Welcome Back!

Say hi to others, get some breakfast and get settled.

Be ready to start at 8:55a

Welcome Back!

Your 30-second share this morning:

(1) What is your project about?

(2) One insight or realization you had yesterday that is informing what else you want to learn about.

Keep it tight and clear!

CCI CENTER FOR CARE INNOVATIONS

catalyst

blue of california foundation

Blue Shield of California Foundation is an Independent Licensee of the Blue Shield Association

Communicating - 3 minute version

1. Characterize your project's **topic**.

2. Characterize the **objective of your project**.

3. Describe **who** you will talk doing what **activity** and what you want to learn about from them.

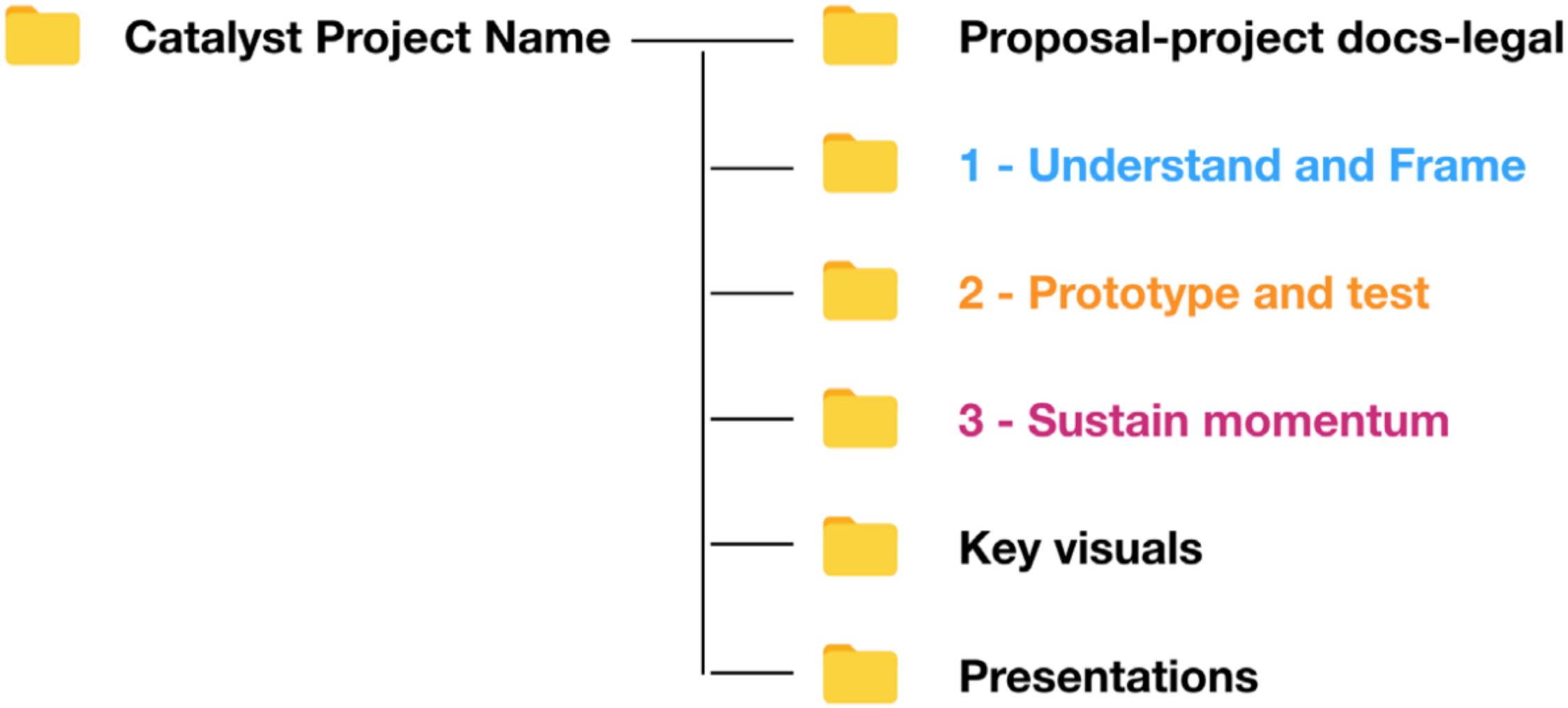
4. Describe **other things** you will research and what you hope to learn from them.

5. **Identify what you're most excited/concerned about** in your plan to engage in or learn about your project.

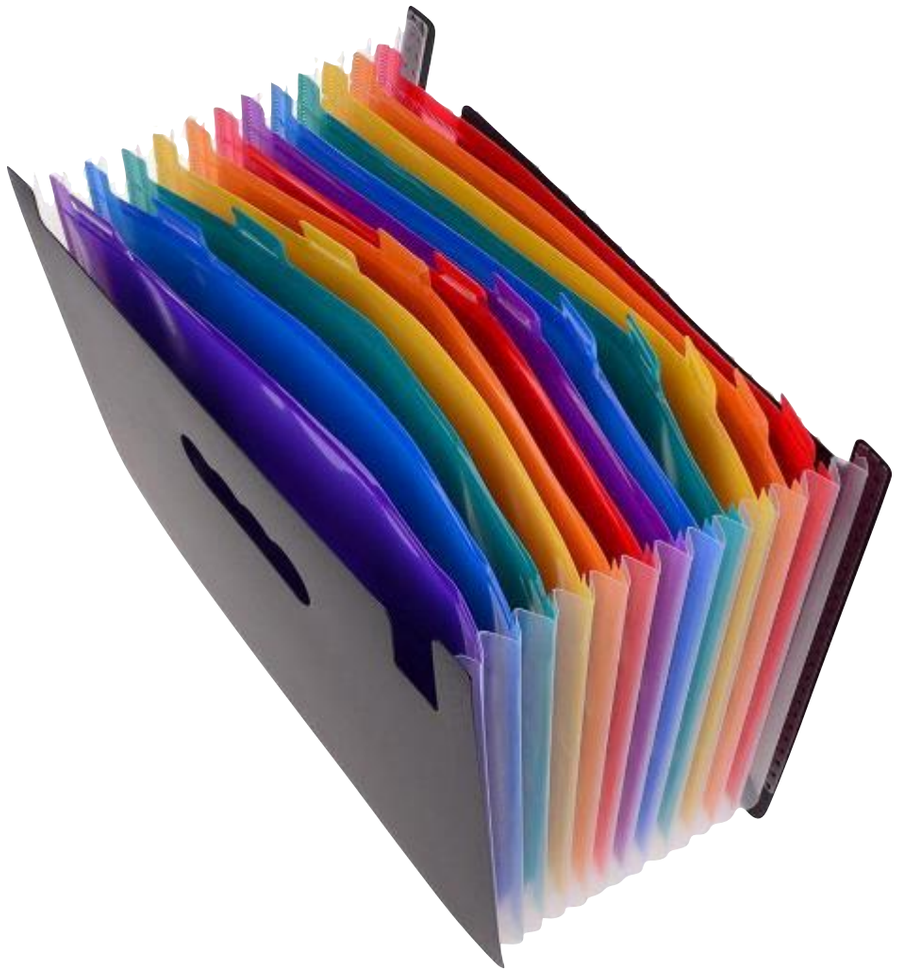
Organizing and Displaying Project Research

Find a wall/board for project work

Organize digital assets



Organize physical notes, pictures, etc.



Coach Share

Blake Gregory
Alameda Health System

careinnovations.org/wearecatalysts/resources

KNOWLEDGE SHARE

Case Study: Cultivating Workplace Happiness

FEB 21, 2018 • Focus Area: **Innovation & Design Thinking** • Program: **Catalyst**

Written by: **Center for Care Innovations**

Cultivating Workplace Happiness

Research has shown that a happy, satisfied workforce increases staff productivity. And in a health care setting, that translates into patient satisfaction. In our 2017 cycle of Catalyst, Alameda Health System began piloting a solution to increase staff satisfaction.

