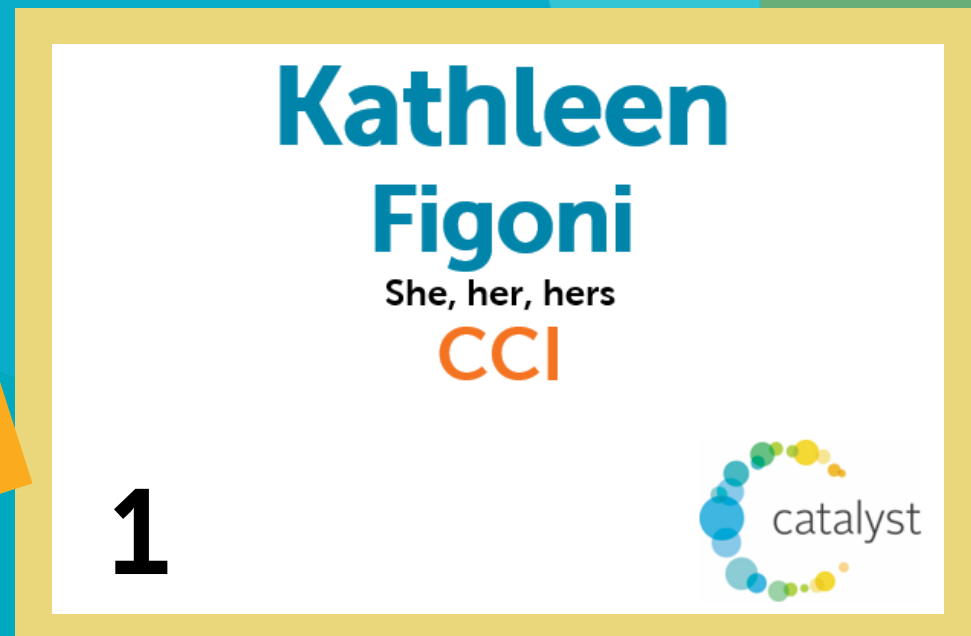


Welcome, Catalysts!

Say hi to others, get some breakfast.

Please sit at the table # listed on
your name tag



Teams & Coaches introduce yourselves before we get started
Coaches give your team one piece of advice/words of wisdom.
Teams write down that piece of advice.

Catalyst 2020 Workshop 1

February 19-20, 2020



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

Energizer

The background of the slide is composed of several large, overlapping circles in various shades of teal and green. The circles are semi-transparent, creating a layered effect. The colors range from a light, pale green to a deep, dark teal. The overall composition is abstract and modern.

Welcome Catalysts!

I've walked in your shoes...

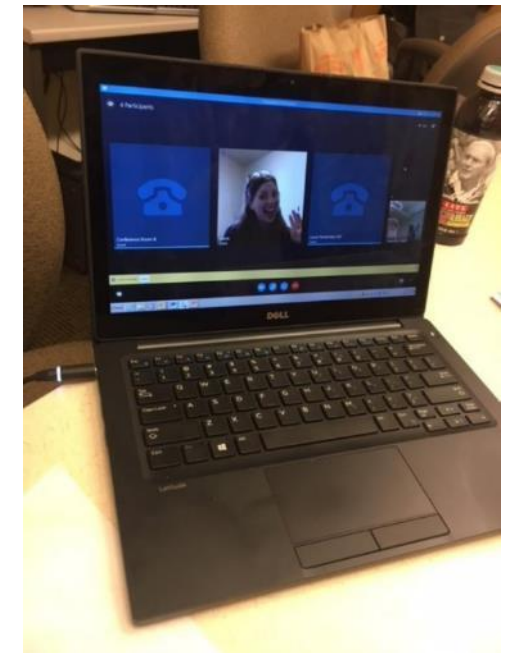
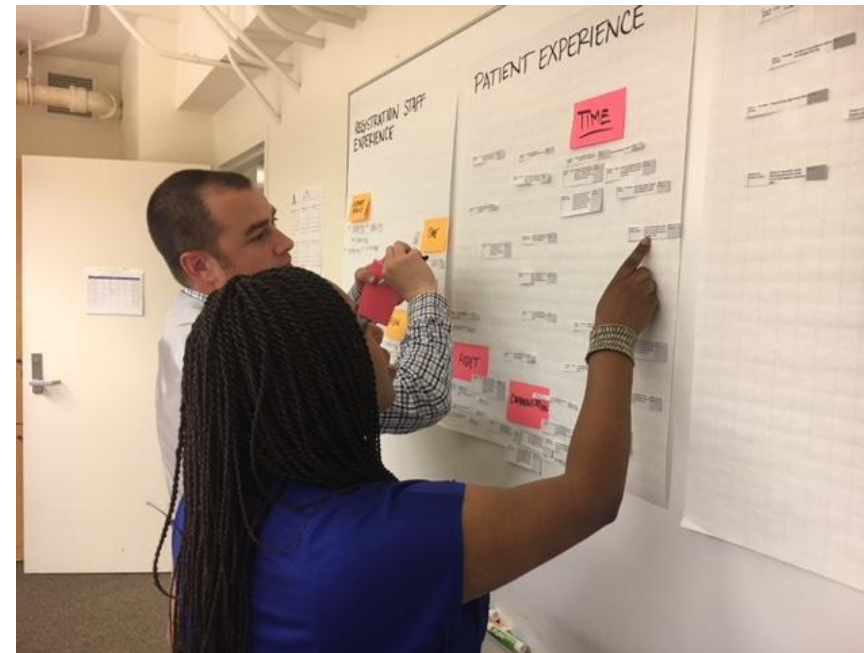
Catalyst Workshop 2014
Cohort #2



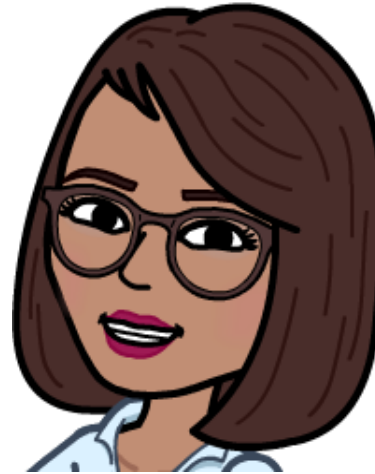
Design Research
From the field



I've walked alongside you...



Program Leads



Diana Nguyen

Program Coordinator & Coach

diana@careinnovations.org



Kathleen Figoni

Program Manager & Coach

kathleen@careinnovations.org



Chris Conley

Lead Facilitator

chris@twobitventures.com

Catalyst Program

Underserved communities deserve a social services system that offers services tailored to their needs and context.


Resource-constrained organizations need new ways of working and problem solving to respond to their communities' needs in an ever-changing environment.

Designing for Community Health

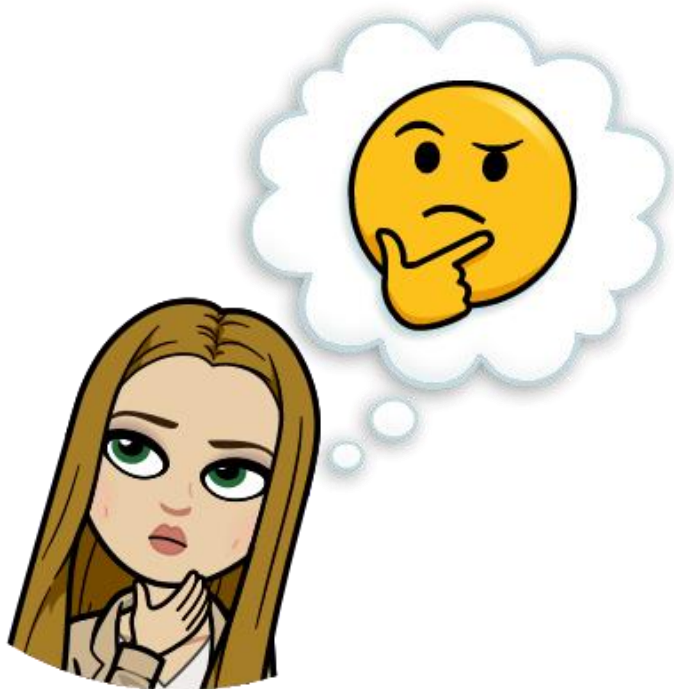
To address the overall health and equity of our communities, it requires moving beyond one's own organization and partner with community organizations.

By addressing upstream factors impacting health at the community level it will help our underserved communities engage in healthier behaviors.

Goals for the next two days

- 
- ✓ Get to know coach, peers, and each others' projects
 - ✓ Reflect on pre-work
 - ✓ Learn what a design project looks and feels like
 - ✓ Practice!
 - Design research methods
 - Learn how to organize data
 - Share about your project
 - Give and receive feedback
 - ✓ Learn ways to reframe your project
 - ✓ We're going to have some FUN!

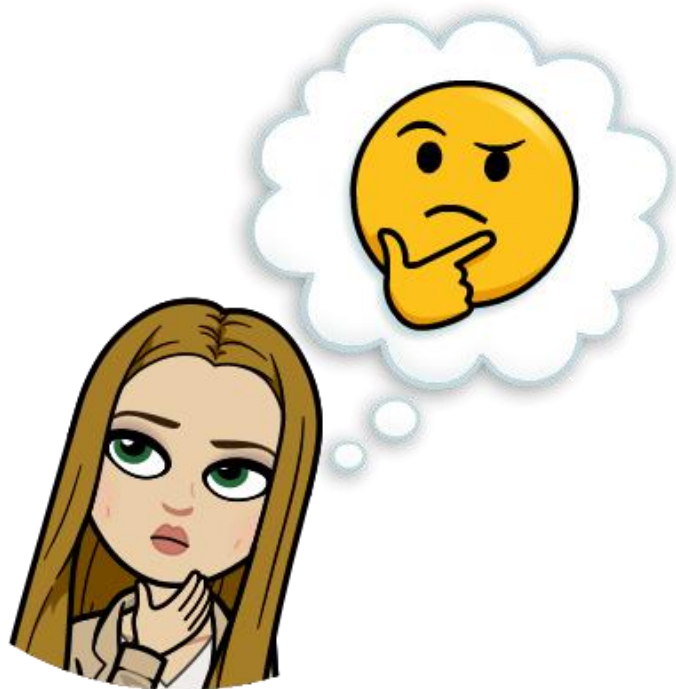
Throughout this program...



You'll question...
...a lot!



Throughout this program...

