SOCIAL INNOVATION LAB FIELD GUIDE

Ben Weinlick, MA-&- Aleeya Velji, M.Ed

Adapted from Think Jar Collective lab guide and design tools, and the Edmonton Shift Lab field guide.

HELLO, WELCOME TO SOCIAL INNOVATION LABS!

WWW.THINKJARCOLLECTIVE.COM - BEN WEINLICK,MA - 780-918-5608 -
BWEINLICK@GMAIL.COM @THINKJAR_ @WEINBENLICK

FIELD GUIDE-DESIGNED TO HELP YOU WITH YOUR SOCIAL INNOVATION LAB PRACTICE

People to thank and share credit with for this practitioner orientated lab guide

What makes Social Innovation strong in Canada is the open and supportive learning network of systems change and lab explorers from many walks of life.

We are grateful to the people and labs who share their time, learning, tools and support.

Never forget networks are far more powerful agents of change than single individuals.

We can't solve complex challenges if we hide in silos, so keep connected and supportive of each other.

Many thanks and we hope you cross paths with these stellar leaders and change labs

- *Our fellow Edmonton Shift Lab Stewards, Jodi Calahoo-Stonehouse, Ashley Dryburgh, Sameer Singh, Molly McMahon, Rhea Kachroo, Mark Cabaj and especially the whole Core Team and Advisory of the Shift Lab!*
- *Skills Society Leaders and the Citizen Action Lab team whom Ben and team have been working on and tweaking a disability inclusion lab process for over 10 years now*
- *Alberta Social Innovation Connect Admin Advisors and Fellows who've been uncovering patterns of social innovation boosting it across Alberta - Kelsey Spitz, Melissa Herman, Aleeya Velji, Kate Letizia, Lesley Cornelisse, Annand Ollivierre*
- *Our friends at the Government of Alberta CoLab whom we learn a ton from and have the privilege of convening the SDX - Systemic Design Exchange with - Keren Perla, Roya Damabi, Brent Welsch, and Alex Ryan*
- *Kathy Burgett and Meagan Highet at Norwood Centre for Partnering with Barnraise*
- *Zak Aitkinson and team at Barnraise: supporting a cool design project to share variations of design thinking with the Non Profit Sector*
- *Chad Park from the Natural Step and Energy Futures Lab, whom helped us with ideas for convening the Edmonton Shift Lab*
- *Social Innovation Generation whom have supported us and boosted the social innovation ecosystem across Canada- Tim Draimin, Kelsey Spitz, Vinod Rajasekaran, Geraldine Cahill*
- *Jonathan Veale for insights on systemic design and public sector labs*
- *Diane Roussin and the Winnipeg Boldness Project Lab team*
- *The whole InWithForward crew -especially Sarah Schulman and Jonas Piet who don't like to be called a lab, but whom we've learned a ton about scrappy service design, and systems change work*
- *LabWise leaders and our fellow practitioners - especially Frances Westley & Cheryl Rose*
- *MRU Social Innovation Change Makers - Jill Andres, Dr. Katharine McGowan, James Stauch*
- *Lab facilitators and stewards we co-design and facilitate labs alongside- Ashley Dryburgh, Mark Cabaj, Brooks Hanewich, Molly McMahon, Chris Bruce, Chris Gusen, Sam Singh, Jodi Calihoo-Stonehouse, Keren Perla, Brent Welsch, Roya Damabi*
- *Most important all the inspiring community members who have been part of our labs and shared ideas, insights and helped with prototyping innovations*

This guide is for lab practitioner explorers!

Embrace new ways of thinking and doing !

BEFORE WE DIVE IN,

Some terms you'll hear thrown around a lot

Human Centered Design Thinking

Systems Thinking

Design Lab

Social Lab

Social Innovation Lab

We're going to go over the above terms in the next few pages.

This guide is by no means a comprehensive guide to social innovation labs. It's made by practitioners of labs for practitioners of labs.

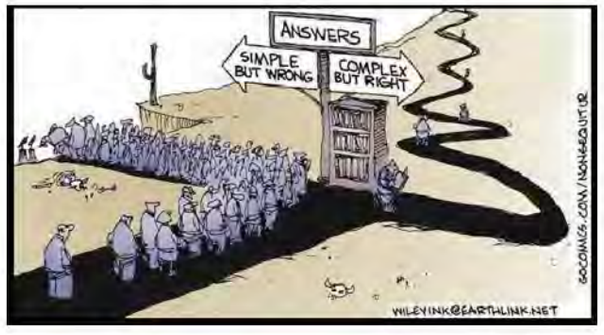
Part of being a lab explorer is being open to emergent learning, and systems thinking so expect that if you talk to us a few years from when this was written (2016-2017), our understanding and practice of labs will have hopefully, evolved and deepened through practice

We hope you find it helpful and invite you to adapt and remix the content to find your own ways forward in social innovation labs.

CAUTION AND THINGS TO CONSIDER WHEN USING THIS FIELD GUIDE

Beware of Templates!

There is a danger in creating a lab guide that people will attempt to use it as a template or formula to rigidly follow. We often rigidly cling to templates when we fall for the allure of hoping to find silver bullet solutions, tools and processes to solve complex problems. The tricky thing is, the more the uncertainty and complexity, the more we can find ourselves getting overwhelmed and insisting on rigid answers. Be aware and careful of this very human tendency to insist on simple truths and answers when we're facing the messiness and overwhelm of wicked problems. The truth is, the field of social innovation labs is still a pioneering and emerging discipline where there is much room for experimentation and many sided approaches. No person or group has found a formula that works consistently in all situations to make positive systemic impact around complex challenges. That said, a general direction to start with is helpful or we'll get overwhelmed by complexity and do nothing or simply revert back to business as usual approaches to solution finding. Usually people and collectives want to launch a social innovation lab because business as usual approaches on their own are not working to make progress.



This lab guide leans towards Human Centered Design principles

Some labs and lab guides lean towards whole systems thinking processes. With this lab guide we are striving to show how both a systems perspective and design perspective are important for making progress on complex challenges. However, we admit that this guide will lean a little bit more towards human centered design principles. Human centred design (HCD), in a nutshell, is about gaining insights from the users/people affected or experiencing a challenge we are designing with, and then collaboratively ideating solutions, prototyping them and testing the proposed solutions to see if they will actually help. When we try to solve challenges on behalf of others without involving them in the process, i.e. when we do "to" people, we often end up with short sighted solutions that people don't need or want developed. A human centered design lab approach helps to mitigate designing solutions that don't really meet needs, and supports designing solutions "with" people.

We lean a bit more towards human centered design principles and processes because, in our experience, HCD principles can work well when you only have a few days, or months for your social innovation lab to come up with some possible prototypes to test. Whole systems processes require quite a bit of time and stewardship to do well.

A Systems Thinking Lens gives a "birds eye" view of the complex dynamics of a challenge and a Human Centered Design lens offers a "worms eye view" of what's going on with the challenge on the ground with people -Both are needed.

Generally, the narrower the scope of the challenge area the more human centered design thinking can help and the more broad and messy the more a whole systems lens helps to uncover assumptions around the issue and eventually narrow scope to leverage points to intervene and design solutions around.

An example of a social innovation lab - Skills Society's Action Lab. Participants are using an empathy map to help understand what the users of a system are really needing
www.skillssociety.ca/action-lab/

WHAT ARE LABS?

To aid the move from roundtable talks to action, a promising approach has been emerging in the social innovation ecosystem. Often called a social innovation lab, the approach draws on the strengths, empathy, creativity, and wisdom of a collective to explore new ways of making progress on a complex challenge. These labs are guided by convening diverse perspectives on an issue, gaining insight from people with lived experience of a challenge, facilitated ideation, building prototypes of solutions, and testing them to see how they work on the ground with people. A lab creates a safe zone for a collective to explore, question assumptions, be bold, be agile enough to adapt as learning emerges and experiment with solutions.

As evidence emerges of what prototyped solutions are working, solutions can be scaled and spread to impact systemic change.

Labs can be...

- Permanent spaces for tackling issues
- Service Design focused innovation labs
- Policy and Systems Change Labs
- Pop-up design jam labs in community
- Collectives of diverse stakeholders tackling complex challenges over many years

What Kinds of Challenges Do Labs Tackle?

Social Innovation Labs are convened mostly when tackling a wickedly complex problem.

Simple

Making a Cake

Complicated

Sending Rockets To The Moon

Complex

Raising Good Humans

Simple problems are when you can find a single agreed upon solution. Recipes to bake cakes are examples of simple problems where if you follow the recipe you'll always get the same results.

Complicated problems are when you can find solutions through the right expertise, formulas and rules that will eventually lead to an agreed upon solution. Rocket science resides more in the complicated problem realm-it's really hard to figure out the math and physics to send a rocket to the moon, but once the formulas are worked out, we can continue to replicate success.

Complex problems are problems that are not fully understood and when there is little agreement on how to address the issue. Raising children to be good humans is a complex challenge where even in the same family, one way of raising a child will not necessarily bring the same results for all the children in the family.

You have a Complex Problem if there is...

- Not much agreement on the nature of the problem
- Not much certainty on what to do about the problem
- A high degree of unpredictability

Adapted from Zimmerman, Westley, Quinn Patton, Getting to Maybe 2006

What the Heck is Social Innovation?

A Social Innovation Should Strive For Systemic Impact

"A SOCIAL INNOVATION CAN BE A PRODUCT, PROCESS, OR TECHNOLOGY, BUT IT CAN ALSO BE A PRINCIPLE, AN IDEA, A PIECE OF LEGISLATION, A SOCIAL MOVEMENT, AN INTERVENTION, OR SOME COMBINATION OF THEM."
STANFORD SOCIAL INNOVATION REVIEW

Social Innovation in essence is about uncovering promising solutions or pathways to complex social challenges and then striving to spread and scale them systemically.

Common mistakes to avoid when entering the social innovation space, are to get obsessed with the new, chase novelty and not pay attention to what might already be working for some in a complex problem area. As social innovator Al Etmanski has said, "*Innovation is a mixture of the old and the new with a dash of surprise.*" On the ground in a social innovation lab, balancing old and new means you'll need to pay attention to the history of the complex challenge, what's working already and steward the lab towards also seeing new possibilities. This is a very tricky tension to navigate.

Support culture shifts that embrace new ways of seeing and doing

If you're first getting into social innovation, systems change and labs, and you hear that striving to think differently and ideating new possibilities is not really social innovation, you might quit before you even get started.

It is always easier to be a critic than to see what might be good about a new possibility or approach.

To support deep social innovation to emerge we need networks of people and collectives saying, "yes and" more often than "yeah but".

Myth: Anything we try that is new in the social sector is social innovation

Not Really!
Has to go deeper to be a social innovation

But we can't be haters!
We need to avoid throwing wet blankets on people and collectives just opening up about trying some new ways of tackling complex challenges

Individual creative mindset
People might be trying to get into a creative mindset that sets the stage for getting to social innovation

Collaborative Creativity
People trying to be creative as collectives if helped along can set the stage for innovative solutions

Supports Culture of Innovation

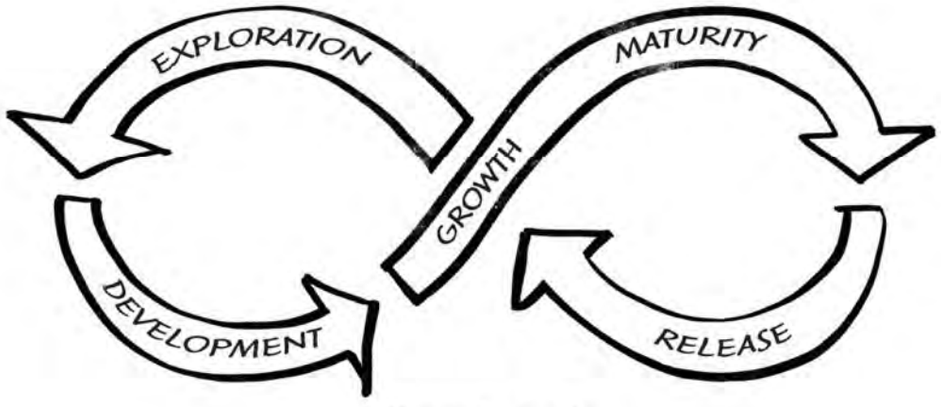
Social Innovation

We need both culture and tools of social innovation in order to make progress

Don't get too attached: All innovations have a life cycle

Over time we need to allow for

Creating, developing, sustaining, and learning when to release innovations.



Panarchy cycle

Read more about culture and tools of innovation in this Think Jar Collective article

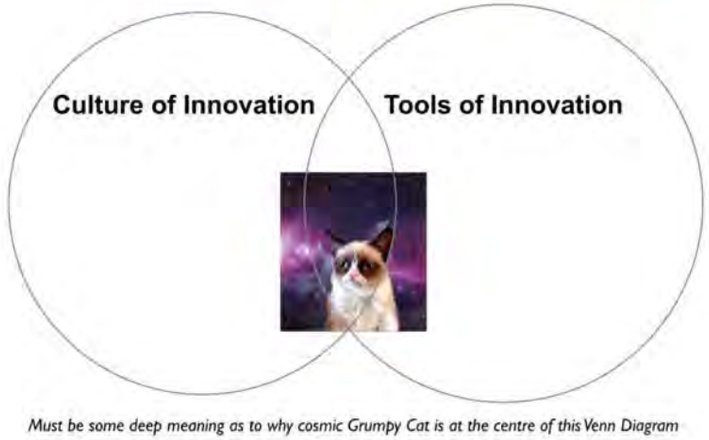
www.thinkjarcollective.com/articles/culture-vs-tools-of-innovation/

If organizations are serious about innovation, then the leadership needs to recognize the importance of investing in both tools of innovation like labs and the longer term and tougher work of building and strengthening a culture of innovation.

Why?

One reason is that all innovations have a life cycle and if we get too attached to sustaining a particular innovation that emerged from a lab process, we will be unable to see opportunities that ensure solutions continue to work. If we strengthen a culture of innovation we can keep adapting and innovating as our innovations rise and fall with the needs of the people we serve and the trends of the time.

Most organizations fail to produce real and relevant innovation because they don't want to take the time to do the harder culture building work



Must be some deep meaning as to why cosmic Grumpy Cat is at the centre of this Venn Diagram

WHY SOCIAL INNOVATION LABS?

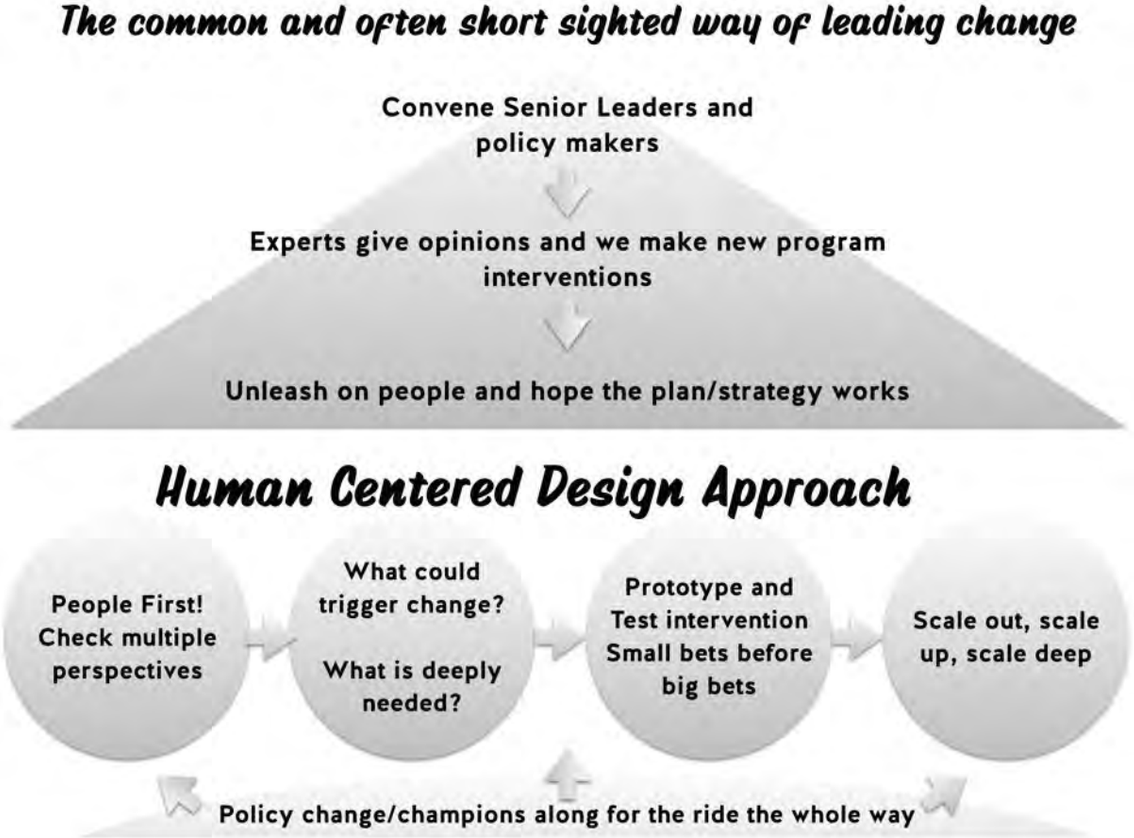
-***Challenges we face are increasingly complex.*** *Labs help to navigate complexity*

- ***Business as usual approaches to problem solving are not really working anymore on their own.*** *Labs offer traditional and fresh problem solving approaches*

- ***Working in silos doesn't really work to tackle complex challenges.*** *Relevant solutions often emerge from creative collisions between seemingly disparate ideas and disciplines. Labs help convene multiple perspectives which helps to uncover better pathways forward*

- ***We need fresh ways to understand problems and their root causes.*** *Social innovation labs help to uncover status quo assumptions which can lead to better understanding of root causes of challenges*

- ***Need experimental space and processes to try new things and make progress.*** *Labs help build a safe zone for experimentation, trying things, failing, learning from failure, and trying again*



Info-graphic courtesy of- think jar collective

DESIGN AND SOCIAL INNOVATION LAB APPROACHES

Design is about problem solving. We are all designers in a sense when we take on figuring out ways to navigate a challenge we face. When we try to figure out solutions to challenges that pop up personally, at an organizational level or community level, we enter a mode of problem solving where we design solutions.

The tricky thing is, often we design solutions based mostly on our own experiences and biases. Human-centered design (HCD) begins with empathy and strives to dig deeper into the needs and motivations of the people who are facing a challenge.

Human centered design (HCD) is a creative approach to problem solving that starts with the person and ends with an innovative solution to meet people's needs. It supports systems change and service delivery by better understanding what people and communities need and want. We design solutions with people, not for them.

Human centered design

is guided by:

Empathy

Collaboration

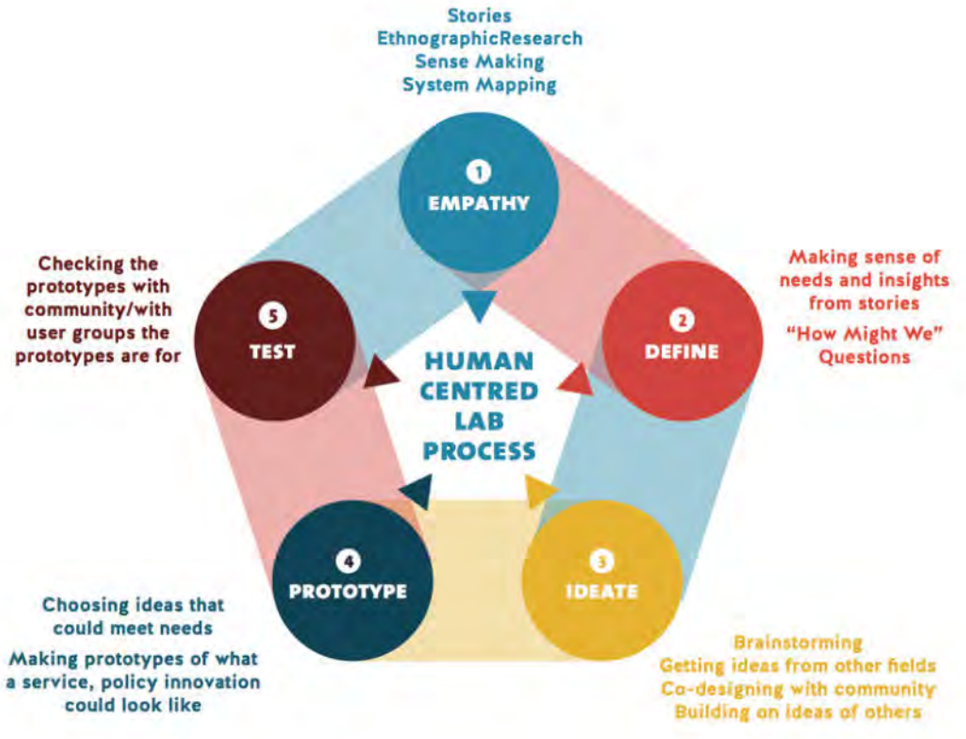
Experimentation

Testing assumptions

Making ideas tangible

Action

This lab field guide focuses on **five phases** based in Human Centered Design Thinking process principles. The five phases of Human Centered Design will be augmented with a bit of systems thinking to help support understanding of root causes in a complex challenge.



