

Workshop Series

During the Stakeholder Mapping and Persona workshop, six Public Science Collaborative (PSC) team members facilitated conversations with the 29 leaders from Iowa's Community Action Network (CAN). The Stakeholder Mapping exercise included a brainstorming activity of CAN's many collaborators, partners, and funders, including people directly involved, such as board members, beneficiaries, donors, or foundations that provide financial support (e.g., grants), and those indirectly involved, such as the media or the local community. The facilitation included using PSC's Persona Identification App, which allowed participants to review, identify, and rank potential users of CAN data and information systems. The top 4 user groups were then selected and ranked for further discussion in breakout rooms.

*"In the end,
our work is about
who we serve."*

*"The key to this whole thing is to
truly embrace our consumers in the
way they want to interact with us
instead of the way we think they want
to interact with us...people in the field
tend to stand in their own way."*

Stakeholder Mapping

Participants began building the stakeholder map by brainstorming who fit in each map quadrant, divided by low and high influence and interest. During this phase, the participants were given time to consider each of the four stakeholder sets. Over 100 stakeholders were identified as either Critical (n=39), Important (n=21), Active (n=24), or Informed (n=19). See the table on the next page for details. Critical stakeholders included agencies connected to the Community Action Network and their funders. The participants noted these groups' significant impact on almost all network activities. Participants described active and informed stakeholders as groups reflecting local governments or churches. More discussion about how CAN might leverage local collaborations to benefit agencies is warranted.

Persona Development

Personas are fictional characters that represent key data system users' goals, needs, and behavior. Workshop participants used PSC's Persona Development App to identify the key users of the CAN system. The top-ranked data users identified during the workshop are shown on the right. Image 1 was described by workshop participants as a front-line staff member responsible for data entry or reporting. Image 2 was viewed as either community members or vendors. Image 3 was described as reflecting the needs of clients with cross-spectrum disabilities. Image 4 evoked ICAA, state, and agency executive leaders who use the system data for decision-making. Following the large group activity to identify key users of the CAN data system, participants worked in small groups to add background information to the CAN personas. Later, PSC incorporated information from the surveys, focus groups, and workshop feedback to create five distinct personas whose diverse needs should be kept in mind throughout the data system selection process. By understanding the characteristics, needs, and goals of the personas highlighted in the following pages, CAN leaders will be better able to identify relevant data system features that meet the needs of target users.



Rank 4

Stakeholder Map of the Community Action Network

<p>Important- Powerful, high influence stakeholders with low interest demand key attention to leverage connections, keep informed and connected through board membership and to enlist direct participation if possible.</p>	<p>Critical- Powerful stakeholders with strong interests (labelled CRITICAL) demand the most attention. Critical stakeholders who are likely to be advocates for ICAA and should be engaged early and encouraged to help address the concerns of other groups that may be influential but less supportive</p>
<ul style="list-style-type: none"> •Current Software Providers, Board Members, DAS ,IT at State level, IT Staff, Consumers, DCAA Commission at state level, households, other management staff, Lobbyists, Customers who want something that works but aren't interested in how the sausage is made, OCS, Non-DCAA Funders, Community partners, Funders, Donors, Customers, Board, Community partners that rely on our data, Individuals who apply for services, Decision-makers 	<ul style="list-style-type: none"> •Funders, Users, Board Members, Critical, US Dept of Health and Human Services, end users, ED CAA/Staff and DCAA, Executive Directors funders, Funding Agencies, Consumers, National Community Action Foundation, CAA staff, Division of Community Action Agencies, LIHEAP Coordinators CSBG Planners EDs, Outreach, LIHEAP staff, Food pantry staff, Program staff, CSBG planner, DCAA Leadership, LIHEAP Application Processors, CSBG Planners who have to report data to State, Organizations or Entities who will assist with funding, Utility Companies, Agency Management, Coordinators, Staff that use System, Planners who prepare reports, collaborative partners, Fiscal, Deliverable fuel vendors, Disaster Coalitions, Hospitals/Clinics, Other Local Nonprofit Agencies, Utility Vendors
<p>Informed-Less influential stakeholders with low interest should not be forgotten. This group should be kept informed, especially of updates that have a general interest after key decisions have been made. This group will neither be interested or obligated to share time or influence, but should also be kept informed.</p>	<p>Active Supporters- Less influential stakeholders with strong interests who are willing to do the work to make this project a success. We want to encourage the groups they make up to participate even if individuals do not have high influence</p>
<ul style="list-style-type: none"> •Community supporters, city governments, partners, community partners, the public, school districts, community members, doctor offices and pharmacies, corporate partners, other community partners, local supporters, federal partners, non-client non-donor community members, some community partners/groups, potential community partners, small businesses, prospective donors •Other - utility vendors, fiscal staff, other vendors we pay on a regular basis (landlords for example) 	<ul style="list-style-type: none"> •Board, Partners, Application Processors, customers, clients, frontline staff using system, staff in outreach centers, current software providers, community partners, data entry workers, partners and their volunteers, area agencies on aging, other local nonprofits, funding partners, local church partners, local governments, consumers, Community Centers, local government, Staff in programs for not using the system, some Funders, Those not being served, community project partners



