SIRF
Strengthening the Implementation of Responsible Fatherhood Programs

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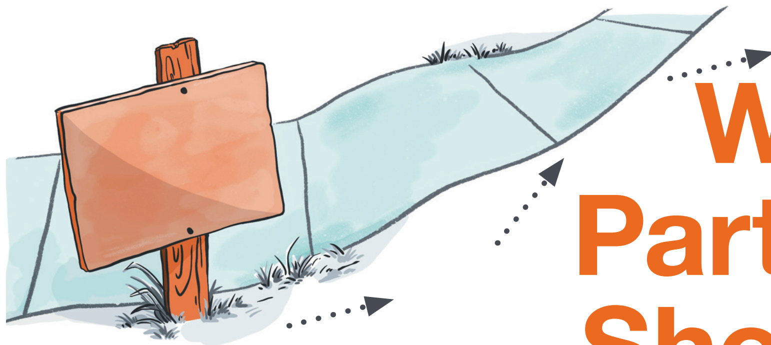


Walking in Participants' Shoes

Customer Journey Mapping as a Tool to Identify Barriers to Program Participation

by Rebecca Behrmann, Becca Heilman, Kureem Nugent, and Donna Wharton-Fields

The Strengthening the Implementation of Responsible Fatherhood Programs (SIRF) project is using an iterative learning approach to build evidence on promising practices in fatherhood programs. SIRF is using rapid learning cycles in an effort to improve the enrollment, engagement, and retention of fathers in nine current federal Fatherhood Family-focused, Interconnected, Resilient, and Essential (FIRE) grantees and one former recipient of a federal fatherhood grant.[2] Participating programs are implementing promising approaches, working with the study team to assess how they could be strengthened, and applying what they learn from those assessments to the next cycle. Each program is testing one of three broad approaches to improving fathers' enrollment, engagement, and retention in services:

CUSTOMER JOURNEY MAPPING helps organizations gain a deeper understanding of their program participants. It is a common problem-solving technique that puts participants—in this case, fathers—front and center and helps organizations redesign services in response to their needs.[1]

- Coaching techniques used in case management
- Enhanced outreach to potential program participants
- Alumni peer mentoring

To identify ways to strengthen participation, the SIRF and program teams used a human-centered design technique called customer journey mapping (hereafter referred to as mapping), a collaborative process that puts the needs and goals of participants at the center of efforts to design or improve a product or service.[3] Mapping helped both the program and SIRF teams to better understand fathers' program experiences and perspectives, and to identify where program processes might be restructured to increase fathers' participation. The process also helped the program and the SIRF team staff members build relationships with each other, and simulated important elements of the learning-cycle experience, including the use of multiple perspectives to assess program operations and processes, team communication, and collaborative problem-solving.

The customer journey mapping process really encouraged us to challenge our assumptions. We discovered early on that with different teams in different locations, we had dramatically different perspectives on many issues, so it was helpful to talk through these differences and rely on the collective wisdom of our group. Yet it was even more elucidating to adopt the perspective of our participants. This really highlighted the areas we had for improvement in ways we had not considered before. —Geraldine (Vonnie) Germain, learning cycle manager, Connections to Success

The SIRF mapping process had five steps. Each program took on the first two steps as homework in advance of a three-hour, hands-on session with the SIRF team in which it tackled the remaining three. A session with peers followed. The rest of this document describes each of those steps in more detail, with visuals illustrating what a program's map could look like along the way. Each step also provides an example of how the mapping process worked in practice, using as a case study a persona and mapping experience that the authors developed based on the experiences of multiple programs that completed the process. From these descriptions, social service program managers can gain the tools to implement simple mapping processes of their own.