Info-graphic courtesy of- the Edmonton Shift Lab

WHAT IS SYSTEMS THINKING?

"A SYSTEM IS AN INTERCONNECTED SET OF ELEMENTS THAT IS COHERENTLY ORGANIZED IN A WAY THAT ACHIEVES SOMETHING (FUNCTION OR PURPOSE)." - DONELLA MEADOWS

LET'S START WITH AN EXAMPLE TO UNDERSTAND SYSTEMS THINKING: THE ELEPHANT AND THE 6 BLIND MEN

There is an old story that goes like this: 6 blind men are presented with an elephant and they want to know what the elephant is like. One man feels the trunk and says the elephant is like a hose. Another man feels the leg and says the elephant is like a trunk. Another man feels the tail and says the elephant is like brush. And this goes on with each man describing the elephant in a different way. However, none of them really understand what the elephant is in its entirety - they are too focused on each part. This story shows that although each part of the elephant is important, we need to look at the big picture to see what is really happening. In other words, when looking at a complex issue, we need to look at the big picture, and explore root causes of the problem because the individual factors are not enough. And that, in the simplest sense, is what systems thinking is. It is looking at the relationships between each part, looking at the way individual parts influence each other, and thinking about how the pieces of a puzzle form the whole picture.

Why Systems Thinking?

There is a tricky tension to navigate when trying to impact deep positive change around a complex issue. It's the tension between focusing too much on helping make change at an individual level, with the need to step back and look at the big picture. We need to look at what's potentially causing a problem for not just one person who encounters it but for many.

Systems thinking helps people to look at things that have happened. These systems problems are not easy to see So sometimes we see parts of the system problem expressed in various places. Often they are in the events we read about in the newspaper or see on the news. If we dig a little deeper we may find structures or patterns that cause reoccurring events to happen. If we keep digging we might be able to see what mental models and assumptions could be causing the pattern to repeat itself. At this level we see the systemic structures that keep patterns in place The hidden mental models and assumptions keep complex problems stuck in our system Systems thinking allows us to see the interconnected nature of problems We then take our systems understanding and use it for designing solutions.

"WHEN WE ARE BLIND TO SYSTEMIC CAUSES OF PROBLEMS, ALL THE SOLUTIONS WE TRY WILL LIKELY MAKE MATTERS WORSE."
- ESTHER DERBY

QUESTIONS SYSTEMS THINKERS ASK:

HAS THIS PROBLEM OCCURRED IN THE PAST?

WHAT STRUCTURES MAY BE CAUSING THIS PROBLEM?

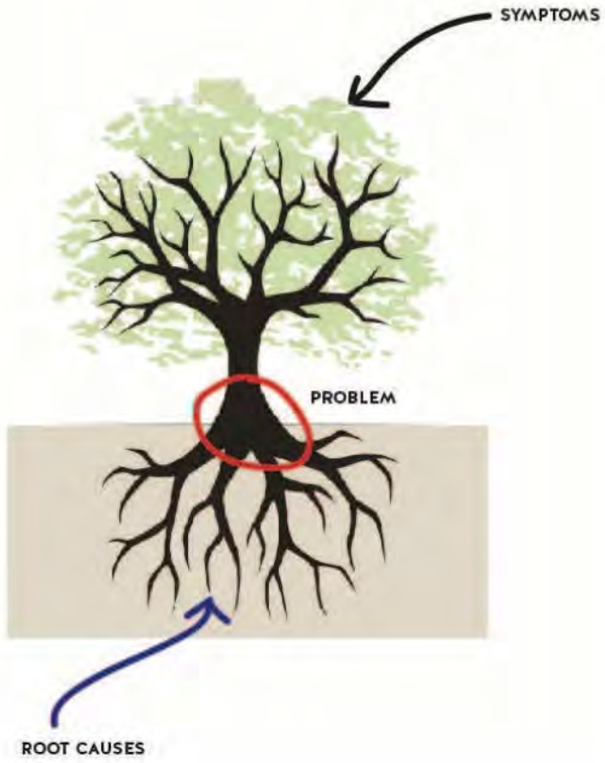
WHAT CHANGE IS NEEDED?

WHY IS THIS CHANGE NEEDED?

HOW WILL THIS CHANGE AFFECT OTHER PARTS OF THE SYSTEM?

HOW DO WE INCREASE PEOPLE'S UNDERSTANDING OF THE ISSUE IN A WAY THAT INTEGRATES THE RICHNESS OF DIVERSE PERSPECTIVE WITH THE SIMPLICITY REQUIRED TO ACT?

ADAPTED FROM: SYSTEMS THINKING FOR SOCIAL CHANGE BY DAVID PETER STROH, 2015



"WE CAN'T IMPOSE OUR WILL ON A SYSTEM. WE CAN LISTEN TO WHAT THE SYSTEM TELLS US, AND DISCOVER HOW ITS PROPERTIES AND OUR VALUES CAN WORK TOGETHER TO BRING FORTH SOMETHING MUCH BETTER THAN COULD EVER BE PRODUCED BY OUR WILL ALONE."
— DONELLA H. MEADOWS

Lab processes are shifting all the time in the field of social innovation labs
Below is a rough summary of three common lab processes currently evolving in the social innovation ecosystem

Evolving Lab Process Approaches

Design Labs

Leans towards user lens

Often Smaller Teams

Focus on improving systems by addressing practical issues through research, co-design, prototyping

Finding out what might work for people by really checking with people.

Bottom up approaches

Can be short sighted if only applying Design Thinking

Social Innovation Labs

Attempts Balance

Focus on assisting lab participants to better understand and work with the dynamics at play in complex problem domains.

Often a mix of Systems thinking and Design Thinking

Bias towards Action and prototyping solutions

Might lean a little more towards design approaches

Social Labs

Leans towards Systems lens

Often Big groups

Focus on the role of people in shaping systems, with intensive personal transformation as the major pathway to change

A lot of group dynamics work
Questions lead to more questions

Can be tricky to move to action if groups get stuck in existential systems thinking funk

When To Use Which Approach?

When...

You have a somewhat narrow and clear challenge scope

When you have less time for your lab

When you want to prototype a service or program

When...

You have a bit more time to explore

When you have a complex challenge but a somewhat defined scope

You have systems challenges

When you want to probe a system through a prototype & not just talk

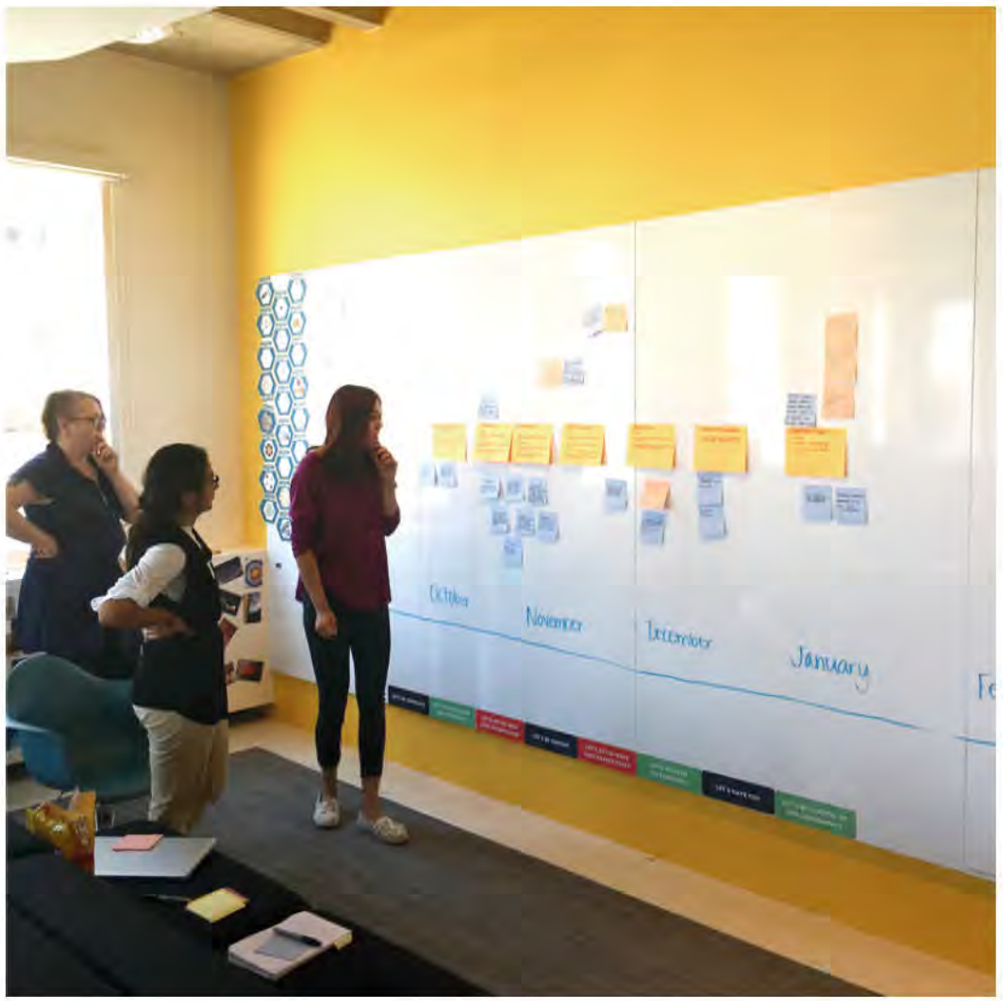
When...

You have a lot of time, high tolerance for ambiguity, and don't need to necessarily land on tangible prototypes of solutions

A shift in people's perspective is what the lab is looking for

Info-graphic courtesy of- think jar collective

GETTING READY FOR A LAB



Lab stewards/conveners getting ready for a lab

Conveners of a lab will find they will need to do quite a bit of pre-lab work to set up the lab for success.

As conveners of a lab you will need to

- Develop a "roughly right" challenge scope for your lab

- Develop a background brief to explain the entry point of the challenge the lab is undertaking

- Identify who should be part of the lab

- Spend time connecting with stakeholders and inviting people to take part

- Design workshops

- Be open to emergent feedback and tensions that arise and adapt lab activities along the way

SO, YOU'VE GOT A COMPLEX PROBLEM

Here are some suggested entry points to begin a lab journey

Begin research and scoping the challenge

One of the really tricky early stages of setting up a lab is figuring out the working definition and scope of a complex challenge.

There is often a tendency to create a very broad scope, however be aware that the broader the scope, the longer it will take to work with a lab team to uncover leverage points to design potential solutions around. On the other side, if you make the scope too narrow, you might find your lab misses the systems perspective of the challenge and creates interventions that won't have potential for systemic impact.

Practical Considerations

Generally, we've found that the less time you have for your lab, you'll want to consider creating a narrower challenge scope. Example: If you only have time for a 2-3 day design lab sprint, you don't really want your challenge scope to be as broad as something like, "addressing poverty". You'll want to narrow it to a workable scope. A workable scope for a short lab sprint might be something like exploring

How might we reduce barriers for new Canadians so they can access city programs and services?

Don't make your challenge scope too rigid

Especially with multi month or multi year labs, the challenge scope is just to start the exploration and will help with creating your background brief, and communicating what your lab is about. Once you get into your lab, the lab team will be working with the challenge scope and it will shift with emergent feedback. Be ready to test and adapt your challenge scope as you proceed.

Plan what kind of lab process might best fit your challenge

Once you've started down the social innovation lab road, learn about different kinds of lab process approaches (see diagram on page 15) and which ones might fit the challenges you want to tackle.

"Let's see what we have here?"

CONNECT, LISTEN TO PEOPLE, TAKE IN FEEDBACK

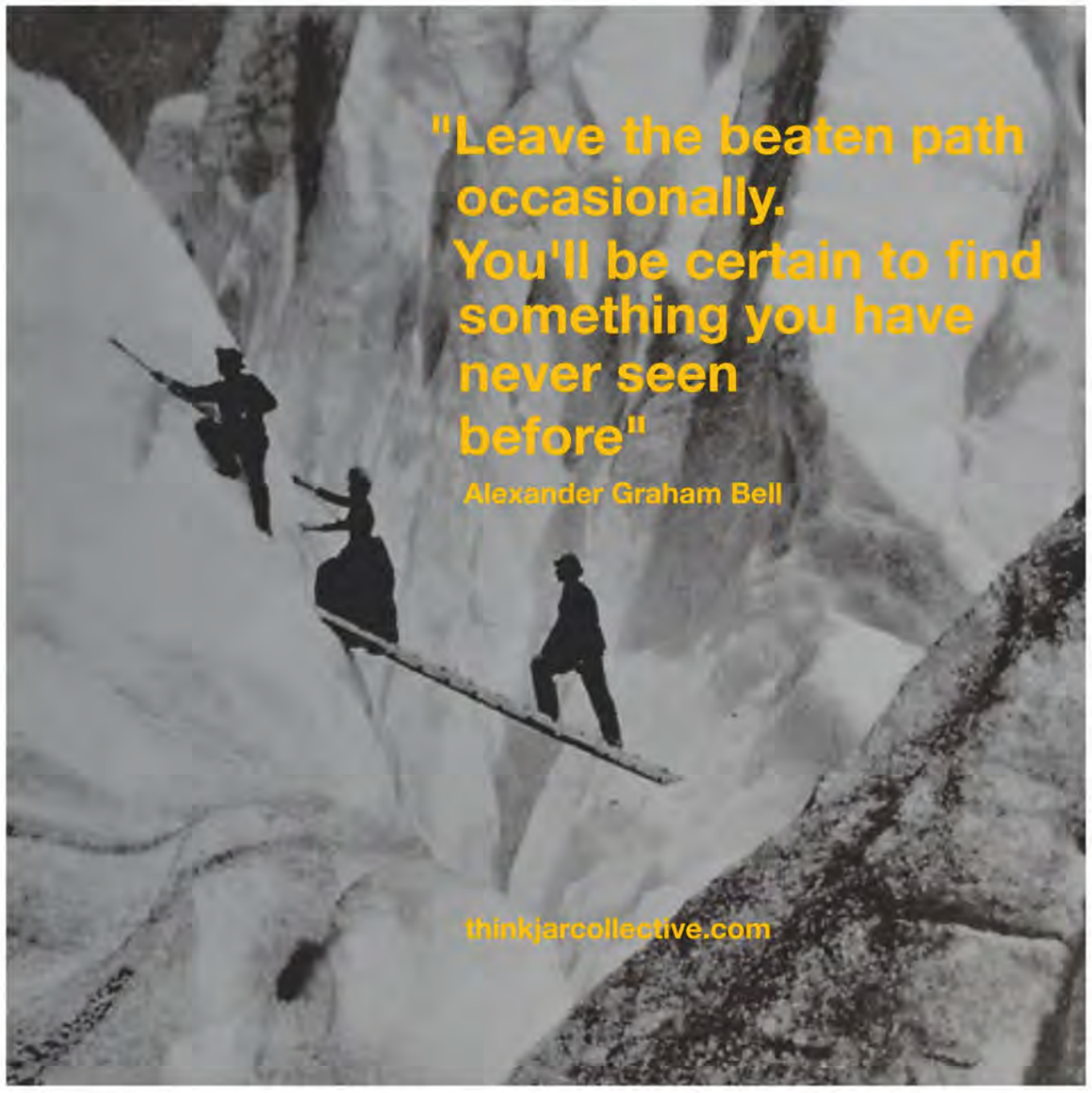
Once you have a draft challenge scope and have clarified your intent around launching a social innovation lab to tackle a complex issue, get out into community, knock on doors of people and organizations who may be interested in being part of a lab. Go for tea/coffee with people and ask for ideas, thoughts and feedback.

Talking to stakeholders in a complex challenge domain about why a lab approach has merit will continue to help clarify intent of the lab, help you see what might be missing and help build relationships.

Relationships are key to setting up good labs

When meeting with people and sharing the merits of a lab, the following can help

- Explain what social innovation labs are
- Explain how in complexity business as usual approaches are not working all that well at making progress and labs are emerging as promising ways to bring diverse collectives together to build fresh solutions
- Share what challenge and scope you want to tackle through a lab approach
- Ask for their insights, thoughts, experience and advice they might have to move forward
- Ask how they might want to be involved



MAP OUT STAKEHOLDERS IN THE CHALLENGE DOMAIN

Mapping stakeholders in a system and challenge domain is a good early lab activity to begin thinking about who should be involved in your lab.

You might do this activity with a few people you met with about launching your lab and expressed interest in supporting it.

Stakeholder Mapping Steps

-Roll out some butcher block paper on a long table or tape it on a wall

-Get some sticky notes and sharpies ready to rock

-Write down the current version of your challenge on the big paper

-On sticky notes write down all the people, organizations, and groups who are connected with the challenge

-Theme and cluster the groups of stakeholders

Pro-tip: Make sure to list a diverse mix across the system

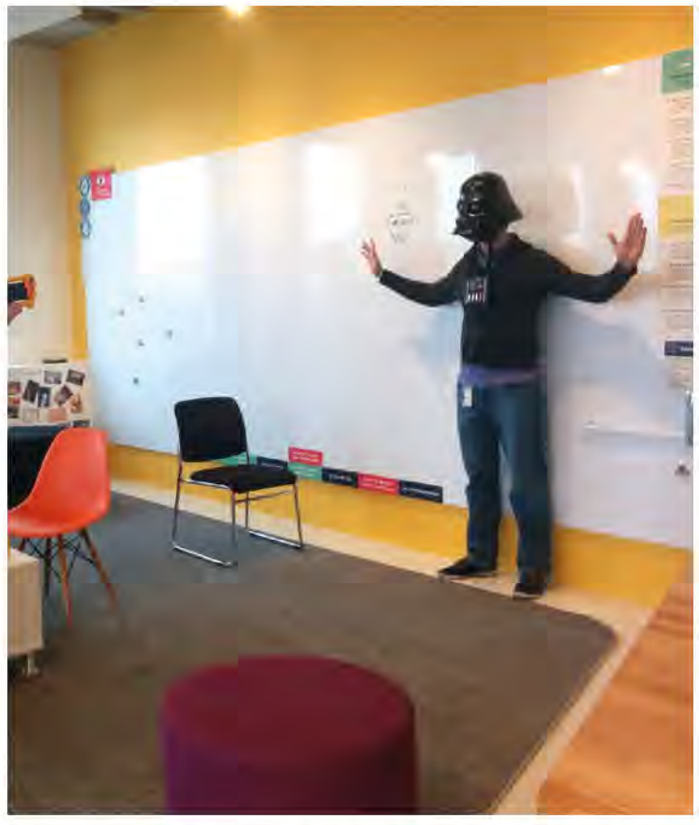
- People/groups with lived experience of the challenge
- Groups or organizations working on the issue or who care about it deeply
- People and groups connected with the issue from municipal, provincial federal system perspectives
- Inspiring leaders close by and far away doing promising work in the challenge area

Consider who would be best as the conveners/stewards of a lab

People often ask, "how do you get buy in from community for a lab?" To help with this, you need to take time to consider who is best to convene and steward your lab. You might get negative push back from the stakeholders in a system you're working with, if a lab convener team comes from outside the community the lab is going to work with. However, you might not have people with the skills to steward a social innovation lab process from within the community you are working with.

Often a mix of stewards with lab process knowledge and people rooted in community with domain knowledge is key. The stewards work together as equals to make progress and guide the lab journey.

Convener/stewardship teams are often about 5-8 people. See page 24 for more on suggested lab roles.



May or may not be government civil servants working in Skills Society's Action Lab

CREATE A BRIEF FOR YOUR LAB

You might create a challenge brief as a early step before talking to people, but in our experience you'll want to talk to people first, clarify the challenge a bit and then create a brief.

When you are launching your lab you will need some things to help communicate what your lab is striving to tackle, and how you're going to try a new approach (a social innovation lab) to try to make progress. Creating a social innovation lab brief will help

The brief should include

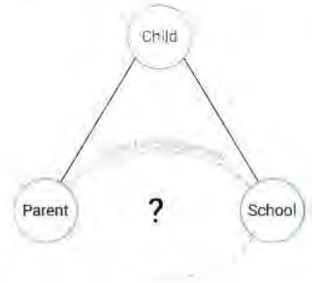
- Background info on the challenge
- The challenge scope (often framed as a How Might We Question)
- Who the conveners of the lab are at present
- Why a social innovation lab approach is valuable to your challenge and briefly what the lab approach entails
- A list of any known constraints
- Who is convening the lab and who to contact

BarnRaise
SAN FRANCISCO

PROBLEM STATEMENT

How Might We create pathways for parents/children to carry out learning through play as a family at home and in community?

