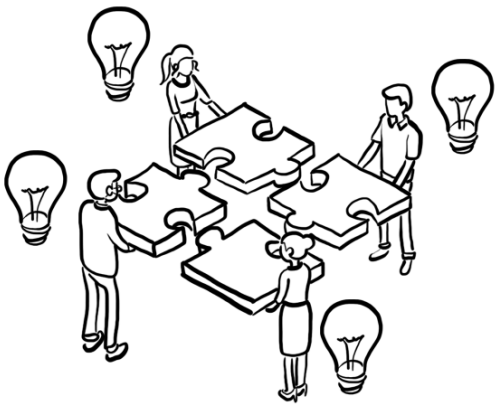
SHIFT LAB

2.0 PRIMER DOCUMENT

What is the Edmonton Shift Lab?

A partnership between Edmonton Community Foundation and Skills Society Action Lab, the Edmonton Shift Lab is an action-oriented exploration of racism in our city. We are building on the great work already done in Edmonton and approaching these challenges through a social innovation lab to steward an exploration that can provide us with insights and prototypes into how we can make change. We have completed one cycle of the lab (what we affectionately call Shift Lab I.0) and are ready to dive into 2.0.



What is Social Innovation?

In essence, social innovation is about uncovering promising solutions to complex problems. Once solutions have been thoroughly tested, a solution becomes a true social innovation when it spreads and scales to a systemic level. Complex problems -- also known as wicked problems -- are characterized by a low level of agreement on what the problem is and what might be the best way to address it. Complex challenges are messy, conflicting, changing, not easily definable and full of uncertainty. Social innovation approaches strive to tackle problems at their root, don't chase novelty, pay attention to what might already be working, and are open to experimenting with new pathways and possibilities. As Canadian social innovator Al Etmanski says, "innovation is a mixture of the old and the new with a dash of surprise."

What are Social Innovation Labs?

If social innovation is the theory, labs are the practice. They explore new ways of making progress on a complex challenge. Social innovation labs strive to create experimental spaces, to see whole systems, and to generate new insights. The central principle is that solutions are not known at the outset of the process and through engaging multiple stakeholders in the complex problem, better interventions can emerge that have potential for deeper systemic impact.

The power is in the prototype! We aimed for diversity in all the teams of Shift Lab. Who decides what prototype moves forward is determined mainly through testing with community.

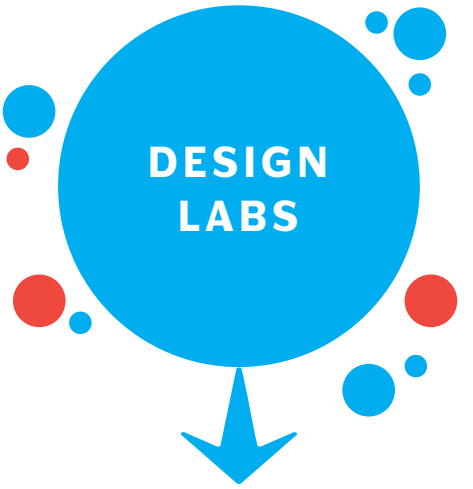
Evolving lab methods

There is no one way to design and lead a social innovation lab. Lab design and methodologies always need to be custom-tailored to the context of the lab. Although many different lab process approaches are possible, there are three that are typically used: design labs, social innovation labs, and social labs. Due to time constraints and the action-oriented nature of the Edmonton Shift Lab, the first iteration of the Shift Lab was mainly a social innovation lab, leaning towards design methodologies as there was a desire for practical prototypes in a short time frame.

Want to learn more about Social Innovation Lab Process Stewardship?