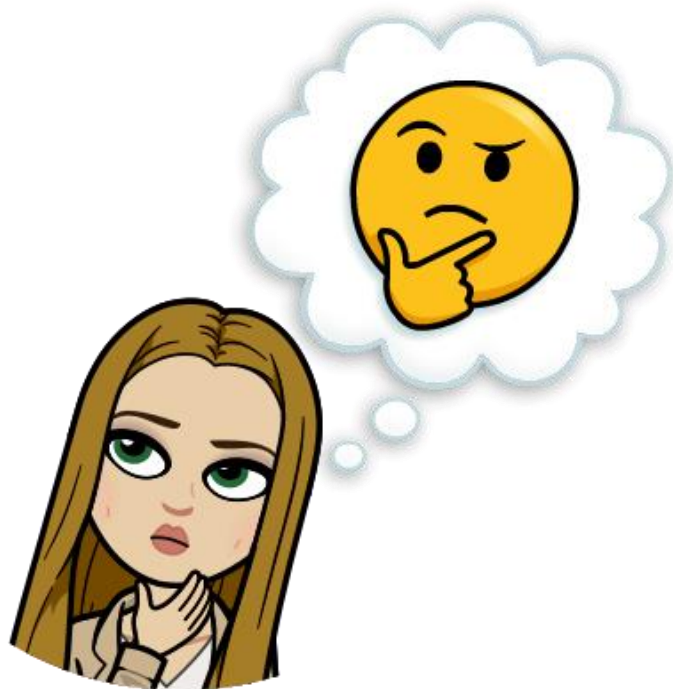


You'll question...
...a lot!



You may even
want to run

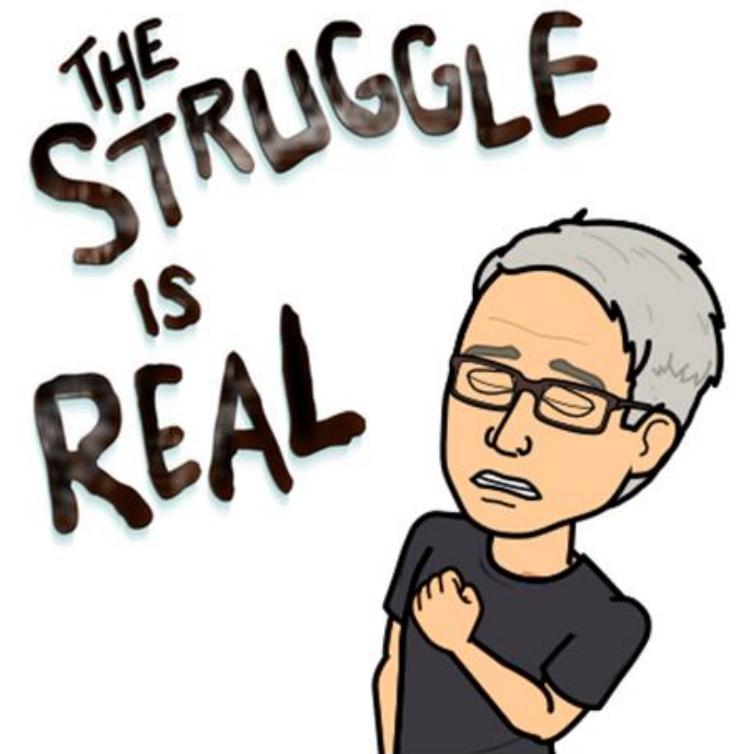
Throughout this program...



You'll question...
...a lot!

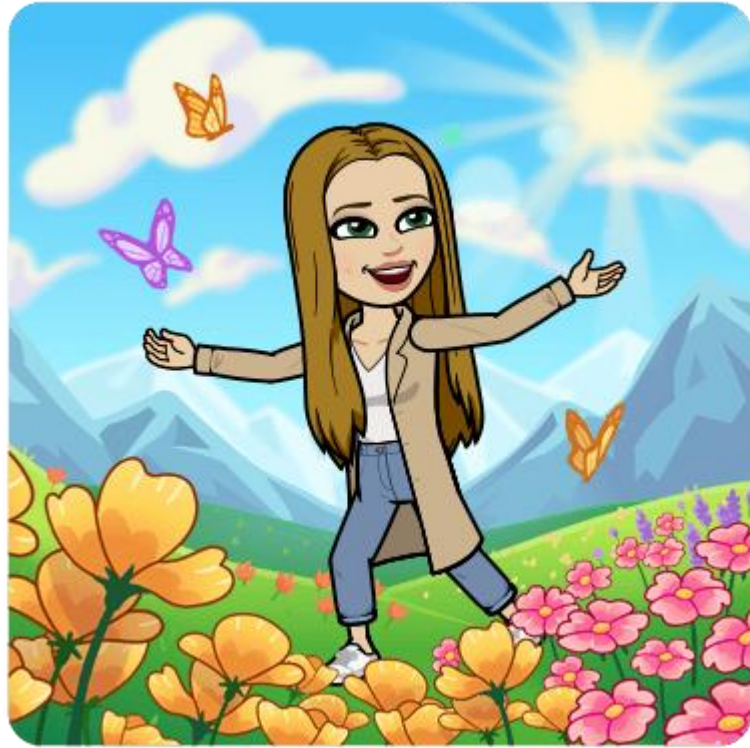


You may even
want to run



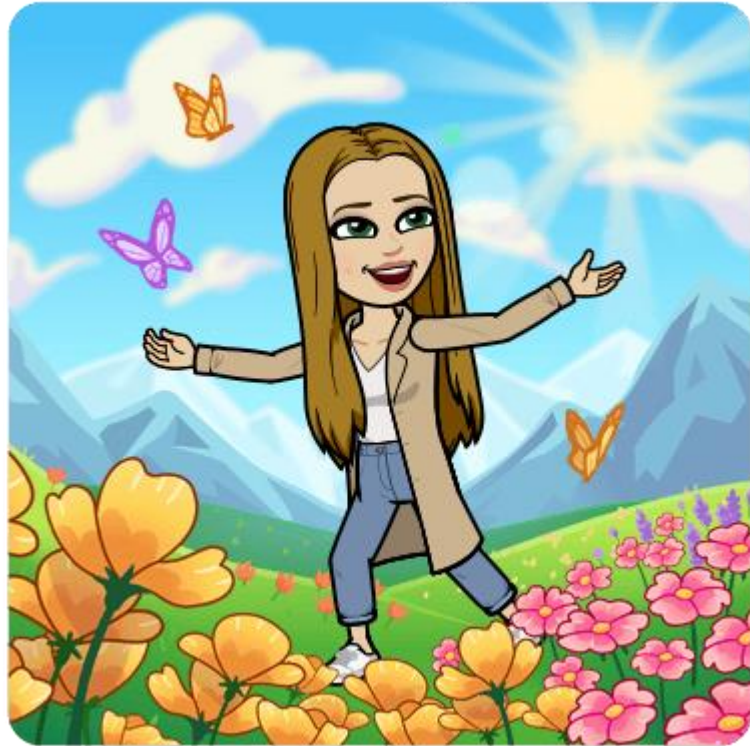
You'll be challenged
and may even struggle

But... in the end



You'll see the...
HCD light!

But... in the end

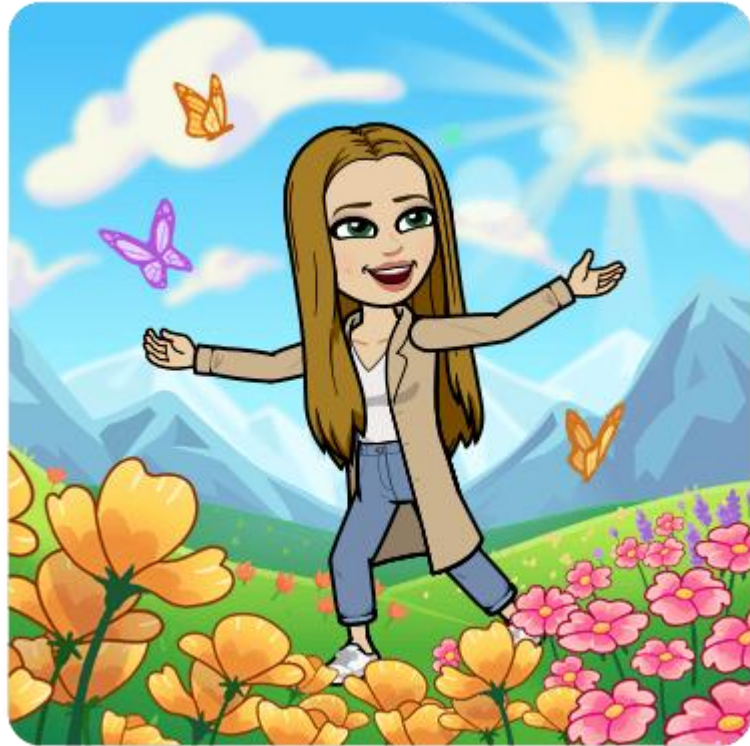


You'll see the...
HCD light!

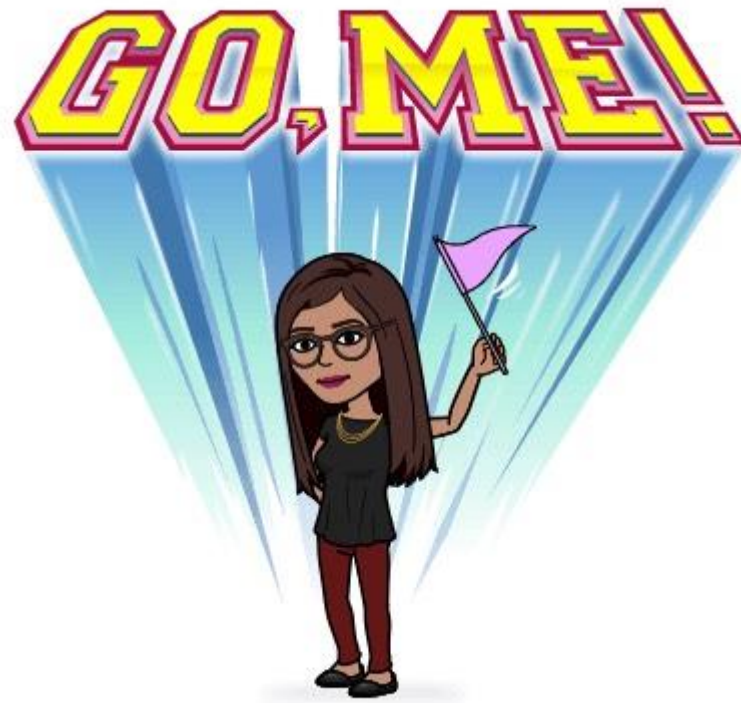


You'll feel proud

But... in the end



You'll see the...
HCD light!