Photos | Moments | Collections | Years

Search

Library Hide

- Photos
- Memories
- Favorites
- People
- Places
- Imports
- Recently Deleted

Shared

- Activity
- Shared Albums
  - Family
  - Hayes pics
  - Fair
  - Doctor Appt: Hayes
  - Doctor Appt: Miles
  - Family
  - 2017 Thanksgiving

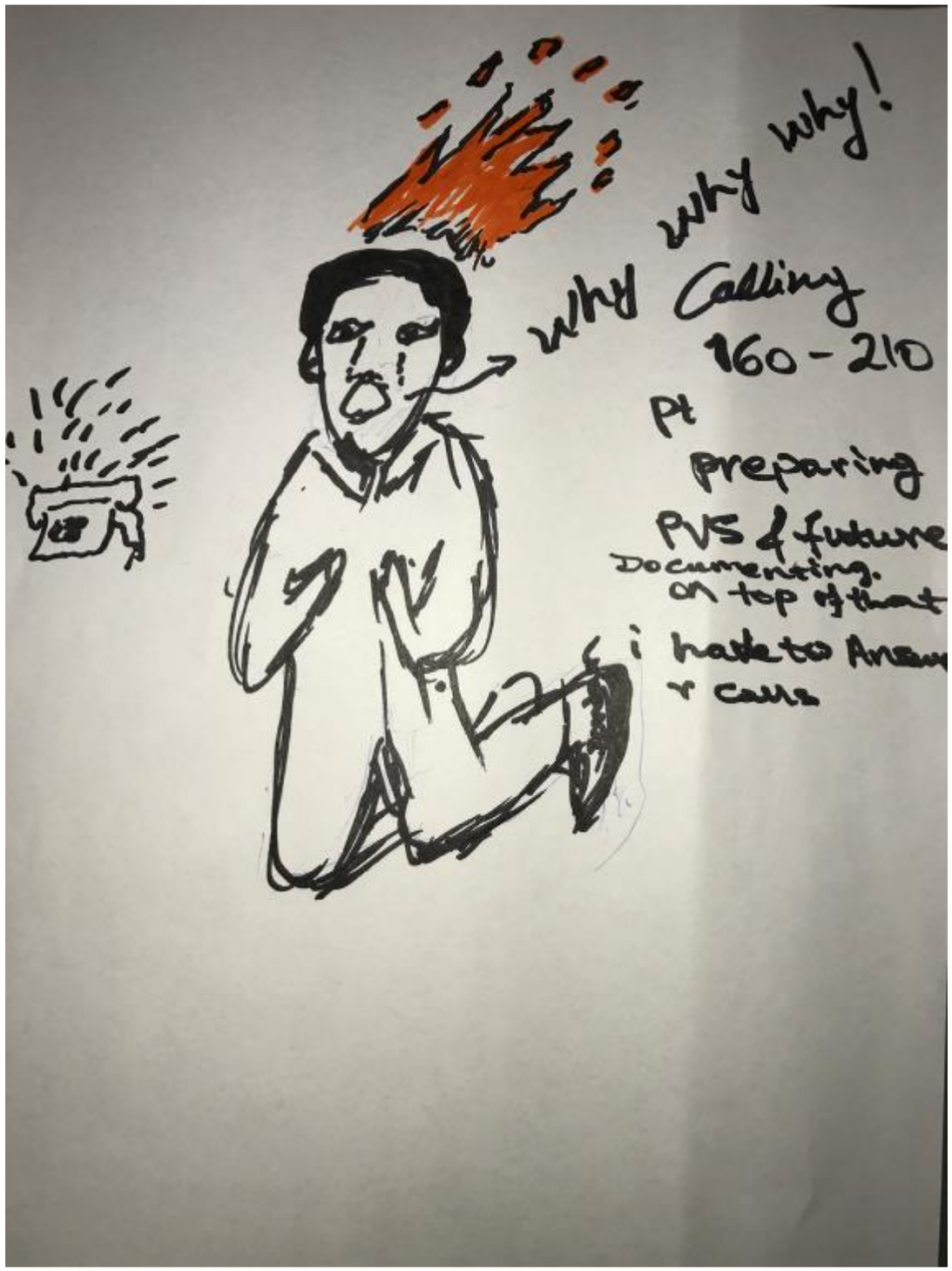
Albums

- Media Types

April 2017

Photos Library · 21,697 Items

Showing: All Items


why why why!
why Calling
160 - 210
Pt
preparing
PVS & future
Documenting.
On top of that

Evernote

Search notes

Blake Gregory

New Note

Shortcuts

All Notes

Notebooks

Blake's notebook

Shared with Me

Tags

Trash

Work Chat

All Notes

SNIN Fall Meeting 2017

Futurecasting: When should you do future casting? Stuck, out of ideas, rigid culture not open to new ideas; market surprises, anticipate disr...

11/1/17

September 2017 1

Catalyst Project Notes

--Friday MA Huddle 2/17...

9/21/17 --Friday MA Huddle 2/17/17: 10 hour shifts disc...

9/21/17

June 2017 3

Catalyst Workshop Session 3

Building support: —even...

6/28/17 Building support: — even if you originally secure...

6/28/17

SNI Ambulatory Care Transformati...

Lessons learned from San

Blake's notebook click to add tags

Share

Created: Mar 9, 2017 Updated: Sep 21, 2017

Catalyst Project Notes

--Raffle for a runner-up prize? OR 1st, 2nd, 3rd prize?

No Good Deed Goes Unnoticed Meeting Notes 8/24/17:

Debrief on No Good Deed Goes Unnoticed Ceremony:

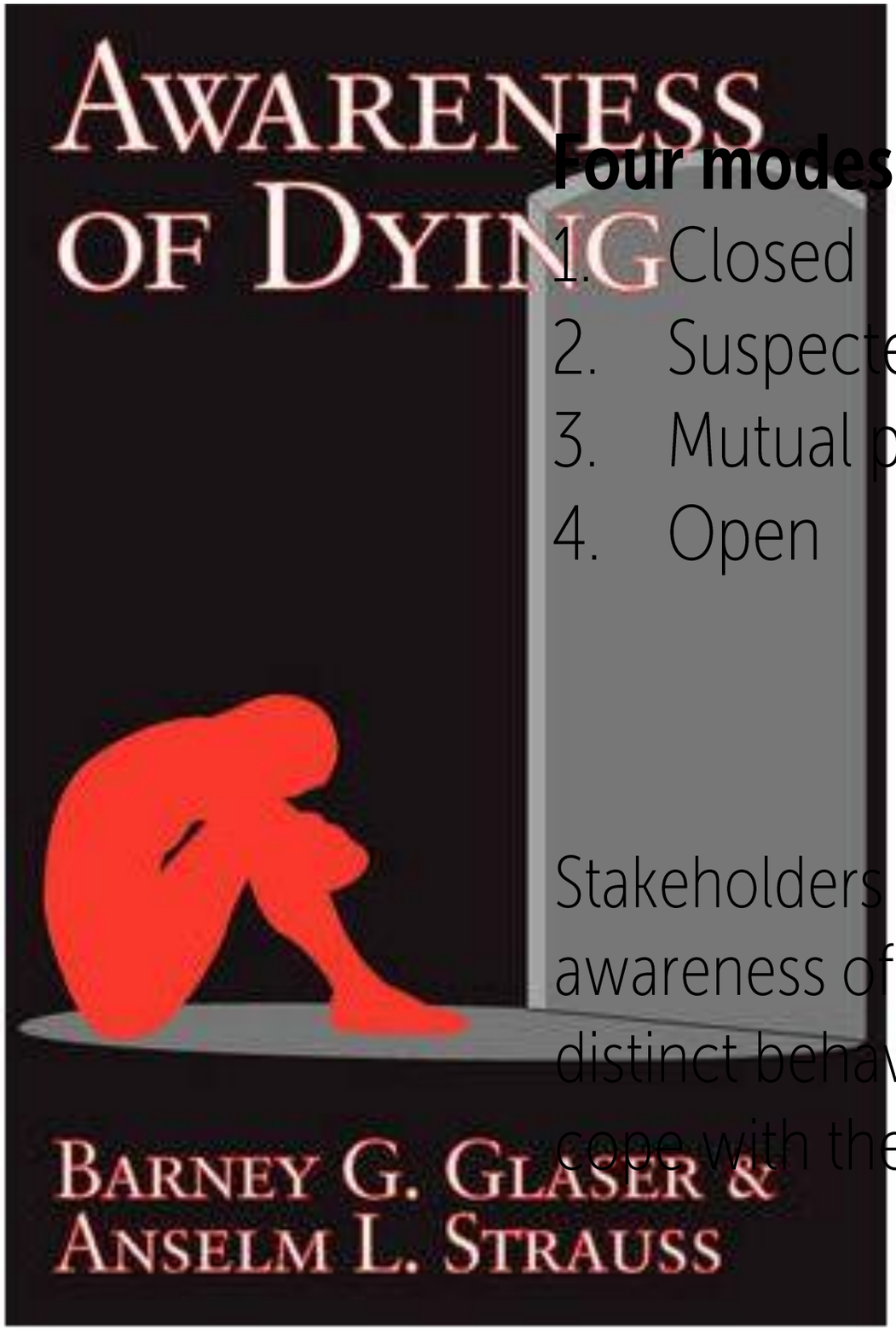
- Leslie discussed the Monopoly money system that they use are her husband's work: incentive program where managers give Monopoly money for prizes (point system)
- Feedback has been positive, people felt "warm and fuzzy"
- Good to do it in front of the whole clinic
- Goal is to recognize people
- Outer limits needs a pot--Carima will own this
- Thinking about having a wall of fame with winner's pictures
- Better messaging about having people turning in their money
- Discussed having our next "ceremony" at downtime mtg in Sept--we will select/showcase a new group of people, will try to make sure that all groups (outer limits, ECs, etc.) will get recognized