Check out Think Jar Collective's field guide at: thinkjarcollective.com/tools/social-innovation-lab-field-guide/

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

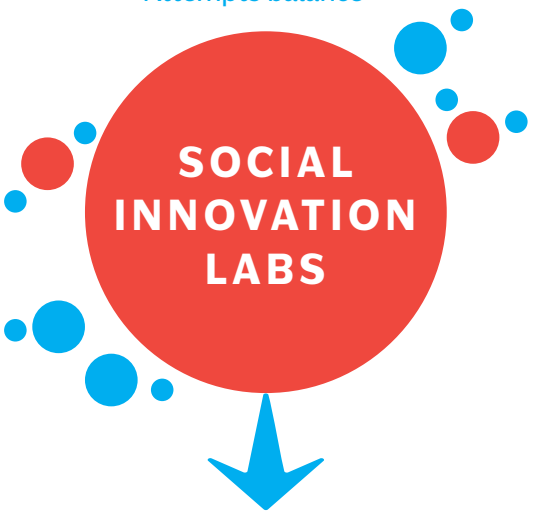
USE WHEN:

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

Attempts balance



FOCUS ON:

Assissting 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

USE WHEN:

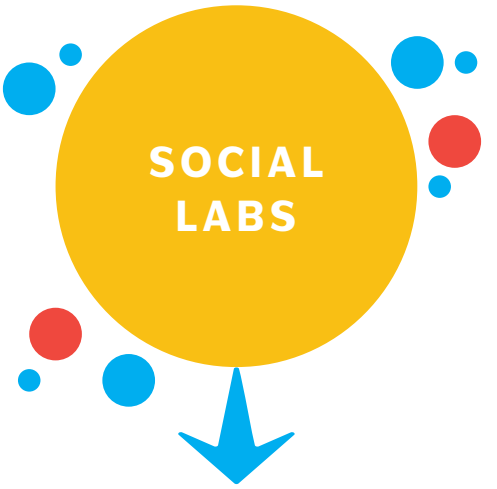
You have a bit more time to explore

When you have a complex challenge but a somewhat defined scope

You have systems challenges

When you want to probe a system through a prototyple and not just talk

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

USE WHEN:

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

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

graphic courtesy of Think Jar Collective

HOW WE GOT TO 2.0

Shift Lab I.0 began with a tension around scope. The intersection of racism and poverty is massive. Within the context of Edmonton, it manifests differently depending on culture, on neighbourhood, on what government happens to be in power, and a hundred other factors. A requirement of social innovation is a tightly focussed problem area, so the Stewardship team knew we had to pinpoint a specific challenge. However, early community consultations told us that the focus couldn't be developed by the Stewardship team alone -- it had to come from community. Once we recruited our Core team, their first task was to pick a focus area and they landed on housing.

When the Stewardship team began reflecting on what we had learned from I.0, we returned to this problem of scope. This lead to our first big a-ha! moment for 2.0: we realized that we needed to drop the intersecting part of the problem (in this case, poverty) and focus only on racism. We found that even with a focus on housing, the problem area was still too big.

To get more focused and discover where there was demand for work around racism, we initiated a discovery phase that lasted about eight months.

What did the discovery phase teach us?

In the discovery phase, we focused on three areas:

- **Racism**
- **Indigenous ways of knowing**
- **Behaviour change**

We hired research experts in each domain area to gather insights and data to find critical leverage points that would help us design 2.0. Along the way, we actively looked for partnerships with organizations that were interested in making changes around racism, and ways to make deep and meaningful change with this work. From this discovery, we came up with potential guiding questions, which we shared with our mentors for advice and guidance.

While in discovery phase, we simultaneously ran an international speaker series to share expert insights and ideas around racism with Edmontonians. This series was open to community and attracted people working in this space and those curious around the city. The views of these expert authors on practises that were working outside of Canada helped us formulate our direction.

Based on these three factors -- what we learned from Shift Lab I.0, what we learned during the discovery phase, and what we learned from the speaker series -- we landed on our scope and direction for 2.0.

CHALLENGE SCOPE FOR SHIFT LAB 2.0

The guiding question for Shift Lab 2.0 is this:

How might we create better anti-racism interventions that acknowledge everyone's humanity and create behaviour change?