You'll feel proud

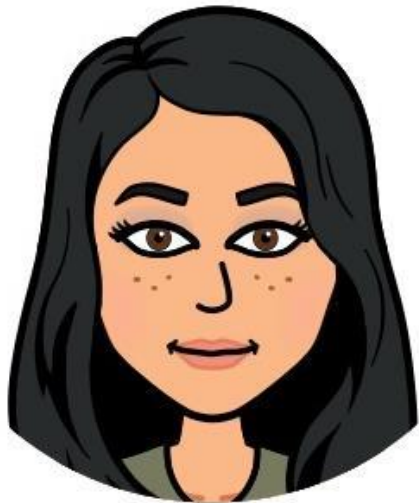


You'll start to see
transformation!

Catalyst Video

What does it mean to be a Catalyst?

Evaluation & Learnings



Roza Do

rozado.co@gmail.com



Chris Rubeo

chris.rubeo@berkeley.edu



Workshop 1:1's



Midpoint Check in Call



Post Program Check in Call

Housekeeping



Bathrooms



Wi-Fi



Take Breaks!



Photography

Working differently together

Mindsets



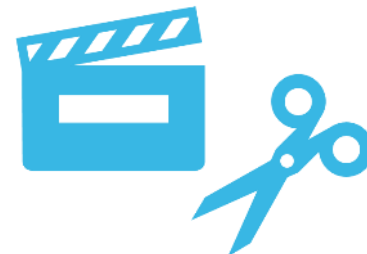
inclusion +
empathy



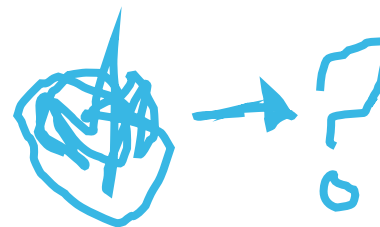
start small +
learn fast



collaboration



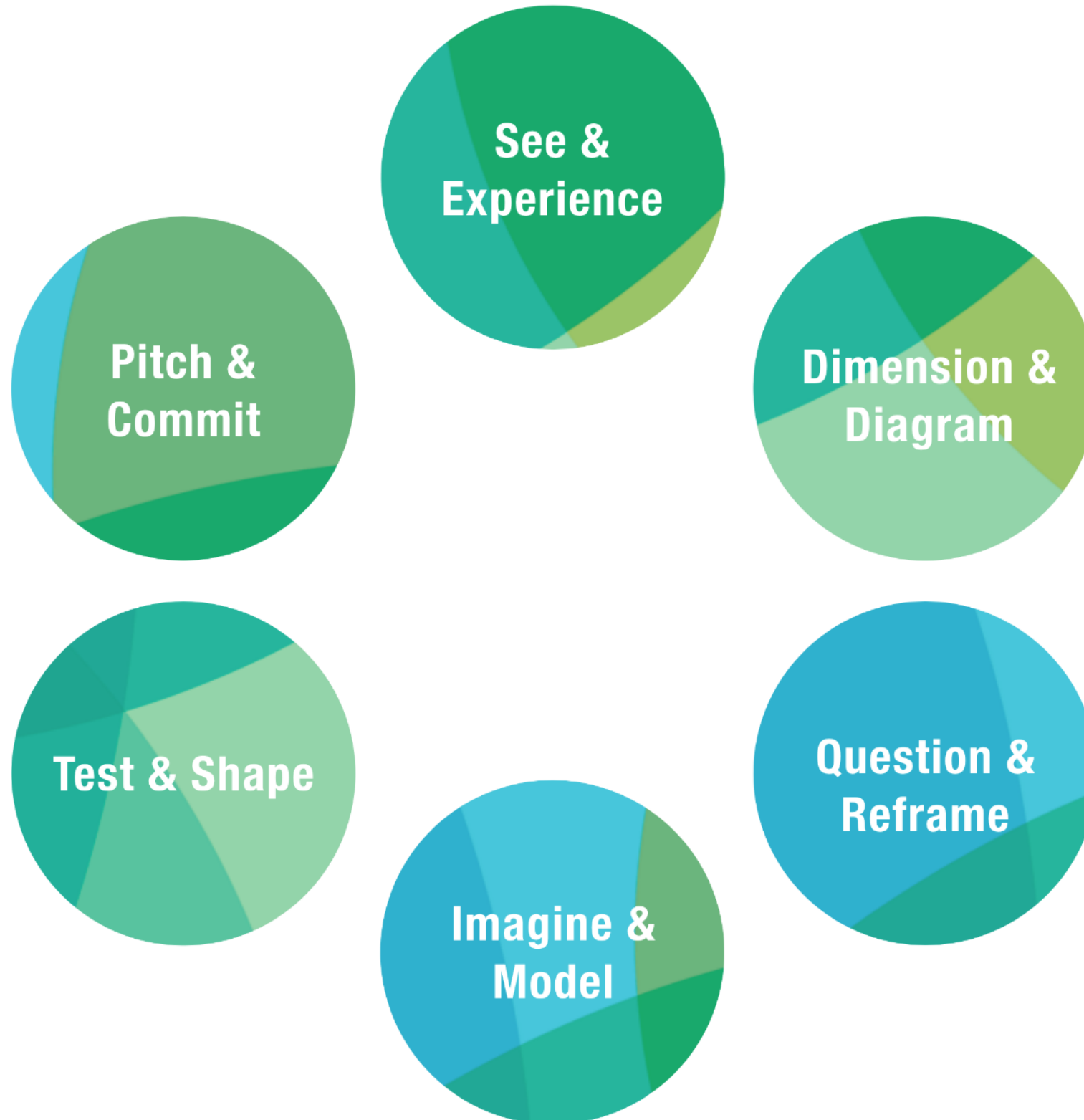
making things
tangible



show work
early + often

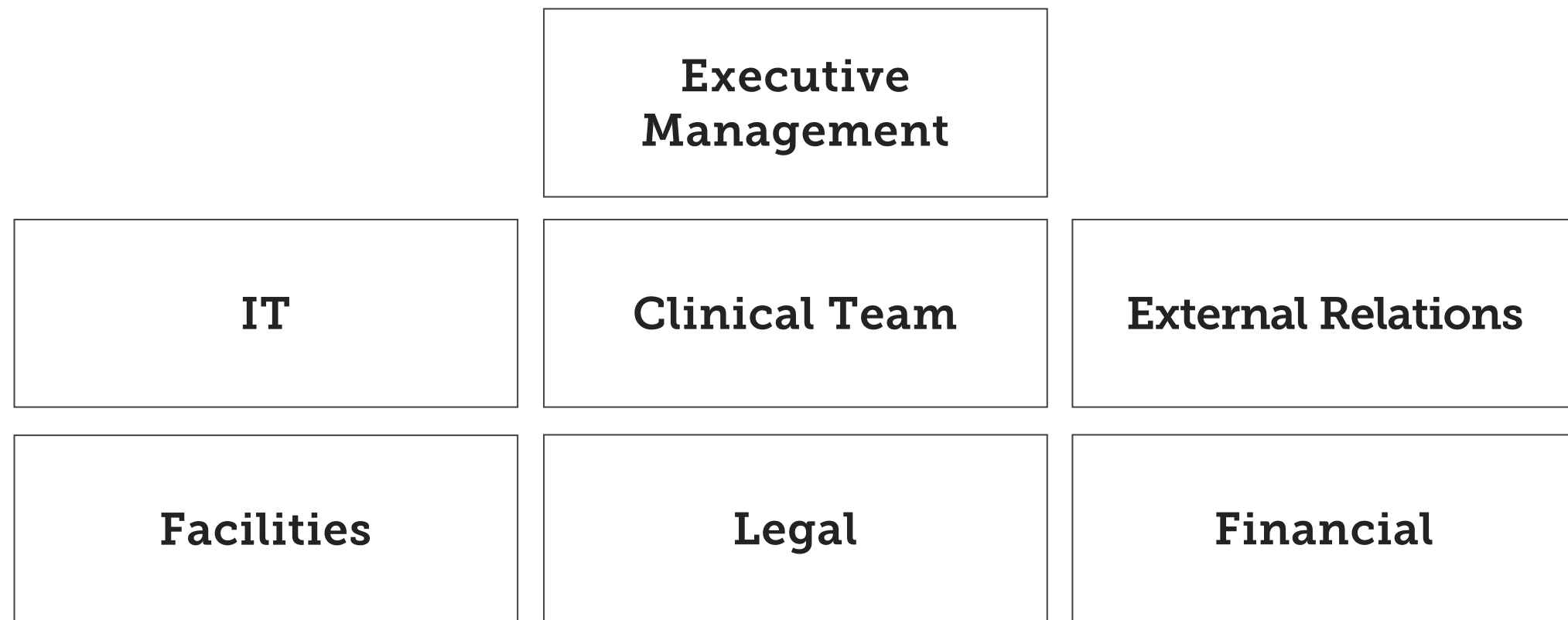


Behaviors





How do we work today?



**We're organized for OPERATING EFFICIENTLY --
doing what we know how to do**

EEEMP

Email

Email

Email

Meetings

Powerpoint

Individual Analytical Verbal

**Collaborat
ive
Creative
Tangible**



PIXAR

ANIMATION STUDIOS



THE INCREDIBLES

Working on the Story


Pixar spends a surprising amount of time figuring out how to tell the story that makes the movie.

Pixar Story Video

Pixar Fighting with Respect Video



But you're not making movies.



However, the same mindsets and behaviors are essential to your work.