Analyzing Qualitative Research

PROBLEM WALL
Access to mental health services for youth in Ontario
How might we...?
NOT ENOUGH MONEY $
AWARNESS
(OF SERVICES)
COMMUNITY
LIMITED RESOURCES
Lack of supply
MORE MONEY NEEDED
$$$ COST
Of 15 Canadian universities and colleges, all but one have increased their mental health budgets over the past 5 years
344% increase in calls to the Mental Health Helpline (ConnexOntario) since 2010 by people 25 or younger.
"How might we help externalize his thoughts and feelings?"
Solution:
AI interface

Grounded Theory, Glaser & Strauss

Grounded theory comes from gathering, thinking about and explaining situations from rich, qualitative data.



Four modes of awareness

1. Closed
2. Suspected
3. Mutual pretense
4. Open

Stakeholders in each mode of awareness of imminent death had distinct behaviors and strategies to cope with the situation.

Constant Comparative Method

The analytical approach to creating grounded theory.

Identify concepts in the data and constantly compare them to additional data to reinforce or negate the concept.

How to:

Write out facts, insights, quotes, on individual sticky notes from your research.

Then use affinity sorts to group your sticky note data. (Patterns, consistent behavior, set ups, pain points, etc.)

Give these concepts names. Find additional evidence to reinforce or negate the idea.

Settle on a small number of concepts, organized hierarchically with supporting evidence.

Construct a narrative that explains what happens, why it happens and implications for change.

An Example

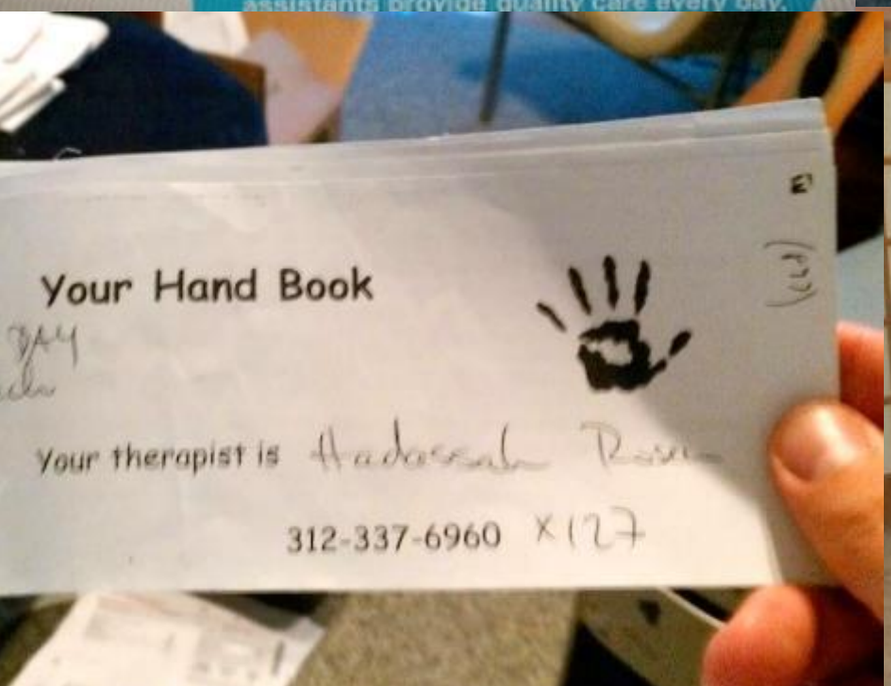
transitions & recovery

How can we characterize the experience of people transitioning from hospital care?

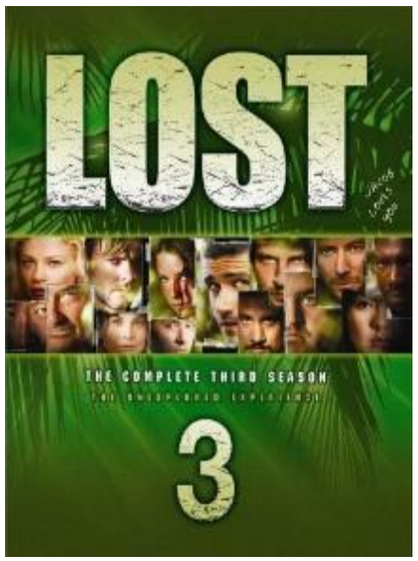
TYPE OF SERVICE
TOTAL BILLED
Medical Visit
Testing / X-ray / Lab
Surgery
TOTAL THIS CLAIM

CVS.com
MinuteClinic
Photo
Optical
Locations
minute clinic
the medical clinic in CVS/pharmacy
Find a Clinic
MinuteClinic makes health care easier for people with a lot going on. Our family nurse practitioners and physician assistants provide quality care every day.

00.0


Your Hand Book
Your therapist is
312-337-6960 x127

transitions & recovery



Isolation

Phillip H
Chicago, IL

"I chose the dvd, Lost, due to **how I felt after my surgery** -- I woke up by myself in the hospital and recovering a bit after at home with pretty much myself on an island."

transitions & recovery

Information & Comfort

Crystal S
Columbus, OH

I had ample opportunity to ask questions but many were just read off a paper or given a cut dry answer. In the tender state I was in upon release, **I really just needed comfort.**"

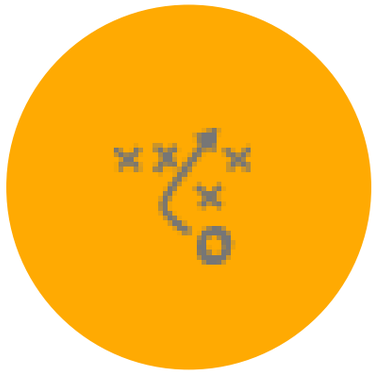
transitions & recovery

Taking control again

Hannah L
Issaquah, WA

"The shoes **signify a new slate**. I think I can create a new normal, be healthier, exercise more, and a good pair of shoes is necessary to be successful with this."

transitions & recovery



coordinating care

un-rushed

"I feel relieved when I talk to my doctor but angry when they are in rush to get to the next patient.

I have to rely on them, but I feel like I'm on hold until they are available."

integrated

"I believe the doctors, nurses, patient, caregivers, etc should all come together to make key decisions regarding a patient's discharge planning."

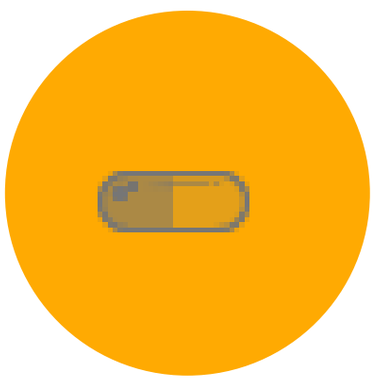
continuity

"The nurses that took care of me in the hospital for both surgeries and my urologist's nurse were incredible... They were also an invaluable resource for me during recovery when I had questions."

