out your External Partner cards (purple) in a column under the External Partner heading of your butcher paper.  
2. For each External Partner, assess the following:  
   - Are any external partners and/or community assets missing that should be contributing to your overarching goal?  
   - Make new External Partner cards for them.  
3. Set your new External Partner cards aside.  
**Time Allotted:** 10 minutes  
**Directions: Gap Analysis External Partners**  
**Animations:** Yes  
- Give the instruction to lay out the External Partner Cards.  
- Once the cards are in place, click to advance to steps 2 and 3.  
- Call attention to the instructions to **clear all filters** and to sort the Internal or External column of the **Partners** tab from **A to Z**.  
- Watch the time and prompt the room when there are 5 and 2 minutes left.  
- Make sure that the newly created External Partner Cards are set aside.  
- Move to the next slide if the team finishes early |
| 5 minutes | Slide 6 | **Consolidation**  
**Directions:** Look at the checkbox side of your Project cards to complete the following:  
- Remove any cards with goals that you deemed “Not Aligned”.  
- Remove any cards with goals that you deemed “Not Met”.  
- Clip together any “Redundant” cards. Stagger the cards so that each project name can still be seen.  
**Time Allotted:** 5 minutes  
**Directions: Consolidation**  
**Animations:** No  
- Give the instruction to look at the check box side of the Project Cards.  
- Watch the time and prompt the room when there are 2 minutes left.  
- Make sure that all project names can be seen for any “Redundant” cards that are clipped together.  
- Move to the next slide. |
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<td>5 minutes</td>
<td>Slide 7</td>
<td><strong>Current Connections</strong>&lt;br&gt;<strong>Directions:</strong>&lt;br&gt;1. Use the black marker to draw the connections that currently exist.&lt;br&gt;   • Connect Domains to Internal/Partners.&lt;br&gt;   • Connect Internal Partners to Projects.&lt;br&gt;   • Connect External Partners to Projects.&lt;br&gt;2. Take a photograph of your &quot;ideal State&quot;, include your school or hospital name and &quot;Current&quot; in the Subject Line and send it to: <a href="mailto:healthequityresearch@aamc.org">healthequityresearch@aamc.org</a>&lt;br&gt;<strong>Time Allotted:</strong> 5 minutes&lt;br&gt;<strong>Directions:</strong>&lt;br&gt;• Give the instruction to use the black marker and only the original cards.&lt;br&gt;• Watch the time and prompt the room when there are 2 minutes left.&lt;br&gt;• Move to the next slide.</td>
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<tr>
<td>5 minutes</td>
<td>Slide 8</td>
<td><strong>Balance</strong>&lt;br&gt;<strong>Directions:</strong> Use the red marker to cross out connections that are overburdened or redundant.&lt;br&gt;• Are any internal partners &quot;overburdened&quot;? If so, cross out the connections that are not essential.&lt;br&gt;• Are any external partners &quot;overburdened&quot;? If so, cross out the connections that are not essential.&lt;br&gt;<strong>Time Allotted:</strong> 5 minutes&lt;br&gt;<strong>Directions:</strong>&lt;br&gt;• Give the instruction to use the red marker.&lt;br&gt;• Watch the time and prompt the room when there are 2 minutes left.&lt;br&gt;• Move to the next slide.</td>
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<td>10 minutes</td>
<td>Slide 9</td>
<td><strong>Ideal State</strong>&lt;br&gt;<strong>Directions:</strong>&lt;br&gt;1. Add any newly created Domain, Internal Partner, or External Partner cards to the appropriate column.&lt;br&gt;2. Use the green marker to make new connections between these new Domains and partners that you think will contribute to your overarching goal.&lt;br&gt;3. Review your ideal state. Make any needed changes or adjustments. Once finalized, tape down your cards.&lt;br&gt;4. Take a photograph of your &quot;Ideal State&quot;, include your school or hospital name and &quot;Ideal&quot; in the Subject Line and send it to: <a href="mailto:healthequityresearch@aamc.org">healthequityresearch@aamc.org</a>&lt;br&gt;<strong>Time Allotted:</strong> 10 minutes&lt;br&gt;<strong>Directions:</strong>&lt;br&gt;• Give the instruction to add any newly created cards to the appropriate column and to use the green marker.&lt;br&gt;• Watch the time and prompt the room when there are 5 and 2 minutes left.&lt;br&gt;• Move to the next slide.</td>
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| 10 minutes | Slide 10 | **Table Discussion: Systems Thinking**<br>**Thought Exercise:** Imagine you are a client/patient who could benefit from the work related to your overarching goal.<br>• Select a likely point of entry into the system for this patient/client.<br>• Walk through the system.<br>• Are there logical connections between all the projects or at least between related projects?<br>• Is there clear communication between community providers and the AMC and vice versa?<br>• How easy (or hard) is it to move between and benefit from the projects/services?<br>• What partners or activities could be added to ease the path?<br>**Time Allotted:** 10 minutes<br>**Directions:**<br>• Read the thought exercise slowly. Click to advance to each bullet point.<br>• Invite discussion once you have read the thought exercise.<br>• Watch the time and prompt the room when there are 5 and 2 minutes left.
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| 10 minutes | Slide 11 | **Directions: Ah Ha Moments**  
Animations: Yes  
- Ask what the biggest insight or surprise was for this activity and invite discussion  
- After 5 minutes of conversation, ask each person to share.  