This question helps guide the four prototype team challenge questions:

- *How might we reimagine what it means to be a treaty person?*
- *How might we create an interactive empathy experience that strives to reduce racist behaviour over time?*
- *How might we create encouraging pathways that help potential allies for racial justice overcome white fragility?*
- *How might we design intervention(s) that de-escalate public displays of overt racist behaviour?*

The main audience we are trying to shift

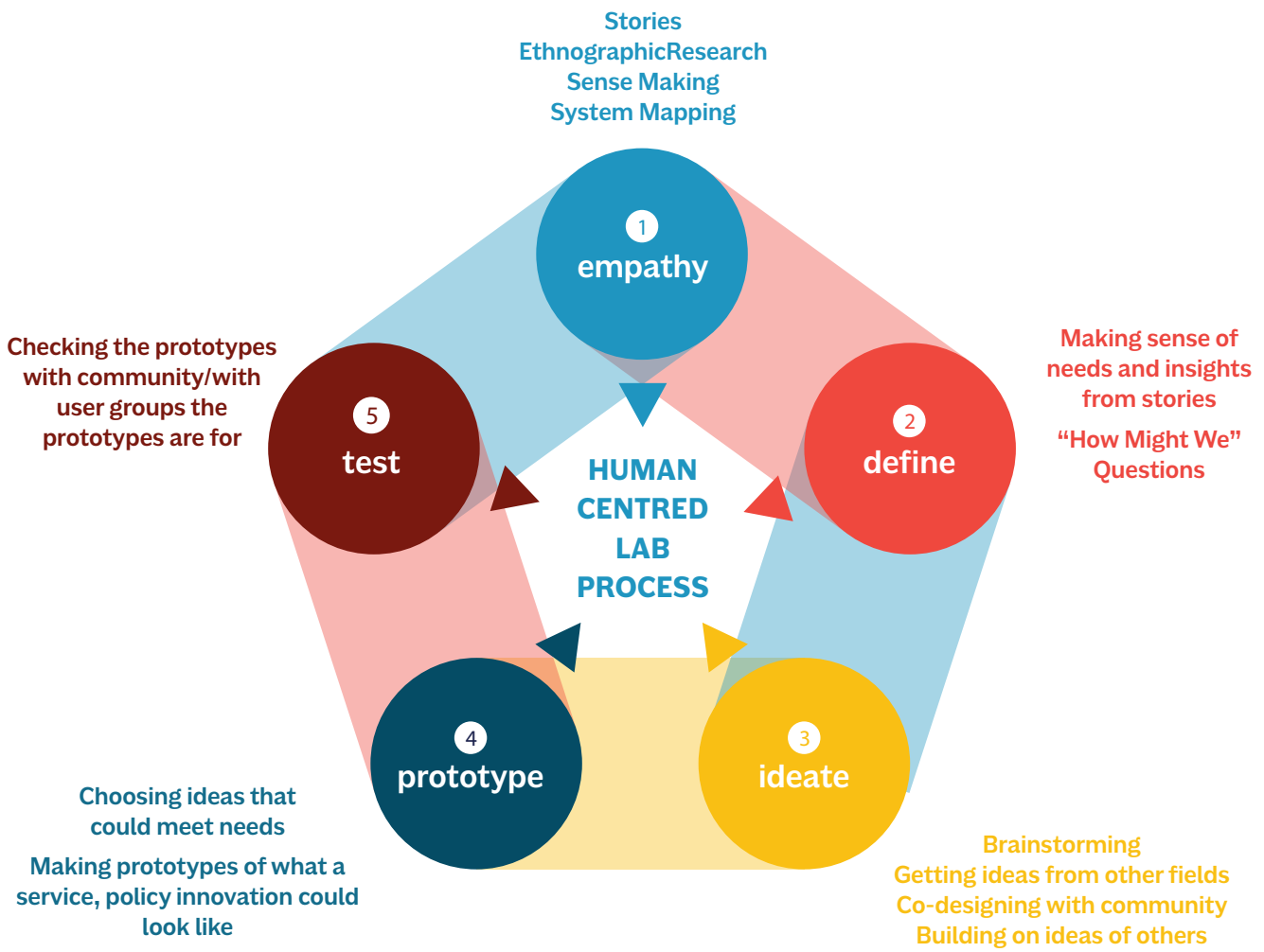
The "sleepy middle" is an archetype that has emerged in the development of Shift Lab 2.0. Imagine a continuum: on one end, there are the tiki torch-carrying racists who care only for people who look like them. On the other, there are passionate anti-racist activists, seeking dignity and respect for all. The sleepy middle is somewhere between these two poles. They may think of themselves as good people who "don't see colour." They would be shocked by a racist joke but might also be unaware of how systemic racism is infused in everyday life. They have varying levels of understanding of what racism is, whether it still exists, and why it's important to work to end it.