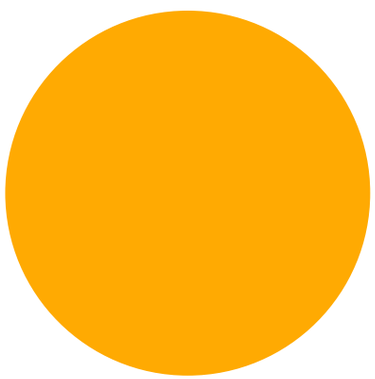
transitions & recovery

Categories of **uncertainty**

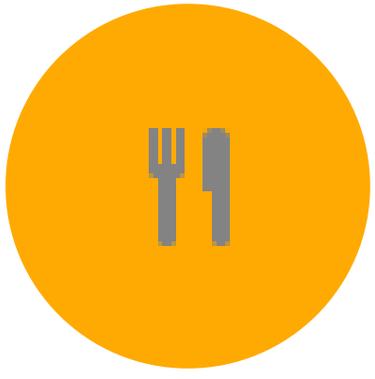
coordinating care



pain management



managing medications



managing “life”

economic recovery

emotional well being

transitions &
recovery

hospital =
life suspended

uncertainty

the new normal

transitions & recovery

Lots of points

uncrushed

"I feel relieved when I talk to my doctor but angry when they are in rush to get to the next patient.

I have to rely on them, but I feel like I'm on hold until they are available."

integrated

"I believe the doctors, nurses, patient, caregivers, etc should all come together to make key decisions regarding a patient's discharge planning."

continuity

"The nurses that took care of me in the hospital for both surgeries and my urologist's nurse were incredible... They were also an invaluable resource for me during recovery when I had questions."

Handful of themes

- pain management
- managing medications
- coordinating care
- managing "life"
- economic recovery
- emotional well being

Unifying idea

uncertainty

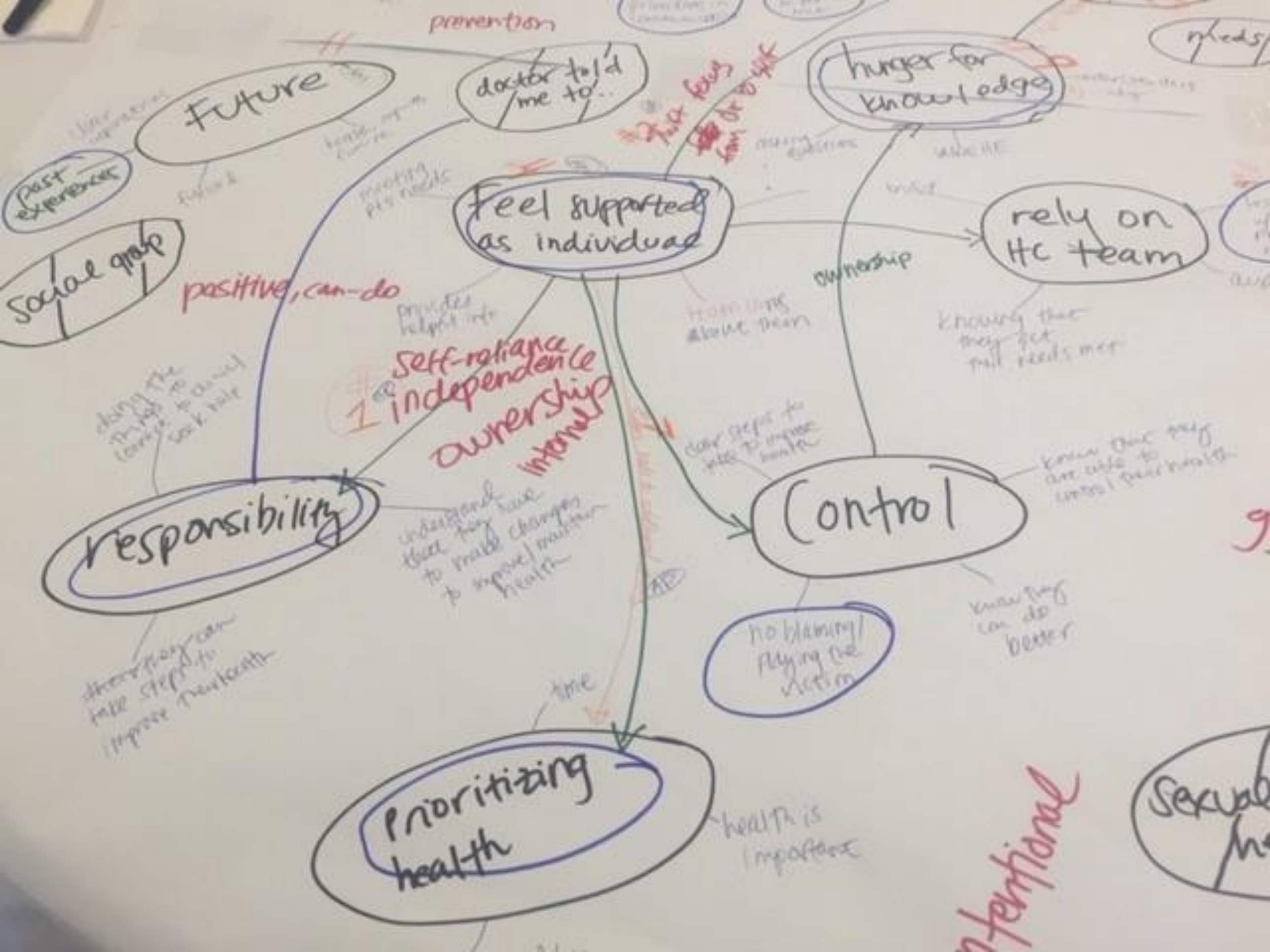
bottom up & top down analysis

How to Analyze Qualitative Data

- Focus on an activity/phenomenon you wish to understand.
- Gather data across many dimensions through observation, show-and-tell interviews, participation.
- With a small team, go through the data. Characterize what actually happens. (Affinity Sort, Journey Map)
- Identify concepts and themes in the data. What is challenging? What are different patterns of behavior?
- Categorize the concepts and themes in a hierarchy and illustrate with examples from the data.

Coach Share

Ariel Peterson
Venice Family Clinic


prevention
Future
doctor told me to..
hunger for knowledge
past experiences
Social group
Feel supported as individual
rely on HC team
positive, can-do
ownership
self-reliance
independence
ownership
internal
responsibility
Control
no blaming/playing the victim
time
Prioritizing health
health is important
intentional

KNOWLEDGE SHARE

Case Study: Enhancing the Prenatal Care Experience

MAR 8, 2018 • Focus Area: **Innovation & Design Thinking** • Program: **Catalyst**

Written by: **Center for Care Innovations**

Enhancing the Prenatal Care Experience

Prenatal patients have many — often brief — appointments. Yet, after visiting their providers, they can spend up to an hour waiting to meet with their

careinnovations.org/wearecatalysts/resources

Let's try it!

Adapting your household to a more volatile environment

- Brainstorm what you might do over the coming years to adapt your household for more volatile environmental conditions on sticky notes. (10m)

- Step back and together, make affinity groups from the many stickies. (5m)

- With another color sticky, name those groups as themes. (5m)

- Create an over-arching concept or idea that characterizes adapting households to volatility. (5m)

- Prepare to share what you came up with.

Organizing qualitative data

Review and discussion

Personas

Personas

Characterize who you are designing for

What is a Persona?

- A persona is a document that characterizes a group of end users with similar needs
- It is built from interviews you have completed with real-life end users
- It captures their behavior, attitudes, challenges and needs
- It is used to communicate and maintain awareness of these end-users throughout your project

Catalyst Example: A Better Prenatal Care Experience

Venice Family Clinic

Demographics

- Adult female (25-35 years old)
- Third Pregnancy
- Married/stable partner

Attitudes

- Tired/Overwhelmed: with a family, two kids, often a job, and now a pregnancy, she is physically and emotionally exhausted
- Scared: "I was afraid because I did not know how my kids would react [to having a new sibling]"
- Worried about future of family's wellbeing- education and finances

Behaviors related to prenatal care

- Attends appointments even though she wishes that she did not have to spend as much time at the clinic
- Is confident in her own knowledge/experience of caring for her baby but also knows that there are always new things to learn
- Is not afraid to ask questions about anything - The good, the bad, and the ugly. Knows that the clinic is a safe place and that staff will not judge her.

Needs/Goals/Motivations related to prenatal care

- Highest concern is the safety of her baby
- Worries about taking care of her other kids as well
- Would like to minimize time at the clinic, without impacting care

Teach Me

TINA

LEARNING FOCUSED Teacher

"Tell me more! I need Internet at home and in my classroom. So, it's got to work. When I do have trouble, though, I want to be able to fix it quickly on my own."

