Welcome Back!
Say hi to others, get some breakfast and get settled.

Be ready to start at 8:55am
Energizer
Rock Paper Scissors
Welcome Back!

Your 30-second share this morning:

(1) What’s one insight or idea from yesterday that you appreciated?
(2) What’s one question you have about this way of working?

Keep it tight and clear!
How to manage your project content
Find a wall/board for project work
Organize physical notes, pictures, etc.
Organize digital assets

- Catalyst Project Name
  - Proposal-project docs-legal
    - 1 - Understand and Frame
    - 2 - Prototype and test
    - 3 - Sustain momentum
    - Key visuals
    - Presentations
Coach Share

Organizing + Displaying Data
Catalyst Project Notes

--Friday MA Huddle 2/17/17: 10 hour shifts discussion:
- Pros: admin time, less stress, time to follow up, personal life, less call-ins, less burnout, easier coverage, no late shifts, less stress
- Cons: finding coverage for call-outs, short-staffed, personal life conflicts (school schedule, childcare, etc), extra duties
- How do we know this is working? 3 month pilot, measure success (number of call outs, room stocking, survey of providers, communication errors)
- Change in duties: no admin time, all orders processed by end of day, all tasks done within 72 hours, pre-visit prep/reminder calls

--Employee engagement survey, Feb 2017:
- Positives: mission, peers care and do good work
- Negatives: don’t have a best friend at work, don’t get praise within last week for doing good work, don’t get performance feedback over the last 6 months

--Retreat 2/22/17:
- Goals for retreat: come up with a vision for our clinic’s future
- Past-present-future exercise
- Clinic name and purpose statement
- Feedback/debrief about results of employee engagement survey
- FIRST NAME BASIS
- Team roadmaps and objectives for next 12 months
- Retreat surveys
- Impressions from retreat: we all want the same thing, we all want to feel appreciated, people feel closer since the retreat after getting to spend non-clinical time together, more mutual respect, feel like we know each other on a personal level, people feel free to share ideas and give feedback, people feel more relaxed, clerks feel more a part of the clinic now, more of a sense of family, more engaged in problem-solving in clinic

--MA Co-Design 2/24/17:
- Worst day at work: back to back calls, PVS prep, lack of teamwork, unequal distribution of tasks, stress, missing stickers, poor flow, lack of room space, angry patients, too many patients, working with multiple providers, docs not doing their part, demanding providers, EKGs, double discharge, too much happening all at once, no available appts, late shift, communication problems, providers making mistakes with ordering, lack of a map to show patients where to go, crazy day, having to be in 2 places at once
- Best day at work: provider is running on time, good flow, patients come on time, no push back from provider, waiting room not full, positives feedback from patient, acknowledgement from mgmt, no call outs, full staff

--MA for a Day 3/9/17:
- Hard parts: there’s a lot do during intake and discharge and a lot of what you have to do doesn’t feel necessary or meaningful, having an intake and discharge at the same time, vaccines slow things down, needed to find a different room for a pap, printer wasn’t working, provider is running behind

SNI Ambulatory Care Transformation

Lessons learned from San Mateo: --Adapting to roles and responsibilities; going from cowboy mentality to pit crew mentality -- Setting up operator stan...
Why why why!

Calling 160-210

Pt preparing

PV & future

Documenting, on top of that

I had to answer your cause
How to work with qualitative data
PROBLEM WALL
Access to mental health services for youth in Ontario

AWARDSNESS
Lack of awareness of mental health issues

Lack of awareness of what mental health issues look like

Lack of awareness of the support available

Lack of awareness of the costs involved

Limited Resources

Community

Limited access to community mental health services

Limited access to community mental health support services

Limited access to community mental health programs

Limited access to community mental health facilities

Limited access to community mental health organizations

Limited access to community mental health agencies

Limited access to community mental health volunteers

Limited access to community mental health funding

Limited access to community mental health resources
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.
Iterative Comparison of Data

Identify concepts from your research (interviews, data, materials) and iteratively compare them to additional content 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.

Prioritize 5-7 concepts and select key supporting observations and quotes/

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?
"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."
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.”
Taking control again

“"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.""
Emotional well-being

**Connected**

“I believe the doctors, nurses, patient, caregivers, etc should all come together to make key decisions with me.

**In Control**

“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.”

