ThirdStory

Roadmapping Guide

A practical tool for assessing and shifting system conditions

Date: 22 May 2025



Introduction

What is roadmapping...

A tool and process for assisting to evolve a vision and translate it into a realistic action plan

Where it came from...

The tool was developed by ThirdStory (previously Innovation Unit) and partners through:

- Learning from Global Education Leaders' Partnership jurisdictions' transformation efforts
- Experience and research on system transformation in other sectors and countries

How it helps...

- A source of reflection and fresh ideas
- The resources are probably less significant than the clarity of thinking the tool provokes



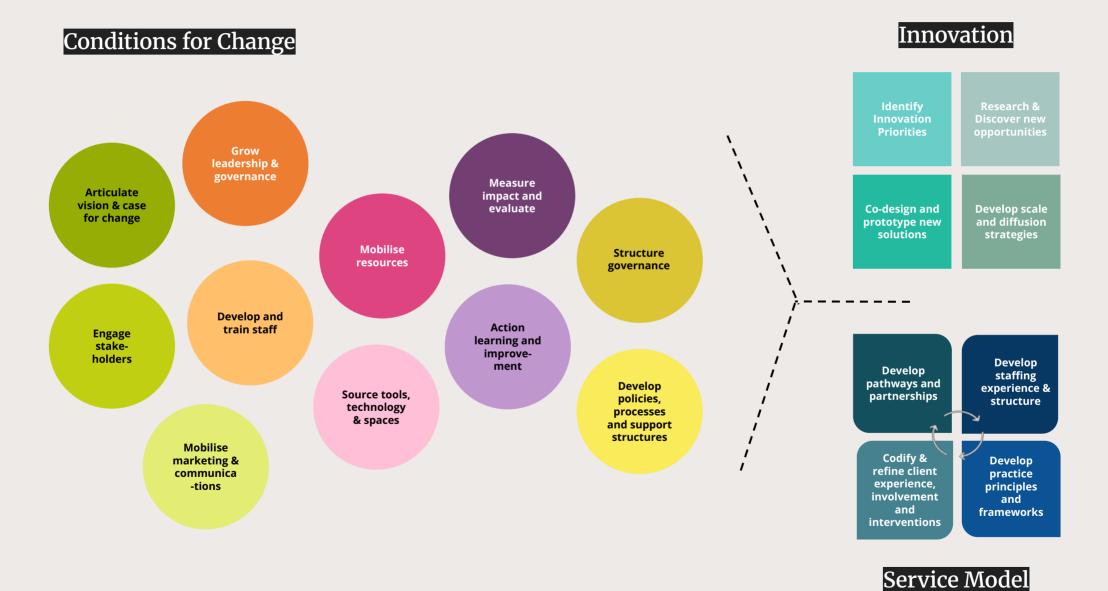


Instructions

- Introduce the tool to those who will be using it help participants get familiar with all elements and sub-elements
- Develop a Case for change (if you haven't already) you need this anchor of why you're doing the work to keep people focused on the goal.
- Build the first version of the roadmap using the tool with broad (relevant) stakeholders, importantly decision-makers (doing this in-person with cut-out paper elements works best)
- Create realistic action plans that translate the output from the tool, outline components of the roadmap in detail so that they can be followed through
- Learning loops and iteration set rhythms of regular reflection and learning moments where you can return to the roadmap and update as needed



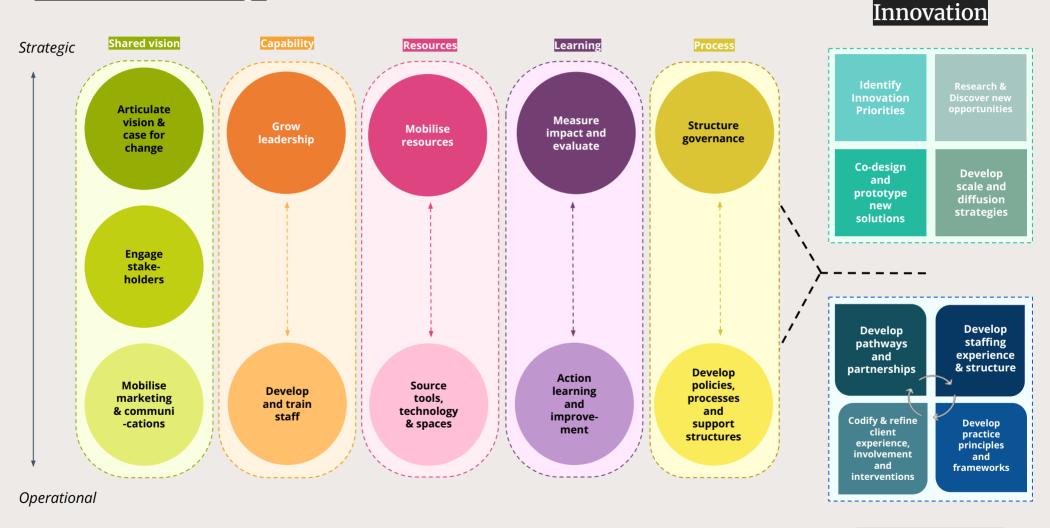
Roadmap elements





Roadmap categories

Conditions for Change



Service Model



Make international comparisons

Benchmark against other jurisdictions, initiatives and organisations making a difference in innovative ways