My school continuously strives to be a premier educational institution in the state of Georgia. Technology is now a part of our everyday lives, so I use technology and the Internet in my classroom. I use it for personal projects, but also for classroom projects with all of my students. When in a classroom with 30 middle school kids, I don't have time to call the DSL provider if I have trouble with the connection. So, I need to be able to troubleshoot problems on my own right there on site. If I have too many connection problems, I will report it to our school principal and recommend that we use a different DSL provider. As Teachers, we don't have a lot of time to deal with extra problems outside of our everyday chaos.

At home, I use the Internet to do research for the book I am writing. I am also an avid cook, so I connect almost every evening to pick out recipes and view the recipes I've saved online. When I am at home, I have a little bit more time to troubleshoot if needed. And, I do prefer to fix the problem myself, if possible.

This user has a High need for connection and a moderately High willingness to troubleshoot problems when they arise. She is interested in what is happening and why the function is being performed. She wants to learn about her computer and DSL.Tina will study simple wiring diagrams, try to check connections and will download DSL software. She wants to learn more computer jargon, but explanations may be needed. She may also use a chat for customer support, to learn how to fix her DSL connection in her classroom or at home by herself.

Title: Science Teacher

Company name: Crabapple Middle School

Industry: Education

Location: Roswell, Georgia

Short pitch:

Crabapple Middle School has enjoyed twenty plus years of excellence in education since its opening in 1992. In 1998, Crabapple Middle became the ten Counties First National School of Excellence and a Georgia School of Excellence in 2000. Crabapple Middle was recognized as one of the first Georgia Lighthouse Schools to Watch for excellence in middle level education.

USER TYPE

KEY VALUES

- Learning
- Educating and innovating
- Autonomy

CONNECTION NEEDS

QUESTIONS ASKED WHEN CONSIDERING A PROVIDER

EMPLOYMENT

TECH SAVVY

COMMUNICATION PREFERENCES

SUPPORT PREFERENCES

SECURITY CONCERNS

FEATURES AND FUNCTIONALITY BY PERSONA TYPE

Low Tech NGO

Chike (34)

Project Manager

Chike is a **Nigerian local** with an **undergrad degree in Political Science**. His passion has always been to use what he learns to help his country, and now he's ready to put his new skills to work.

He recently started working for a non-profit organisation focused on **coordinating disaster recovery assistance** all over the country. They received some grant funding from the US and UK, and they're under constant pressure to **explain and justify how they use their funds**.

The learning curve has been steep, but Chike is **passionate and driven**, and he wants to get things done quickly and with **as little budget as possible**.

He sees **big potential for using Vumi Go** to connect to the people they are trying to help, but he's not sure if he can afford it, and if he has the technical skills required to make it a success.

I don't want to mess around. I need a cheap, easy way to communicate with the people we're trying to help.

GOALS

- Easy account and campaign setup.
- Cheap messaging.
- Minimal maintenance time required.

DIMENSIONS

- Access to tech skills
- Messaging budget
- Involvement
- Reach
- Dev needs

Persona Name

"A quote that captures an important point of view from the persona relevant to the project topic."

Background

A couple of paragraphs that provide an understanding of who the persona is, relevant background info and how they relate to the project topic.

A couple of paragraphs that provide an understanding of who the persona is, relevant background info and how they relate to the project topic.

Goals/Desires

A few sentences or bullet list of their goals of desires as they relate to the project area

"Another quote with the persona's priority need or suggestion."

Dimensions

lo hi

lo hi

lo hi

lo hi

lo hi

ABOUT

Age:

Work:

Family:

Location:

Education:

Motivations

A paragraph or list of what drives this persona — care for others, ambition, doing well, being fair, etc.

Frustrations/Needs

A few sentences or bullet list of their frustrations in the project area and what they need.

2 x 2 Diagram

How-to

- Conduct show-and-tell interviews to capture rich information about your users.

- On sticky notes, populate the different categories of your user persona with information from your user interviews.

- Use affinity sorting to cluster the sticky notes into two or more different draft personas.

- Write in other aspects of the personas, inspired by your real users, to flesh out final personas.

Q&A

Comments

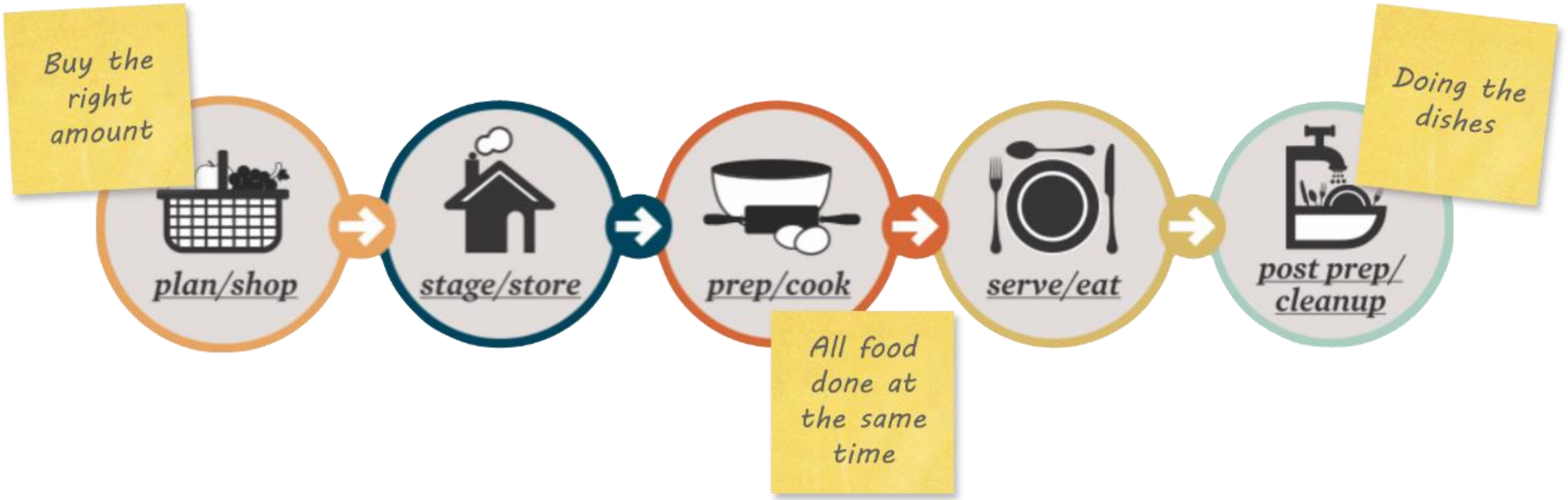
Journey Mapping

What's a Journey Map?

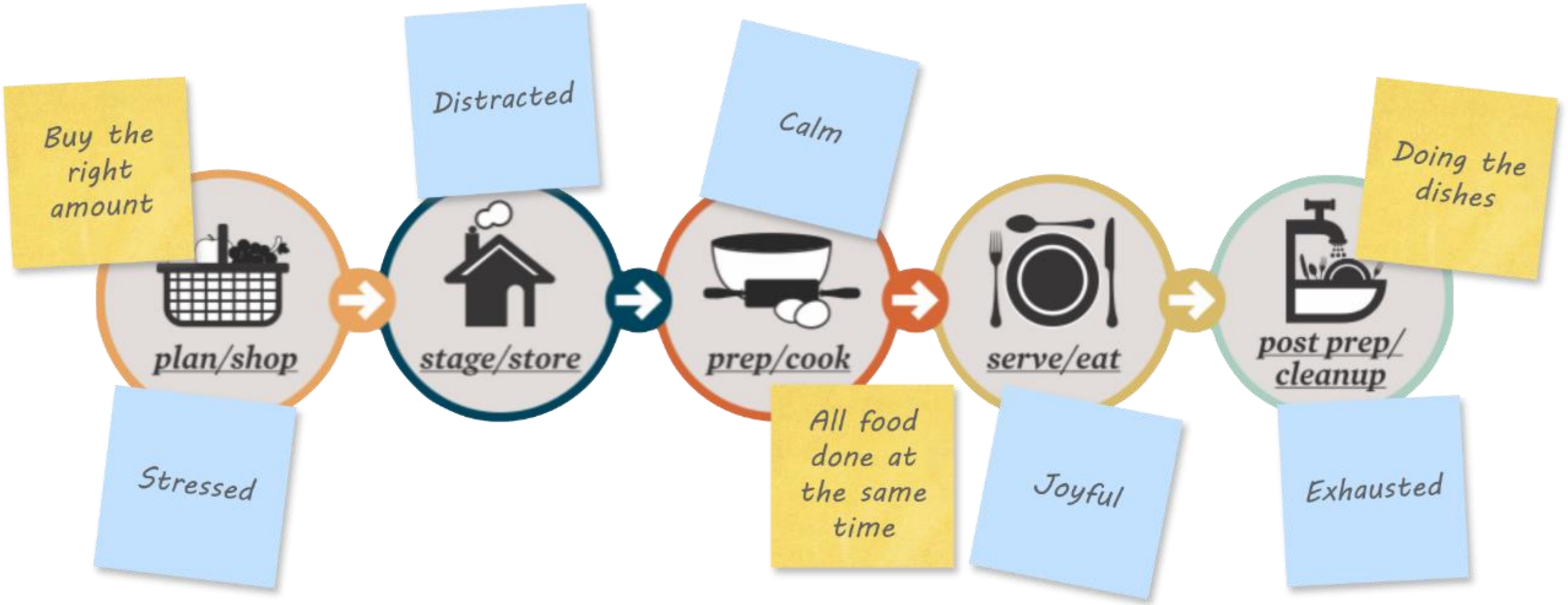
- A flow chart of a user's experience
- Made up of core activities
- Layered with important information like feelings, interactions, and pain points