**Ah Ha Moments?**  
**Table Discussion:** In completing this mapping activity, what was your biggest insight or surprise?  
Share your team’s “Ah Ha” with the room.
Identifying the Outcome of Interest and Creating Project Cards

Tip: Print out these instructions.

Outcome of Interest: Write your first prioritized outcome of interest as indicated in your CHNA (you will repeat this process for your second and third outcomes of interest).

- Write your outcome of interest below.
- Using bullet points, write the overarching goals for your outcome of interest below.

Overarching Goals:

Project Cards: Open your Health Equity Inventory (HEI).

- Select the Filters tab.
- Go to the Filter by Outcome of Interest box in the blue Initiatives Data Table Filtering area.
- Select the filters for the prioritized outcome of interest that you identified above.
- Select the Initiatives tab to see all projects associated with your selected outcome of interest.
- Enter the names of your first two projects on the first two half pages in the Project Card Template.

Note: Each set of two half pages will print as one page (project 1 & 2 Goal Analysis Grid).

- Repeat the names of your first two projects and enter their goals and evidence of impact on the next two half pages.

Note: Each set of two half pages will print as one page (project 1 & 2 Goals and Impact).

- Repeat this process until all projects for the identified outcome of interest have been entered.
- Print the Project cards back to back on pink paper and cut each page in half so that each project is on one card.
Creating Domain Cards

Tip: Print out these instructions.

Pre-Work: Creating Project Cards. If you have not yet created Project Cards, please complete that step.

Domain Cards: Open your Health Equity Inventory (HEI).

- Select the Filters tab.
- Go to the Filter by Outcome of Interest box in the blue Initiatives Data Table Filtering area.
- Ensure that the filters for the prioritized outcome of interest that you identified for the Project Cards are still selected.
- Select the Initiatives tab.
- Click on the Initiative Domain column and sort the data A to Z.
- Scroll over to the Project Lead area of the Initiatives tab.
- Open the Domain Cards Template.
- For each domain indicated on your HEI enter the all project lead’s School/Hospital and Department affiliation under the Associated Institutions and Departments heading for that specific domain.

- Repeat this process until all associated institutions and departments for the identified outcome of interest have been entered.
- Print the Domain Cards single sided on yellow paper.
- Cut each page in half so that each Domain is on one card.
- Draw a star on the top right corner of the Domain cards associated with your identified outcome of interest.
Creating Internal Partner Cards

Tip: Print out these instructions.