Assess political and organisational ambition

Identify whether there is an articulated and shared vision at the state or national level

Listen to the people most impacted

Use empathy interviews, engagement surveys and other methods to elicit insights, issues, and compelling stories

Audit current resource use

Evaluate how well current funding aligns to priorities and outcomes and provides value for money

Clarify purpose and objectives

Set a vision within the wider social, cultural and economic goals

Assess demand for a new vision

Explore social sentiment and the public narrative

Highlight relevant futures thinking and articulate ambitious outcomes

Connect to global narratives with local relevance to set high expectations for what service users will achieve and gain through the new approach

Articulate vision & case for change

Articulate a powerful vision and a compelling narrative comprising analysis of reasons for redesign: and the 'nightmare' of no change.

Connect to research from other relevant disciplines

Summarise research from adjacent fields to provide fresh insight

Stress the need for holistic system change

Commit to reforming the whole system

Highlight present inequalities

Reveal variations between the experiences and outcomes for different groups people



Map stakeholder groups

Determine engagement and

Design a range of participation pathways and approaches for

stakeholders that reflect their

unique perspectives and interests and their available

involvement methods

Identify potential actors: people with lived experience, service users, organisations, communities, politicians, policy-makers, social entrepreneurs, etc.

Engage stakeholders Mobilise and involve all potential actors, build alliances and coalitions, grow a social movement

Mobilise lived experience and community effort

Harness the discretionary effort of people with lived experience and members of communities as 'co-producers' of quality care models

Strengthen demand among supporters

Identify and engage passionate advocates to co-lead aspects of the change process; provide a range of tailored opportunities for engagement

Identify and address resistance and opponents

Understand people and organisations who will perceive change as loss and and are likely to offer resistance to change

time



Engage and involve widely

Establish a dynamic system-wide engagement and communication strategy; create awareness and energy around emergent success

Build a knowledge platform

Share case studies of the testing and implementation of innovative new models

Engage potential early adopters

Support potential innovators to engage with and learn from prototypes and pilots elsewhere

Mobilise marketing and communications

Tell the stories of your impact and success and bring broader stakeholders along for the journey.

Create artefacts

Support practitioners/ professionals to develop models, tools, frameworks and materials to support wider adoption and adaptation

Mobilise lived experience and community effort

Harness the discretionary effort of people with lived experience and members of communities as 'co-producers' of quality care models



Distribute leadership for change

Improvement and innovation thrive when leadership is shared across roles, organisations, and levels of the system.

Develop system leadership capacities and capabilities

Extend the skills of (existing or potential) system leaders to effectively initiate and support redesign and implementation

Build communities of practice

Create learning networks to develop and test emergent ideas and approaches



Develop local leaders' capacities and capabilities

Extend the skills of local leaders to engage with model and system redesign as part of a learning community

Create appropriate governance structures

Revise, replace or supplement decision making and resource allocation arrangements so they support and amplify redesign of the model

Secure system authorisation

Deepen commitment to need - and develop a process for - change



Build the pipeline

Motivate students and people in the community who show potential

Expand the range of roles and responsibilities

Support the development of new professional roles in the redesigned model

Recruit staff

Develop partnerships to prepare, grow and induct workers

Identify and develop talent

Take action to attract, develop and retain high quality workers

Support new ways of working

Support staff and leaders with mentoring and coaching

Develop the workforce

Develop the knowledge, skills, mind-sets and dispositions of workers to transform outcomes

Grow ecosystemic leadership

Develop and sustain leaders individually and collectively

Incentivise teams

Motivate, professionally develop and progress teams

Design new professional learning opportunities

Facilitate collaborative opportunities for staff to expand and refine their knowledge, skills, and dispositions

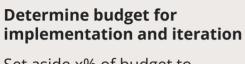
Agree professional standards

Develop frameworks that support performance management and accountability



Allocate staff time

Ensure staff have appropriate time to pursue new approaches



Set aside x% of budget to support redesign efforts

Review current budget allocations processes

Audit current allocations against strategic priorities and consider moving resources

Mobilise resources

Explore strategic delivery and investment partnerships to sustainably fund and support redesigned model and functions

Seek independent sources of funding

Reduce exposure to risk by complementing internal budgets with external financing where possible and relevant

Explore potential finance models

Consider models like payment for improved outcomes, social enterprise offerings, and others

Mobilise community effort

Harness the discretionary effort of people with lived experience and members of communities as 'co-producers'



Design and execute collaboratively

Find suitable partners to co-design and deliver technology strategy with users

Identify space and toolkit needs

Work with teams and users to understand needs for physical spaces and day to day work tools to enable the change.