catalyst

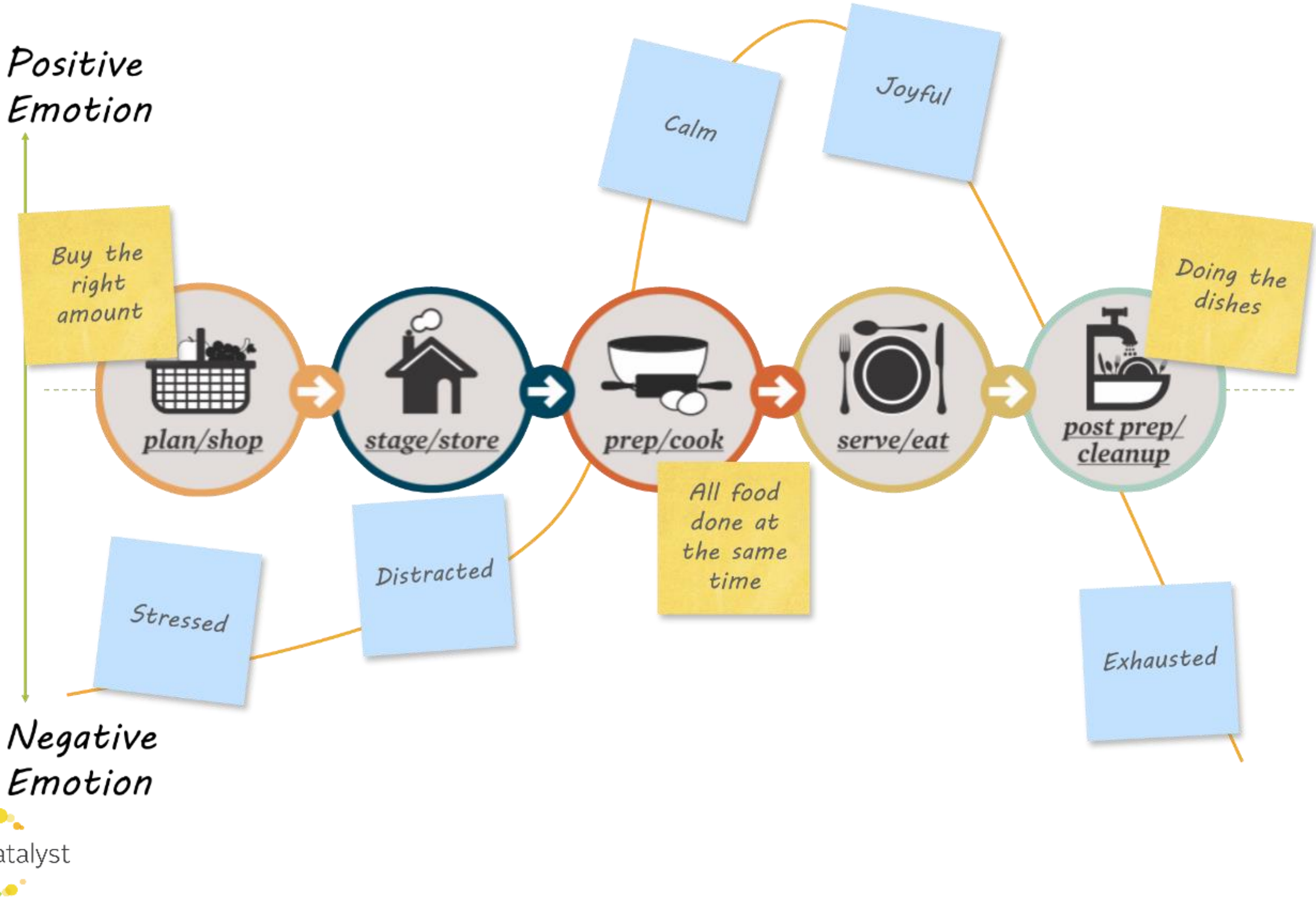
Cooking Dinner



Cooking Dinner



Cooking Dinner



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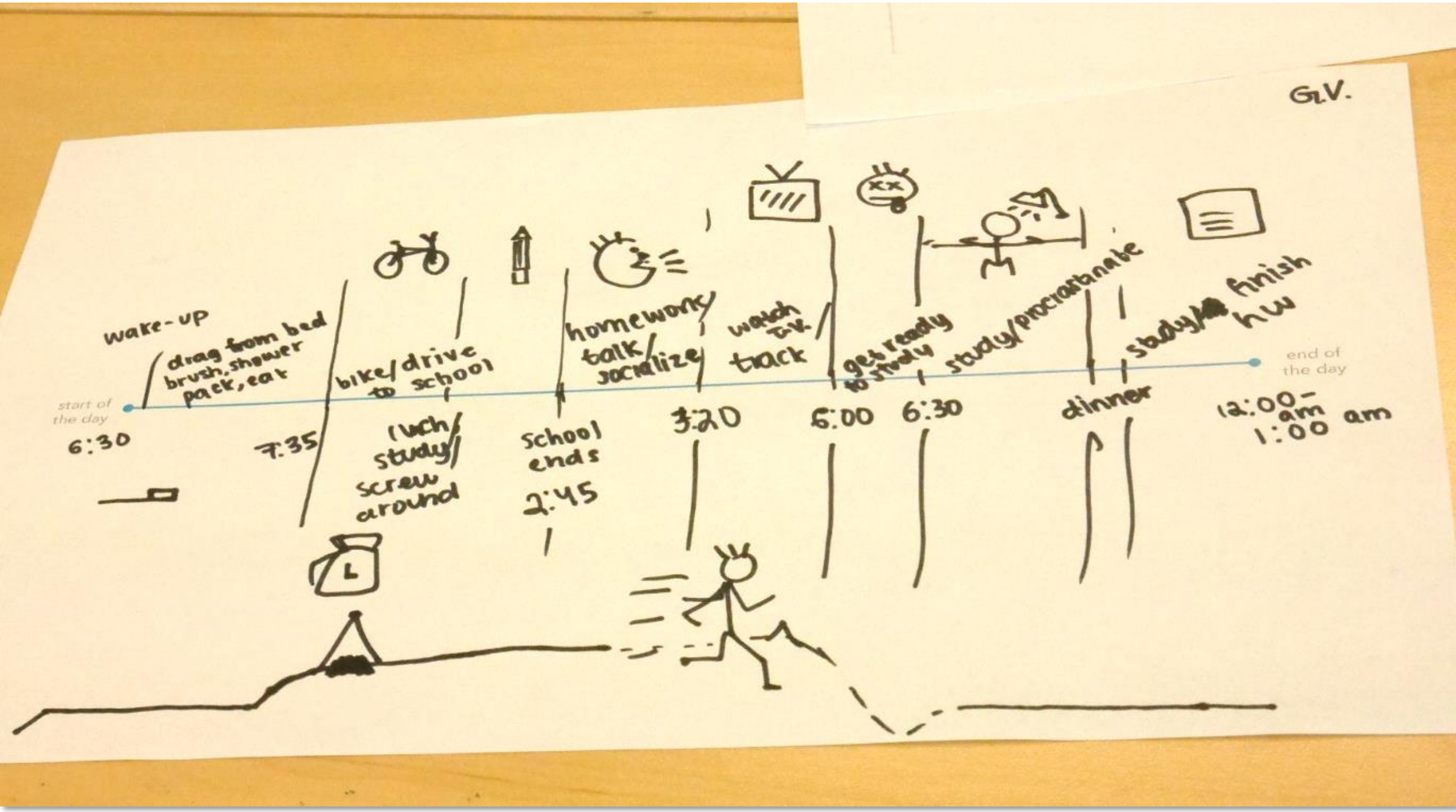