PROFILE

Gender : Female
Age : 34
Education : Bachelor's degree in Social Work
Occupation : Case Worker for CAN



I believe if I can help even one person, that I am helping the whole community.

BIOGRAPHY

Luann enjoys serving her community and often volunteers on weekends to work in her neighborhood community garden. Her job is emotionally taxing and so to decompress, she enjoys listening to true crime podcasts. She frequently feels frustrated with work because she often finds she is spending more time with data reporting than her passion, which is helping clients.

MOTIVATIONS

Luann cares deeply about serving families and genuinely helping people. She feels supported by her co-workers to accomplish her heavy task load. She enjoys the variety of being able to work with clients both in the field and in the office. She is interested in advancement opportunities and actively seeks self-improvement.

GOALS

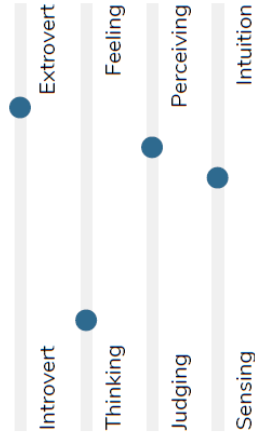
She needs a data system that allows for:

- A streamlined single application with ability to see information across all the Community Action Network (CAN) programs and determine eligibility
- Features should include the ability to upload documents and photos from multiple devices and to connect the application to a payment processing method
- The reduction of repetition in data entry while being able to report accurate data to funder and community requests
- Her agency must maintain ultimate control of their data
- A simple user interface that is streamlined and user friendly
- Improved reporting options that allows for customization and lets her create reports for outreach and outcomes while being easy to learn

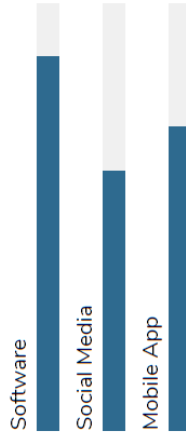
FRUSTRATIONS

Luann struggles with burnout and often feels that there is not enough time to get everything done. She becomes frustrated with how clunky the system is for users to navigate—getting accurate reports or data is a constant struggle. Often she feels overwhelmed by training for technology updates, system changes, and the lack of easy interfaces and manuals. Frequently she has to capture large amounts of information over multiple formats which is repetitive and time consuming.

PERSONALITY



TECHNOLOGY



INFLUENCERS

- Attending professional conferences
- Interaction with staff
- Interaction with clients
- Continuing Education
- Community Action Network (CAN)



STEVE FROM STATE

PROFILE

Gender : Male
Age : 48
Education : Master's degree
Occupation : Social Services



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“What's best for Iowa is successful, efficient, and passionate people”

BIOGRAPHY

Steve has an extensive background in leadership and community development experience that he draws on as a Program Manager. Steve's position is politically appointed, and he must consider the political realities of decisions. Outside of work he enjoys staying busy by coaching his son's soccer team and spending time outdoors. It is important to Steve that he stay up-to-date on important issues and he listens to podcasts during his commute.

MOTIVATIONS

Steve is focused on working towards more accurate data application. He wants to move his department to be as cutting edge as possible while having a positive impact on the people of Iowa. He really cares about the work and wants to support the agencies. It is important for long-term success to maintain and grow collaborations with local entities.