**But comforted**

“The nurses that took care of me in the hospital for both surgeries and my urologist’s nurse were incredible... They took care of me and made me feel comfortable and safe.”
Categories of **uncertainty**

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

uncertainty

the new normal
Lots of points

uncrushed
“I feel relieved when I talk to my doctor but angry when they are in a 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 topics

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

Unifying theme

transitions & recovery

bottom up & top down analysis

uncertainty
Coach Share

Analyzing Qualitative Data
Emma PPT
Break
How to capture & use your user’s experience
Personas
Personas

Characterize who you are designing with
What is a Persona?

- A persona characterizes a person that you are designing for.
- 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 this person’s needs throughout your project.
Catalyst Example: A Better Prenatal Care Experience

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
Catalyst Training: Session 1       |        2020      |     Center for Care Innovations

TINA
LEARNING FOCUSED Teacher

Science Teacher
Catawba Middle School
Rosenville, Georgia

“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 currently only has a 1:7 computer to student ratio, so we try to limit the number of students to one per computer. I have some trouble managing the students. I try to give them a chance to work on the computer, but then they start to get confused and they start to ask questions. I need to be able to get them back on track. It’s a big problem, but it’s something that I need to work on.

I have some trouble managing the students. I try to give them a chance to work on the computer, but then they start to get confused and they start to ask questions. I need to be able to get them back on track. It’s a big problem, but it’s something that I need to work on.

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

Dimensions:
- + Access to tech skills
- + Messaging budget
- + Involvement
- + Reach
- + Dev needs

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 organization 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.
Persona Name

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.

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

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.

Dimensions

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

“Another quote with the persona’s priority need or suggestion.”

2 x 2 Diagram

[Blank diagram]

ABOUT

Age:

Work:

Family:

Location:

Education:
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
Cooking Dinner

Buy the right amount

plan/shop

stage/store

prep/cook

serve/eat

post prep/cleanup

All food done at the same time

Doing the dishes
Cooking Dinner

- **Buy the right amount**
  - Stressed

- **Distracted**
  - Calm

- **Calm**
  - All food done at the same time

- **Serve/eat**
  - Joyful

- **Post prep/cleanup**
  - Exhausted

- **Doing the dishes**
Cooking Dinner

Positive Emotion

Buy the right amount

(plan/shop) → (stage/store) → (prep/cook) → (serve/eat) → (post prep/cleanup)

Calm

Joyful

Doing the dishes

Negative Emotion

Stressed

Distracted

All food done at the same time

Exhausted
Create with sticky notes

Phases

Steps

Goals

Pain-points
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 **focus areas** for solution strategy and ideas
Coach Share

Personas
Coach Share

Journey Mapping

Manuel Campo
Journey Mapping & Framing Experience

Manuel Campa, MD
LAC+USC Medical Center
Adult Primary Care Clinics
Immigrant Experience
Substance Use Disorder
FOOD INSECURITY
Population Health Outreach
Create & share a Journey Map
Make a Journey Map with Your Team

1. Choose a user journey related to 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.
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?
Lunch
Identify & challenge conventions
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.”
Classrooms
Banks
Do you know of a product, service, organization or program that has broken convention?
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
How to recognize them

• Listen for iconic stories of the organization
• Ask “Why is that?” numerous times
• Ask "How do we know that?" numerous times
• When you hear the same idea or phrase from many different people in the organization
• “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
Clarify your project topic, purpose and scope
Team time: Project Planning & Feedback (30 min)

1. Consider your project definition - what is the topic of your project and main goal?

2. Why is this topic/goal worth addressing?

3. Do you have good ideas about whose experiences you want to learn about?

4. Who will you make a Journey Map for? What is a likely Persona in your projects?

5. Be practical, specific and concrete!

6. Work with your coach to scope appropriately.
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.
Break
Build your work plan
Phase 1 Project Workplan (60 min)

1. Consider areas of design research and how your team will work on the project.

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

3. When and how can you meet?

4. How will you do interviews? When can you do some collaborative sessions?

5. Can you use existing events to accomplish things?
Pitch project & approach to others - groups of 3 teams
How to prepare for ideation
Connecting insights to ideas

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

• Now you need to focus ideation and create many ideas to choose from.

-> Create "How might we?" questions to focus and empower ideation.
Create them from research, for example:

• Our service providers lack awareness and specific strategies for providing culturally-relevant care.

• Yet, they will have little time for professional development and external classes...

• How might our clients help us better understand traditions and approaches relevant to them?
More examples:

• How might our facility reflect the culture of our clients in more meaningful ways?