APPROACH FOR 2.0: THE TRIPLE HELIX

Labs are intended to be practical and "designerly." When you have a really tricky problem like racism, it requires thinking in creative ways. The design and facilitation of a lab is what supports the learnings, prototypes and people to deeply think about and understand the problem. In Shift Lab I.0, the process adopted Human Centered Design (HCD), Systems Thinking and Theory U. Along the way, we discovered that Indigenous methodologies (particularly Cree) have some startling similarities with design and systems thinking. What would it look like if we could put these three ways of thinking into conversation with one another? As a result, we are intentionally thinking about our approach for 2.0 as a triple helix -- a braid of Indigenous epistemologies, design thinking, and systems thinking. We don't know what this will look like yet, but we look forward to experimenting with you.

What is Human Centered Design as an approach?

In a sense, we are all designers 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 that we often design solutions based mostly on our own experiences and biases, which is a problem when we are trying to find solutions for other people. Human-Centered Design (HCD) is a creative approach to problem solving that starts with seeing people as they are in reality and ends with an innovative solution to meet those people's needs. It supports systems change and service delivery by better understanding what people and community need and want. HCD does not claim to solve the root cause of a problem, rather it is a process that gives designers and clients the opportunity to try and build solutions together.



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

Systems Thinking is a holistic way to step back and look at the parts making up a complex challenge and explore what biases, assumptions, and structures might be keeping a system operating the way it does.

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 like racism for not just one group of people who encounter it but for many.

It's a bit like an out-of-control patch of poison ivy at a children's playground: you can cut the leaves back to prevent children from being stung, or you can attack the roots of the weeds so it doesn't come back.

Systems thinking helps people to look at things that have happened (events), structures, and assumptions that might be causing a problem like racism to emerge and stick around.

What systems thinking looks like in action:

System Thinkers are keenly aware of their biases and assumptions

Systems Thinkers seek to acknowledge that an improvement in one area of a system can adversely affect another area of the system

Systems Thinkers look at what root causes might be contributing to a problem

Systems Thinkers ask questions and wonder why something happens

Systems thinkers see the interconnections within the physical environment: of the land, water, beings, values.

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

Kesinisitohtamihk Nehiyawihtwawin:

Ways we understand the world from a Cree Systems Perspective

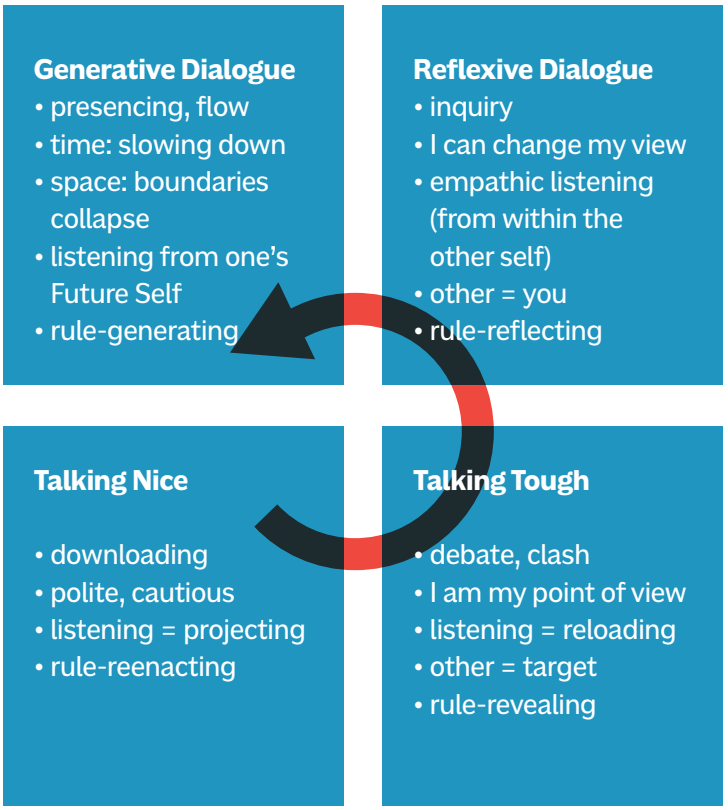
Shift Lab 2.0 strives to be informed and grounded in Cree perspectives and values pertinent to Treaty 6 Territory, which encompasses Edmonton and much of central Alberta. Cree worldviews have been grounded in systems perspectives for thousands of years. For example, in Cree worldviews the human is not the center of a system: Cree recognize the interconnection of the four-legged beings, the winged ones, the water, the air, and the land with the two-legged beings (i.e. us). Understanding the natural rhythms of these different parts is essential to their preservation. In Shift Lab 2.0, we intentionally want to be aware of this connection and approach solution finding with a whole systems perspective.

We have thoughtfully created a team of Cree people and advisors, specifically a language speaker, a traditional knowledge keeper, a renowned Cree designer, and folks advocating for change in areas of homelessness and systemic racism. In Shift Lab 2.0 we are exploring Cree systems thinking, Cree design techniques and philosophies, rooted in Cree worldview perspectives. These members will offer the lab guidance on how we might navigate through the complexities of Cree and Western world realities. This intentionality may help us uncover some of the collisions where social innovation and Indigenous ways of knowing may be complementary to each other. The intention is to push on each other's thinking so that we can work better together and try to uncover the ways in which we can collectively accomplish what we want to achieve. We are not claiming to be experts in anything; we are simply exploring what might be possible so that we can co-create solutions that combine Cree ways of being with social innovation.

Some methods for going deep that we will be exploring

As racism is something that can internally affect us, there is something about personal transformation that needs to occur when thinking about change. There are a number of tools that help us go deeper. For example, Otto Scharmer's "Theory U" is a tool that helps us to explore how we unpack what we already know and see in new ways. Additionally, Scharmer suggests there are 4 types of conversations that support how we talk together to create understanding. They range from talking nice to deeper conversations in which people try to understand each other. Throughout the lab we will be exploring different methods for going deep, weaving them through the process of how we unpack racism in Edmonton.