1 Develop a Persona

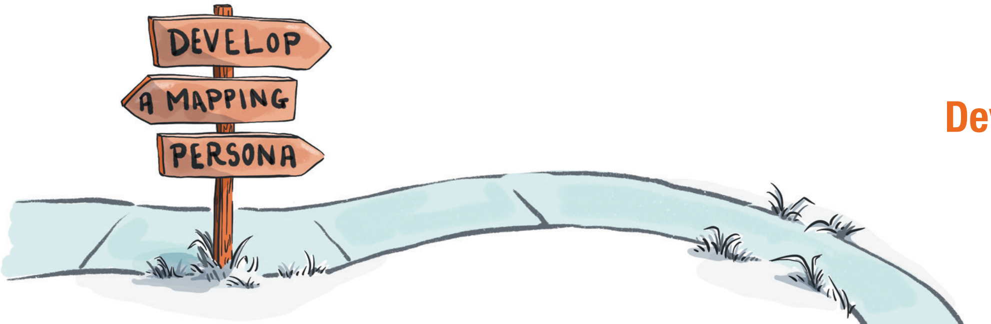
2 Lay the Groundwork

3 Map!

4 Analyze Strengths, Gaps, and Challenges

5 Identify Potential Solutions

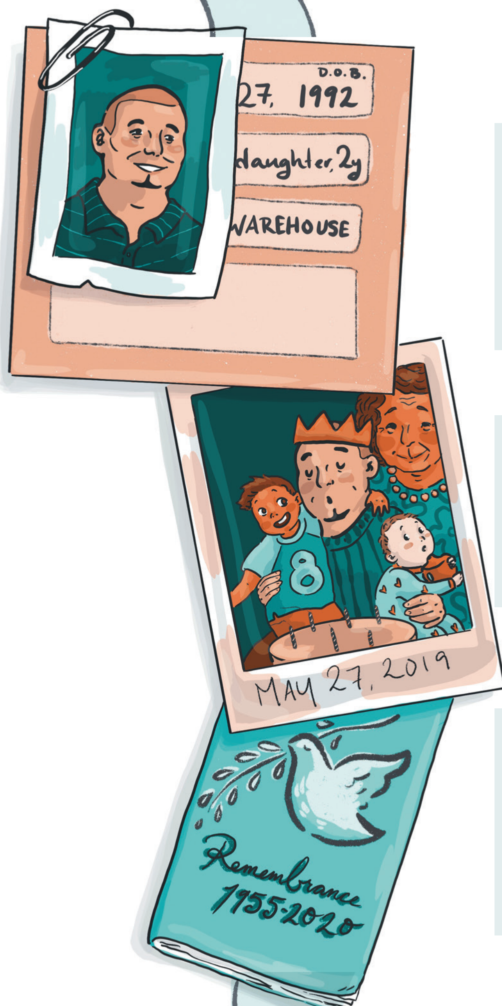
Customer Journey Mapping: A Five-Step Process



STEP 1
Develop a Persona

In advance of the three-hour, hands-on mapping exercise described in Steps 3 through 5, a program created a *persona*, which allowed those participating in the exercise to understand the mindset, needs, and goals of a typical program participant.[4] Each of the 10 programs drew on its participation data and previous experience to create a profile of a father whom staff members would not be surprised to see. The mapping process is built around the experience, thoughts, and feelings of this "persona." Talking through the persona's experiences, thoughts, and feelings helps to deepen staff members' empathy for what it takes for fathers to participate in program services fully, as they note the demands, challenges, or frustrations that may cause fathers to drop off along the way. With that knowledge, staff members can create a new vision of the types of experiences they would like fathers to have in their program.

For example, a program may have chosen to develop a persona similar to Jose.



"Jose"

Jose was a 30-year-old father of two young children, employed in a warehouse, whose goal was to advance in his career and increase visitation with his children.

Reflecting the reality of the environment, Jose was mourning the recent death of his mother from COVID-19.

The combination of Jose's circumstances left him feeling overwhelmed, trying to balance the demands of life with active participation in the program.