• How might we create frequent opportunities for staff recognition?

• How might we create new collaborative behaviors that improve staff morale?
Who wants to try one to practice?
Try to create a few draft ones for your own team.
Nice work today!
Day 2 Evaluations
What’s Next?

Team Activities

Program Offerings

Phase 1: February – April
Collect research “artifacts,” send “postcards,” ask for help

2020 Program Timeline

January

2020 Program Timeline

February

March

April

May

June

In-Person Workshops

In Oakland, CA

Workshop 1

1/30-2/20

Workshop 2

4/15-4/16

Workshop 3

6/17-6/18

Milestones

1. Attend virtual kickoff meeting (1/16, 2 pm).
2. Complete assigned research 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

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:
Preparing your pitch

Optional

Download roadmap

Go to: careinnovations.org/wearecatalysts
Collect research “artifacts,” send “postcards,” ask for help

2020 Program Timeline

January

February

March

April

May

June

In-Person Workshops
In Oakland, CA

Milestones

1. Attend virtual kickoff meeting (1/16, 2 pm).
2. Complete assigned research ahead of Workshop 1.

Workshop 1
1/20-1/22

Workshop 2
4/15-4/16

Workshop 3
6/17-6/18

Sponsors attend showcase on 6/18

Remote Support
Optional

Virtual Office Hours:
Recruiting and partnering with stakeholders

“Booster” Webinar:
Taking great video with a smartphone

Ongoing coach support

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Download roadmap

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- Workshop 1: 2/19/20
- Workshop 2: 4/15-4/16
- Workshop 3: 6/17-6/18

**Milestones**

1. Attend virtual kickoff meeting (1/16, 12 p.m).
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.

**Remote Support**

- Ongoing coach support
- **Virtual Office Hours:** Recruiting and partnering with stakeholders
- **“Booster” Webinar:** Taking great video with a smartphone
- **“Booster” Webinar:** Prepping your pitch
- **“Booster” Webinar:** Making ideas tangible and testing them quickly
- **“Booster” Webinar:** Editing and embedding video in your pitch

**Download roadmap**

Go to: careinnovations.org/wearecatalysts
Collect research “artifacts,” send “postcards,” ask for help

2020 Program Timeline

**In-Person Workshops**

- **February:** Workshop 1
  - In-person research in advance of Workshop 1
- **March:** Workshop 2
  - Question & Reframe
- **April:** Workshop 3
  - Pitch & Commit
- **May:** Sponsors attend showcase on 5/18
- **June:**

**Milestones**

1. Attend virtual kickoff meeting (1/16, 12:30 p.m).
2. Complete assigned research in advance of Workshop 1.

- **February:** Share your project activities with sponsors and stakeholders on a monthly basis.
- **March:** During activities, take photos and video of stakeholders to document your research and prototype testing.

**Remote Support**

- **February:** Ongoing coach support
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- **April:** "Booster" Webinar: Taking great video with a smartphone
- **June:** "Booster" Webinar: Prepping your pitch

**Virtual Office Hours**
- Making ideas tangible and testing them quickly

**Go to:** careinnovations.org/wearecatalysts

Download roadmap
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.

✓ Narrow in on the pain point(s) you will focus on for the rest of the program.

✓ Bring journey maps/personas, hierarchy narrative (quotes, sub-themes, and major theme), and HMW statements to Workshop 2.
Upcoming Booster Webinars (optional)

Mar 3rd: Recruiting Design Partners
Mar 11th: Ethnographic Research Techniques
Mar 17th: Drop in Office Hours
Mar 23rd: Making sense of your research
Mar 31st: “How Might We….“ Statements

30 minutes

All sessions will be recorded and posted to www.careinnovations.org/wearecatalysts/program
Lean on your coaches!

www.careinnovations.org/wearecatalysts/community
www.careinnovations.org/wearecatalysts
Your EVERYTHING

www.careinnovations.org/wearecatalysts/program
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Via CCI Academy, we bring everything from CCI’s 20 years of technical assistance work strengthening health and social services organizations directly to you, in an online format.

Short Courses
Learn the mindsets, behaviors and skills to pursue new ideas and strategies in your community.

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See what others have tried and the lessons they’ve learned through weekly two-hour sessions.

Community Discussion
On online forum with peers ready to answer questions, share experiences and connect you to what you need.

Join for Free!
Take home your Catalyst goody bags!
Thank you, and onward!

Please complete your evaluation forms.