4 Types of Conversations

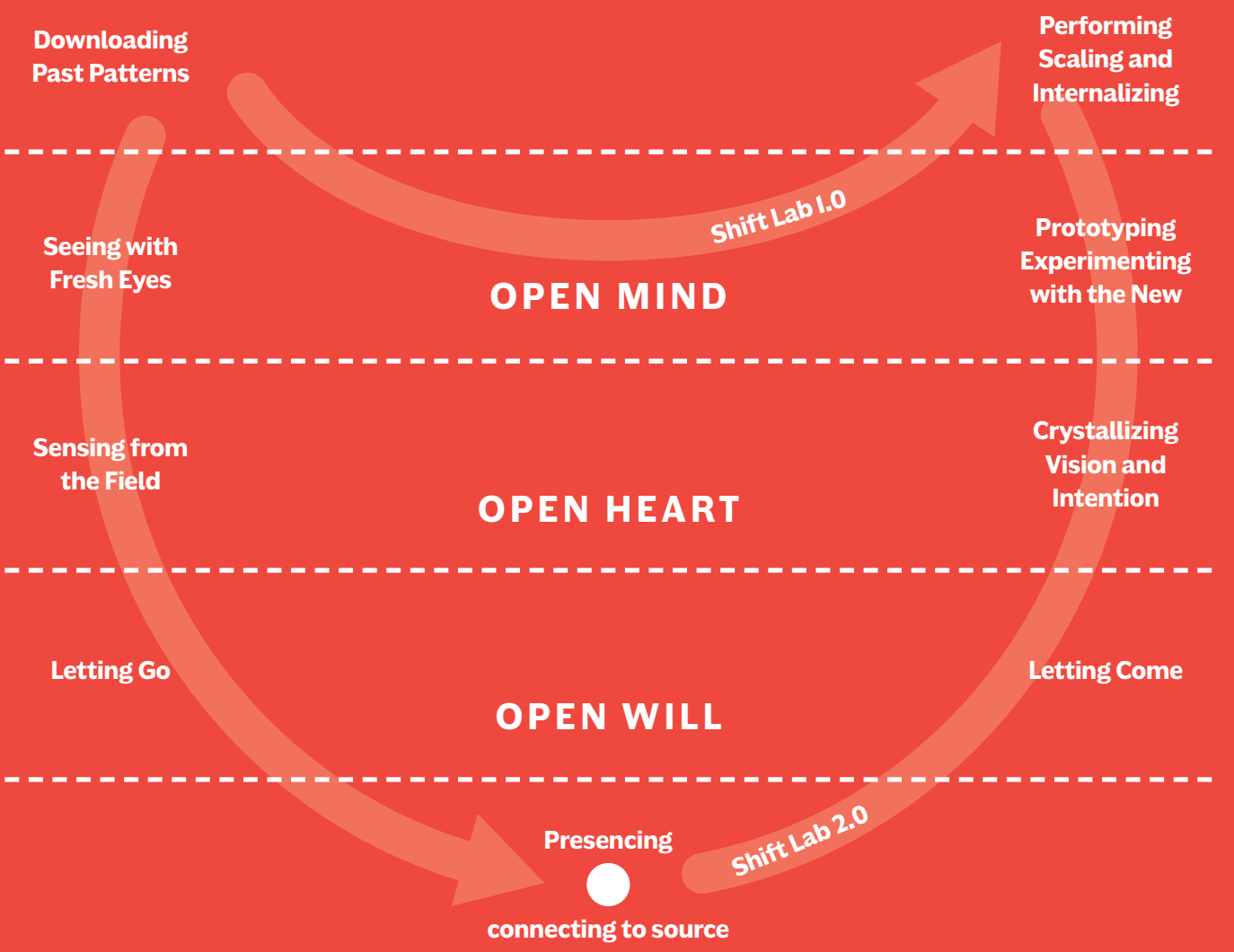


Otto Scharmer developed the Four Types of Conversation framework to describe four levels of conversation.

They range from relatively superficial conversations (Talking Nice) to deeper conversations in which people try to understand one another's perspective and make themselves open to developing new perspectives (Reflexive and Generative Dialogue).

While all four types of conversation are important when tackling such complex issues as racism and poverty, meaningful change and innovative responses typically emerge from deeper conversations.