G.V.
wake-up
drag from bed brush, shower pack, eat
bike/drive to school
homework/ talk/ socialize
watch T.V. track
get ready to study
study/procrastinate
study/ finish h.w
start of the day
end of the day
6:30
7:35
lunch/ study/ screw around
school ends 2:45
3:20
5:00
6:30
dinner
12:00- 1:00 am

Pre Visit (Prep)

HV# 2-5 Goals

To bring 1) Life calendar: Facilitator
- a) Colored pencils

Computer Prep
- pull up "Activity"
- mark facilitator in Parsimmony

Minifolder

pull visit materials from drawers

During

1) Health Assessment
- a) Vitals
- b) update appts
- c) ER visits

2) Review
- a) triplicate form

3) Clt. topic → Smart Goals

4) Program Topic

Post (multiple)

1) Persimmony
- a) Document

2) Other (long Prep)

3.) ETO forms → Lanett

White copy HV form → Paper Chart

Why Use A Journey Map?

- Infuses process with human stories
- Makes user experience tangible and easy to share
- Weaves different kinds of information into one diagram
- Offers spring board for solutions and strategy

catalyst

Principles of Journey Mapping

- Interviews and observations are your foundation
- Start simply, then add on and remake the map as you learn
- Display relevant information thoughtfully and creatively
- Show users your map to get feedback

Coach Share

Tabitha Thomas
Consultant, Formerly w/ WEAVE

KNOWLEDGE SHARE

Case Study: Caring for the Caregivers

JAN 17, 2019 • Focus Area: Innovation & Design Thinking • Program: Catalyst

WEAVE, a Sacramento-based nonprofit organization, is the primary provider of crisis-intervention services for survivors of domestic violence and sexual assault in Sacramento County, and the county's only rape crisis center.

As part of its mission, WEAVE provides comprehensive services to victims of sex trafficking, many of whom are children. Direct service staff who work with this population are at high risk of vicarious trauma and burnout, and job turnover is high. One of WEAVE's primary goal is to build, grow, and sustain a movement to end sex trafficking once and for all, but to do so organization staff realized they needed to provide more support for those working directly with sex-trafficking victims and survivors.

careinnovations.org/wearecatalysts/resources

Activity - Journey Map

30 minutes

1. Choose a user journey for your project
2. List key activities user *does*
3. Order them from left to right
4. Label “stages” of related activities
5. Add in “layers” of information
    - Thoughts, feelings, pain points, quotes, etc.

catalyst

Reflection

- How did it go?
- What's challenging about it?
- What value do you see in it?
- How could you apply it to your project?

Convention & Orthodoxies

Convention:

"a way in which something is usually done, especially within a particular area or activity."

Orthodoxies:

"Tightly-held beliefs that guide an organization's decisions and their interpretation of new information."

Class rooms

Banks

Employment services

Waiting rooms

What's good about conventions and orthodoxies?

When can they be bad?

Why is it hard to change them?

Why it's important to be able to identify

- Convention is stable but the world is changing quickly
- Organizational memory can be faulty - some things aren't meant to be conventions at all!
- New value creation often comes from challenging convention

A few points

- The first goal is to identify without judgement
- There are **internal** ones, specific to the organization
- And **external** ones, common to the industry
- They exist on many **levels**
- Challenging convention needs to be done with respect and curiosity

How to recognize them

- Dig deeper into iconic stories of the organization
- Ask “Why is that?” numerous times
- Ask "How do we know that?" numerous times
- When you hear the same phrase from many different people in the organization
- Look for them here: “We can’t do that because…” or “We tried that once…”
- Ask your newest colleagues what they see as strong beliefs in the organization

Let’s apply this to your project!

Conventions and orthodoxies

1. With your team, brainstorm conventions and orthodoxies related to your project - use a sticky note for each one. (10 min.)

2. Consider internal, industry and cultural ones.

3. Identify a few that might be worth questioning.

4. Find another team and share your results with each other. Encourage the other team to add to your own list! (10 min.)

Review and discussion

Project Scoping

Assessing your project's scope

1. Many projects become too ambitious.

2. A small project done well is better!

3. Restate what your project is about, re-articulate what you're working on.

4. Identify constraints you have.

5. Don't be vague. | Think small | What can you do in five months?

Project scope - at this point in your thinking…

- We're working on _____
- Our goal is to _____
- Key areas of research for us are _____, _____, & _____
- Types of solutions we could come up with are: _____
- What we probably can't address is: _____

Coach Share

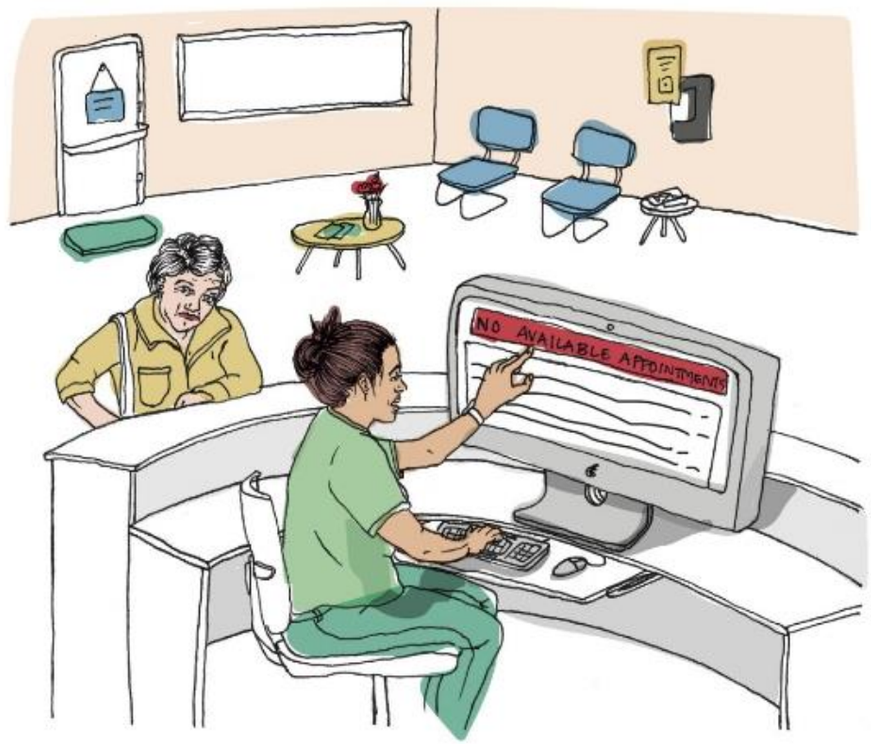
Sarah Kerr
Open Door Community Health Centers

KNOWLEDGE SHARE

Case Study: Optimizing Patient Appointment Access

FEB 14, 2018 • Focus Area: **Innovation & Design Thinking** • Program: **Catalyst**

Written by: **Center for Care Innovations**



Optimizing Patient Appointment Access

careinnovations.org/wearecatalysts/resources

Activity - assess project scope

- We're working on _____
- Our goal is to _____
- Key areas of research for us are _____, _____, & _____
- Types of solutions we could come up with are: _____
- What we probably can't address is: _____

Project Research Roadmap Planning

Project planning calendar activity

Team time: Project Planning & Feedback (45 min)

1. Consider your project definition and areas of design research

2. Work on a calendar plan of your activities over the coming 9 weeks - 30-40 minutes

3. Pitch your project and work plan to two other teams for feedback

4. Discuss in your team to refine approach

Cross pitch to new teams (30 min)

- Breakout into groups of 2 teams
- Team A pitches their project and shares their initial research plan. (3-4 minutes)
- Team B listens, jots notes, questions and feedback on sticky notes.
- When pitch is done, team B gives feedback to team A.
- Team A listens to feedback without defending. Discuss after all feedback has been shared.