Support real-time formative assessment

Support real-time formative assessment and data-based decision-making at all levels

Increase administrative efficiency

Streamline back office processing, information systems, and professional development planning and support

Source tools, technology and spaces

Design and implement appropriate technology, physical spaces and toolkits to enable, support and accelerate the vision for care and its workforce

Provide knowledge management framework

Provide a knowledge management framework and platform for sharing practice and insights

Ensure access and security

Enable anytime, anywhere access for all, with requisite privacy, safety and security

Develop capabilities to utilise technology

Develop digital fluency and technological ability and literacy for staff, stakeholders and users

Plan investment, maintenance and sustainability

Ensure necessary technical support and strategy to respond to new infrastructure, equipment and content



Clear theories of change

Effective improvement work is underpinned by a shared understanding of what change is being pursued, why it matters, and how it's expected to happen.

Develop evaluation frameworks

Link theories of action and specific goals with the vision

Identify indicators

Outline progress and performance indicators to regularly assess progress towards achieving the vision

Design measures

Determine appropriate measures that align with the indicators and with the vision

Measure and track impact

Develop metrics and methods by which progress and performance will be evaluated

Evaluate consistently and act on data

Track evaluation progress regularly and rigorously and use data to refine plans and processes

Establish research design

Outline methods for tracking and reporting on measures

Assess implementation impact

Utilise formative and summative assessment data to evaluate impact of change for people and communities

Build coherence

Align system evaluation frameworks with other assessment systems and approaches



Real-time feedback from people with lived experience

Centre the voices of those closest to the change, using their insights to shape, challenge and improve the work as it unfolds.

Learning embedded into routines, not added on

Reflection and learning aren't a side project—they're part of everyday practice and decision-making.

Improvement infrastructure

Deliberate structures—like dedicated teams, coaching, or improvement cycles—support people to do the work well.

Psychological safety and trust

People are more likely to try new things and speak up about what's not working when they feel safe and supported.

Action learning and improvement Embed action learning and continuous improvement into the work to ensure it

stays grounded, adaptive and

Fail-fast, learn-fast mindset

Create safe conditions to try new things, learn quickly from missteps, and grow stronger as the work progresses.

Shared data and insights to drive decisions

Everyone sees and uses timely data and stories to guide smart, evidence-informed choices.

Measurement for learning, not compliance

Data is used to understand progress and adapt practice—not to audit or punish.

System-wide commitment to curiosity and iteration

From the frontlines to leadership, cultivate a culture that values experimentation, feedback and ongoing growth.



Develop communication channels

Setup communication channels between practitioners to promote trust, and reduce confusion

governa

Clarify responsibilities and accountability, and create or adapt existing governance mechanisms that help to support model fidelity and practice quality

Establish governance

structure

Identify key practice leads

Identify key owners of the new practice who can champion change and support fidelity across the organisation/system

Create or update policies and procedures

Review existing policies and procedures and update or create new ones to support new practices

Structure governance

Create the structures and processes in the background that help to make a new practice robust and ensure it sticks

Establish risk management

Articulate fears and risks, and identify appropriate mitigation strategies



Build an appropriate culture

Develop an enduring culture that encourages informed risk-taking, is externally-oriented and passionate about outcomes

Consider alternative governance arrangements

Explore options for governance of the organisation, models and projects that reflect the new needs and priorities

Disseminate granular, comparative performance information

Use accessible, granular performance information to support peer-to-peer challenge and drive data-based decision-making

Develop policies, processes and systems

At all levels of the system that support change

Advocate for enabling legislation

Campaign for legislation that better enables the new model, and future adaptations of the model, to work at full capacity and thrive

Provide appropriate reward and recognition

Create funding regimes, accountability frameworks and development opportunities that reward implementation and redesign, and ongoing improvement

Remove barriers to change

Analyse and eliminate potential disablers and disincentives

Encourage ecosystemic collaboration

Encourage the formation of networks and clusters



We want to see a world where communities are strong, and people achieve the lives they aspire to. We collaborate with communities, government and others to develop, grow and scale new possibilities.

With operations in Australia, Aotearoa New Zealand and the Caribbean, our approach is informed by two decades of partnerships and projects in local and international contexts.

Together, we help shift systems across a range of social, health and education settings and bring about the changes our communities need.

Join our Social Design Academy

We support organisations, leaders, and practitioners to deliver real-world innovation projects and grow their design capability for social impact and systems change.

> Enrol for our next cohort by heading to thirdstory.org/social-design-academy

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