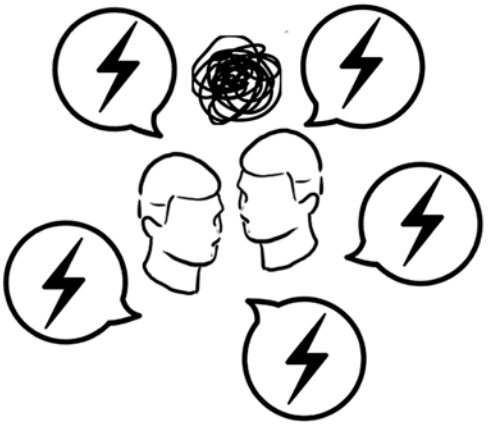
THEORY U



One way to understand this challenge of "going deeper" to tackle tough social challenges is the Theory U framework. The framework describes the journey of social innovators as working through multiple phases of discovery, beginning with "downloading" their own mental models of a complex situation and then gaining increasing insight through conversations, experiences and research with others. This (ideally) results in an openness to the emergence of new ideas about how to address the challenge. They are expressed and tested through prototyping possible new approaches and then – if appropriate – scaling and institutionalizing successful experiments.

When asked to describe their new insights from Shift Lab I.0, several Core Lab and Stewardship team members described their "U" journey as a shallow one. Almost everyone could point to some new insights into the causes of and possible solutions to racism and poverty. But they also felt unable to test their own assumptions and ideas fully, to empathize deeply with the racism that amplifies poverty, and eventually to see the challenge in profoundly new ways.

adapted from Otto Scharmer



THE ISSUE OF RACISM

WORKING DEFINITION

Racism is the individual and systemic manifestation of the uneven distribution of power and prejudice related to culturally defined ideas of "race."

TYPES OF RACISM

Defined by Shelly Tochluk

INTERNALIZED RACISM

- Lies within individuals
- Private beliefs and biases about race and racism, influenced by our culture
- May be unconscious or psychologically rooted. Often reflects historic, intergenerational trauma

INTERPERSONAL RACISM:

- Occurs between individuals, anecdotal
- Biases that occur when individuals interact with others and their private racial beliefs affect their public interactions

INSTITUTIONAL RACISM

- Occurs within institutions and systems of power
- Unfair policies and discriminatory practices of institutions (schools, workplaces, etc.) that routinely produce racially inequitable outcomes for people of color and advantages for white people

STRUCTURAL RACISM

- Racial bias among institutions and across society
- Cumulative and compounding effects of an array of societal factors including the history, culture, ideology, and interactions of institutions and policies

WHAT IS BEHAVIOUR CHANGE NUDGING?

Types of Nudges

Nudges are small changes in environment and interactions that are easy and inexpensive to implement. Several different techniques exist for nudging, including defaults, social proof heuristics, and increasing the salience of the desired option.

A default option is the option an individual automatically receives if he or she does nothing. People are more likely to choose a particular option if it is the default option. For example, Pichert & Katsikopoulos found that a greater number of consumers chose the renewable energy option for electricity when it was offered as the default option.

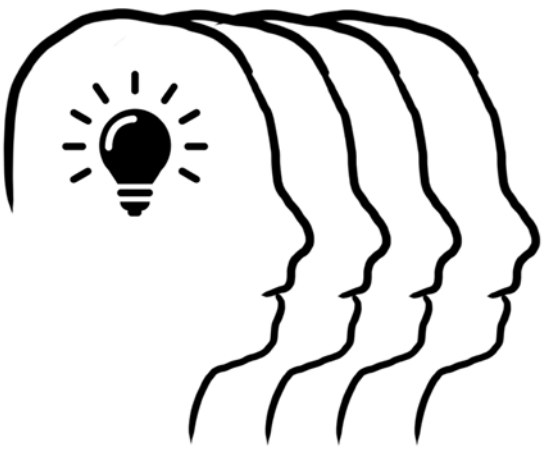
A social proof heuristic refers to the tendency for individuals to look at the behavior of other people to help guide their own behavior. Studies have found some success in using social proof heuristics to nudge individuals to make healthier food choices.
When an individual's attention is drawn towards a particular option, that option will become more salient to the individual, and he or she will be more likely to choose to that option. As an example, in snack shops at train stations in the Netherlands, consumers purchased more fruit and healthy snack options when they were relocated next to the cash register.