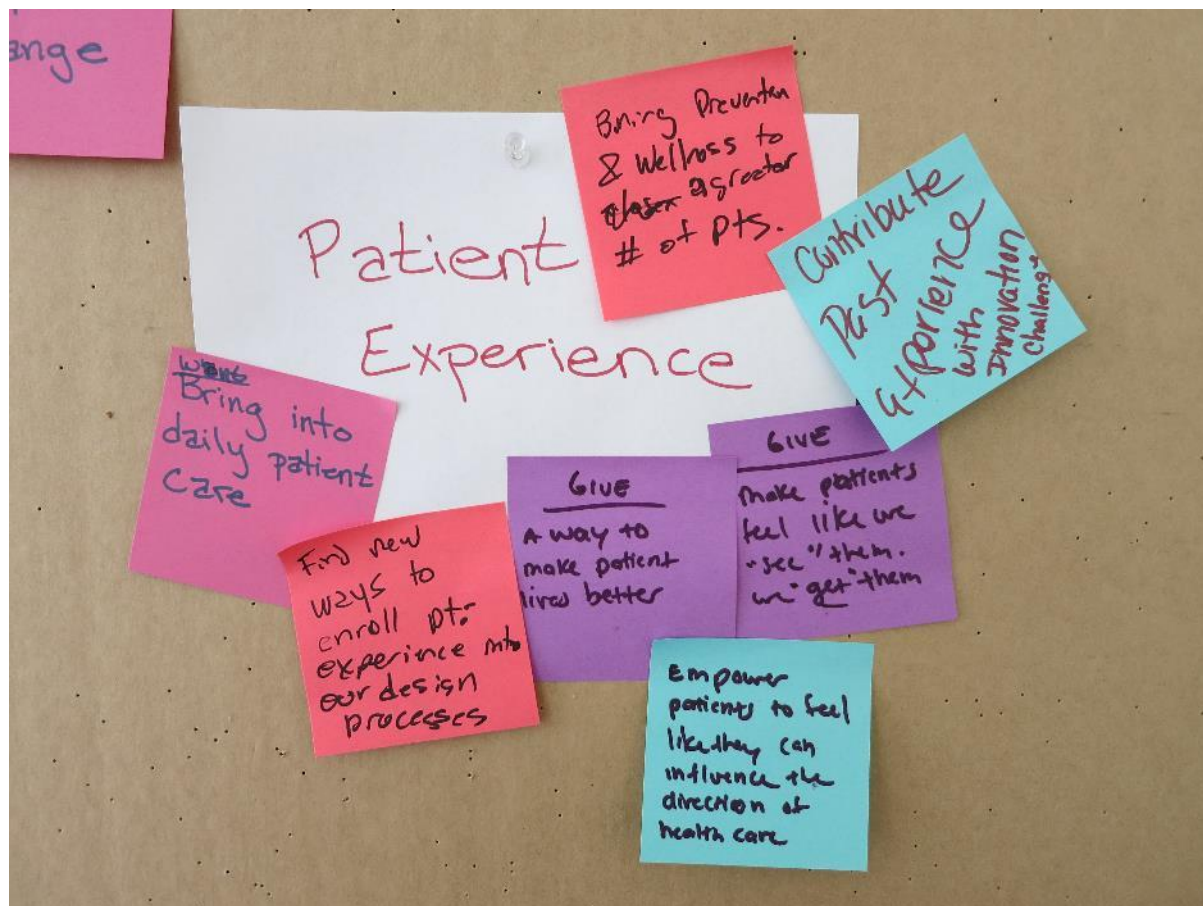


Collaborative Cycle & Affinity Clustering Reflective Discussion

A photograph of a collaborative meeting in a modern office. In the foreground, two women are seated at a white table, looking towards the right. The woman on the left has blonde hair and is wearing a black and white patterned top. The woman on the right has dark hair and is wearing a black and white patterned top. They are seated in orange chairs. In the background, two men are standing and looking at a large whiteboard. The whiteboard has a diagram on it. To the right of the whiteboard, there is a wall covered with many small documents and photos. The office has a brick wall and a wooden pillar. The text "A collaborative cycle is a way to structure a meeting to produce a creative result." is overlaid on the image in white font on a green background.

A collaborative cycle is a way to structure a meeting to produce a creative result.

Affinity clustering is a way to organize notes and ideas into related groups.




Using sticky notes lets you easily sort ideas and distill & label themes.

Collaborative Cycle w/ Affinity Clustering

1. Set up the topic, your goal for ideas
2. Brainstorm ideas in pieces - separate sticky notes
3. Sort, organize and label content groups
4. Reflect on what it could mean
5. Agree on key take-aways & any next steps





You'll recognize this pattern
embedded in many of the design
thinking methods.

Use it as the framework for work
you do with colleagues.

Now you try!

1. Organize in groups of two teams at your table. Get sticky notes and a sharpie pen for each person.
2. Write down, on one note per sticky *What you're excited about and what you're concerned about with your Catalyst experience.*
3. Write 7-10 ideas per person.
4. Stop and collaboratively sort your stickies into related groups.
5. Discuss the themes and categories coming from the stickies in your teams.
6. Together we'll review the themes as a group.

The background consists of several large, overlapping circles in various shades of blue and green. The circles are semi-transparent, creating a layered effect. The colors range from light sky blue to deep teal and forest green. The text "How did it go?" is centered in the middle of the image in a white, sans-serif font.

How did it go?

(What we just did...)

Reflective Discussion

A way to think critically together as a team to improve communication and the development of insights.

Structure of Reflective Discussion

1. Start with an open-ended question — “how did it go?”
2. Encourage more detailed description
- “say more about that.”
3. Encourage alternative viewpoints.
Ask for the positive aspects and the negative aspects.
4. Generate new action — “what could we do as a result?”
5. Agree on take-aways & next steps






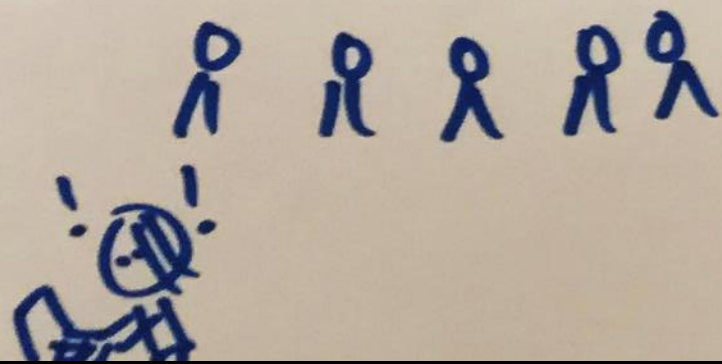
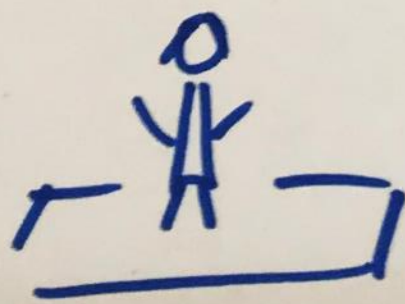
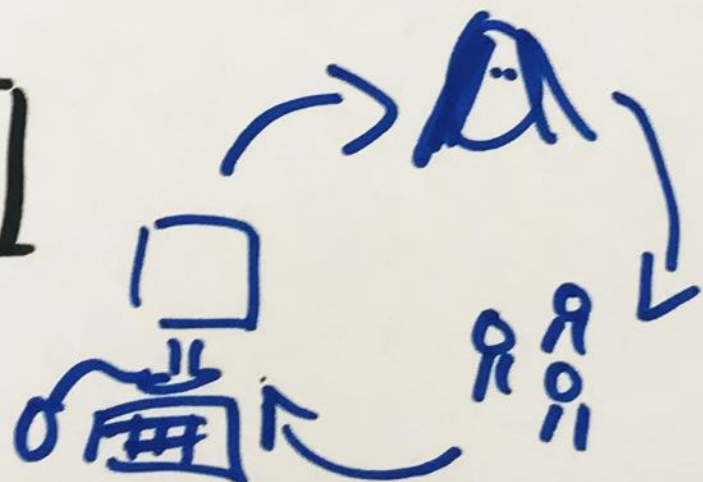
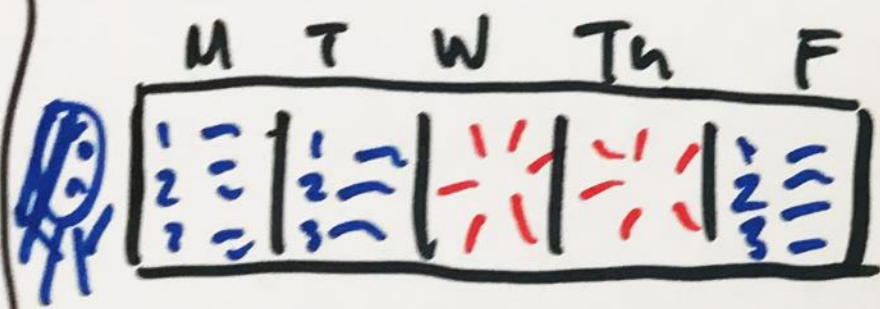
Use it with any work activity, at team check-ins and when you are stuck.

Capture key points, insights or actions that result.

Team & Coaches Introductions

Share Prepwork Experiences

DRAW YOUR EXPERIENCE: A recent workday that felt chaotic 





AGENDA

- COVERAGE
- 2 Providers
- Clear task Box
- FAX
- Labs
- ordering
- "Special Projects"

ADMIN

IF TIME
LEFT

Draw Your Experience:
What it feels like on your worst day at work

Alameda Health System K6 Adult Primary Care Clinic



Draw Your Experience:

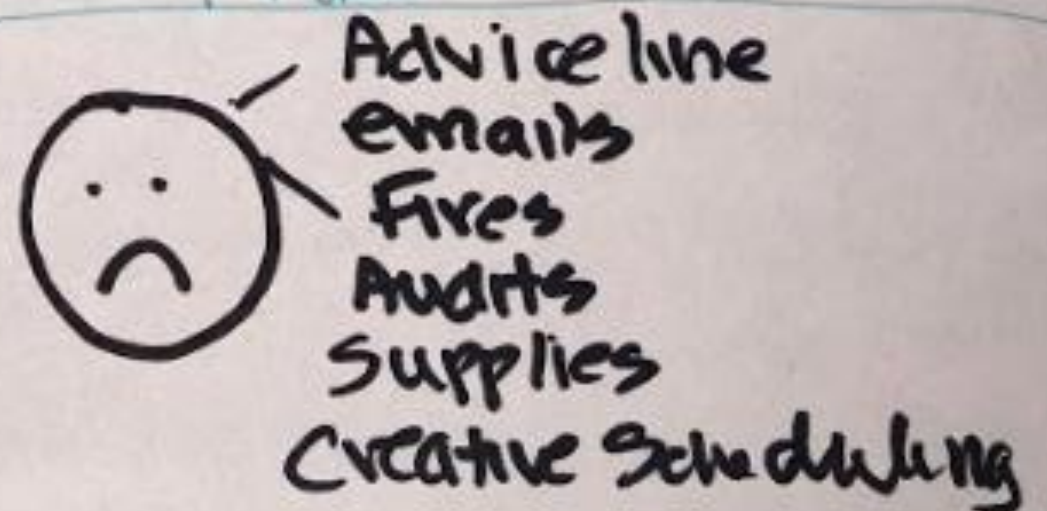
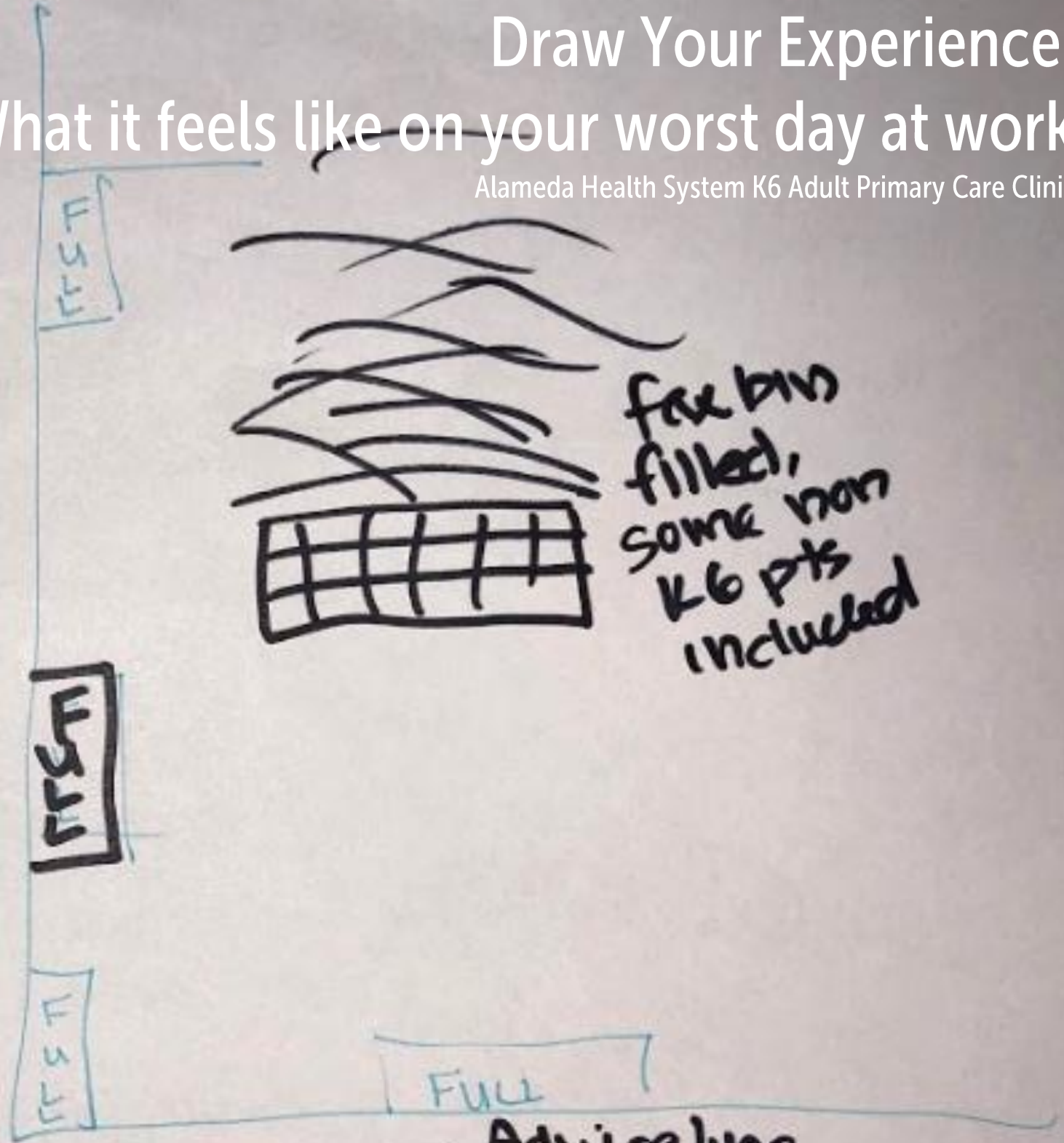
What it feels like on your worst day at work

Alameda Health System K6 Adult Primary Care Clinic

Waiting Room



Hallway



Prep-work share and feedback

- Get out the "draw your experience" pages from your rework
- Share what your project is about, who did you interview & what did you ask them to draw?
- What reflections do you have on what they shared?
- Any reflections on doing this exercise?



Communicating about your work and using feedback to improve

Communicating with others about
your project helps you understand it
and allows others to provide value.



6/3/16
Communicating Style: public vs. private
Process: skill level

6/3/16

The basic idea

1. Share your work early and often, before you're "ready"
2. Share your work in an easy to understand format
3. Embrace feedback and go make your work better.

Ways you can do this

- Don't work on something more than an hour or two before getting feedback!
- Print your work out and post it on a wall or board.
- Grab a colleague or two and "pitch" the work, trying to present it as you would if you HAD TO at that point.
- Get as much feedback as you can, encouraging colleagues and responding positively, not defensively.

A simple framework for early in your project

1. Your project topic and goal
2. Why it is challenging to address
3. What you'd like to know or learn to help you solve the problem
4. What kind of solutions do see at this time as having potential?

Present w/ Feedback

- Feedback is just a helpful viewpoint -- no need to agree or disagree with it!
- To receive feedback, ask for more before replying. Use, "Nice. Say more about that..."
- To give feedback, use:
 - I like...
 - I wish...
 - I wonder...

Try it!

- Prep a quick share of your project topic and goal (15 min)
 1. Your project topic and goal
 2. Why it is challenging to address
 3. What you'd like to know or learn to help you solve the problem
 4. What kind of solutions do see at this time as having potential?
- Get with two other teams
- 3 min pitch, 5 min feedback, then rotate



How did that go?

Guest Speaker

Welcome Guest Speakers from the field! Reimagined Lab



Sharon Turner
Designer
Reimagined Lab Fellow



Jaspal Sandhu, Ph.D.
Managing Partner
Gobee Group



reimagine|lab

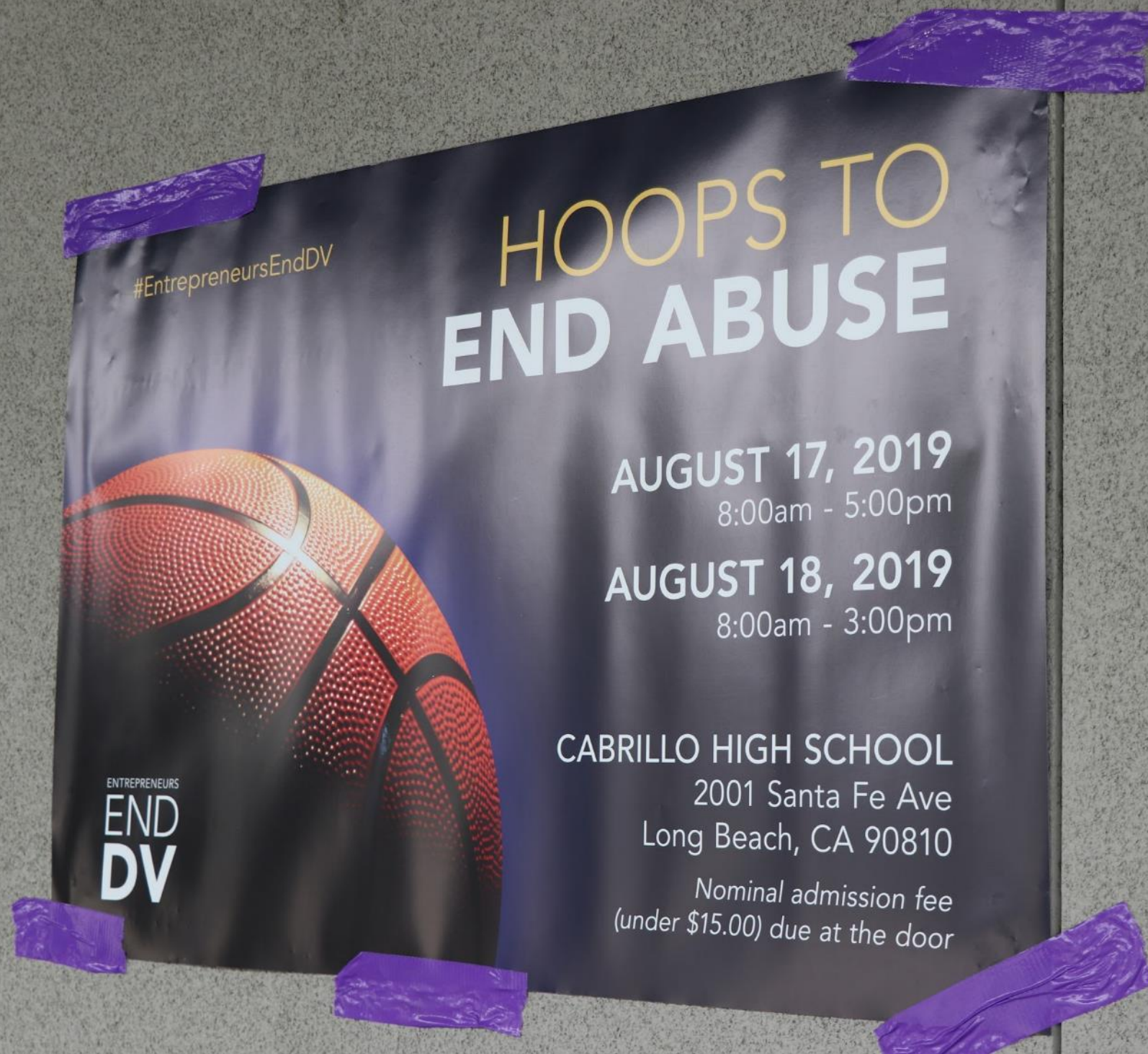
Preventing cycles of violence, now and into the future

blue  of california
foundation


GOBEE



Pacific Grove, May 2018



photos: Blue Shield of California Foundation





Long Beach, August 2019

Lunch



Let's practice some design research

Wallet Exercise

Wallet Exercise - 7 min each

1. Break into groups of three and assign a "participant", an "interviewer" and a "observer."
2. Conduct show-and-tell interview according to the structure on the next page.
3. Practice: listening, waiting through participant pauses, asking open-ended questions.
4. Be curious and respond authentically to what the participant shares.
5. Rotate roles when you hear the signal.

Open-ended interview with a wallet

1. **Story behind the wallet.** "Tell me about how you came to have this wallet." "What do you like about it?" "What don't you like?"
2. **Overall use of the wallet.** "Tell me about how you use the wallet." Where you carry it, when you use it.
3. **Inventory.** Share with me some of what is in your wallet and what you use them for.
4. Probe **interesting details with "tell me more about..."**
5. **Close** after about 5 minutes



Q&A

Wallet Exercise

How to plan for an interview

Preparing for an interview

- Clarify what activities or experiences you wish to better understand. Identify things, tasks and user goals that you'd like to know about.
- **User is the expert**, you want to know what really happens, not what is supposed to happen.
- Open with a "**grand tour**" question. i.e. "Tell me about yourself and the role you play here."
- Follow with **open-ended requests** focused on what participant is sharing with you and relates to your planned topics and questions.
- Listen, don't talk. **Use "Tell me about..."** Don't provide possible answers or yes/no questions.