Challenge OVERVIEW
At The Place Non-Profit it is a challenge for educators to encourage learning through play within the out of school environment (home and community). The Place staff would like to encourage parents and care givers to become more engaged by engaging with The Place Centre so that play is used as a learning tool in all environments.



The Place PROGRAM OF FOCUS
The Child Program is a free, child-directed, learn through play program for children birth to 5 years old.

We believe in developing resiliency in children and families and in building on the strengths of families by encouraging the development of community relationships as well as by drawing from their natural supports. The Early Start Program employs these strategies in order to build individualized supports for children and their families that will truly meet their needs in their most vulnerable moments.

The Early Start Program is a high quality, licensed and accredited children's program that supports healthy early childhood development. Early Childhood Educators support children's learning
as they play in a safe and nurturing environment. The goal is to expose children to a variety of positive play experiences aimed at fostering optimal development of the whole child and all developmental domains; these include social, language, physical, emotional, intellectual and creative. Our program rooms are called 'Communities' to include children as a citizen of the space.

NON-PROFIT INFO

Family Resources

ORGANIZATION BACKGROUND The Place Child & Family Resource Centre is an Edmonton based organization that has been supporting children and families since 1980. We provide a wide range of programs and support services focused on supporting optimal child development, stable and self-sufficient families, and strong and supportive communities.

This is page 1 of a 2 page brief example. On the 2nd page include possible constraints, contact info, and a bit about what a lab is

CONVENING THE RIGHT LAB TEAM

Diverse perspectives make for creative ideas!

Figuring out how many people, what mindset is required and who should be part of your social innovation lab is a key step to get ready for your lab.

Consider

-Inviting diverse perspectives around the issue

-Inviting participants with domain knowledge and participants with fresh outside perspectives

-Participants should have a high tolerance for ambiguity

-Participants should be open to learning from traditional views and being willing to dive into new perspectives

-Participants should show they are willing to question their assumptions throughout the whole lab process

WHO AND HOW MANY PARTICIPANTS FOR A LAB?

Figuring out who should be part of your lab and what they might want out of being part of it is tricky work. Below are some things to consider with who might be valuable to include in your lab exploration.

Generally you'll want a good mix of people with domain expertise and experience. You might want to include...

- People with lived experience

- Designers who can help make ideas tangible

- Anthropologists, Psychologists, Social Scientists

- Stakeholders in the issue with diverse perspectives

How Many People?

You may have a large collective or network connected with your complex challenge, however when actually getting into sense making, ideating and prototyping, teams of 7 - 9 people is ideal.

Fewer than 7 and you lack perspectives and get bigger than 9 and it becomes tricky to hear quieter voices and make decisions together.

For Lab workshops you may decide that one team of 9 is best or you may have capacity to steward a lab of multiple teams of 7-9 participants.

When there are large groups of people (40-100) involved in tackling a complex challenge, you'll need to figure out how to steward successfully between engaging as a large collective and workshopping in small teams of 7-9.

MINDSET OF LAB EXPLORERS

Social Innovation Labs really are people and how they dynamically work together to find solutions that never would be created by individuals working alone in silos. The mindset of lab participants is crucial for success of your lab.

We've learned the following mindset is helpful to look for in people when convening lab participants

- A mindset where people don't jump to conclusions too quickly
- A mindset where people are comfortable with uncertainty and ambiguity
- A mindset where people build on the ideas of others more than shoot ideas down
- A mindset of humility in facing complexity
- A mindset where people can shift between reflection and action
- A mindset where diversity of perspectives is valued
- A mindset where one is willing to be wrong, make mistakes and learn

SUGGESTED LAB ROLES

Lab roles depend on how big your lab is going to be.

Generally we've found some essential roles to create for a successful social innovation lab.

- **Stewards/Conveners:** They support the vision, design of the lab and often help facilitate lab workshops

- **Lab Advisory:** They don't govern the lab, but are champions of the lab. Often leaders with hands on levers in various systems and can help advise as insights and prototypes emerge.

- **Coordinator(s):**-They support communication between stakeholders of the lab and keeps everyone on track with timelines and deadlines

- **Designer(s):** They come to lab workshops and helps make ideas visual. They also often create visual artifacts from insights and prototypes in lab sessions

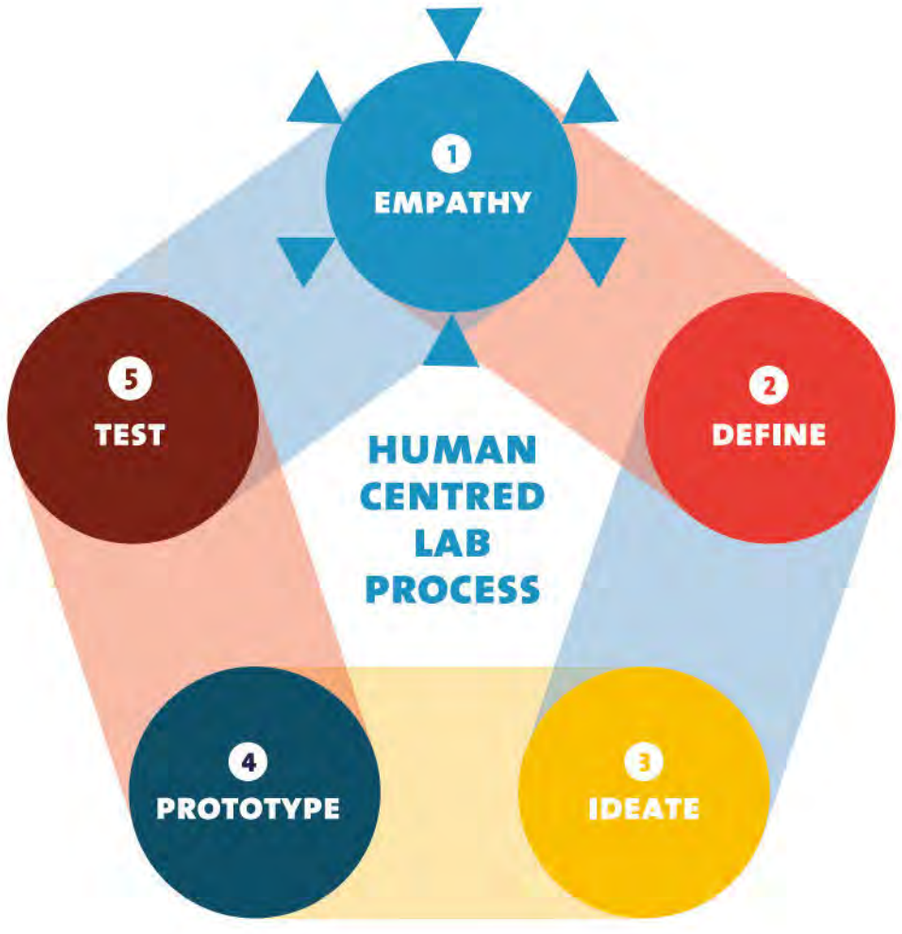
- **Lab Story Reporter:** They come to each lab workshop, record visually and through narrative what happened in the session. They create a visual report of each lab session.

- **Core Lab Team Explorers:** They are the diverse lab team(s)working the complex challenge in lab workshops and in the field doing ethnographic research. This team is a diverse mix of people and skills for the challenge

- **Research Broker:** They support the lab team with more rigorous research as insights emerge from ethnographic field work and lab workshops.

- **Lab Developmental Evaluation Lead:** They help the lab with making sense of emergent learning, adapting to feedback and making decisions that count.

LAB PHASE 1: EMPATHY



This is the first part of the human centered lab process.

Empathy is not about getting all touchy feely. Empathy in human centered design is about gaining insights from people by striving to see and learn from their perspective.

Empathy involves learning from others and striving to understanding their needs around the challenge area. Labs engage in Empathy through:

Ethnographic Research

Sense Making

System Mapping

The following sections will help you work your way through the empathy phase.

SYSTEMS MAPPING

Birds Eye View of Complex Systems

Systems mapping can help a lab team to step back and take a high level view of events that are occurring in the challenge area context, structures that seem to support events to surface and deep biases and assumptions that may be keeping structures and systems in place.

When a team takes the time to system map well, it can help to surface relationships between all the complex parts of a system and eventually consider leverage points for intervening and designing potential solutions around.

Caution!

System maps that social innovation lab teams create are not definitive maps of an issue. The purpose of the maps is for lab teams to create shared understanding, gain alternative perspectives, question deeply held assumptions and start to converge on where interventions may help.

"None of us see the system. We see our own part based on our own background and history. And we all think we see the most crucial part."

- Peter Senge, Accelerate 2014

Common System Mapping Tools

- Rich Picture Mapping
- Iceberg Analysis
- Z.I.P. Analysis Tool to help converge on leverage points in a Rich Picture Map or Iceberg

See tools and links section

Edmonton Shift Lab Core Team Member exploring with her team perspectives on poverty in Edmonton and where racism might be making poverty worse

ESSENCE AND PURPOSE OF SCRAPPY EMPATHY BASED DESIGN RESEARCH

With scrappy design based ethnographic research, remember that lab participants are not writing a thesis or PhD. It is fast paced research on the ground and in community with people. That said, you still need to ensure you create consent forms, and ensure their is informed consent when engaging with community.

Make sure to learn about and follow indigenous protocols if exploring with and alongside indigenous communities.

SCRAPPY DESIGN RESEARCH IS TRYING TO EXPLORE THE FOLLOWING

- What are the deeper needs/wishes of people affected by the issue?
- What are challenges in services and systems people are facing?
- What do people really want/need but aren't getting?
- Question and dig deeper on our assumptions about what people and systems need
- Gain fresh, unexpected insights, ideas from interaction
- Learn a bit more what motivates people
- Make sense of insights and then create better prototypes of things, services, policies that might help

ETHNOGRAPHIC RESEARCH: HANG OUT WITH PEOPLE AND LEARN

What does ethnographic research actually mean and look like for a lab? It means we hang out with people, learn from their stories, and try to understand their perspective.

As we follow the thread of what we learn together through the research it leads us to the things and leverage points we need to design for in a social innovation lab.

By learning from people with lived experience of a challenge, we can gain important insights that help ensure that we are actually designing 'with' them, which increases the likelihood of the solution being what is needed.

Engaging in Ethnographic Fieldwork

Ethnographic fieldwork means going out into the community and gathering stories and insights. It is done through conversations with people in the community whom are stakeholders in the challenge we are exploring. This is an important phase of the lab because by talking with people, we can design with them and ensure that their needs, wants, and desires are actually being met.

There are a few important things to remember when conducting ethnographic research that are listed below. Remember this is just a short fieldguide with some guiding principles to get you started! Let your conversations, ideas, and interactions flow naturally as you speak with people and share stories.

1. **Observe as much as you possibly can.** When talking with people, it is important to observe everything you can about the environment and make notes about anything that stands out to you. Make sure you don't only observe things that support your assumptions and biases, instead, observe what you can about people, their environment, and anything else that may be happening.

For example, if you are going to meet with a parent in a marginalized neighborhood, observe the neighborhood: what kind of schools are present there? what resources do you see? what are the houses like? what kinds of interactions do community members have?. By observing as much as we can we may be able to see connections between things we hadn't thought of previously.

2. **Take pictures and record.** Once you get permission to make recordings if not too intrusive. Part of the observation process can be making recordings. The human memory is pretty unreliable and it changes what we think we heard, felt, or saw. We need hard copies of things in order to make sure what we are remembering is accurate. These recordings can be photographs or audio recordings. It is important to always get permission from people, let them know what the data will be used for, and to impress upon them that their identities will be protected.

3. **Take field notes.** Essentially, field notes are a diary of what we see when we go out into the community and talk with people. Field notes don't have to be written in a particular way or for an audience. They are your records of what you saw and how you felt when you heard others' stories that you can use to understand people's needs, wants, and desires. Use any way of expressing yourself and your experiences that you feel is best. Something weird tends to happen when we see the same thing over and over again - we stop paying attention to it, even if it's something shocking or amazing. Field notes help you notice this shift in how you see things after being exposed to them many times.

4. Interview people. Interviews will be quite important to the lab as they will lead our prototypes and thinking. Interviewing about something like race can be difficult and we will continue to improve this section as we move forward through the lab process. One crucial thing to remember is that it's not just what people tell you, it's how they tell you - it is important to pay attention to their social cues, body language, and willingness to talk about certain subjects. There are 4 key pieces outlined in Ethnographic Fieldwork: A Beginner's Guide that ethnographers should focus on when interviewing someone.

Interviews are just conversations between people. If you behave too formally, people will keep their answers brief and formal as well. Now, this doesn't mean we can cross boundaries or be impolite, it just means that we want to try and keep a natural flow of conversation going. Be an interested, sympathetic, listener and remember that interviews may also be messy and complex (like real conversations).

You are part of the interview. Everything you say and do is not in a bubble; it will have an impact on the person you are talking to. Because of that, it is important to remember that the person will have many assumptions about you as the interviewer and that will play into how they answer your questions. That's why we want it to be a conversation and not a rigid interview. It's also important that you record what you say as the conversation unfolds because this is just as important as what the interviewee says.

Anecdotes are crucial information to our research. People construct their narratives (conversations) around anecdotes (stories). These anecdotes help us understand what people mean or understand by particular terms and how they see the world and themselves. Many researchers dismiss stories as people going off on unrelated tangents, however, these anecdotes can provide connections between things. Let people tell you their stories even if you think the story is irrelevant. The things we see as getting "side-tracked" will help us learn about motives, contexts, experiences, etc.

5. There is no such thing as a bad interview. Every interview will give us some information about the community and will help deepen our understanding of the communities we are studying. Plus, the more we do, the better we get!

ADAPTED FROM: ETHNOGRAPHIC FIELDWORK, A BEGINNER'S GUIDE BY JAN BLOMMAERT AND DONG JIE (2010)

Digging a bit deeper to get started

It's time to figure out what you already know (and believe you know) about the challenge.

Describe a little about what you think your challenge is about at present. Why is it important to tackle it?

Share what you know and what you would like to know more about.

Take five minutes to answer the questions below yourself and then five minutes to discuss your answers with your team. If it's helpful, use Post-it notes to organize your thoughts and look for unique perspectives as well as overlaps in your team's knowledge base.

What are the aspects of the challenge that you already know a lot about? What are your assumptions?

Building an Interview Guide

1. Identify objectives for interviews.

a. What do we wish/need to gain from the interview? What kind of insights are we looking for? How do we build trust with people?

2. Come up with questions.

There are many ways to build questions. You can try dividing questions into two groups easy vs. deep. Easy questions help us make people feel comfortable and open up. Deep questions give us insight into people's hopes, ambitions, fears. Examples of easy vs. deep questions:

Easy: What did you and your family do over the weekend?

Deep: Draw your dream grocery aisle. What would be on the shelves and in the coolers?

Start with the easy questions and move to deep questions as trust is built.

What kinds of questions do we want to ask? Should we have questions or just topics to guide the interview?

3. Think of some ice-breakers or conversation starters.

a. What are some ways in which we can build trust together? How can we be thoughtful of different groups of people? How can we make people feel comfortable?

4. Think about out-of-the box interview techniques.

a. Give participants a camera and ask them to take pictures of things that are important to them in their environment and why.

b. Ask people to build a time line of their experiences, what was important to them, what they struggled with, etc.

c. Give people a deck of cards with words on them and ask them to sort the words in order of importance.

d. What are some other techniques that can give us insights?

Click the Red Link For Interview Guide Discovery Worksheets

Adapted from: IDEO

Explore immersion in different contexts

In addition to ethnographic research with people and organizations within the system context you are exploring, also consider visiting parallel contexts to shake loose new insights and perspectives. This is a great creative thinking exploration.

To explore context immersions

- **List the qualities and characteristics of your challenge area**
- **List fields, disciplines, processes, cultures, you could think of where you see a parallel you could draw insights from**
- **Go visit places (real and digital)**
- **Go on a service safari where you take part in a service experience to learn from the it and draw insights for your challenge**
- **Take notes and photos**
- **Capture interesting quotes**
- **Draw sketches and plans**

"CREATIVITY IS CONNECTING THE SEEMINGLY UNCONNECTED"
- WILLIAM PLOMMER

Example of looking beyond the familiar for fresh ideas.

A group of lab explorers in a youth mentoring organization wanted to explore how they might increase the quality of relationships in shorter amounts of time than usual mentoring matches.

The lab explorers first interviewed and hung out with youth and their mentors to gain insight.

In addition to looking in the usual places for their context, the lab team also wondered where else they could get ideas for how to create bonding and quality relationships.

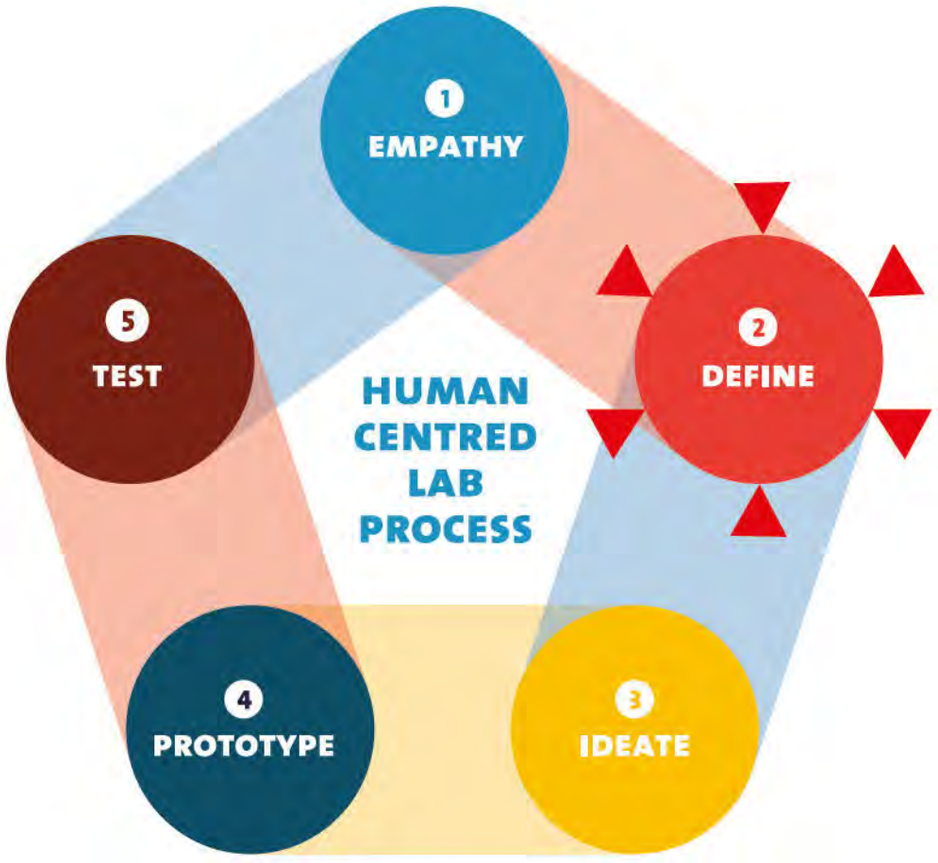
The lab team thought about what activities and platforms help people bond, connect and build relationships. They started learning from dating websites, Pokemon Go and other contexts beyond mentorship where healthy relationship building can often emerge.

Summary of Different Research Approaches

	Quantitative Approach	Qualitative Approach	Ethnography: Mixed (Quantitative + Qualitative) Approach
The research tradition	There is an objective reality which can be discovered	There are multiple realities that are constantly made and remade	Combination of the two: there are multiple realities which are constantly made and remade, based on power & structure
Point of the research	To (in)validate and generalize findings	To understand and apply meanings	To generate and prototype ideas
Sources of data	Surveys, data-sets	Interviews, focus groups, observation	Observation, interviews, stimulus, interventions, reflection
Research roles	Investigator & Subject	Facilitator & participant	Observer & Prompter & Participant (blended at different times)
Unit of focus	Individual	Individual & peers, family, groups	Relationships, interactions with self, peers, family, service providers, organizations
Outputs	Statistics, charts, articles	Case studies, stories, articles	Stories, themes, photos, films podcasts, visualizations, scenarios, experiences
Inputs	Questions, scales, databases	Interview guide, coding chart	Materials, stimuli, construct notebook

ADAPTED FROM RESEARCH APPROACH DIAGRAM BY DR.SARAH SCHULMAN - INWITHFORWARD

LAB PHASE 2: DEFINE



This phase involves taking all the information and insights you've gathered to understand a bit more about people's challenges, motivations, wants, and needs and then finding leverage points to design around.

Labs can engage in this through:

Sense Making of Insights and Needs from field work

"How Might We" Questions to uncover leverage points for designing prototypes around

SENSE MAKING

Sense making really just means coming together and making meaning from your experiences to figure out what is happening and why.

At this stage you have talked to a bunch of people in the community, and you've documented your interviews.

First, on your own you'll think about the interviews you have had and key things you have learned.

Then with the rest of your lab team you'll get together, share learning, develop insights together, find themes and begin to uncover leverage points for designing around.