Pre-Work: Creating Project Cards. If you have not yet created Project Cards, please complete that step.

Internal Partner Cards: Open your Health Equity Inventory (HEI).

- Refer to your Project Cards for the list of projects associated with your outcome of interest.
- Select the Filters tab.
- Scroll down to the green Partners Data Table Filtering area
- Select the Internal filter.
- Select the Partners tab.
- Click on the External Organization or Internal Department column and sort the data A to Z.
- Use Find and Select (or Ctrl F) to find the name of the first project listed on your Project Cards.
- Open the Internal Partner Cards Template.
  1. Enter the name of this internal partner.
  2. Enter the prioritized outcome of interest.
  3. Enter the project/initiative name(s) associated with the outcome of interest
  4. Enter any other projects/initiatives with this partner.

Repeat this process until all internal partners have been entered.

Print the Internal Partner Cards single sided on blue paper.

Cut each page in half so that each Internal Partner is on one card.
Creating External Partner Cards

Tip: Print out these instructions.

Pre-Work: Creating Project Cards. If you have not yet created Project Cards, please complete that step.

External Partner Cards: Open your Health Equity Inventory (HEI).

- Refer to your Project Cards for the list of projects associated with your outcome of interest.
- Select the Filters tab.
- Scroll down to the green Partners Data Table Filtering area
- Select the External filter.
- Select the Partners tab.
- Click on the External Organization or External Department column and sort the data A to Z.

- Use Find and Select (or Ctrl F) to find the name of the first project listed on your Project Cards.
- Open the External Partner Cards Template.
  1. Enter the name of this external partner.
  2. Enter the prioritized outcome of interest.
  3. Enter the project/initiative name(s) associated with the outcome of interest
  4. Enter any other projects/initiatives with this partner.

Note: If you have many external partners for one project and they are not partnering with you on other initiatives, you may opt to group them all onto one External Partner Card.

- Repeat this process until all external partners have been entered.
- Print the External Partner Cards single sided on purple paper.
- Cut each page in half so that each External Partner is on one card.
Butcher Paper Preparation

Pre-Work: Creating Project Cards. If you have not yet created Project Cards, please complete that step.

Directions:

- Cut a piece of butcher paper approximately 4’ in length
- Use a black marker to label the butcher paper as follows:

  **Top left:** Write the prioritized outcome of interest and the overarching goal that you identified when you created your Project Cards.

  **Column Headings:** Divide your butcher paper into four equal columns below the prioritized outcome of interest as follows:

  | <Your Prioritized Outcome of Interest and Overarching Goal> |
  |-----------------|-----------------|-----------------|-----------------|
  | Domains         | Internal Partners | Projects         | External Partners |
  |                 |                  |                  |                  |

Association of American Medical Colleges
Project Goal Analysis Handout

**Directions:** Use this guide to help you evaluate the project goals. Select as many options as apply.

- ☐ **No Goal:** Select this option when there is no program goal.

- ☐ **Goal Met:** Select this option when the project has been evaluated and it met its goal.

- ☐ **Goal Not Met:** Select this option when the project has been evaluated and it did not meet its goal.

- ☐ **Not Evaluated:** Select this option if the project has not been evaluated.

- ☐ **Not Smart:** Select this option if the project goal is not
  - Specific
  - Measurable
  - Agreed Upon
  - Realistic
  - Time-Based

- ☐ **Process Only:** Select this option if the project goal is limited to inputs and outputs rather than outcomes (i.e. “Served 850 clients” “Hosted four Healthy Heart clinic days”).

- ☐ **Not Aligned:** Select this option if the project does not contribute to or is at cross-purposes with the achievement of the overarching goal for your prioritized area of interest.

- ☐ **Redundant:** Select this option if the project has the same or very similar goals as another project.