To create the persona we used in the mapping process, we looked at data from past clients served to identify demographic traits, needs, and barriers that our clients frequently face.—Billy Liber (project director) and Jennifer Kearny (program manager), Passages: Connecting Fathers & Families

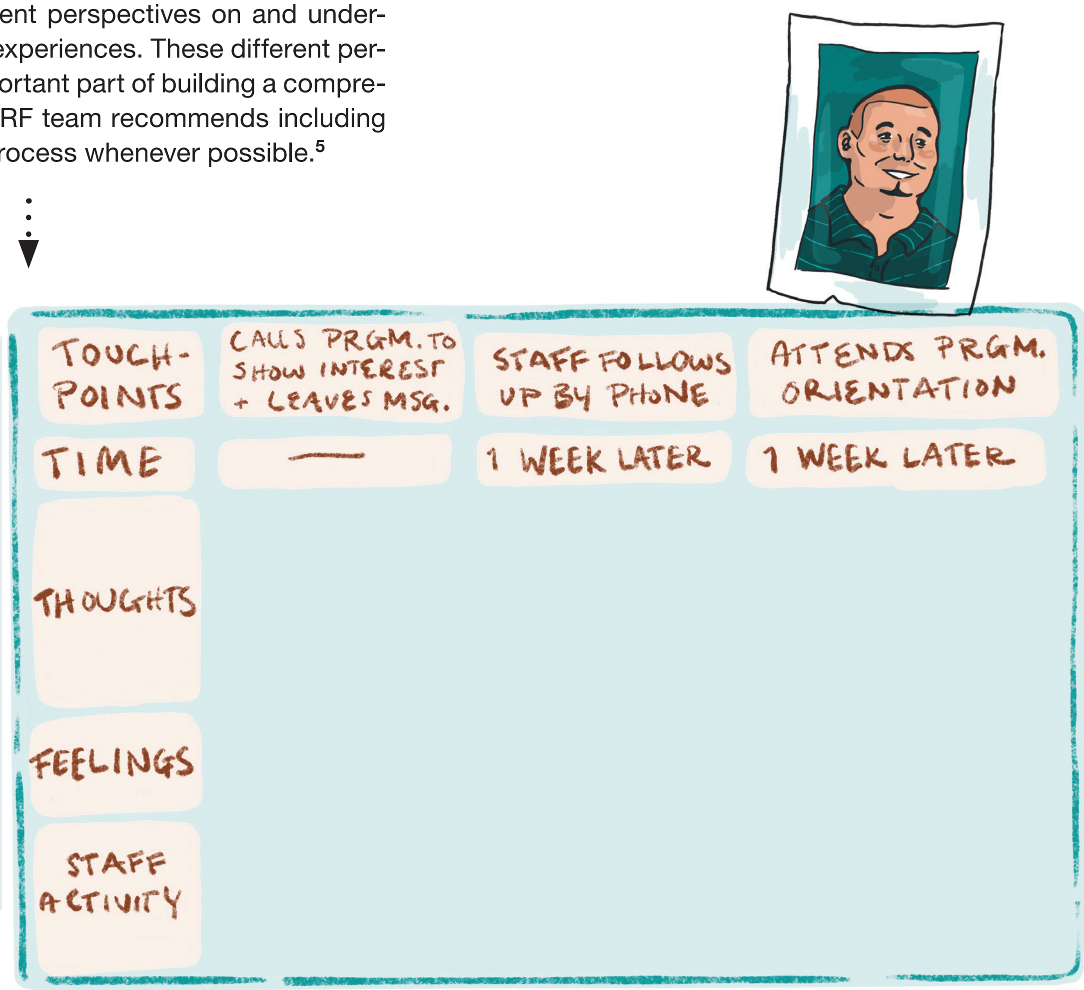
The persona developed in this step will be an integral part of the mapping process as a whole. It is also important, though, even at this early stage, to recognize the limitations of viewing the program experience through the lens of one "typical" participant. Programs should be mindful of that fact, and may benefit from including focus group discussions and interviews throughout the mapping exercise that allow them to take account of additional perspectives and experiences.

STEP 2
Lay the Groundwork

The SIRF team also shared a mapping template with the program in advance of the hands-on exercise. The template gave program staff members an idea of how the mapping process would unfold. Their job was to fill out the template with important points of contact between participants and program. Those "touchpoints" would then be the start of the map.