Tip Sheet for Creating a Discussion Guide

Tips for Creating a Discussion Guide

A discussion guide helps you prepare for spending time with a person whose experience you wish to better understand. The goal is to create a framework for the participant to share openly with rich detail.

1. THE GROUNDWORK - Get these all out on sticky notes

- Consider your project's topic – who is involved in activities related to it and what are those activities?
- Whose experience and associated activities would you like to learn more about?
- What specific interactions – among people or between people and specific tools/objects – are you curious about?
- These activities, topics and questions form a backdrop for your inquiry.

2. SHOW RESPECT AND GAIN TRUST

- Thank the participant(s), reinforce that it is their expertise and experience you seek to learn from, confirm the time and address any questions they have.
- Confirm it is OK to record video and/or audio for internal purposes only.
- Throughout the interview acknowledge and thank them for their helpfulness and insights and that you are learning a lot about how things really work.

3. START WITH A GRAND TOUR

- Begin with a broad open-ended question that covers the overall experience you are trying to learn more about.
- Use, "Take me through ..." as an easy way to start. i.e. "Take me through how you serve your clients from when they stop in through completing the program."
- This allows the participant to touch on a broad range of activities and sets the stage for your further inquiry.

4. THEN EXPLORE SPECIFICS

- Now ask them for more detail in a particular area they covered that is especially relevant to your project.
- Occasionally, refer to your list of activities, topics, questions you wrote down in planning for the interview to confirm you are getting good info to answer them.

5. WRAP IT UP

- Make sure to respect the time of your participant and close on time or before.
- Look to ask a blue sky question at the end. "If there were no barriers to a new way of doing this, how should it work?"
- Thank them for their time and ask permission to follow up.

Coach Share

Show + Tell Interview Observations

How to research your project

Design Research is...

...looking creatively and rigorously
into your project and its context
to better understand all its dimensions

VELT HOSPITAL

Roosevelt

#1
STAMP
CARD

#2
FILL OUT
CARD

#3
PASS CARD
THRU WINDOW

#4
HAVE A SEAT -
WAIT TO BE CALLED

Nurse
Triage

CPEP



Design Research - Why

To understand what is really going on and why - all of the dimensions involved

To make your project tangible by having lots of visual evidence, examples & references

To broaden your capacity for designing a better solution

The attitude to bring to this work

Curiosity and learning

Investigator, explorer

No assumptions -- leave what you think you know behind for now

Space to post research visually



Design Research - what to look at

Topic

People/orgs

Technology

Process & policies

Money flows

Environment

Topic - What your project is about

- Mostly internet/library research -> people, papers, articles, trends, debates, examples, successes, failures
- Find examples to learn from and be inspired (Analogous Examples)
- Use visual references and post on board. Highlight key points on sticky notes
- **Goal: current understanding of topic, current principles, models, state of the art, examples to reference.**

People/orgs

- Understand people's experience
- Use empathy, not judgement
- Use observation, show-and-tell interviewing, try the activity yourself.
- Open ended questions
- **Goal: Who is involved. What people do, how they do it and why. What works for them. What doesn't work for them.**

Process, policies, rules and practices

- Understand the structures that govern people's activities.
- How are things supposed to work? Why? How are they documented? Get copies.
- Identify cultural norms -- undocumented but shared expectations of behavior
- Visualize processes and compare to real experience.
- **Goal: Understand the current "rules-of-the-game" and where they come from**

Technology

- Look at the technology and products, both digital and physical, that are used.
- How do these tools augment or hinder the work flow and experience?
- Get demonstrations by people who use the tools everyday. Take screen shots/pictures.
- **Goal: Understand the tools, technology and conditions that relate to your project.**

Environment

- All activities happen in an environment. How does it help or hinder?
- Assess the physical space -- how is it configured and why? Draw a map, how people flow, where things are located.
- What challenges may be caused by the space, its artifacts and activities that happen?
- **Goal: Understand the role physical space plays in your project**

Money & time

- Every project has financial dimensions. Is there a current financial model? Who pays for what?
- Interview those who manage or oversee budgets. Where do they see challenge and opportunity?
- Identify ways value is or can be measured - often metrics can be converted to value - what is it worth?
- **Goal - understand economic dimensions of your project. Your solution will need to create value.**

Design Research

Topic

People/Orgs

Technology

Process & policies

Economics

Environment



Systems thinking Systems literacy

Systems Thinking is...

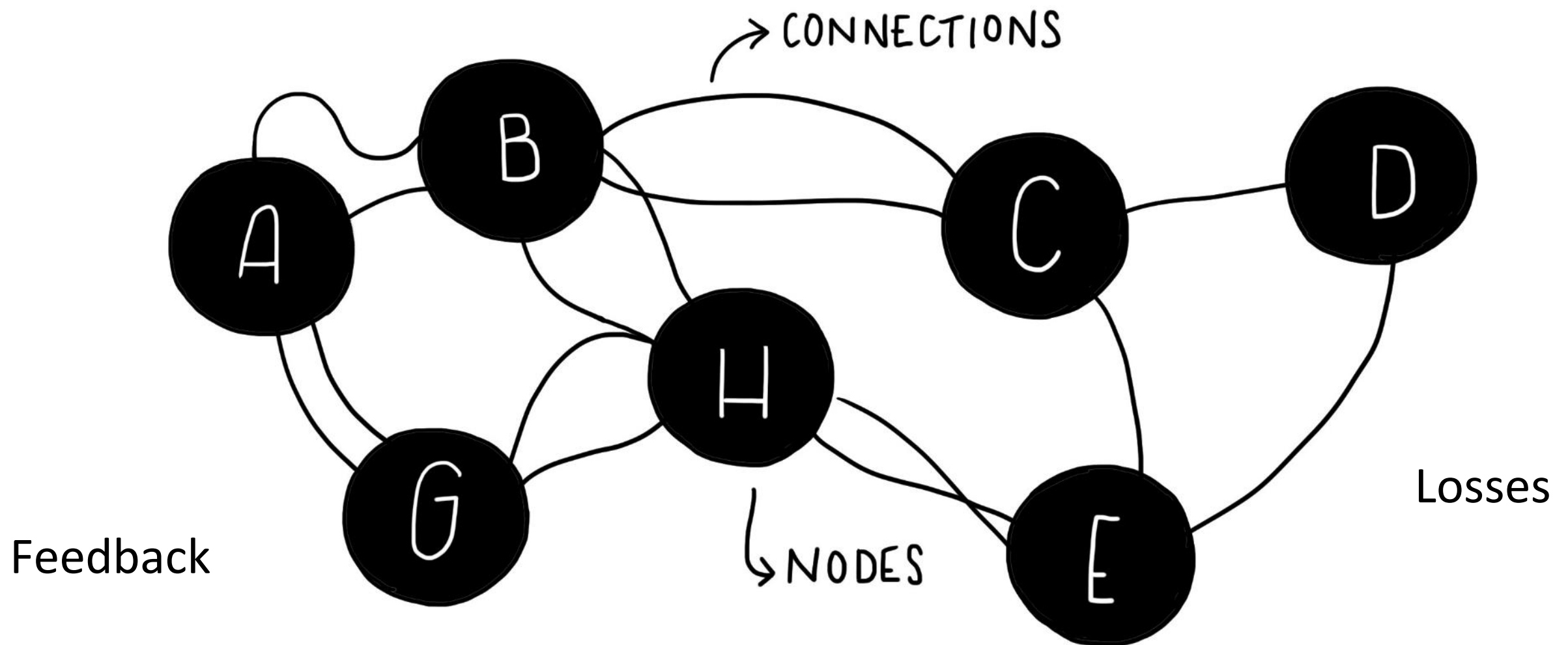
...understanding that the problems you are solving involve many elements with individual behaviors and interactions, all of which comprise a system with it's own dynamic.

Use a systems diagram for your project

Without becoming a systems thinking geek, consider making a diagram of the system your project is a part of...

Use simple diagram elements

Flows



Helpful pieces for a systems diagram

- Identify elements: People, orgs, locations
- Show relationships
- Identify flows, inputs, outputs and losses
- Identify communication and feedback loops
- Characterize the dynamics of the wholes and the parts
- **Goal: Better understand the relationship between the whole and its parts - especially community**

They help to think about and show a system

OUTLINE OF A CIRCULAR ECONOMY

PRINCIPLE

1

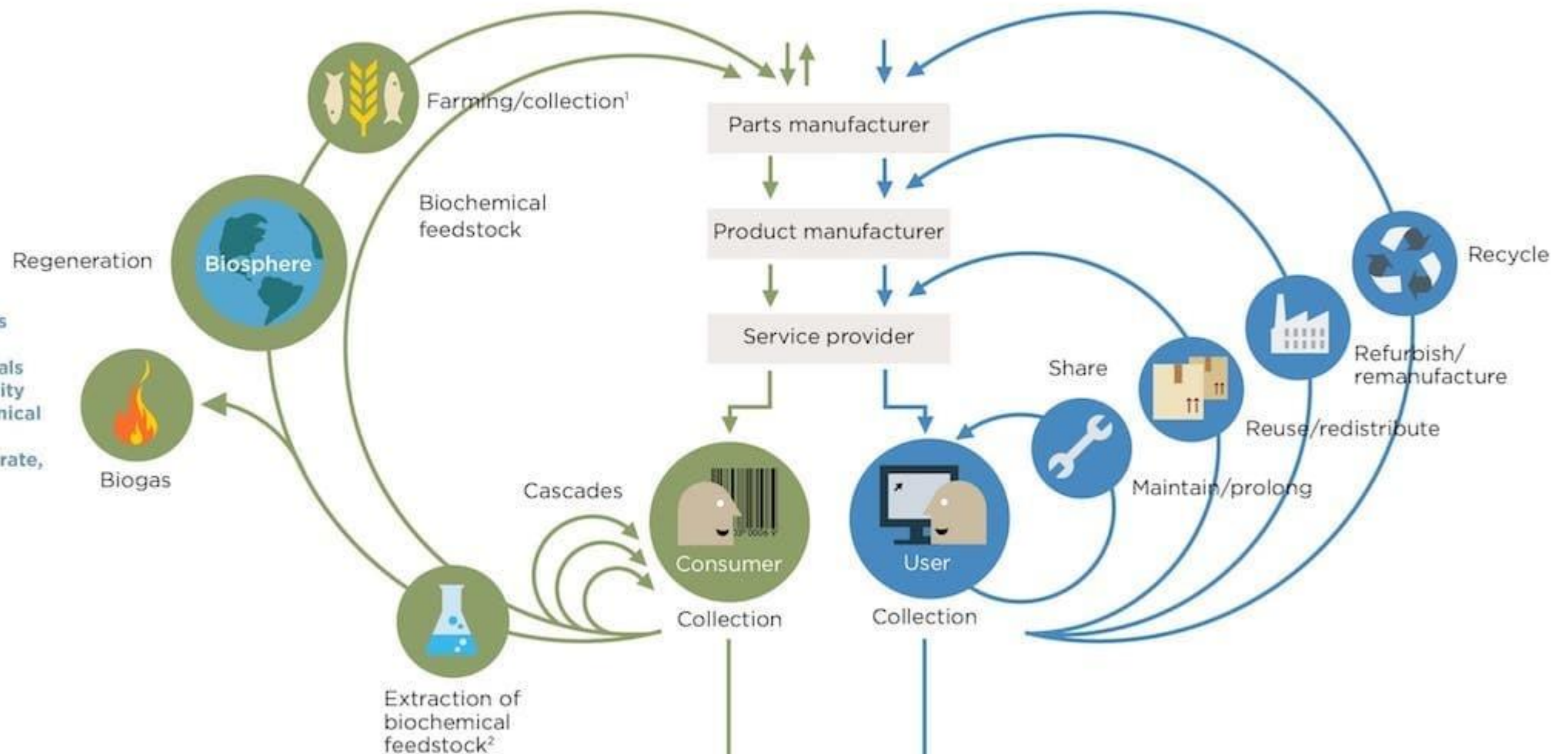
Preserve and enhance natural capital by controlling finite stocks and balancing renewable resource flows
ReSOLVE levers: regenerate, virtualise, exchange



