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
Energizer
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
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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.
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

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Workshop 1:1’s

Midpoint Check in Call

Post Program Check in Call
Housekeeping

Bathrooms

Take Breaks!

Wi-Fi

Photography
Working differently together
Mindsets

- inclusion + empathy
- collaboration
- start small + learn fast
- making things tangible
- show work early + often
- catalyst
Behaviors

- See & Experience
- Dimension & Diagram
- Question & Reframe
- Imagine & Model
- Test & Shape
- Pitch & Commit
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
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 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.
How did it go?
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

[Diagram with stick figures and symbols representing interactions and tasks]
AGENDA

- Coverage
- 2 Providers
- Clear Task Box
- Fax
- Labs
- Ordering
- "Special Projects"

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
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.
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
HOOPS TO END ABUSE

AUGUST 17, 2019
8:00am - 5:00pm

AUGUST 18, 2019
8:00am - 3:00pm

CABRILLO HIGH SCHOOL
2001 Santa Fe Ave
Long Beach, CA 90810

Nominal admission fee
(under $15.00) due at the door

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.
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 or 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.

www.careinnovations.org/resources
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
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
- Technology
- Money flows

- People/orgs
- Process & policies
- 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

Feedback

Connections

Nodes

Losses
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 for a circular economy. The diagram outlines three principles:

1. **Principle 1:** Preserve and enhance natural capital by controlling finite stocks and balancing renewable resource flows. ReSOLVE levers: regenerate, virtualise, exchange.

2. **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.

3. **Principle 3:** Foster system effectiveness by revealing and designing out negative externalities. All ReSOLVE levers.

The diagram includes cycles of biochemistry, recycling, and resource management. It highlights the importance of renewables, finite materials, and the flow management of resources.
Use simple diagram elements

Accountability to higher authorities (boards, Congress, parliament)

Donor pressure to show results

Competition for resources

M&E competing with “program work” for $$$

Fear of negative evaluations

M&E requirements imposed

M&E perceived as “alien”

Resistance to M&E

No consensus for poor job description and performance

Rewards & Incentives

Perceived need for program feedback and/or learning (vs. accountability)

Funding System Dynamics

Unrealistic timeframes: proposed goals, quick proposal periods, spend down pressures

Implementer pressure to show impact

Organizational capacity to track results

Evaluability of programs

Value and use of evaluation results

Perceived program “failures”

Unproven effectiveness

Overclaiming of expected outcomes/impacts

Program design based on donor-defined needs and/or favored organizational methods (vs. context)

Unclear definition of goals and evaluation strategies

Program Cycle Dynamics
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

1. Internal Scan
   Understand direction & current efforts

2. External Scan
   Identify & meet external partner(s)

3. Sustain & Grow
   Fund & expand collaborations

4. Collaboration
   Design & pilot collaborative effort
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

1. Internal Scan
   Understand direction & current efforts

2. External Scan
   Identify & meet external partner(s)

3. Sustain & Grow
   Fund & expand collaborations

4. Collaboration
   Design & pilot collaborative effort
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.
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]

What We’re Hearing:

“Direct quote from staff about what they learned, or client about what they experienced...”
-Source Attribution
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 flyers that educates patients as well as promotes OVMC's Pharmacy.
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

Show & Tell Interviews
Conventions & Orthodoxyes

Collaborative Cycle
Design Partner Recruitment

Personas
Journey Mapping

Analyzing Qualitative Research
Project Definition and Framing

You’re Already Practicing
Draw Your Experience
Affinity Mapping

Reflective Discussion
Postcards from the Field
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 HOUR

ALL DAY!

“OPEN TIL CLOSE!”

3.50 WELL DRINKS

3.50 DRAFTS