Sense making on your own

To the right and in the links below are a couple tools to help you think through learning from interviews and articles. The tools can help you record some of the important things to take back to your lab team to share with them.

Click the Red Link For Sense Making

Worksheets For Interviews

Worksheets For Articles and Media

+ UNEXPECTED

What were the most inspiring stories or unexpected events?

+ INTERESTING STORIES

What was the most memorable and surprising story?

+ INTERACTIONS

What was compelling about the way he/she interacted with his/her environment?

+ MOTIVATIONS

What did he/she care about most? What motivates him/her?

+ FRUSTRATIONS

What frustrated him/her? What does he/she struggle with?

+ READ BETWEEN THE LINES

Tune into participants' emotions, contradictions, workarounds, body language and surprises. Resist the urge to project your own ideas.

Summary of Interview

_____

Name:_____

Who was the person you interviewed?
What do they do? What motivates them?
What's a bit about their story?

_____

_____

_____

_____

What were the top 2 aha moments you had from learning from _____?

+_____

+_____

What do you sense at present are the top 2 needs that _____ has?

+_____

+_____

Adapted from: ThinkJar Collective & IDEO

HELPFUL TOOL FOR A LAB TEAM TO BUCKET INSIGHTS FROM FIELD WORK

We've found that before you get into group sense making of interviews and articles, that it can be helpful to have some buckets to sort insights. You're going to have a lot of stories and a lot of insights. The categories to the right can help to make sense of them.

Needs	Challenges/ Tricky Stuff	Things/Questions to explore and dig deeper on	Ideas that could help	Unexpected insight/aha

To Do This

- **Gather your team(s) of 7-9 people max**
- **Ensure each person has filled out the worksheets in the links from the previous pages with core insights from interviews and articles**
- **Post the headings listed in the graphic on the right on a large board or butcher block paper- (Needs, Challenges, Dig Deeper On, Ideas that could help, Unexpected insights**
- **Give everyone sticky notes and sharpies**
- **Give time constraints (possibly 6 mins per story share)**
- **One at a time each person shares one of their interview stories and insights from the interview**
- **As one person shares the interview story, the other participants write down any insights that fall into the category buckets of, Needs, Challenges, Things to Dig Deeper on etc...**
- **At the end of each story sharing round, participants share their sticky note insights and decide which bucket they think they should put the insight into**
- **You might do 5-6 rounds of this**

YOU'LL NEVER FEEL QUITE SATISFIED YOU LEARNED ENOUGH

After you do a sense making round, lab teams will find they have more questions, more assumptions and more uncertainty. This is good. Embrace it and identify what you need to do next to optimize your time.

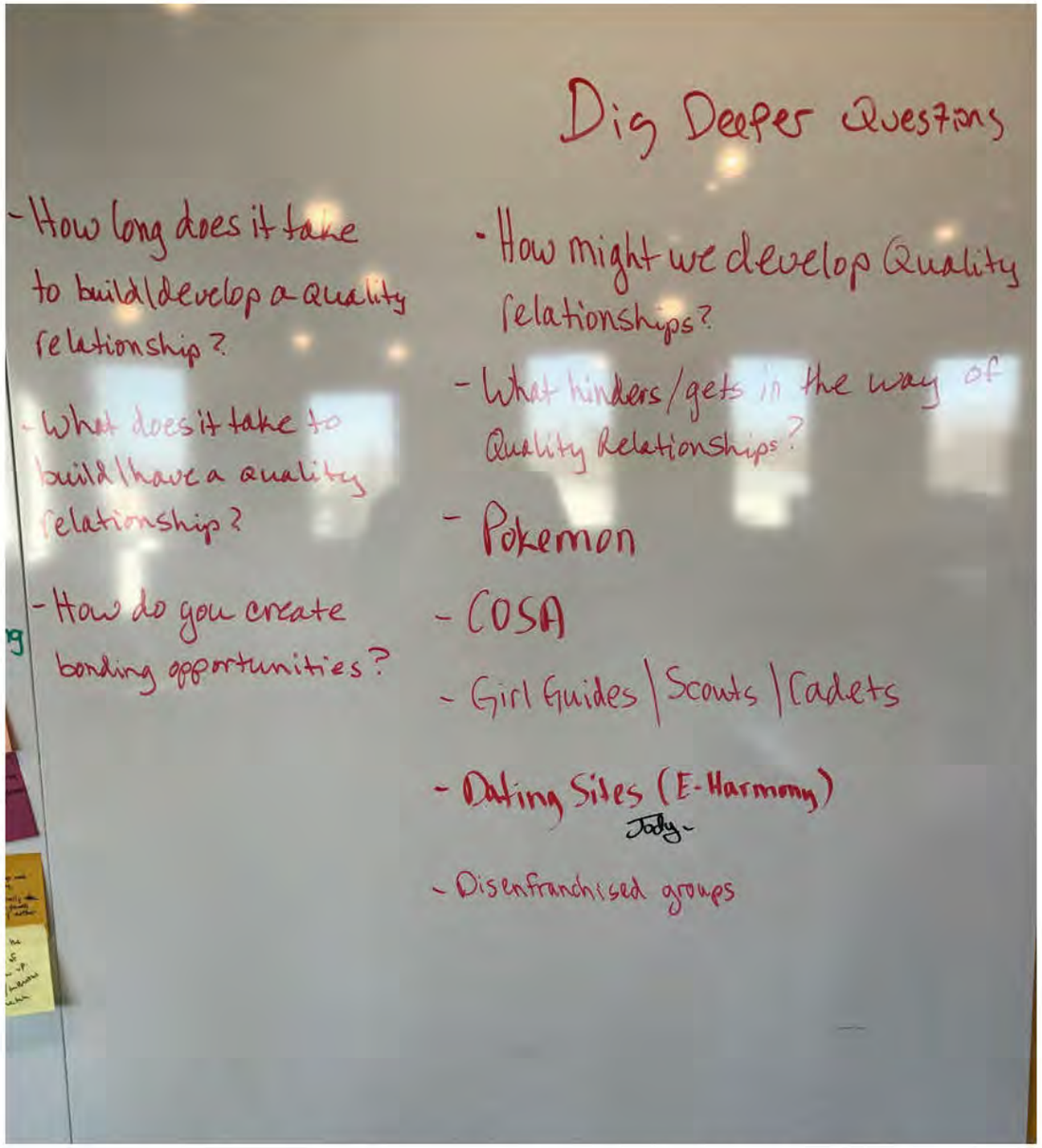
Dig Deeper

Depending on how much time you have for your lab field work, you'll want to at this stage identify if the lab team should go back to the same people they interviewed for another round to explore deeper, or if new areas opened up to explore to gain insight. Or both.

Often this is a stage, where lab explorers recognize they might not have explored the challenge area theme of the lab with interviewees and missed key things.

In the next rounds lab explorers will go deeper and insights will come back richer

You can follow similar processes to bucketing insights together as a lab team after each round of field work.



A lab team's plan to dig deeper in their next round of field research

DOES THE CORE CHALLENGE NEED A REFRAME?

At this point, your lab team should step back and ask themselves if through their exploration and sense making, the core challenge or scope may have shifted and needs to be reframed.

A reframe can feel uneasy as more questions surface but it is a good sign a lab team is digging deeper on assumptions about the problem domain. This can be tricky and takes good facilitation.

Some guiding questions to start the conversation might include

- What problem are we seeing that our lab needs to create solutions around. What's the problem we're trying to solve and for who?
- What level of intervention are we thinking we can be most useful in? Should we tackle mental models, assumptions and deep root causes? Do we have time for that?
- Are we seeing the systemic nature of the problem still?
- Is our thinking too broad to design around?
- Are we thinking too narrowly about the challenge areas?
- What is the Core Challenge now that our lab has capacity to tackle based on our learning?

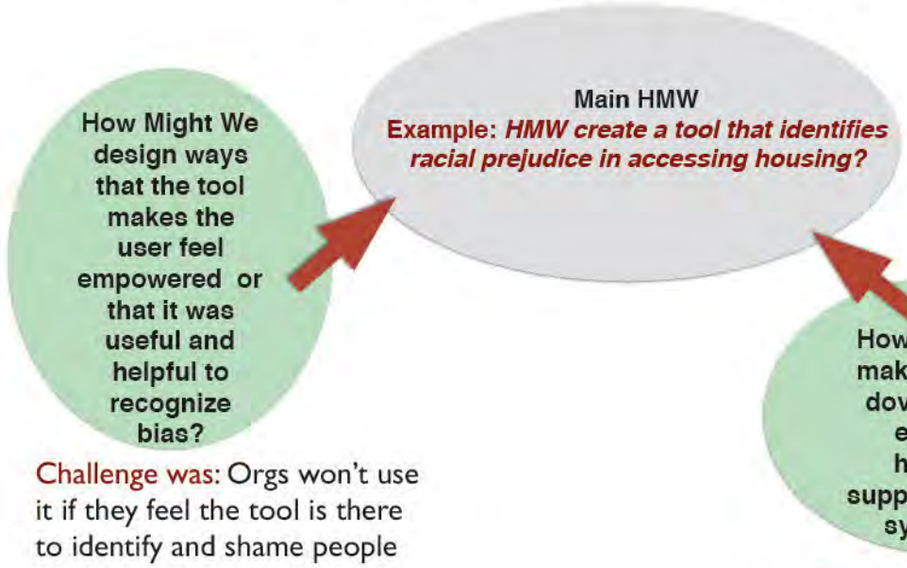
Jodi Calahoo-Stonehouse a steward of the Edmonton Shift Lab helping the core team consider indigenous perspectives on an issue

IDENTIFYING LEVERAGE POINTS FOR DESIGNING SOLUTIONS THROUGH "HOW MIGHT WE" QUESTIONS

This section focuses on taking the challenges and needs uncovered in the field work and transforming them into workable "How Might We" questions to design around.

These "How Might We" questions are used later to guide ideation and prototyping.

Creating leverage point HMWs from challenges and needs



Challenge was: Orgs won't use it if they feel the tool is there to identify and shame people

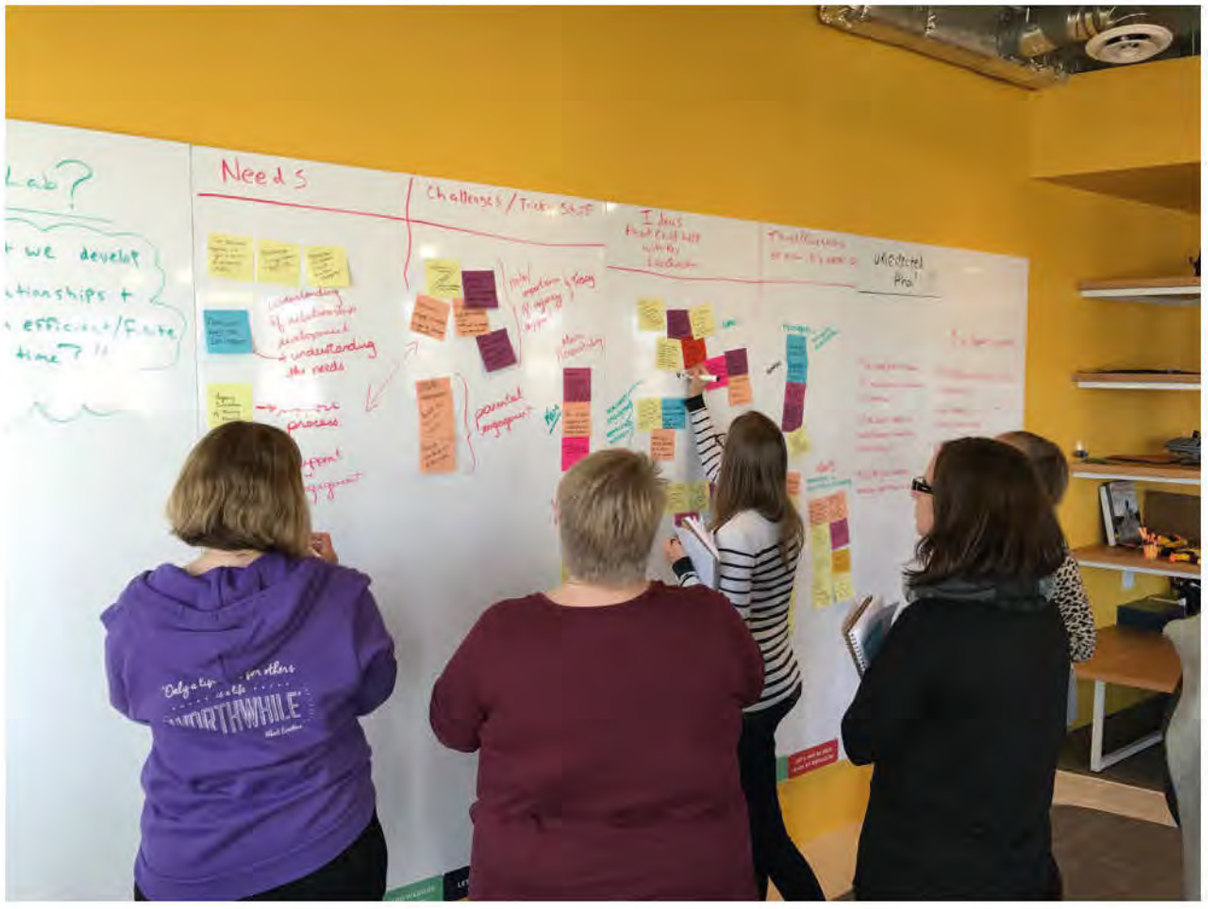
Need was: Tool needs to not be so outside what the org is used to, that it won't be adopted because can't work with their systems

Identifying Leverage Point Design Criteria

Once all the research has been shared back and bucketed, it is important to find common themes in the insights to be able to design prototypes around.

Option 1

The team could look at their mass of sticky notes in the category buckets and dot vote. They dot vote by each person placing 6 dots(could be more) on what they identify as the top *needs*, *challenges* to consider for designing solutions going forward. Participants can dot vote on any sticky in any category bucket on the board. They can also put more than one dot on the same sticky note



Option 2

Have the participants take time to scan the board(s) with sticky notes in the category buckets. As they scan have **each participant** write down on new sticky notes...

3 stickies of the key needs they see that people and the system have

3 stickies of the key challenges they see that people and the system has

Then cluster into themes and write down what the

Need Themes are and what the *Challenge* Themes are

Once you have **The Core Challenge Themes and The Core Need Themes**

Split the lab team into groups of 2 or 3 and have the team transform each challenge theme and each need theme into "How Might We" questions.

Once challenges and needs have been transformed, check them with the other member of the core teams and ask for help to ensure they are clear, not too narrow and not too broad.

Keep in mind that developing good "How Might We" questions takes practice and is tricky. Ask for help if you need it.

Write out on large stickies or on paper what the fresh challenge and need considerations are for the next steps of ideation and prototyping.

Click the Red Link For HMW Worksheets

PROPERLY SCOPING HOW MIGHT WE QUESTIONS

TOO NARROW

☒

HMW create a cone to eat ice cream without dripping?
This question implies that redesigning the cone is the solution. However, the team should be thinking more broadly about a range of possible solutions.

TOO BROAD

☒

HMW redesign dessert?
This question doesn't give enough direction because it doesn't imply a starting point or immediately help people generate ideas around one category of desserts.

JUST RIGHT

☑

HMW redesign ice cream to be more portable?
This question is scoped properly because it frames the challenge but does not imply a solution. Rather it allows people to brainstorm multiple solutions.

IDEO

Transform into How Might We ?s

Converge now on one core challenge and one core need

*Challenge*_____

How Might we..._____

_____

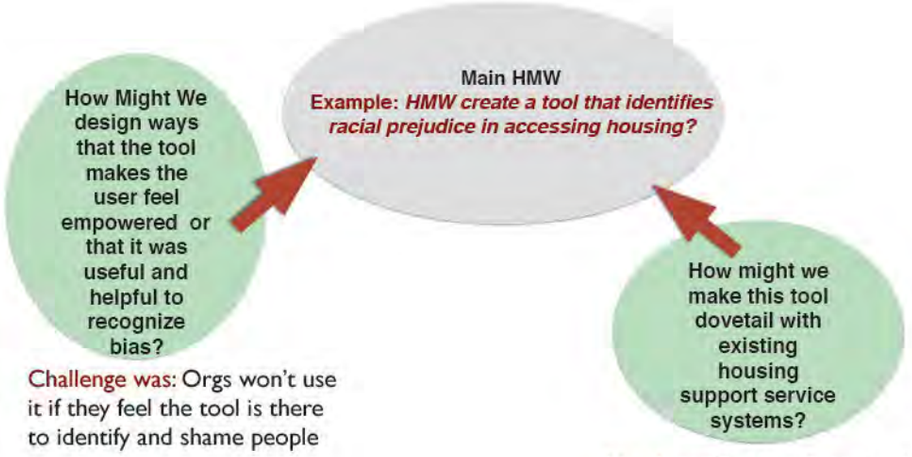
_____

*Core Need*_____

How Might we..._____

_____

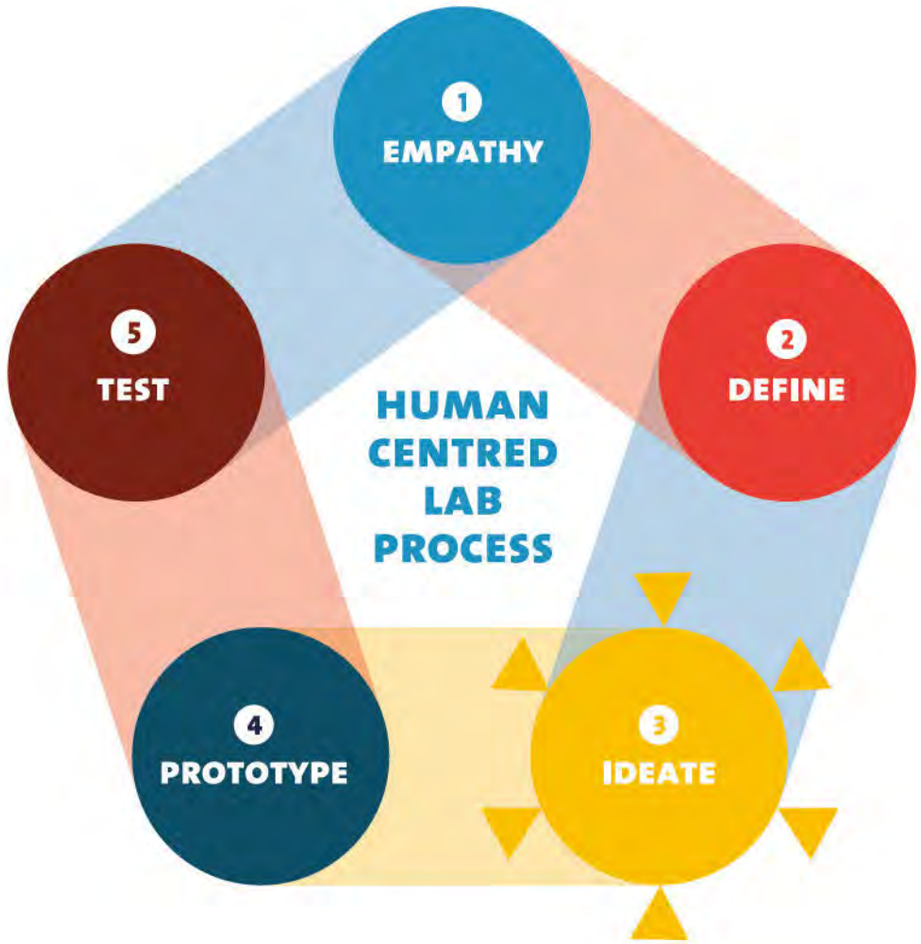
_____



Challenge was: Orgs won't use it if they feel the tool is there to identify and shame people

Need was: Tool needs to not be so outside what the org is used to, that it won't be adopted because can't work with their systems

LAB PHASE 3: IDEATE



This phase involves launching ideas from insights in the previous phases. Labs often engage in this through:

Brainstorming/BrainWriting

Getting Ideas from Other Fields & Building On the Ideas of Others

The following sections will help you work your way through the ideate phase.

Ideation requires us to diverge & converge

Diverge: come up with as many ideas as possible
Converge: find the ideas that we can turn into prototypes or ideas we can act upon

IDEATION

Learning how to come up with ideas and potential solutions to prototype is often a delicate process that needs some stewardship. Brainstorming often gets a bad rap because of a lack of an understanding around the importance of safeguarding the required thinking modalities. People trying to ideate too often mix divergent thinking and convergent thinking at the wrong times and end up harming trust or throwing wet blankets on potential good ideas.

Brainstorming can sometimes sound like a free for all activity but in social innovation labs, it is a guided activity that helps foster creativity and innovation. It helps us think in different ways to come up with fresh, new ideas. It is important to be thoughtful and open to other people's ideas and suggestions.

Skills Society Action Lab

Set the stage for ideation

Before beginning ideation laying out some ground rules helps to keep ideas flowing and keeps our inner naysayer at bay during the process.