PRINCIPLE

2

Optimise resource yields by circulating products, components and materials in use at the highest utility at all times in both technical and biological cycles
ReSOLVE levers: regenerate, share, optimise, loop



PRINCIPLE

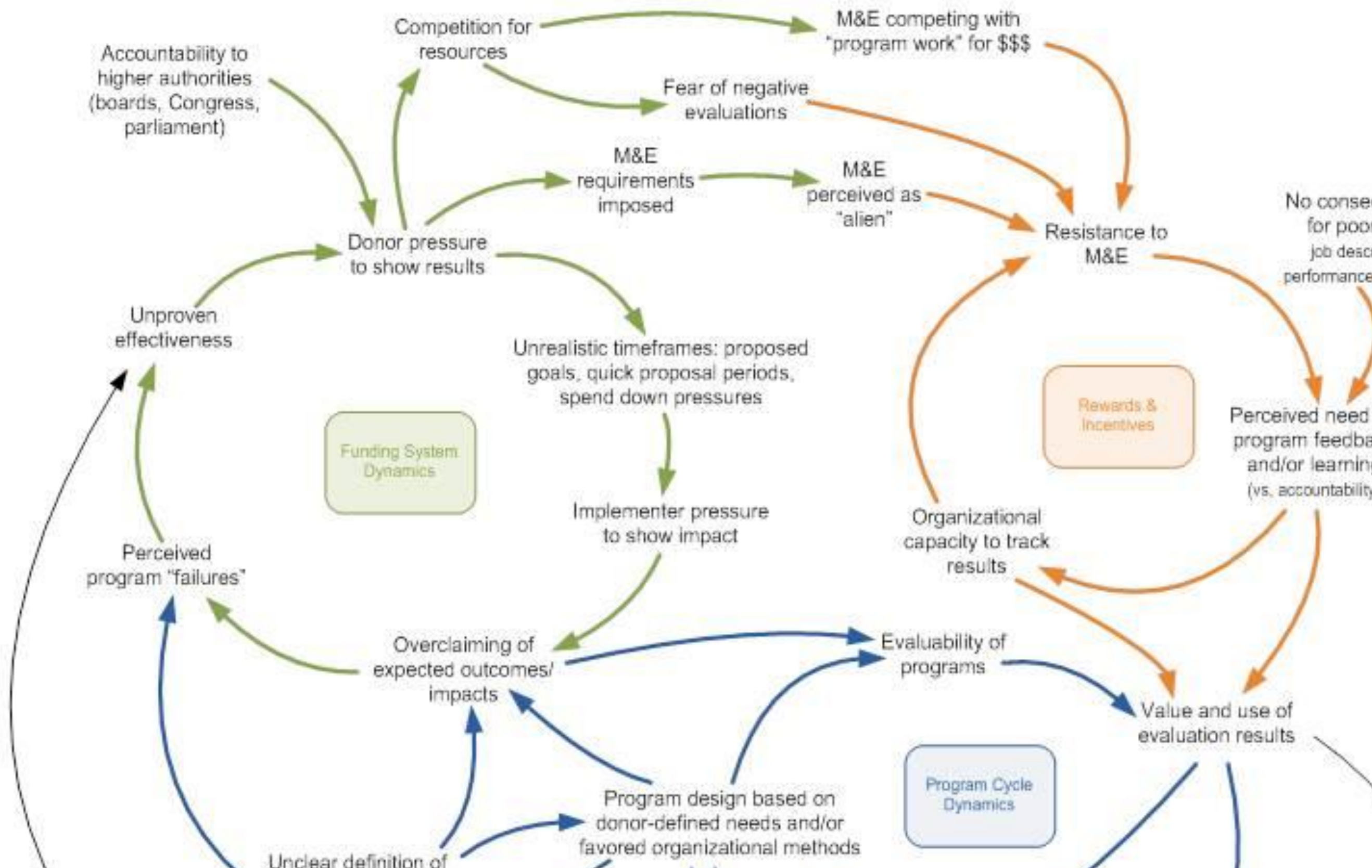
3

Foster system effectiveness by revealing and designing out negative externalities
All ReSOLVE levers



1. Hunting and fishing
2. Can take both post-harvest and post-consumer waste as an input

Use simple diagram elements





Coach Shares

Sarah

Jo

Brainstorm research topics - 30 min

- Work with your team
- Use the poster with sticky notes
- Refer to the 11x17 research areas, think up your own.
- Brainstorm topic and research activities for your project in the different areas
- After 10 min, step back and discuss. Where is there excitement? Interesting approach? What would you prioritize?

Tips for working with other organizations




Improving any one aspect of
community health and equity...

...depends on addressing one or
more *other* aspects.



So, improving food security...

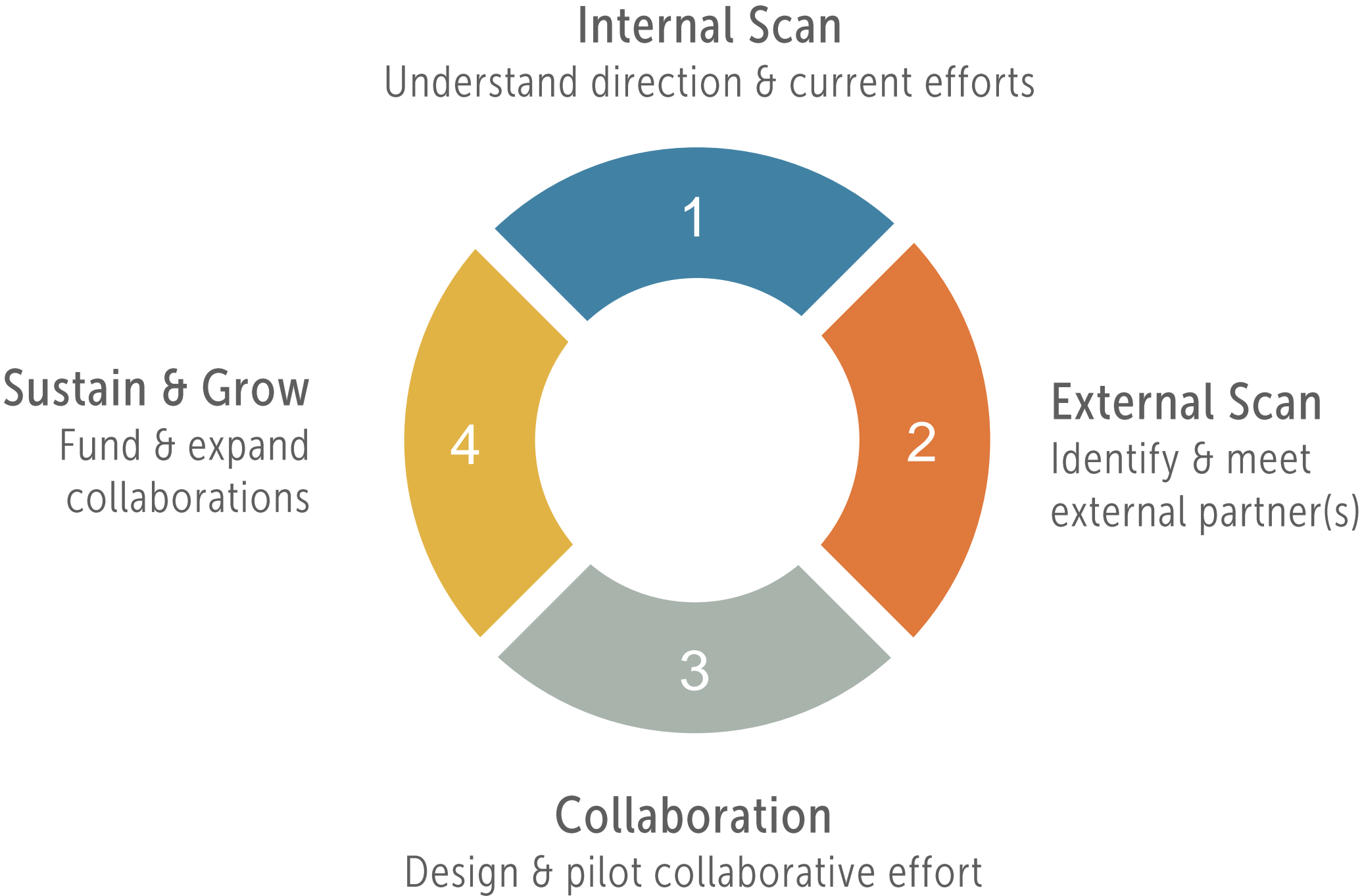
...may depend on transportation
and financial security.



Collaborating with other organizations, rather than trying to address them all yourselves, can be an effective strategy.

But collaboration has many
challenges given how
organizations operate today.