The SIRF team also asked the program to identify staff members to participate in the hands-on mapping exercise. They encouraged the program to bring in people working in different roles who would therefore have different perspectives on and understanding of fathers' experiences. These different perspectives are an important part of building a comprehensive map. The SIRF team recommends including participants in this process whenever possible.[5]

The SIRF mapping template was a five-row table with the persona bio and photo to the left as a reminder of the participant whose experience the program was trying to understand. The table included placeholders across the header row for each point of contact (or "touchpoint") between the program and participant—in this case, Jose. The program team preidentified as many touchpoints as possible, partially populating the grid.



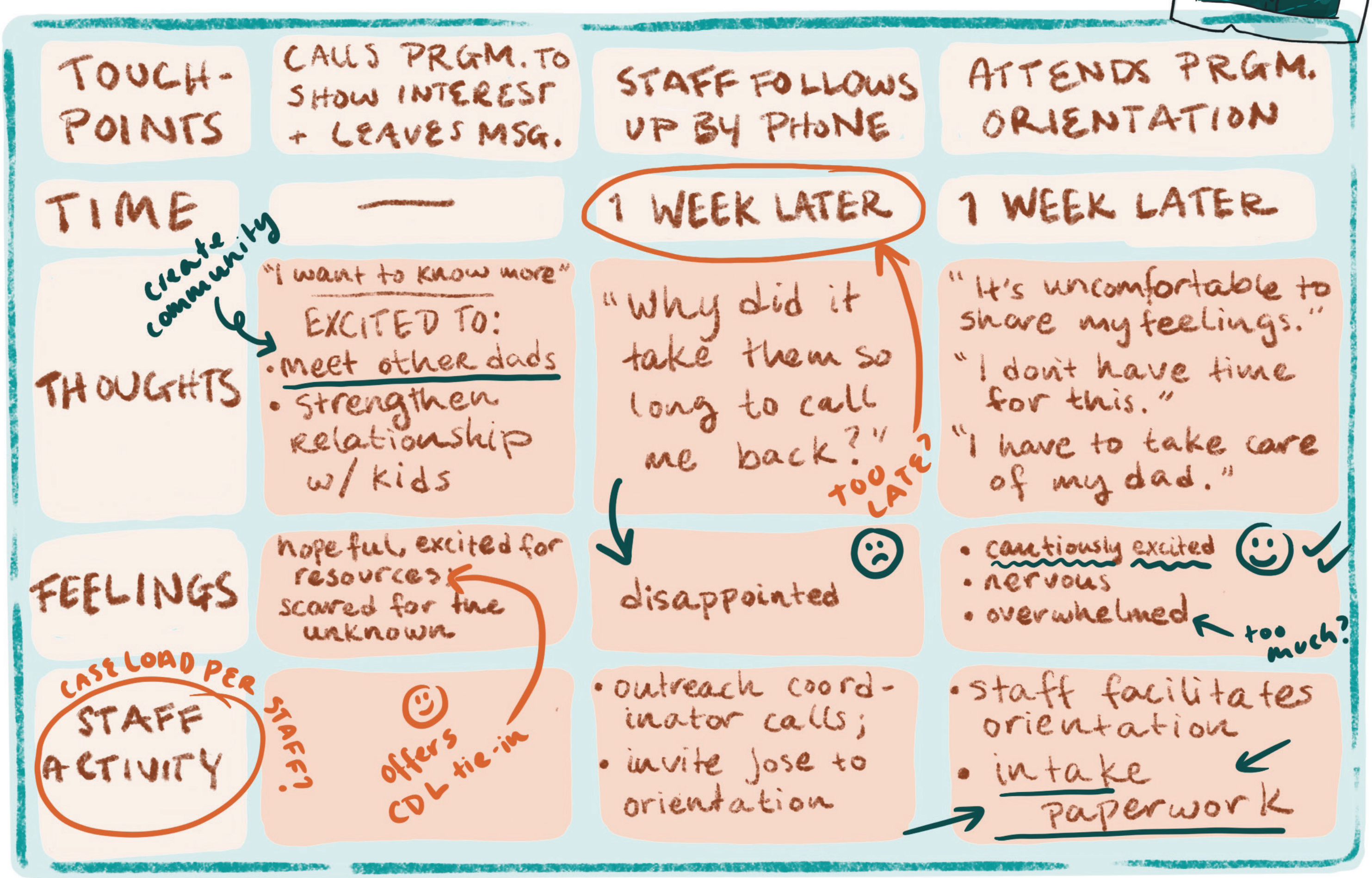
STEP 3
Map!