LET'S ACT IN WAYS THAT FOSTER TRUST
Treat each other with respect. Be supportive. Help others be successful.

LET'S BE OURSELVES
Bring your unique perspective. And speak in ways that people will be willing and eager to listen.

LET'S BE CURIOUS
Be open to having your thinking provoked and expanded. Being willing to be surprised.

LET'S BE CAREFUL OF OUR JUDGMENTS
We see through our own colored glasses. Be careful of absolute judgments, certainties, assumptions and biases.

LET'S ACKNOWLEDGE AND APPRECIATE
Strengthen collaboration through appreciating others contributions and strengths.

LET'S PRACTICE REFLECTIVE OPENNESS
Rather than point fingers or say why someone is wrong, describe where your perspective is coming from. Why do you see situation a certain way. Describe your biases. Doing this will make it easier for people to hear each other's insights.

LET'S BE OPEN TO FEEDBACK
Be receptive to new ideas and come with a willingness to change your thoughts, opinions and behaviors.

LET'S NOT BE HELD BACK BY OBSTACLES
Focus on what's possible. Don't believe in the power of perceived obstacles. Creative teams find ways around challenges that arise.

LET'S HAVE FUN
Work hard and let's not take ourselves too seriously. Humour and fun fosters trust and opens up new ways of thinking.

Now that your team has created How Might We questions for your design challenge, you're ready to start brainstorming! The intention of brainstorming is to leverage the creative power of the group by engaging with the full design team, listening carefully, and building on each other's ideas.

Option 1 - Brainstorm

1.**Write Main Question(s)-** Put up on the wall the main overarching challenge your lab is working on. and below the leverage point HMW design criteria

2.**Gather the gear-** Get a stack of post it notes for each lab explorer

3.**Set the tone -** Review the Lab ground rules and Divergent Thinking Guidelines

4.**1 idea per sticky note!**

5.**Set the clock for 10 mins and turn up the music**

6.**Try other divergent thinking exercises** to open up new thinking

7.Go for quantity of ideas

Design By Doing Lab Exploration

Brainwriting is like brainstorming except ideas are by lab participants on their own , quietly before sharing with the larger team. Brainwriting is a great way to ideate because it allows for ideas from people who may be quieter and don't feel comfortable sharing in a large brainstorm.

Option 2 - Brain-writing

1.**Write Main Question(s)-** Put up on the wall the main overarching challenge your lab is working on. and below the leverage point HMW design criteria

2.**Gather the gear-** Get a stack of post it notes for each lab explorer

3.**Set the tone -** Review the Lab ground rules and Divergent Thinking Guidelines

4.**1 idea per sticky note!**

5.**Set the clock for 10 mins and turn up the music**

6.Write and draw ideas on sticky notes quietly

7.Go for quantity of ideas

Lab Explorers Brain-writing

Option 3 - Wild Brainstorm Mashups

These are a bunch of crazy creative problem solving exercises that will open up new thinking and possibly spark something actionable if you defer judgement.

Forced Connections

How might Nelson Madela solve it? What would he do and say?

How might a user/ person that uses your service design a better solution? How might a child approach the challenge?

How do you think Mr. Rogers would have approached the challenge? How would Helen Keller have approached the challenge?

Ideas from other fields

What interesting ideas have worked in other fields that you could apply to your challenge?

E.g. How could we apply the streamlined customer experience of going to an Apple store to how we design social services?

E.g. An architect got an idea from termite hills for how to solve the challenge of making an air conditioned building in the desert without electricity

Reverse it

For a moment try creating all the ways you could ensure the problem will never be solved.

What would you design if you were tasked with ensuring a service or system innovation could never happen? What would you have to do to ensure statud quo reigned. What would keep the old ways going?

Skills Society Citizen Action Lab- Pop Up Lab Ideation around creating inclusion for people with disabilities

SETTING CRITERIA FOR CONVERGING ON IDEAS TO PROTOTYPE AROUND

Your lab team at this point will have a whole lot of sticky notes of ideas. Some ideas won't be worth exploring and some will.

To help a lab team converge on ideas, it will be important to create a list of criteria for choosing. You don't want to create criteria before ideating, because it may stifle creativity at that stage, but after ideating, it is essential.

Some things to keep in mind when creating criteria for sorting ideas

- Don't make too many points for criteria (5-6 criteria points max)

- Relate you criteria to your Challenge and Need How Might We questions

Example Criteria From a Lab Exploration

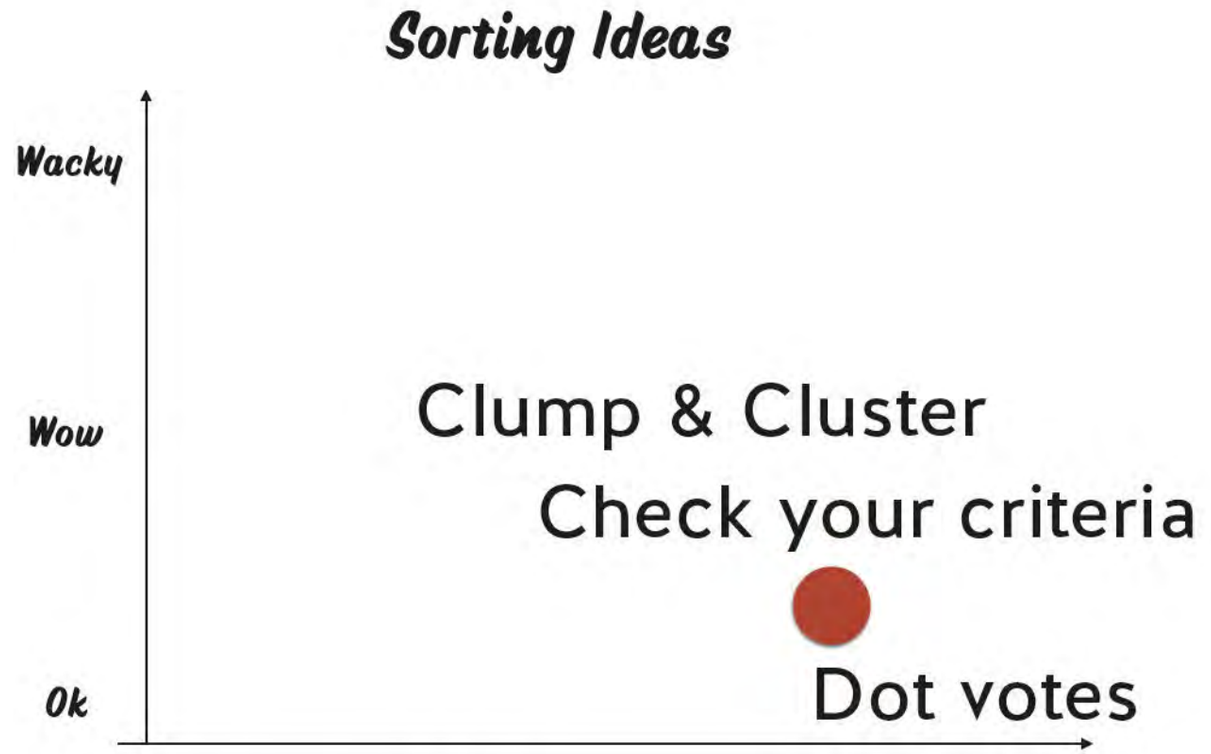
- Ability for Quick Win - But don't limit the big ideas
- Builds on and leads to quality relationships for Parent, Volunteer and Child
- Prototype showable and testable
- Shouldn't already be happening (double check we aren't duplicating)
- Go for Wow and Design for Meaning
- The prototype should attempt to foster quality relationships within a finite amount of time

CONVERGING TOOL

This tool is helpful for a team to plot ideas and begin sorting and converging on good ideas to work with.

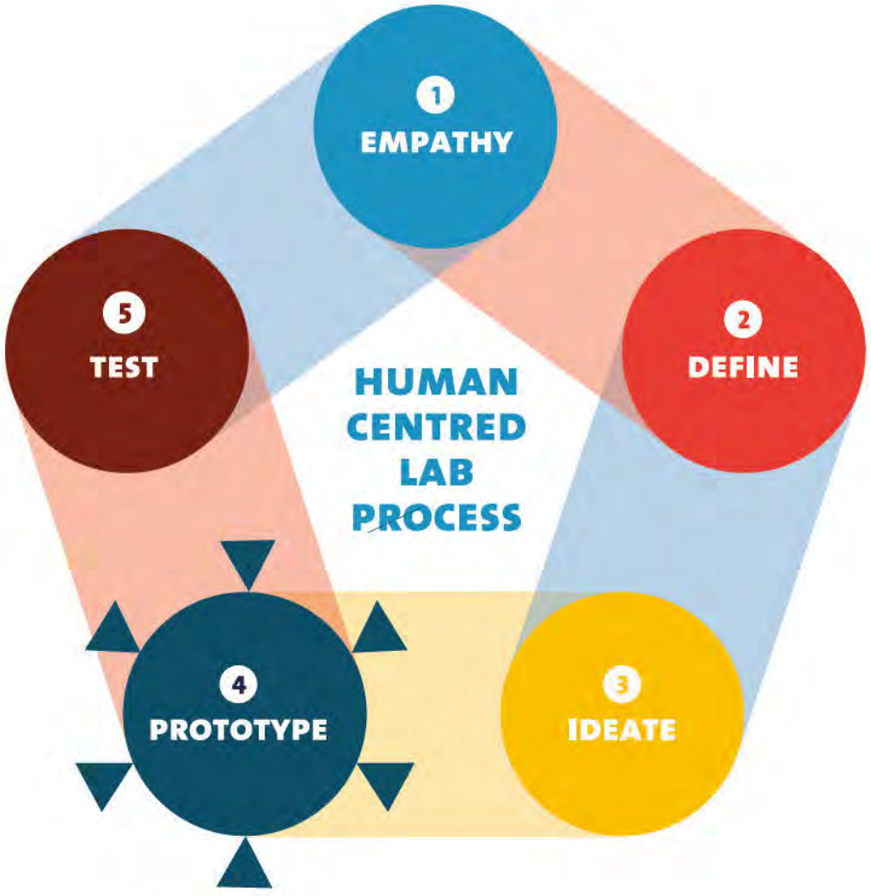
To do this

- Draw a big X & Y axis on a white board or piece of paper
- Write Whacky, Wow and Ok on the X-axis
- Write Ideas that help at individual level and ideas that help at systemic level on y-axis
- Everyone share their ideas on their sticky notes
- Decide where on the chart ideas should go
- Cluster and theme is needed
- Check back on challenge criteria
- Dot vote (6 dots each team member) on which ideas have promise for taking to prototyping and based on the challenge criteria



Adapted from AB CoLab

LAB PHASE 4: PROTOTYPE



Making Prototypes

This phase involves taking ideas and making them visual or tangible.

The following sections will help you work your way through the prototype phase.

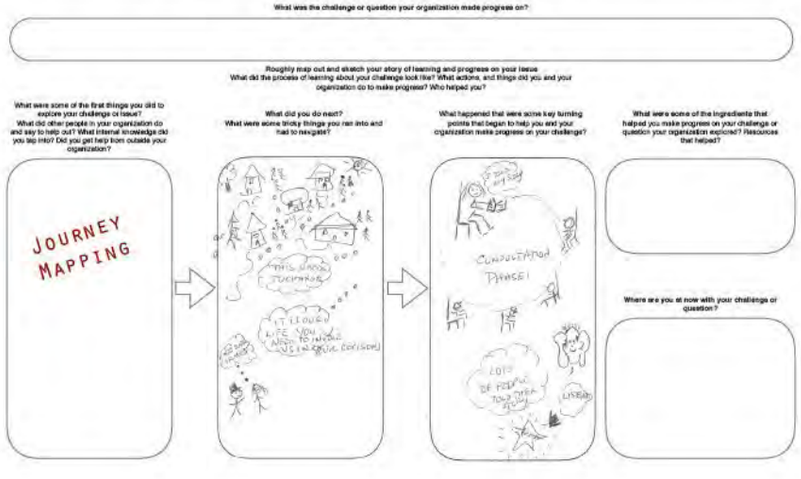
WHAT IS PROTOTYPING?

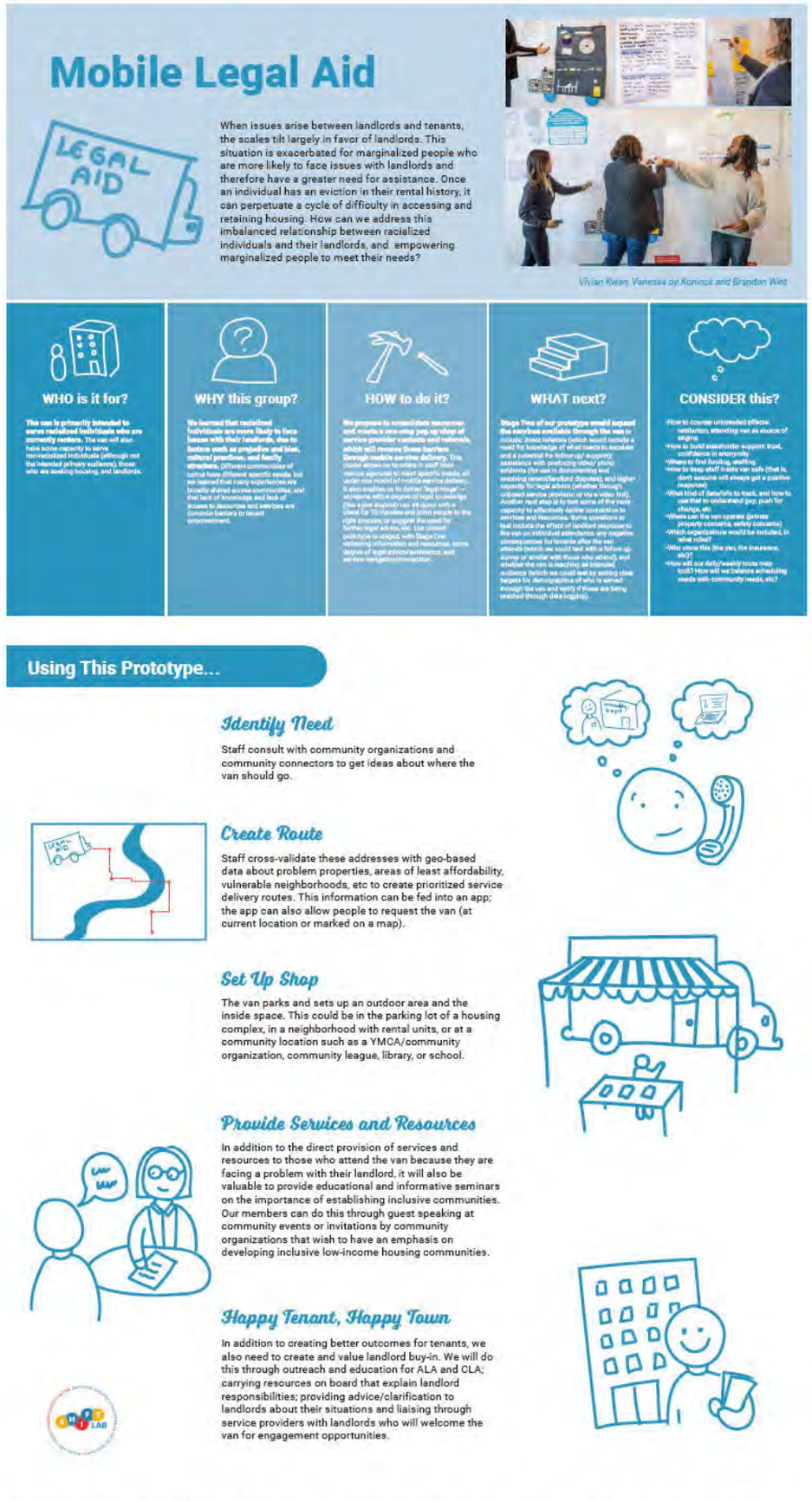
Prototyping is making ideas visual and tangible. It's also a low cost version of an idea that can be tested, tweaked and made better with feedback.

Prototypes are scrappy and messy and not meant to be perfect models. Getting good at prototyping takes practice. One of the most common mistakes to avoid with prototyping is that prototypes are only coherent to the people who made them, but make little sense to others who weren't part of the process.

Have fun with prototyping and always ask yourselves and your lab team, is it clear what the prototype is trying to solve and does it make sense?

A prototype could be of a product, a service, a program, a policy, a system, a movement, a role, an interaction.



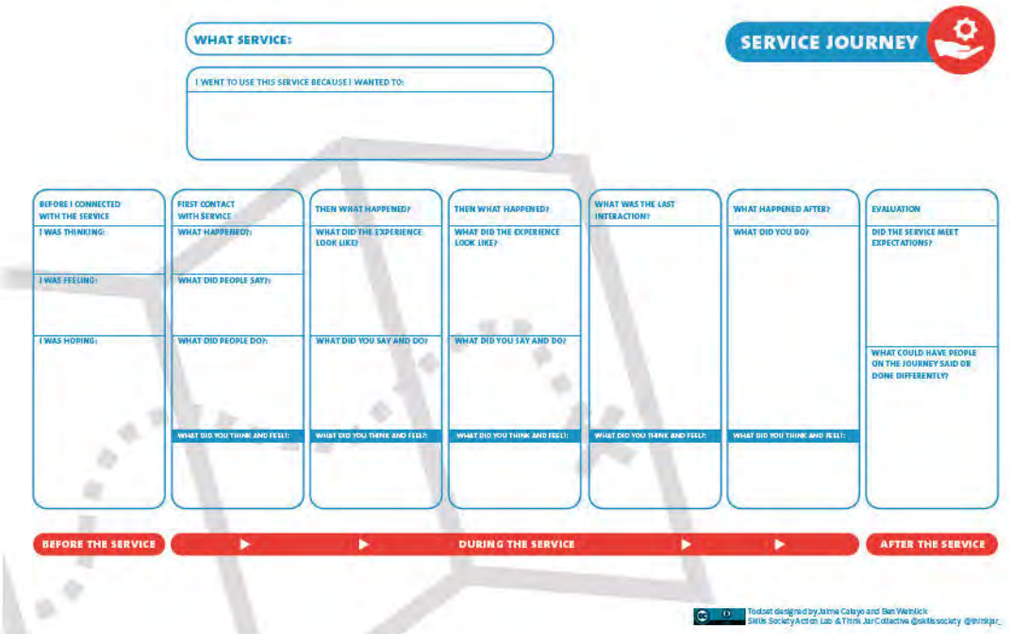


Edmonton Shift Lab Early Prototype that continued to evolve with feedback from community

CHOOSING WHAT PROTOTYPE METHOD

A prototype could be of a product, a service, a program, a policy, a system, a movement, a role, an interaction.

The lab team(s) at this stage will to decide what the best method to make an idea tangible might be.



Service Prototype >

Common Prototype Methods

- If the idea is for a new service or program, you might choose to make a **service journey prototype**
- You might choose to **story board** your idea in steps to illustrate the idea of what your prototype does, what challenge it attempts to tackle and who it helps
- You might prototype a **role play** of a new service, or an interaction
- You might build a **3D model** of the idea out of lego or another material to make tangible the concepts of your prototype
- You might **draw** what a new website page looks like

Role Play Prototype >

PLAI: Parent and child mission kit building

More prototype tools are at the end of the guide

PROTOTYPE CANVAS

This prototype canvas is a good starting place if you're unsure where to start with prototyping. It can help to keep ideas coherent

the Challenge:

the Big Idea:

Who is this for?
What age? Socio-economic status? Interests?

Why this group?
What factors make this group need this product/system/service/experience?

How will you do it?
Key partnerships? Community volunteers?

What are the next steps?
How could you expand on this prototype?

What else is there to consider?
Are there possible challenges that don't have a solution yet?

Tell the Story:

Create a storyboard describing how your prototype works or desicribe the key elements of your prototype visually.