GOALS

Steve feels a data system needs to:

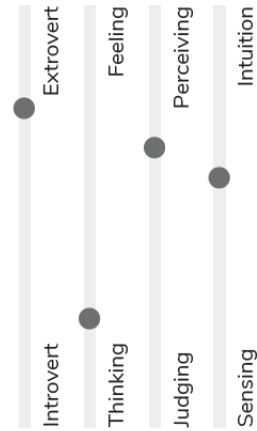
- Need accurate data for federal reporting
- Need legal agreements or new processes to access the data for decision making
- Not rely on a single person in order to access information like the energy audits
- Measure the impacts that we are having on families in a clear, accurate, and consistent way
- Have a comprehensive look at the state-wide system
- Have an integration strategy that allows for ease of use for all data software management across the system

FRUSTRATIONS

Steve is frequently frustrated by changing data when needing to submit federal reports. He doesn't trust the data is always correct which impacts his ability to make federal requests. This is compounded by not being able to pull the reports he needs. It makes finding the needed information a long and tedious process. Frequently he feels pulled between local and federal reporting needs and requests.

Steve also feels frustration over having to provide extra technical assistance due to software problems. They are supporting a software that is old and out of date that doesn't run with modern technology. He also wants to avoid being audited and is committed to following the rules around data privacy and security.

PERSONALITY



TECHNOLOGY

Software

Social Media

Mobile App

INFLUENCERS

- Serving on boards
- Attending professional conferences
- Interacting with staff and clients
- Reading widely, NPR
- Other executive and community leaders
- Legislators



ELEANOR FROM ICAA

PROFILE

Gender : Female
Age : 52
Education : Master's degree
Occupation : Executive Director



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I have dedicated my career to creating positive change for the people of Iowa.”

BIOGRAPHY

Eleanor is passionate about learning and keeping up on emerging trends in the field. Her background is extensive in non-profit leadership and community development experience. She has experience with CAN vendor management and providing TA. She listens to audiobooks to relax and looks forward to that time in her day. It helps her with the stress of having so much to do and never having enough time. Even at home she finds herself troubled by issues at work like frequent staff turn over.

MOTIVATIONS

Eleanor is intent to make a difference and have a positive impact on the families of Iowa. She is looking to provide greater opportunity to create systematic change. To do that she wants good, accurate data to eliminate frustrations and increase efficiency. She is passionate about engaging her employees and serving clients.

GOALS

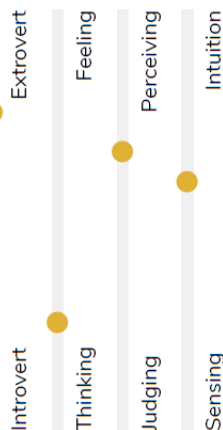
She feels a data system needs to:

- Give people the ability to tell their story and access the services they need to succeed
- Be used for planning purposes and forecasting system wide needs
- Show how money is being spent to support data driven decision-making and look for future funding opportunities
- Measure the impacts that we are having on families in a clear, accurate, and consistent way
- Help identify the programs that work and those that don't
- Find gaps in the community where we can provide services
- Be client centered with the capacity to report outcomes at the family, community, and agency levels

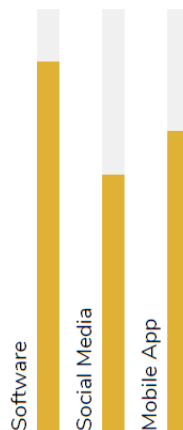
FRUSTRATIONS

Eleanor is frustrated by how difficult it is to monitor a state-wide effort across multiple systems—she can't easily see the whole picture. She regularly deals with conflicting needs from stakeholders—it's hard to make everyone happy. She finds that poor data quality makes it hard to monitor, evaluate, and forecast the needs of staff and clients. She often finds that there is not enough unrestricted funds to support creative, new, and impactful initiatives .

PERSONALITY



TECHNOLOGY



INFLUENCERS

- Serving on boards
- Attending professional conferences
- Interacting with staff and clients
- Reading widely, NPR
- Other executive and community leaders
- Legislators



VAN THE VENDOR

PROFILE

Gender : Male
Age : 40
Education : Associate's degree
Occupation : Energy Utility Representative



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“Strong partnerships produce meaning and value for everyone involved.”