At this step, program staff members spent approximately three hours with representatives of the SIRF project, looking deeply into program participants' experiences through the lens of the persona developed in Step 1. The goal was to understand not only what staff members see but how participants might experience and feel about each interaction. The program began with the touchpoints preidentified in Step 2. However, the program and the SIRF team jointly identified more touchpoints as they talked through the persona's experiences.

For example, the team talked through any and all program contacts in the enrollment process: Did Jose have to complete intake paperwork or surveys after attending orientation? Was he asked to complete any program activities or additional one-on-one meetings before finalizing enrollment? Did he receive a reminder phone call before session 1? If so, was it from the same person he met at orientation or a different employee? If the latter, did the person send an introductory text message before calling?

These interactions were inserted as additional touchpoints in the map. Including this level of detail helps program staff members to understand activities from the perspective of a typical program participant rather than from their own.

After identifying all program touchpoints, the program team moved to the other rows, which asked them to record the staff involved and time elapsed at each touchpoint, then, taking those things into account, Jose's thoughts and feelings at each step. For example, the team saw that Jose commutes a long way to work and that adding more travel time to come to program services causes him significant stress. Although he is initially hopeful and optimistic about program participation, he is disappointed when it takes the team a full week to follow up about his interest in the program. After his mother's recent passing, he has taken on caregiving responsibilities for his father and is overwhelmed trying to attend program services at certain times. Perhaps the program has shifted to virtual services because of the pandemic, and he is uncomfortable telling the staff that he does not have a phone or computer that would enable him to participate.



STEP 4
Analyze Strengths, Gaps, and Challenges

At this stage, the map provides a view of each step in the process. Using the persona of Jose allows the team to put themselves in the shoes of a single user and consider what might affect his ability to enroll in the program and engage in services. They can think about the challenges and opportunities he might face at every touchpoint, and come to a consensus about where he might be experiencing the most obstacles that could impede his participation.

For example, the team thought Jose might become overwhelmed on the first day of workshops. In addition to the added time commitment on top of his work and family responsibilities, he might feel anxious or embarrassed about sharing personal information with program staff members and other participants. At the same time, Jose might be excited to learn more about parenting, connect with other fathers, and improve his relationships with his children.

Using the persona to keep the experience of fathers front and center can help a program focus on the right areas for program improvement.

As a psychologist, I loved [thinking about how fathers might be feeling at various steps in the process]. We strongly emphasize the emotional aspect of fathering and relationships in our program, so this was very aligned with our program model and mission. Even if we, as program developers, are excited about certain program processes, it is more important to ensure that our dads are excited and going to engage in them. —Moshe Moeller, Montefiore Medical Center

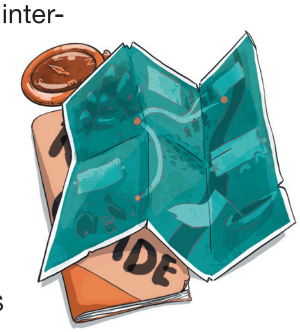
STEP 5
Identify Potential Solutions

Following the mapping exercise, the team brainstormed solutions to address barriers to fathers' participation and build on fathers' interests and strengths. Having narrowed a large, high-level challenge—in this case, the goal of increasing program participation—to a small number of specific points in the process, the team was better able to define concrete solutions. SIRF and program team members considered a mix of solutions drawn from literature reviews, calls previously held with other programs, and the program staff members in the room.