Skills Society Action Lab
designed by Molly McMahon
www.stranger-design.squarespace.com

THINGS TO KEEP IN MIND WITH PROTOTYPING

1. Is the prototype coherent? Will it make sense to others who weren't part of the process?

2. Is the prototype likely to be effective in addressing the challenges and needs that were identified through the sense making activities

3. Is the prototype likely to be feasible?

4. Is The prototype likely to be viable? Could it be supported given policy, culture, resource considerations?

5. Is the prototype testable?

6. Is the prototype really addressing the core challenge still or did the team drift?

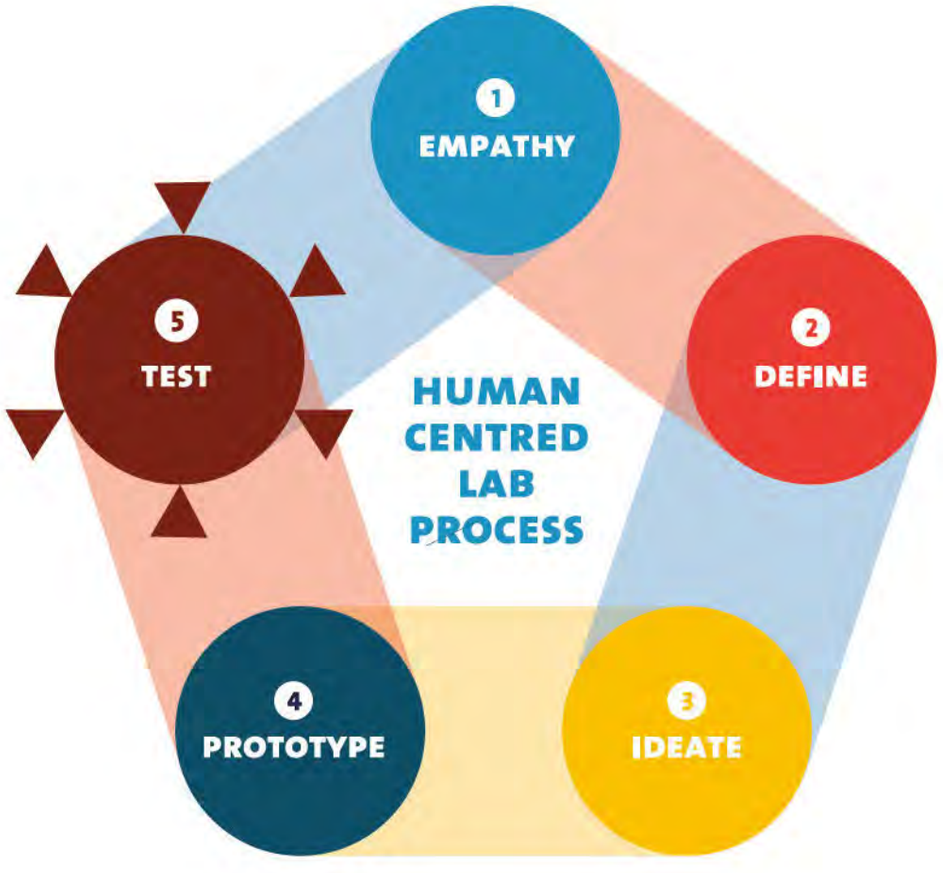
Another activity your team could try right before prototyping and which helps with coherence and feasibility, is for the prototype team to make lists of, Must Haves, Should Haves and Nice to Haves in your prototypes. This helps a team to prioritize the important elements of prototypes

What are the Must Haves of the prototype?

What are the Should Haves of the prototype?

What are the Nice to Haves of the prototype?

LAB PHASE 5: TEST



The fifth phase of the human centered design lab process is about testing prototypes.

Testing prototypes is where we keep our assumptions in check and see what aspects of prototypes land or don't land with people whom a prototype is for.

PROTOTYPE TESTING CONSIDERATIONS

It's a bit scary to test prototypes

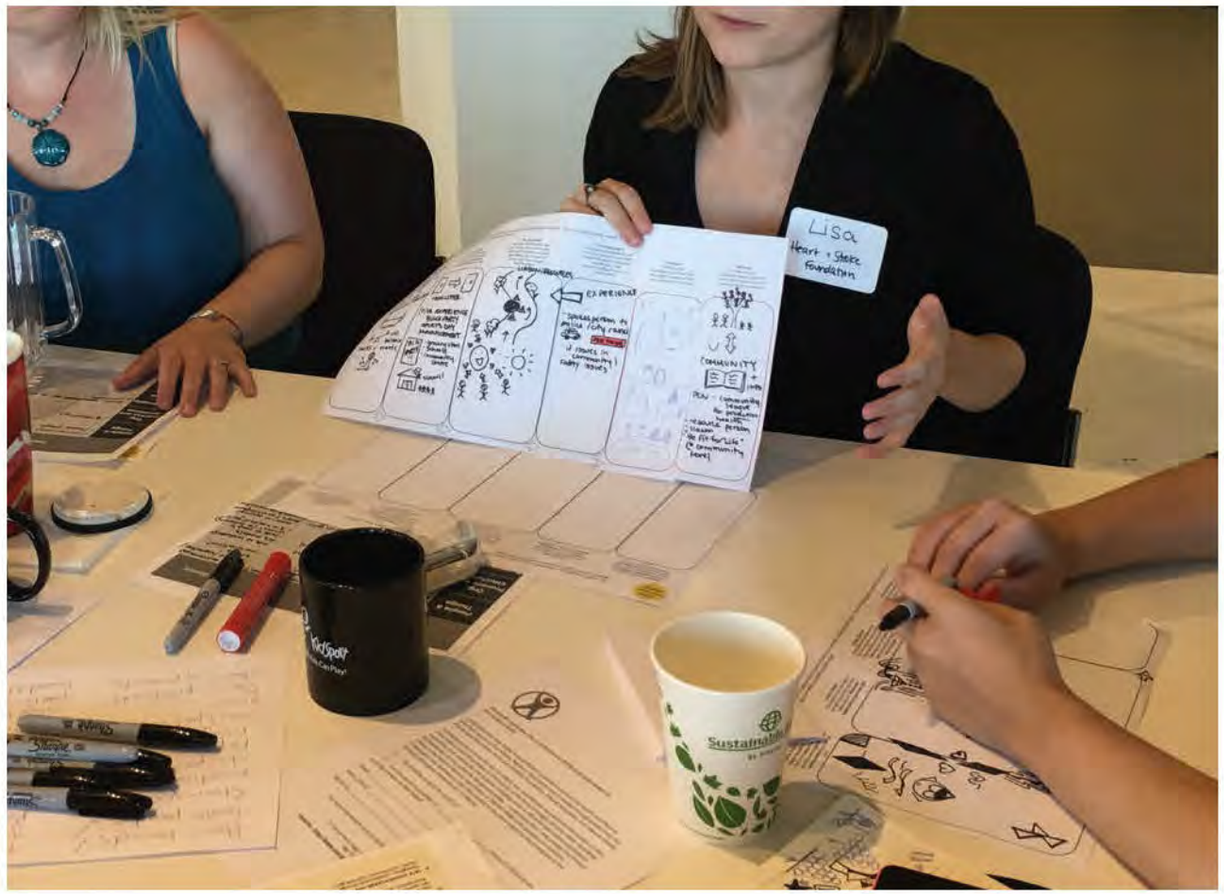
When lab teams test prototypes they often feel a little vulnerable when they go out, share ideas they are excited about and open themselves up to feedback and critique.

Be brave, be willing to be wrong, be humble

Being willing to have your ideas critiqued and challenged is a brave and humbling experience, but when embraced will ensure ideas and prototypes improve so they have deeper impact.

Starting place for testing

If the majority of lab participants are new to labs and prototyping, then we recommend a couple testing rounds among lab participants first before going out into community to test them with people whom the prototypes are supposed to help. This approach will help with building confidence of lab participants to test prototypes humbly and be brave enough to take in feedback



GETTING READY FOR TESTING

Below are some things a lab team will need to think about to plan for feedback

How should the team conduct the feedback sessions?

- What kind of setting would be best?

- What is the lab team going to test?

- What feedback do we need in order to make decisions about the next stage of prototypes?

- Who should test the prototype and give feedback? People the prototype is meant to help? Service or system leaders with domain expertise? A lab advisory?

- Is a large testing session with many people best?

- Is small group testing best?

PITCHING PROTOTYPES

Sometimes a prototype will be so coherent you can simply present it to people and it will be clear how to test it.

Most times however a prototype needs a bit of an intro.

Pick your best communicators on your lab team who can clearly and succinctly explain and pitch a prototype.

When pitching a prototype try the framework below to help with communicating succinctly about a prototype

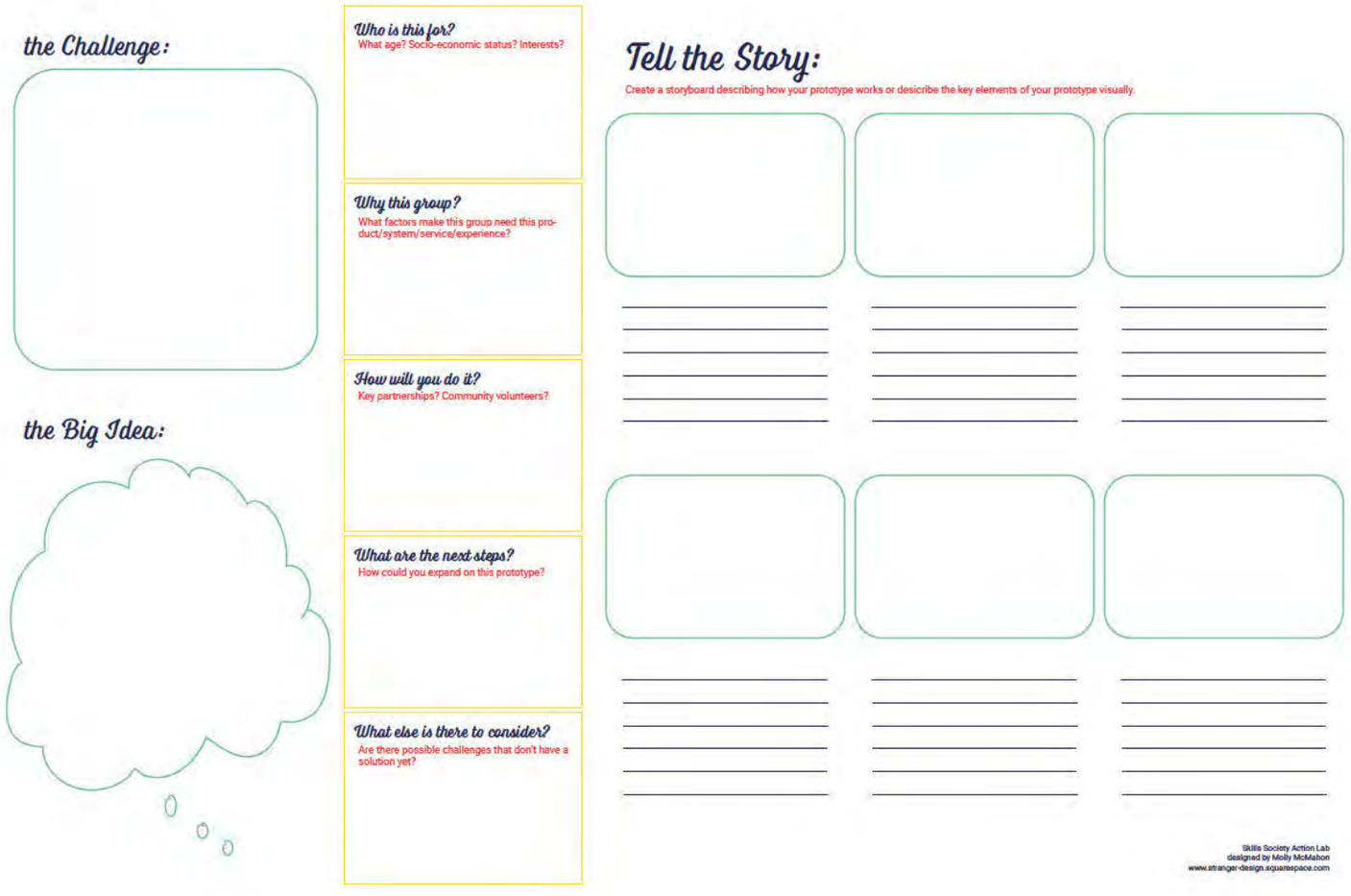
1. Share clearly and succinctly what the challenge was that your lab team was trying to solve for

2.Share in a nutshell what the "Big Idea" of the prototype is

3.Share who the prototype is meant to help

4.Share the prototype and show what it is supposed to do

5.Share what the team at present thinks are possible next steps with the prototype



PROTOTYPE FEEDBACK TOOL

A simple feedback tool is to ask participants testing a prototype to offer feedback within two categories. Feedback givers hear a prototype pitch and then say...

Have you considered the following...

and

Here's an idea I had that might work to make the prototype better

Also ensure a lab team invites testers to ask clarifying questions if something about a prototype is unclear

Have a person record feedback. Alternatively you could have testers write sticky notes of Considerations & Ideas that might work.

Tool - Skills Society Action Lab

FEEDBACK IS FOR DECISION MAKING

After Test Reflections

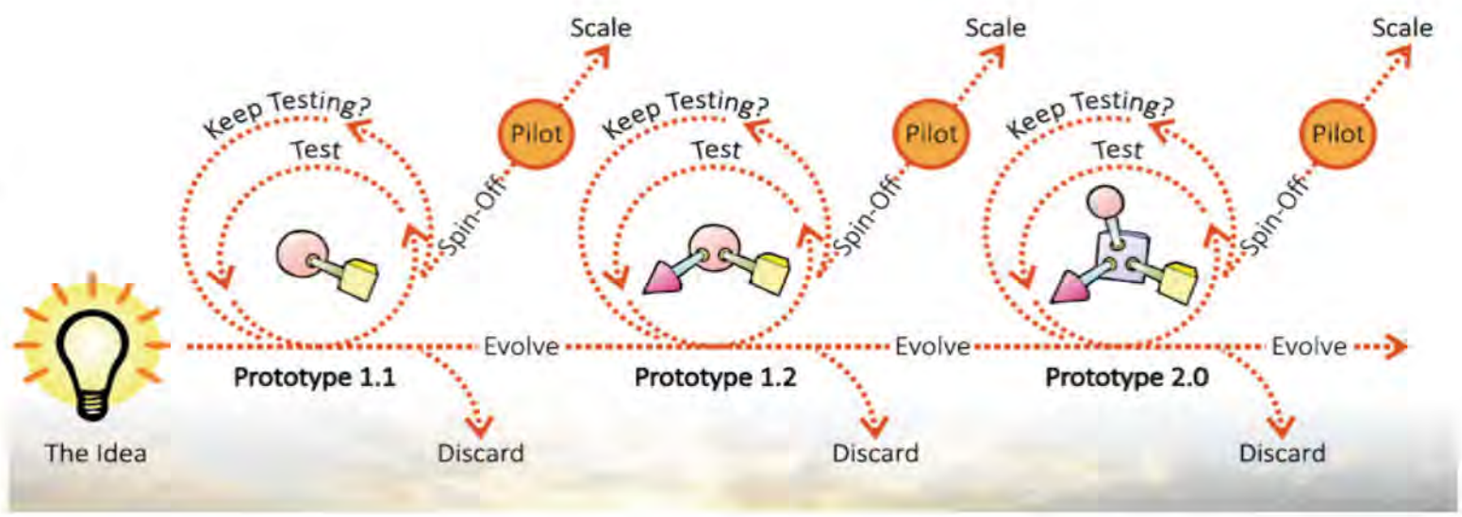
Once you have conducted testing and feedback sessions, it is important for the lab team to reflect and capture what was learned.

Below are reflection questions for after a session. It is good to reflect as soon as possible so that important insights are not lost

- *What did participants really like about the prototypes?*
- *What got people excited?*
- *What pieces seemed to be most important to them?*
- *What parts would participants like to improve?*
- *What didn't work?*
- *What needs further research?*
- *What ideas do I have to improve the prototype based on this session?*

Feedback on prototypes is so a lab team can make decently informed decision about what to do next.
After reflection, a lab team needs to make decisions on what to do with each prototype.

- **Discard?** - Team decides it's not worth continuing
- **Evolve it** - Adapt, Tweak Prototype in some way- Get more user feedback?
- **Graduate to Pilot** - Team and stakeholders feels positive enough to formally pilot
- **Go to Scale** - Test results and feedback so positive that the team is ready to scale without further testing
- **Keep Testing** - Results of testing weren't strong enough to make decisions at this time. Upgrade the evaluation design and try again



Graphic by Mark Cabaj

IMPLEMENTING STUFF THAT COMES OUT OF LABS

As it becomes clearer from multiple testing rounds of prototypes that a lab team has a promising pilot or intervention to roll out, questions begin to arise around how to implement, who should implement and what should be implemented from a social innovation lab.

This section offers some guiding principles and practical advice to get started on a path of implementation.

LABS & IMPLEMENTATION

Lab History With Implementation

At present many social innovation labs in the world struggle with the implementation side of interventions that emerge from lab processes. Some labs currently are wondering whether their purpose is to implement or whether a lab should focus on stewardship of lab processes to help diverse groups to navigate complexity, generate new knowledge, ideas and prototypes and then hand off implementation to others with implementation skill sets. However, a cold handoff is not the best option as handing off interventions to others without experience of a lab journey can cause a lot of knowledge that is key to implementation to be lost.

Different Lab Approaches and Implementation Complexity

Design Labs are a bit better at implementation pathways because they are often working with practical, little bit less complex outcomes. Often outcomes from Design Labs are services, programs, or products.

Social Innovation Labs often have a mix of learning outcomes around the challenge area and tangible service, or program interventions that might be good candidates for implementation.

Social Labs often generate lab participant learning insights, a reframe of the core problem and/or guiding principles as pathways forward from the lab process. Due to the complexity of social lab outcomes, they are often the hardest to implement something practical or tangible.

Implementation is an area many labs are recognizing they need to get better at or need to bring in people with implementation skillsets at times of implementation.

Well it's complicated...

IMPLEMENTATION CONSIDERATIONS

These considerations are only starting places for implementation

Consider what minimum resources are required to pilot an intervention

Consider who might be best to implement

It is often assumed that social innovation lab collectives will also implement promising prototypes, pilots or interventions that emerge from a lab process. Keep in mind that labs implementing a pilot is not always the best way forward, as often a lab team is not necessarily the right group to implement an intervention. They may not be best to implement because an intervention might be best hosted and managed by a group whom the lab team is not directly connected with. Consider who the intervention serves, and who in the challenge domain ecosystem might be good champions to steward a pilot. You might want to consider that a couple people from the lab team be a part of helping steward the transition between the lab and implementation hosts.

Consider readiness factors for organizations piloting an intervention

If an organization is deemed to be the best steward of a pilot, the lab team will need to consider the culture and readiness of the organization to adopt and roll out an intervention. Consider how the intervention will disrupt business as usual approaches of the organization and what is needed to safeguard the implementation process.

Design By Doing Lab

IMPLEMENTATION CONSIDERATIONS CONTINUED

Consider there will need to be evaluation of pilots and learning from implementation

Consider there will still need to be iteration

You will still need to be tweaking, gaining feedback and adapting a pilot or intervention. And seriously, you're never really done the feedback learning loops. Remember that all innovations/interventions have a life cycle.

Consider bringing in implementation support

Although tech startups don't really work in complex domains like social innovation labs do, lean startup principles can sometimes be useful at the implementation stage for honing interventions coming out of Design Labs and Social Innovation Labs. Tools from lean startup methodologies that might be used at this stage can be

- Business model canvas

- Value Proposition Design

- Minimum Viable Product

Consider it might be better to have smaller implementation teams

A large lab collective may push that they want to continue to be involved in all decisions about implementing an intervention. With implementation, smaller teams are best for sorting out details. Have conversations about how to keep the previous lab collective informed, but also how to safeguard an implementation team to have agility with decision making.

Design By Doing Lab

SCALING

For an intervention to really be social innovation, it has to strive for systemic impact and get to root causes of a complex issue. A pilot that is really innovative and useful to one organization does not mean the organization has developed a social innovation.

What this means for Social Innovators

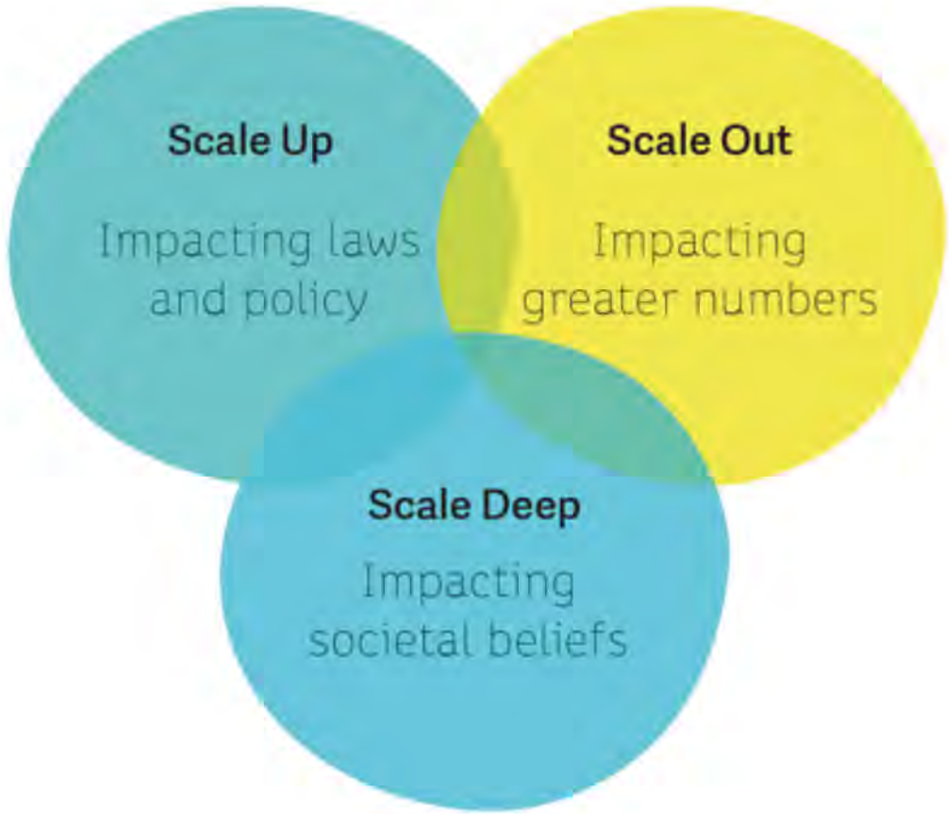
Social Innovators usually get into labs and social innovation because they want to make a dent in the universe. Or at least nudge systemic change in a positive direction.