BIOGRAPHY

Outside of work Van is very family centered, he works hard for 40 hours and then goes home to enjoy a full home life. He likes being able to attend his daughter's soccer games every weekend. With his son he does competitive RC racing. He cares about his community and worries about the people of Iowa who struggle whenever the temperatures drop.

MOTIVATIONS

Enjoys working with clients throughout the state and has a passion for providing services to those in need. Van wants to be able to process reports and data effectively with few obstacles—has a goal of fully automated data processing. Enjoys and wants to maintain longstanding friendly relationships with CAN representatives.

GOALS

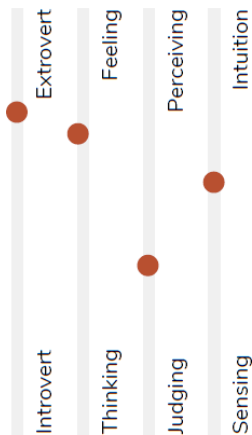
The relationship and data needs for a partnership with CAN are:

- A data system that produces accurate reports and information that can be used for automated processing
- Crisis funding payments formatted the same as other agency payments to make for a cleaner, faster processing
- A continuation of friendly relationships with Community Action partners
- Corrections that are provided to CAN are added into client records and reports consistently
- Having an efficient system that checks information for accuracy and communicates directly with our processing system

FRUSTRATIONS

Van feels the weight of how critical doing his job well is to support the people of Iowa who depend on them for heat through the winter. He wants to avoid delayed payments from agencies for crisis funding because it creates billing conflicts. He often struggles with inefficiency and hassle of extra paperwork and payment processing. He is frequently discouraged with the amount of time spent entering information by hand or having to “clean” the data because of inconsistent and inaccurate data in the reports.

PERSONALITY



TECHNOLOGY

Software

Social Media

Mobile App

INFLUENCERS

- Gets connected to agency data using the Bulletin Board system
- Frequently works with community representatives
- Attends professional trainings and conferences



CARL THE CLIENT

PROFILE

Gender : Male
 Age : 46
 Education : High School Diploma, Military Service and Training
 Occupation : Manufacturing Prior to Permanent Injury



66

"How do I move forward and rebuild my life after my injury?"

BIOGRAPHY

Carl is a single male who lives alone. He has one remaining family member, a sister who helps to support him and navigate services applications. He volunteers at his local community center to stay active. It also helps him stay connected to other veterans. His passion is for cheering on his beloved Chicago Bears: Go Bears!

MOTIVATIONS

Carl is motivated to remain as independent as possible for as long as possible. He works to stay connected to the veteran community and to honor their collective service. He wants to be valued as a respected member of the community. Having to apply for aid can be embarrassing but he has found that when he has to call for help he never feels judged by the CAN staff. Their kindness is his biggest positive when having to seek help.

GOALS

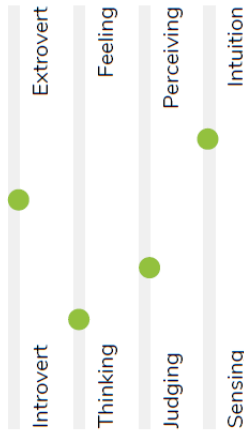
To successfully remain independent, he needs services that:

- Are focused on his goals of having a stable living situation
- Provide quick response times to know if he has qualified for services in order to plan his budget for utilities
- Allow him to be seen and heard by the system, not just a file
- Recognize that he has worked hard his whole life and wants to remain independent and have the ability to access the assistance that will meet his needs without stigmatizing him
- Have a single, easy to use application for all the programs who could give him support services allowing him to access multiple programs

FRUSTRATIONS

Carl feels frustration over filling out the application because it is hard to read, long, and time consuming. He is forced to frequently connect with the agencies multiple times to get all his documentation submitted. It is a struggle to upload documents or pictures from his phone to his applications. Carl often gets confused by the program interfaces being overly complicated and then feels embarrassed having to call the agency for help. He uses multiple devices from different locations to access application and service information which forces him to restart the application repeatedly adding to the frustration. Its difficult to get to the service office for face-to-face meetings and needs help with transportation.

PERSONALITY



TECHNOLOGY

Software

Social Media

Mobile App

INFLUENCERS

- Connected to CAN through caseworker
- Uses online portals to access services