Through the costumer journey mapping process, we were able to take a step back and put ourselves in the shoes of both our staff and participants. Instead of imposing our ideas of how to conduct this process, we were able to make adjustments that aligned with how the process occurred in real life.—Katelyn Kopakin, program director, Jewish Family & Children's Service of the Suncoast, Inc.

At this stage, program staff members considered several approaches that they felt might improve Jose's experience in the program, including altering outreach strategies, using alumni mentors to offer additional support, and changing case management practices. After carefully considering Jose's thoughts, feelings, and challenges, they chose to shift their approach to case management so that it was more directly led by and focused on fathers' needs—that is to say, rooted in coaching techniques—with the hope of hearing and supporting participants like Jose more actively throughout their interactions with the program.

The team developed a prototype of what coaching could look like in their program. A prototype is an early model or rough sketch of a proposed solution, created to gather reactions on its feasibility, strengths, and weaknesses. In a cross-program call that followed the mapping session, they role-played their prototype to get the reactions of staff members from other fatherhood programs.[6] They adjusted and finalized their ideas and, ultimately, developed an implementation plan that defined the coaching techniques they would employ, which staff members would be trained in and use them, and which program-participant interactions they would be used in.



The program hoped that if a father were in a position similar to Jose's, the new coaching approach to case management would help him become more engaged in case management meetings and more confident in setting and achieving his own goals. Because the team put participants' experiences and perspectives at the center of the mapping process, it ended up with a plan meant to make participants feel more in control, better supported, and less overwhelmed. The team hoped that more participants like Jose would complete the program as a result.

CONCLUSION

The five-step mapping framework described in detail above can help social service organizations, including fatherhood programs, put the needs and goals of participants at the center of their planning efforts. Mapping can help programs identify moments of challenge and opportunity, and then narrow their focus to those that appear to be most pressing based on participants' experiences. Additionally, as mentioned above, this exercise helped program and SIRF team staff members build relationships with each other, laying a foundation for research to follow.

Mapping does not need to be—and perhaps should not be—a one-time exercise used only at the outset of a program. Drawing on the experience of staff members who completed the process with the SIRF team, one program now plans to use mapping as an annual "temperature check" on its processes, ensuring they continue to meet participants' needs. Another is considering using it during the training and orientation process for new employees, to help them see the program through the eyes of participants. Using this five-step process as a guide, practitioners can think creatively about how to adapt mapping to their needs.

NOTES

1 Adam Richardson, "Using Customer Journey Maps to Improve Customer Experience," *Harvard Business Review* (https://hbr.org/2010/11/using-customer-journey-maps-to, 2010).

2 For more information on the SIRF study design, see Charles Michalopoulos, Rebecca Behrmann, and Michelle S. Manno, *Using Learning Cycles to Strengthen Fatherhood Programs: An Introduction to the Strengthening the Implementation of Responsible Fatherhood Programs (SIRF) Study*, OPRE Report 2022-62 (Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services, 2022). For more on Fatherhood FIRE grants, see U.S. Department of Health and Human Services, Office of Family Assistance, "Responsible Fatherhood" (website: www.acf.hhs.gov/ofa/programs/healthy-marriage/responsible-fatherhood, 2020).

3 Richardson (2010).

4 LUMA Institute, *Innovating for People: Handbook of Human-Centered Design Methods* (Pittsburgh, PA: LUMA Institute, 2012).

5 The team initially hoped to include fathers in the SIRF mapping process. However, because the mapping process took place both during the COVID-19 pandemic and during a period when federally funded Responsible Fatherhood programs were not operating, fathers did not participate. The SIRF team tried to include fathers' voices in other ways, including through earlier phone calls and discussions that helped the team understand challenges fatherhood programs frequently face and potential solutions to those challenges.

6 This is another stage where the SIRF team would recommend including participants themselves whenever possible, though the SIRF mapping timeline and COVID-19 pandemic did not allow for this inclusion in most cases.

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