Day 2 Evaluations

How Might We Statements

Connecting insights to ideas

- You've done of a lot of research and have a structured basis of insights and supporting data.

- How do you keep from going straight to individual ideas?

- How do you create many ideas that can be sorted and evaluated?

-> Use "How might we?" questions

How might we…?

- How might we welcome the clients in more appropriate ways?

- How might we continue serving post partum mothers and their family?

- How might we try new behaviors that improve staff morale?

Try one or two on us...

What's Next?

Team Activities

Program Offerings

Phase 1: February - April

Collect research "artifacts," send "postcards," ask for help

2019 Program Timeline

January | February | March | April | May | June

In-Person Workshops

In Oakland, CA

Workshop 1
2/20-2/21

SEE & EXPERIENCE | DIMENSION & DIAGRAM | QUESTION & REFRAME

Workshop 2
4/24-4/25

QUESTION & REFRAME | IMAGINE & MODEL | TEST & SHAPE

Workshop 3
6/26-6/27

Sponsors attend showcase on 6/27

PITCH & COMMIT

Milestones

1. Attend virtual kickoff meeting (1/23, 12 pm).
2. Complete assigned research in advance of Workshop 1.

Share your project activities with sponsors and stakeholders on a monthly basis.

During activities, take photos and video of stakeholders to document your research and prototype testing.

Pitch your solution prototype at Workshop 3.

Remote Support

Optional

Ongoing coach support

Virtual Office Hours:
Recruiting and partnering with stakeholders

"Booster" Webinar
Taking great video with a smartphone

Virtual Office Hours
Making ideas tangible and testing them quickly

"Booster" Webinar
Prepping your pitch

"Booster" Webinar
Editing and embedding video in your pitch

Phase 1 Reminders

- ✓ Do the things you lay out in your research plan.
- ✓ Take photos and video (with consent!) during your research activities. These will be helpful for the June showcase.
- ✓ Set aside time regularly to "synthesize" and reflect on what you are learning. Create a visual framework of your key themes and insights to discuss with your sponsor and stakeholders.
- ✓ Narrow in on the pain point(s) you will focus on for the rest of the program. How might you re-frame those challenges so they are articulated as optimistic and collective opportunities (*"How might we…[HMW]"*)?
- ✓ Bring your journey maps/personas, hierarchy narrative (quotes, sub-themes, and major theme), and HMW statements to Workshop 2.

Upcoming Booster Webinars (optional, dates to be set)

- Design research office hours (Q&A)
  - Recruiting design partners
  - Ethnographic research techniques
  - Organizing research artifacts (quotes, photos, videos)
  - Making sense of your research
- Taking better video with a smartphone
- "How Might We…" Statements
- Maybe more!

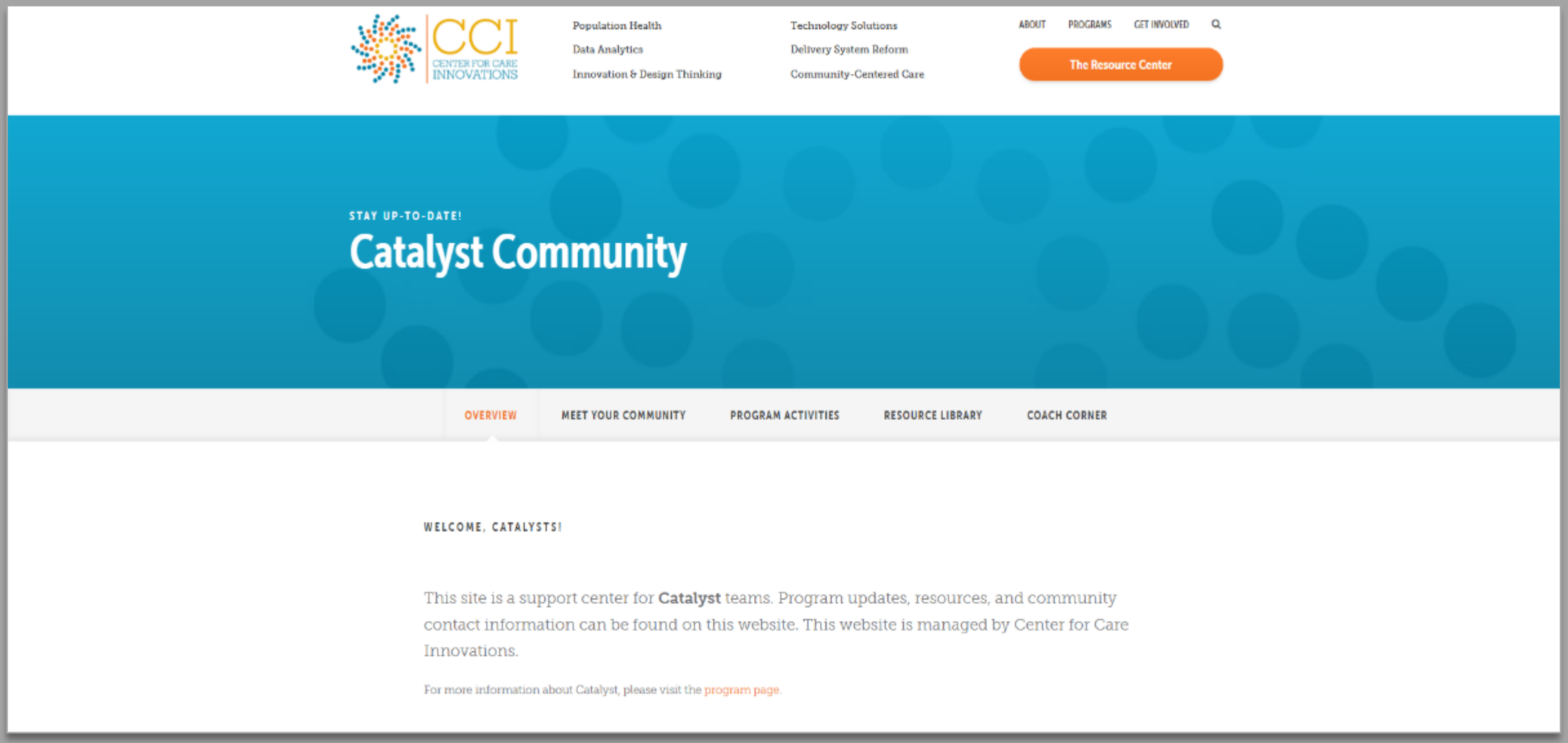
All sessions will be recorded and posted to www.careinnovations.org/wearecatalysts/program

Lean on your coaches!

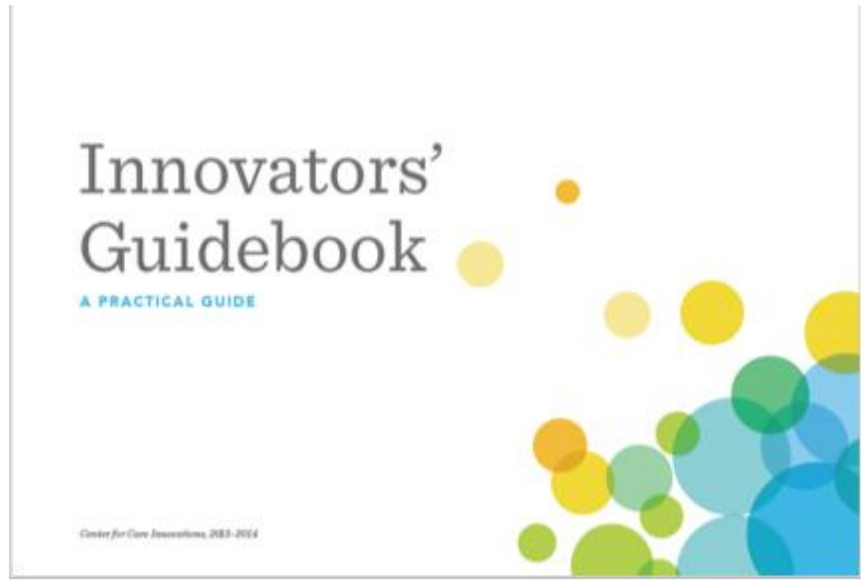
Use the Google Group to email with others

catalyst2019@googlegroups.com

Your EVERYTHING: www.careinnovations.org/wearecatalysts



Take home your Catalyst goody bags!



Thank you, and onward!

Please complete your evaluation forms.

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