You don't really need to get into social innovation labs, if organizations want some better processes, creativity and services that meet needs of the people they serve. If organizations want innovation but don't necessarily want to nudge systems beyond their organization, then Design Labs are often the way to go to make sense of organizational challenges, and co-design solutions with organizational stakeholders. Design Labs are powerful processes for uncovering solutions that work.

If people and organizations want to make bigger systemic impact around a challenge that affects many stakeholders in a system, then striving to think about what interventions and processes are most likely to yield systemic impact is key.

Reflecting on and framing scaling of solutions through the lens of Scaling up, Scaling out and Scaling Deep can be a good exercise for a lab collective and implementation team to explore in order to make informed decisions and work towards social innovation.

Keep in mind that Scaling Deep usually takes many many years, and often generations to impact. It's big work that takes big picture thinking and action.

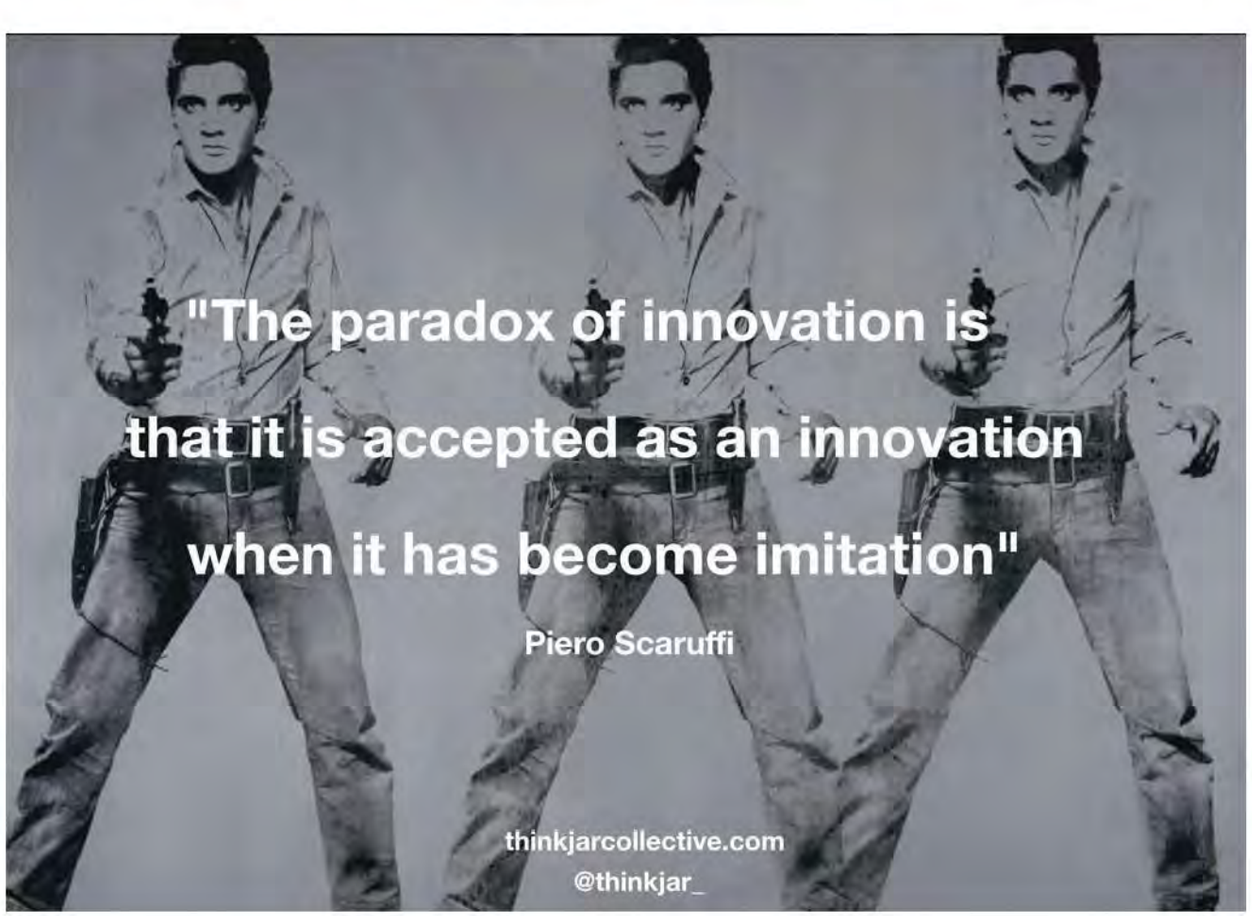


Scaling out, scaling up, and scaling deep for social innovation.[1]

- **Scale Up:** changing institutions at the level of policy, rules and resource flows
- **Scale Out:** replication and dissemination, increasing number of people or communities impacted
- **Scale Deep:** changing relationships, cultural values and beliefs, "hearts and minds"

Riddell, D., Moore, M. (2015) Scaling Out, *Scaling Up, Scaling Deep: Advancing Systemic Social Innovation and the Learning Processes to Support it*. The J.W. McConnell Family Foundation.

TENSIONS AND PARADOXES IN LABS



By now it should be apparent that social innovation labs are complex and the issue's they tackle are also complex. There aren't silver bullet solutions, but there are some silver buckshot patterns.

Labs are kind of a Zen-like thing where if you think you've got it, your grasping at an"it" to nail down means you've lost it. That said, we didn't want to leave hopeful lab practitioners hanging with vagaries, so we offered our present best learning and practical patterns of successful social innovation labs. Please remix into your own lab approach and let us know what you've learned.

One thing we have found is that if you are really navigating complexity with humility, and willingness to have your assumptions rocked, then you'll find you have a mindset that is able to hold and flow with paradoxes and tensions that arise.

This section offers some common tensions and paradoxes you'll likely come upon when getting into labs.

Just Some of The Tensions That Will Likely Arise & Require Stellar Stewardship To Navigate And Harness

Systems View	<>	View of Individuals
Systems Thinking	<>	Design Thinking
Democratic Decision Making Process	<>	Rapid Feedback Decision Making
Experienced Perspectives	<>	Fresh or New Perspectives
Privileged Perspectives	<>	Marginalized Perspectives
Really Good Ideas To Implement But Come From A Privileged Expert	<>	Passionate Ideas From People With Lived Experience But The Ideas Don't Address The Issue
Making Systemic Interventions	<Tension>	Making Interventions Needed By People Lab Teams Have Connections With
Quantitative Data	<>	Qualitative Data
Doing What Lab Participants Are Used To	<>	Trying New Processes & Approaches
Traditional Knowledge In A Domain	<>	New Knowledge To Be Generated
One Perspective	<>	Another Perspective
Addressing Root Causes of Issues	<>	Addressing Symptoms
Designing Solutions With Domain Experts	<>	Co-Designing Solutions With People With Lived Experience
Systems Perspective Is Too Abstract To Work With	<>	Pragmatic Design Perspective Is Short Sighted

THE PARADOX OF CO-DESIGN

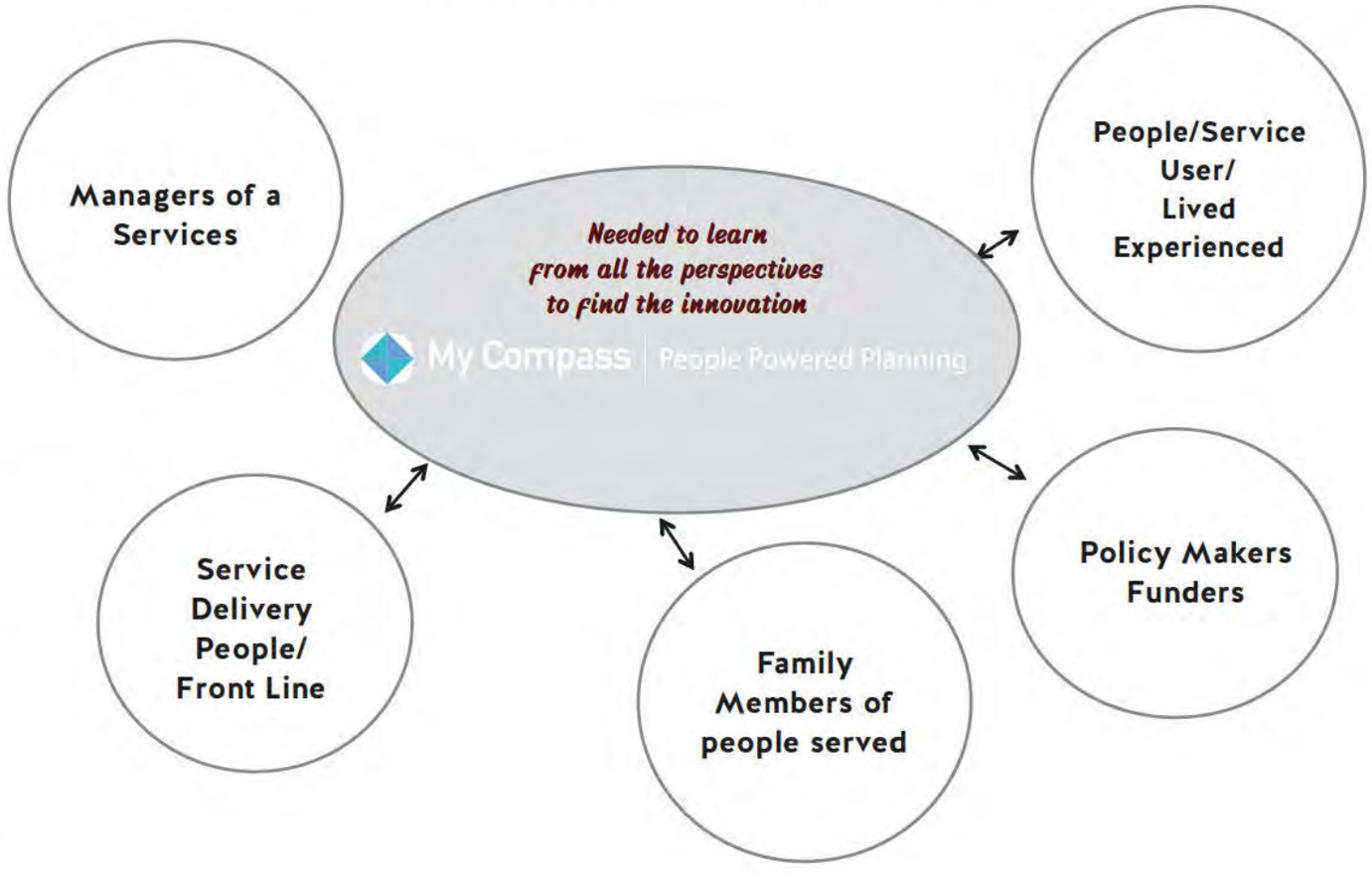
Co-Design is a concept in Design where solutions are designed with insights and input from users of the solutions.

Often when lab teams first learn about social innovation labs and the concept of Co-Design, they rightfully get excited that work will be done to listen to the too often forgotten voices of people with lived experience of a complex problem domain. While the excitement around co-design is well placed, what often is missed is that good solutions come about not just from one perspective on a complex issue but from many perspectives and insights.

We don't come from traditional Design education backgrounds, but from backgrounds and education in social justice and human rights approaches to systems change. The notion of co-designing solutions with the most marginalized is deeply aligned with social justice and truly does help to ensure potential solutions fit with people. Power is unbalanced in systems and too often the voice of lived experience is missing from solutions in business as usual approaches to problem solving.

All that said, a robust social innovation lab needs to learn from and gain insights on a complex problem from all the stakeholders in a system. It doesn't work to listen only to one voice, whether that voice is from experts or marginalized voices. You never know where surprising insights and good ideas might come from on a lab journey, so plan for learning from many perspectives around the challenge domain. Get ready for many head scratching tensions that challenge assumptions.

Example: *How might we create a flexible, more people centred social service case management and reporting process that works for person's served and reporting to funders?*



Co-Design Activities and Insights happened with all stakeholders to create this social innovation called MyCompass Planning ,which is on its way towards making systemic impact to humanize the planning and case management experience in social services www.mycompassplanning.com

THE PARADOX OF DEMOCRATIZING SOLUTION FINDING

At times in a lab there will be a variety of processes that democratize choices, consensus and decision making. Whether you are using Dotmocracy to identify leverage points in a system to intervene around, or to make decisions on what ideas to choose to prototype around, democratized decision making is woven throughout labs. These processes are very useful to get some sense of what a lab team is focusing on and feels is important to pay attention to, however after being around and in labs for a while, we bet that you'll begin to wonder if democratic group consensus building is always the right approach to uncover good solutions. Making good choices and decisions in labs is one of those things where you'll need to find a radical middle between two extremes. There will be tension to navigate.

Alternatives

It's not a great option to be a tyrant or pull an expert card as justification for making a decision, but there are a few things that might help.

Rather than simply accept whatever decision or choice has the most votes and then going forward, your team will need to reflect together when decisions are about to be made, asking each other things like,

- Why do we think this decision or direction is the best one?
- Do we think the choice fits with the nature of the challenge we are tackling? Why?
- What do we think we might be missing or not seeing?

"It's really hard to design stuff through focus groups. A lot of times people don't know what they want until you show it to them"
- Steve Jobs

Often the "right" decision is to try a variety of approaches and see what's promising

More often than not, you won't really know if a decision was "right" until you get something out into the system to test and get feedback on. Don't get stuck in action paralysis or be too risk averse, be brave to try something, place small bets, get feedback and see what promising signals emerge.

LAB EVALUATION

"Many forms of evaluation are the enemy of social innovation if applied at the wrong time or in the wrong way. But serious social innovators want to make a difference, and need some way of determining whether what they are doing is actually working. The right kind of evaluation can be a powerful tool to help the social innovator stand still and take stock."
Zimmerman, Westley, Quinn Patton, Getting to Maybe, 2006

Developmental Evaluation (DE) is a big topic. If you haven't learned about it before, you will likely have misunderstandings about what it actually is because of common associations people have with the word "evaluation". You might find DE is not what you think.

This section of the field guide offers a basic lab practitioner perspective on evaluation to hopefully impress upon a lab team the importance of adapting to emergent feedback and learning that arises all the way through a social innovation lab process

To really do DE right consider bringing along a developmental evaluation lead to help a social innovation lab team to develop, test and adapt interventions tackling tough problems in a number of ways:

1. Asking evaluative questions

2. Providing real time feedback

3. Making sense of data and linking to decisions in real time

4. Tracking the emergence, evolution and adaptation in a would-be social innovation

WHAT IS DEVELOPMENTAL EVALUATION IN A NUTSHELL?

Guiding Principles of Developmental Evaluation for Labs

•Developmental Evaluation (DE) is about supporting social innovators to tackle complex challenges

•DE focuses on development (versus improvement, accountability or summative judgment) and encourages strategic, emergent learning

•DE employs participatory approaches with stakeholders in a lab to define what the "it" of what is to be learned from a lab is

•DE helps a lab to explore and adapt to emergent feedback

•DE helps a lab team to explore what they are learning about the problem/challenge and it's context and where there are areas of promise emerging

•On a practical level for labs, DE helps a lab team to learn and make decisions that inform workshop design, prototype iterations, and reflective learning activities for lab teams

Adapted from Mark Cabaj & Michael Quinn Patton

Developmental evaluation (DE) informs and supports innovative and adaptive development in complex dynamic environments
- Michael Quinn Patton

Different Evaluation Types

PURPOSE	TYPICAL QUESTIONS	TYPICAL METHODS	EXAMPLES
DEVELOPMENTAL: to create, adapt & scale interventions in complex, emergent and dynamic conditions.	What are we learning about the challenge and the context in which it is embedded? What ideas are promising and not? What are options for the next chapter of the program	▪ Real Time Feedback ▪ Rapid Rural Appraisal ▪ Positive Deviance	A collaboration of diverse organizations work to create a new and evolving homelessness reduction strategy based on housing first principles in a constantly evolving city.
FORMATIVE: to improve the design and delivery of an intervention.	What is working well and not so well? What are the kinks we need to work out or refinements? How can we improve results or reduce costs?	▪ Total Quality Management ▪ Continuous Improvement ▪ Six Sigma	A team of experts works with a hospital emergency room to reduce waiting room times using 90-day Plan-Do-Study-Act cycles.
SUMMATIVE: to judge the merit or worth of an intervention in order to determine if it should be sustained, replicated or discontinued.	Are the outcomes meeting expectations? Are the benefits worth the costs? What parts of the model are critical in replicating the model?	▪ Impact Evaluation ▪ Contribution Analysis ▪ Cost-Benefit Evaluation, Social Return on Investment	An external group of evaluators evaluates whether a community safety pilot program has prevented at-risk kids from joining gangs.
MONITORING: to track routine data on a program and the context in which it is operating to determine if further investigation is required.	Are inputs, activities and outputs flowing smoothly? Anything going on in the environment we should worry about or address?	▪ Scorecards & Dashboards ▪ Performance measurement ▪ Environmental scans	A Chamber of Commerce monitors the ebb and flow of membership, their annual feedback on needs & policy changes related to local businesses.
ACCOUNTABILITY: to demonstrate good management and adherence to plans and targets.	Are resources well used? Are we doing what we said we would do? Are we following the model with high fidelity?	▪ Program audits ▪ Accreditation & Licensing ▪ End of Project Administrative Reports	A childcare program undergoes a licensing review; an agency submits an annual report of their activities and results to their funder.
KNOWLEDGE DEVELOPMENT: to reflect on post-project learnings and identify general principles of effectiveness to inform future interventions.	What lessons did we learn from this project? What principles can be extracted across similar programs to inform future practice?	▪ Lessons Learned Report ▪ Failure Reports ▪ Meta-Evaluation ▪ Effective practice studies	The managers, investors and investees of a Venture Philanthropy Fund participate in a series of "post-mortem" reviews to identify and distill "lessons learned" after the fund closes its door.

Adapted from Patton, M. Q. (2008). Utilization-Focused Evaluation. Fourth Edition. Los Angeles, CA: Sage Publications. Page 104-141.

CAUTION!

On the next pages there are a few DE lab tools that can help lab teams capture what they are learning from the process of their social innovation lab. However, the handful of tools are not a substitute for a Developmental Evaluation lead with expertise in how to work with a lab team within complex dynamic domains.

The Lab evaluation tools on the following pages are only starting places for lab teams to reflect on what they are learning from a lab process.

If you really want to do Developmental Evaluation well in a social innovation lab, much more nuanced work will need to be explored that can't be captured with a tool.

Some good news though

There are a small and growing number of Developmental Evaluators in Canada. Check out the Innoweave program's list of coaches, many of whom are located in Alberta. http://innoweave.ca/en/modules/developmental-evaluation/coaches

DE Resources and Tools

http://www.betterevaluation.org/en/plan/approach/developmental_evaluation

Innoweave
Practical Tools for Social Innovation

SiG

Here to There

Development Evaluation Workshop

Developing a User Profile

Introduction

One of the central challenges of any evaluation is to design and implement an evaluation where the would-be users of the evaluators are likely to use the results to inform their thinking and action. This can by embracing a customized-approach to designing and evaluating an innovation, which is tailored to the key questions and preferences of the evaluation users, rather than a cookie-cutter solution which may not yield "fit" the expectations of different users.

The Questions

There are five questions that need to be answered to developing a user profile. These include:

#1: Primary Intended Users: Who are the primary intended users of the evaluation?

#2: Major Questions: For each primary intended user, what are the questions they would like answered in the evaluation?

#3: Primary Intended Use: What is the primary intended users *primary intended use* of the evaluation findings(aka what decisions will they make with?

#4: Preferences: What are the key features to keep in mind to improve the probability that primary intended users "use" the evaluation findings ('interpretive lens', preferences for data and methods, their interest in participating in making sense of the findings)?

#5 Windows of Use: When does this primary user need the evaluation feedback?

The Activity

Develop a preliminary user profile for up to five users of your development evaluation by filling out the following table. You will be in a position to complete the user profile for these users (and others) with the assistance of your evaluator.

Primary Intended User	Major Questions	Primary Intended Use (What decisions will they make?)	Preference	Windows of Use
1.				
2.				
3.				
4.				
5.				