Four Pillars of Collaboration



Internal Scan

Understand your own organizations priorities, relationships and assets

- Interview leaders/colleagues
- Gather information about clients, program stats, service blueprints and make them visual for easy sharing and understanding
- Run collaborative cycle with colleagues, ideating what kind of partners would be great to find

External Scan

Explore and understand the community's assets related to your topic area

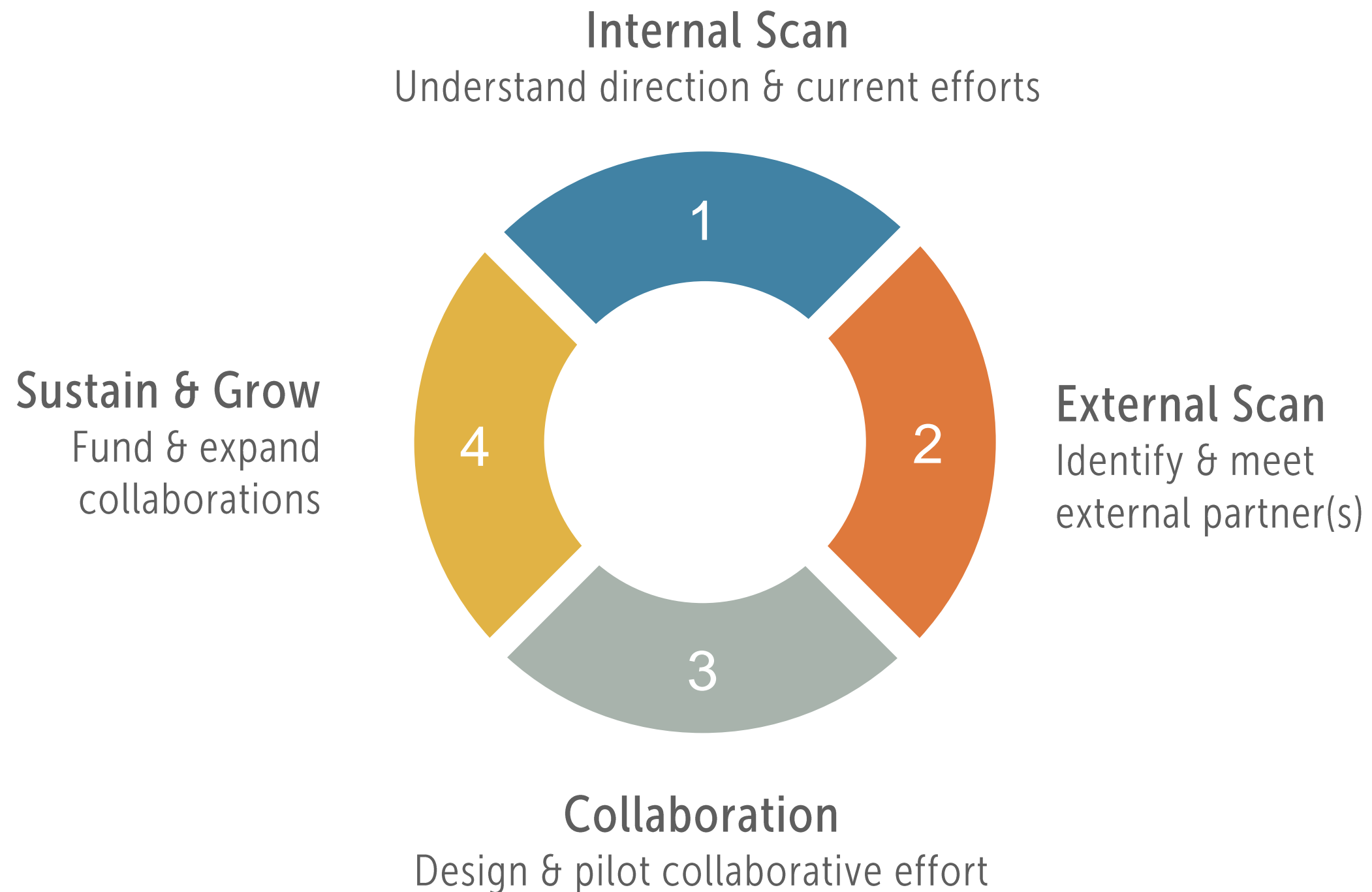
- Drive and map orgs, assets and neighborhoods.
- Seek out stories of other organizations in targeted social services areas
- Attend gatherings or events outside of your area of service
- Run collaborative cycle with colleagues, creating ideas for ways to approach external orgs

Collaboration - use Catalyst methods!

Work with other orgs in creative, human-centered ways.

- Invite others to hosted evening with discussion/collaborative cycle on shared challenges
- Visit other organizations with open, show and tell walk throughs and a collaborative cycle.
- Make diagram or journey map of your understanding of their service and share with them.

Four Pillars of Collaboration





Coach Share

Recruiting + Collaborating with Partners



Whew!

(That firehose metaphor still works...)

Socializing your project and keep others engaged

Things to do

- Maintain a project wall near colleagues and have ad hoc conversations about your content & questions
- Send out a short email or a PDF postcard from the field to colleagues. Share what you're doing and learning. Ask them a question to engage their thoughts.
- Grab 5-minutes of a weekly staff meeting to share one activity or insight from your project with others.
- Invite someone for coffee and "pick their brain" about your project just as a sounding board.

A Postcard from the Field...

Pithy Project Title



[Month] 2018

Dear Colleagues,

We are excited to share about our project to...

This month, we did... We learned...

We wanted to thank [names] for their help with...

Our next steps are to...

We are looking for people to share their perspective on... ...If you are interested, email [project lead name] at [email].

Sincerely,
[Catalyst team member names]

[Insert Photo]

[Photo caption here]

What We're Hearing:

***"Direct quote from staff about what they learned,
or client about what they experienced..."***

-Source Attribution

A Postcard from the Field



Hrishikesh and Sural held two Co-Design Sessions with staff and patients. These sessions were designed to help streamline care for PLWHA by enrolling them in OVMC's pharmacy. Staff and patients had the opportunity to prototype this workflow as well as construct resources to help engage patients in this service.

Pictured Above: Staff prototyping fliers that educates patients as well as promotes OVMC's Pharmacy.

Coach Share

Emma

Plan & Pitch your research approach

Activity: Planning your research, feedback

Work with your team to plan the things your team will research to better understand your project.

Create a short summary to share with another team:

- Project topic and objective
- Overall, what you want to better understand
- Specific dimensions you will research

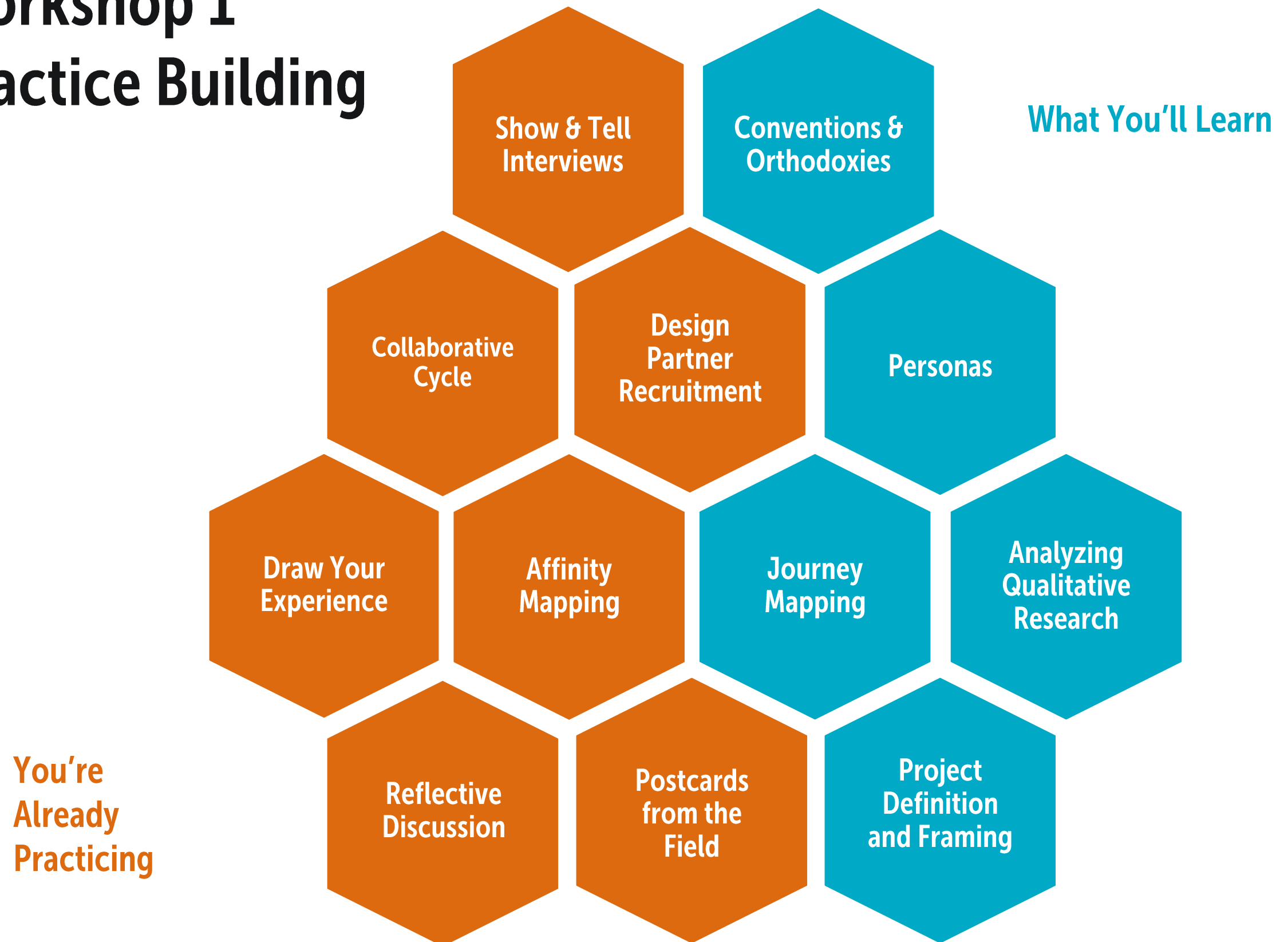
Present to another team for feedback. Rotate.

Nice work today!

Housekeeping for end of day

Workshop 1

Practice Building



Before Happy Hour...

- Drop Evaluation Forms & name tags at registration table
- Can leave items at tables, but no valuables!

Homework for tomorrow:

- Tomorrow, one team member shares for 30 seconds:
 - (1) What's one insight or idea from today that you appreciated?
 - (2) What's one question you have about this way of working?
- Keep it tight and clear!
- We start promptly at 9:00 am, breakfast available 8:30 am
- Coaches arrive by 8:00 am

BOSTON LAGER



HAPPY



ALL DAY!



HOP



ALL DAY!

"OPEN TIL' CLOSE!"



3⁵⁰ WELL DRINKS

3⁵⁰ DRAFTS