Interested in More? Read Michael Quinn Patton's book, Essentials of Utilization-Focused Evaluation. Sage Publications. 2011.

MOST SIGNIFICANT CHANGE EVALUATION

What was the most significant change for you as a result of learning about and applying Human Centred Design Thinking?

You might want to draw that most significant change, because you're a design thinker now and you make your ideas visual!

What are some ways you think you might apply Human Centered Design Thinking and a lab approach in your own practice? How would you like to see it applied?

LEARNING FROM PHASES OF HCD

What was your Human Centered Design Thinking challenge ?

How Might We…

Let's reflect and tell each other the story of what we learned from the Human Centered Design Thinking Process.
For each phase of the process choose your Top Aha Insight! 1 key thing you're Wondering About and 1 key thing to keep in mind that would help others going through a HCD lab exploration

Empathy
Stories
Ethnographic Research
Sense Making
Systems Mapping

My Aha_____

I'm wondering now…

A key thing to keep in mind in this phase is…

Define
Making sense of needs and insights from stories
How Might We Questions

My Aha!_____

I'm wondering now…

A key thing to keep in mind in this phase is…

Ideate
Brainstorming
Getting ideas from other fields
Sketching ideas
Building on ideas of others

My Aha_____

I'm wondering now…

A key thing to keep in mind in this phase is…

Prototype
Choosing ideas that could meet needs
Making prototypes of what a service or innovation could look like

My Aha!_____

I'm wondering now…

A key thing to keep in mind in this phase is…

Testing
Checking our prototypes with each other
Checking our prototypes with user groups

My Aha_____

I'm wondering now…

A key thing to keep in mind in this phase is…

Quotes that stand out from your experience

LAB WORKSHOP EVALUATION

Lab Participant Feedback Form

1. What is most alive for you after today's session (a feeling, a question, an idea)?

2. What worked best for you in today's session? Why?

3. What did not work for you as well? Why?

4. So what are the implications of today's session for your next steps in the Lab?

Edmonton Shift Lab and based on Developmental Evaluation questions from Mark Cabaj

5. Please rate the workshop logistics.

	Very Dissatisfied	Somewhat Dissatisfied	Satisfied	Very Satisfied	Completely Satisfied
Time for interaction	1	2	3	4	5
Intensity and pace	1	2	3	4	5
Overall tone/mood	1	2	3	4	5
Mix of lecture/exercise	1	2	3	4	5
Meeting Space	1	2	3	4	5
Location in City	1	2	3	4	5

Comments:

6. Please rate the facilitators.

	Strongly Disagree	Disagree	Neither Agree of Disagree	Agree	Strongly Agree
Responded to feedback	1	2	3	4	5
Managed tensions well	1	2	3	4	5
Held my attention	1	2	3	4	5
Answered questions	1	2	3	4	5
Made expectations clear	1	2	3	4	5
Stimulated my interest	1	2	3	4	5
Were well prepared					

Comments:

7. What advice do you have that the Lab Stewardship team should consider to develop the next workshops and steps in the Lab?

Prototype: _____

To what extent is this prototype likely to be effective in achieving what we want to achieve?	
To what extent is this prototype likely to generate unintended effects (both positive and negative)?	
To what extent is this prototype likely to be feasible in the real world?	
To what extent is this prototype likely to be viable in our current context (economic, political, social, etc.)?	
To what extent is this prototype likely to be supported by key stakeholders?	
To what extent is this prototype scalable for bigger impact?	
What are we learning about the challenge we are trying to address?	
What are we learning about the broader context and/ or systems in which our challenge and opportunity are embedded?	
What did we learn about the capacity of our innovation team?	
What has changed in the working relationship amongst our team members?	

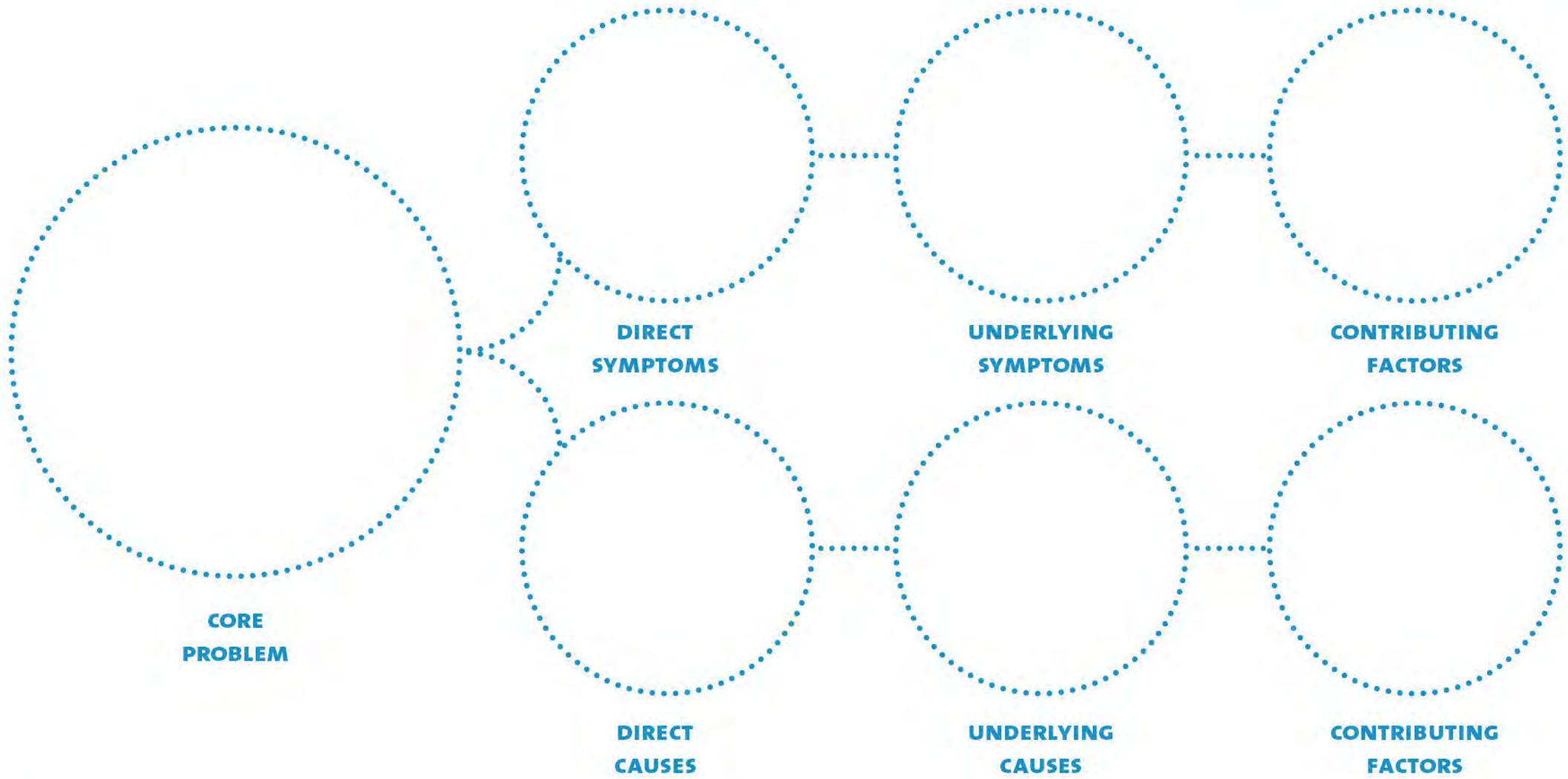
Adapted from Mark Cabaj prototyping evaluation

LAB TOOLS

Edmonton Shift Lab Engaging in an Iceberg Analysis

A Selection of Design & Systems Thinking Tools

CORE PROBLEM MAP



CAUSES ARE THE REASON WHY SOMETHING HAPPENS

SYMPTOMS ARE WHAT WE SEE AS A RESULT OF THE PROBLEM

STORY + KEY DEMOGRAPHICS + HOPES + NEEDS + WISHES

USER PROFILE PICTURE

MAP OF AN EXPERIENCE JOURNEY

NAME

STORY + KEY DEMOGRAPHICS + HOPES + NEEDS + WISHES

USER PROFILE PICTURE

WHAT KIND OF EXPERIENCE JOURNEY

CIRCLE ONE

- ◯ PERSONAL
- ◯ SERVICE
- ◯ SYSTEM

DESCRIBE:

AFTER THE JOURNEY FILL THIS OUT

WHAT WAS A KEY LEARNING?

WHAT WERE THE KEY CHALLENGES OR PAIN POINTS?

WHAT MIGHT HELP?

MY IDEAS ABOUT:

PERSONAL SHIFT JOURNEY

IN THE PAST, I SAW THE WORLD AS:

PAST

BECAUSE OF THESE REASONS:

I SEE THE WORLD THIS WAY NOW:

NOW ..... **FUTURE**

MY HOPES FOR THE FUTURE:

DRAW OR WRITE KEY EVENTS OF YOUR EXPERIENCE ► PLACE THEM IN SQUARES

DRAW OR WRITE KEY EVENTS THAT SHIFTED YOUR PERSPECTIVES,THINKING, VALUES TO CHANGE ► DRAW A LIGHTBULB NEXT TO IT

AFTER YOU HAVE MADE YOUR PERSONAL SHIFT JOURNEY MAP, REFLECT AND FILL OUT THE FOLLOWING:

CHANGED FROM THESE ASSUMPTIONS, VALUES, PERSPECTIVES:

TO THESE ASSUMPTIONS, VALUES, PERSPECTIVES:

BECAUSE THESE THINGS HAPPENED:

My Story:

SHIFT JOURNEY

The Challenge I faced

I learned the following...

PAST

NOW

FUTURE

Because of this...

Now I will consider the following when faced with challenges in the future

DRAW OR WRITE KEY EVENTS OF YOUR EXPERIENCE ► PLACE THEM IN SQUARES

DRAW OR WRITE KEY EVENTS THAT SHIFTED YOUR PERSPECTIVES,THINKING, VALUES TO CHANGE ► DRAW A LIGHTBULB NEXT TO IT

AFTER YOU HAVE MADE YOUR JOURNEY MAP, REFLECT AND FILL OUT THE FOLLOWING:

What key things helped you along the way?

What do you think wouldn't have helped or made things worse?

What would your current self say to your past self around the challenge you needed help getting unstuck from?

SERVICE JOURNEY

WHAT SERVICE:

I WENT TO USE THIS SERVICE BECAUSE I WANTED TO:

BEFORE I CONNECTED WITH THE SERVICE	FIRST CONTACT WITH SERVICE	THEN WHAT HAPPENED?	THEN WHAT HAPPENED?	WHAT WAS THE LAST INTERACTION?	WHAT HAPPENED AFTER?	EVALUATION
I WAS THINKING:	WHAT HAPPENED?:	WHAT DID THE EXPERIENCE LOOK LIKE?	WHAT DID THE EXPERIENCE LOOK LIKE?		WHAT DID YOU DO?	DID THE SERVICE MEET EXPECTATIONS?
I WAS FEELING:	WHAT DID PEOPLE SAY?:					
I WAS HOPING:	WHAT DID PEOPLE DO?:	WHAT DID YOU SAY AND DO?	WHAT DID YOU SAY AND DO?			WHAT COULD HAVE PEOPLE ON THE JOURNEY SAID OR DONE DIFFERENTLY?
	WHAT DID YOU THINK AND FEEL?:	WHAT DID YOU THINK AND FEEL?:	WHAT DID YOU THINK AND FEEL?:	WHAT DID YOU THINK AND FEEL?:	WHAT DID YOU THINK AND FEEL?:	

BEFORE THE SERVICE ▶ ▶ DURING THE SERVICE ▶ ▶ AFTER THE SERVICE

Z.I.P. ANALYSIS

ZOOM IN
–what could be magnified and explored more

INNOVATION OPPORTUNITY
–or way to intervene to improve system

PROBLEM AREA
–or tricky areas to navigate

Tools- Skills Society Action Lab

MAKE YOUR IDEAS VISUAL

YOU MIGHT TRY MAKING AN IMAGINED STORY JOURNEY OF WHAT YOUR SERVICE INNOVATION LOOKS LIKE.
TRY TO NOT JUST USE KEY WORDS. DRAW. SHOW THE FEELINGS AT EACH STAGE AND WHAT IS NEEDED AT EACH STAGE.

PRE-SERVICE

WHAT ARE THEIR INITIAL THOUGHTS AND FEELING? WHAT IS THE PERSON WHO WILL USE YOUR NEW SERVICE THINKING AND FEELING BEFORE THEY CONTACT YOU?

INITIAL CONTACT

How does the user hear about and get in touch with your new stellar service? What does stellar first contact look like?

ON THE JOURNEY

WHAT DOES THE EXPERIENCE LOOK LIKE? Who do they connect with? WHAT DOES THE SERVICE LOOK LIKE? WHAT FEELING DO YOU WANT THE USER TO HAVE AT EACH STAGE? MAP THE STAGES

ON THE JOURNEY 2

WHAT DOES THE EXPERIENCE LOOK LIKE? HOW WILL YOUR SERVICE HELP PEOPLE IF THINGS DON'T ALWAYS GO AS PLANNED? WHAT TROUBLESHOOTING WILL YOUR NEW SERVICE OFFER?

THE GOAL!

FILL THIS OUT FIRST
WHAT DOES SUCCESS LOOK LIKE?
WHAT MIGHT SUCCESS FEEL LIKE?
DRAW AND LIST THE INTERACTIONS

WHAT WAS YOUR CHALLENGE

WHAT'S THE BIG IDEA?

the Challenge:

the Big Idea:

Who is this for?
What age? Socio-economic status? Interests?

Why this group?
What factors make this group need this product/system/service/experience?

How will you do it?
Key partnerships? Community volunteers?

What are the next steps?
How could you expand on this prototype?

What else is there to consider?
Are there possible challenges that don't have a solution yet?

Tell the Story:

Create a storyboard describing how your prototype works or desicribe the key elements of your prototype visually.

Skills Society Action Lab
designed by Molly McMahon
www.stranger-design.squarespace.com

For digging in to “Global” systemic challenges

Events: Surface level issues and challenges we see and hear around the core issue we’re exploring.

The Patterns: If we look just below the event level, we often notice patterns. What keeps happening?

Systemic Structures: “What is causing the pattern we are observing?” the answer is usually some kind of structure.

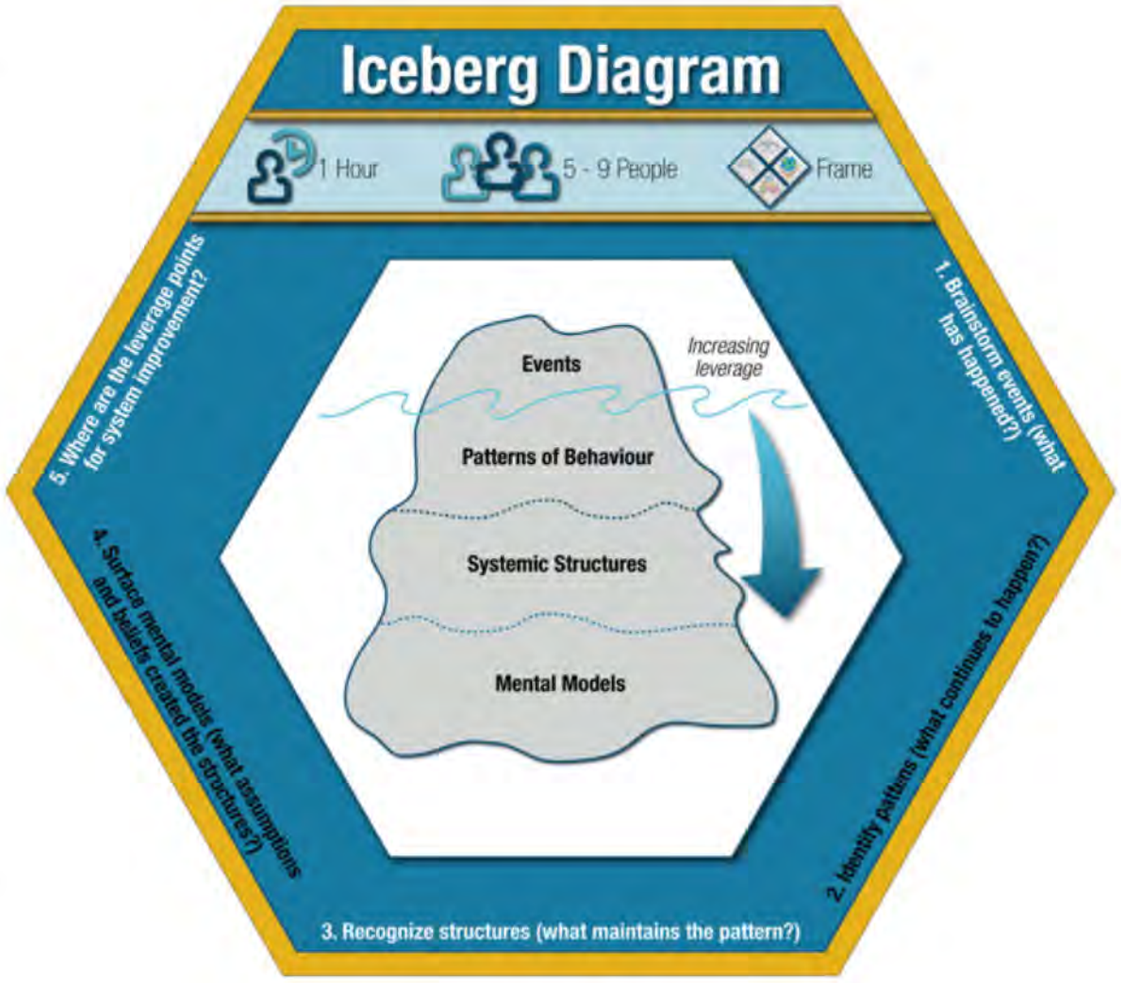
1. Physical things — Places, built environments, roads, offices

2. Organizations — like corporations, governments, and schools.

3. Policies — like laws, regulations, and tax structures.

4. Ritual — habitual behaviours so ingrained that they are not conscious.

Mental Models: Attitudes, beliefs, morals, expectations, and values that allow structures to continue functioning as they are. These are the beliefs that we often learn subconsciously from our society or family and are likely unaware of.



Graphic- AB CoLab

INSPIRATION AND LINKS

A selection of recommended readings, and websites to help you with your social innovation lab practice

Click Red Text for Websites

SOCIAL INNOVATION LABS THAT INSPIRE

Energy Futures Lab

InWithForward

Edmonton Shift Lab

Skills Society Action Lab

MaRs Solutions Lab

Government of Alberta CoLab

Winnipeg Boldness Project

Citizen Action Lab

Participle

Nesta UK

ARTICLES ON LABS & CREATIVITY

Design By Doing Lab- End Poverty Edmonton

So you want to start a design lab- Jonathan Veale

Essential Creative Problem Solving Process- Think Jar Collective

Tools and Culture of Innovation - Think Jar Collective

History and Future of Policy Innovation - DR. Alex Ryan

The Alberta CoLab Story - Dr.Alex Ryan

EVALUATION

Better Evaluation Website

VIDEOS ON LABS

Early Iteration of Citizen Action Lab

InWithForward Videos

TOOLS FOR LABS

SIG - Social Innovation Generation Hub for Labs- Tools

Divergent Thinking and Creative Problem Solving Tools for Ideation- Think Jar Collective

ABSI Connect Vault of resources

Citizen Action Lab Field Guide

PILOTS AND INTERVENTIONS FROM LABS

Kudoz - InWithForward

Citizen Action Lab - Skills Society

MyCompass Planning- Humanized Case Management

Innovation Pathways - Energy Futures Lab

AUTHORS

BEN WEINLICK, MA

Ben is driven by the desire to help people and community get better at navigating complex challenges together. He is the founder of Think Jar Collective, co-founder of MyCompass Planning and a senior leader at Skills Society leading Social Innovation R&D. Ben regularly trains organizations and facilitates human centred design lab explorations around complex issues for the public sector, non-profits and community. For his work striving to lead systems change in human service organizations over the last 15 years he has received some awards including the MacEwan University distinguished alumni award, the Government of Alberta Community Disability Service Sector Leadership Award and the Avenue Top 40 under 40 award.

@thinkjar_ @weinbenlick

www.thinkjarcollective.com | www.skillssociety.ca
bweinlick@gmail.com

ALEEYA VELJI, M.ED.

Aleeya is a budding social innovator who enjoys cycling, BMX, and gardening. Aleeya thinks in systems and developed her understanding of complex environmental, social, and economic challenges through her work as an educator, an ABSI Connect Fellow, and as an intrapreneur at the City of Edmonton. Aleeya currently shares her brain with Studio 44 the Edmonton Shift Lab and ABSI Connect, exploring how to infuse design thinking and systems thinking into the daily work habits of large and small organizations.

@aleeyavelji @ABSIConnect

Notes, Thoughts, Ideas, Questions

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