In Shift Lab 2.0 you will be drawing on the literature review research we conducted that highlighted promising methods of behaviour change science.

In addition to the summary of the lit review, we are using a framework for designing, implementing and evaluating behaviour change called the COM-B model.

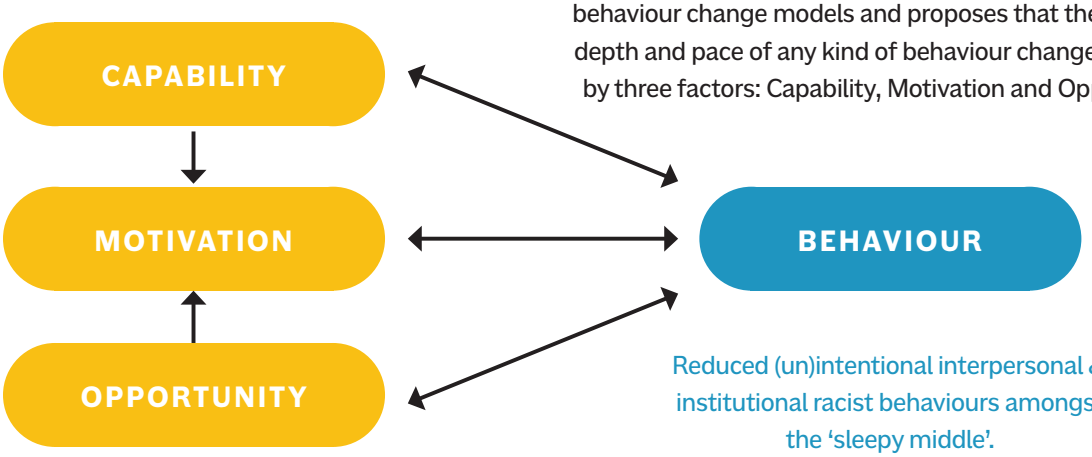
"A nudge, as we will use the term, is something that alters people's behavior in a predictable way without forbidding any options or significantly changing incentives. To count as a mere nudge, the intervention must be easy. Nudges are not mandates. Putting fruit at eye level counts as a nudge. Banning junk food does not."

- Thaler and Sunstein



"The words "If people would just..." are never a part of an effective social innovation. If your goal is to create social change through behaviour change, strong arguments will rarely suffice. You must also understand people's behaviour and design solutions that disrupt their habits."

The COM-B model is based on a synthesis of dozens of behaviour change models and proposes that the direction, depth and pace of any kind of behaviour change is shaped by three factors: Capability, Motivation and Opportunity.



Reduced (un)intentional interpersonal & institutional racist behaviours amongst the 'sleepy middle'.

The participants of Shift Lab 2.0 should (a) consider how all three factors can be integrated into their behaviour change interventions and/or (b) to manage their expectations about the direction, depth and pace of behaviour change on the extent to which they are able to effectively address all three factors (e.g., an intervention that focuses only on capability, will only be useful in situations where motivation and opportunity already exist).

Capability is defined as the individual's psychological and physical capacity to engage in the activity concerned. It includes having the necessary knowledge and skills.

Motivation is defined as all those brain processes that energize and direct behaviour, not just goals and conscious decision-making. It includes habitual processes, emotional responding as well as analytical decision making.

Opportunity is defined as all the factors that lie outside the individual that make the behaviour possible or prompt it.

Mayne, John. 2018. The COM-B Theory of Change Model. A Working Paper. Retrieved from: https://www.researchgate.net/publication/323868561_The_COMB_ToC_Model4

SHIFT LAB 2.0 GUIDING PRINCIPLES AND THEORY OF CHANGE

1. We want to create 'interactive' processes that motivate people to change (covertly and overtly) racist behaviours and/or that contribute to racialized outcomes.
2. We are going to focus on the "sleepy middle": those who may exhibit "unconscious" or "indirect" racist ideas and behaviours, rather than overt and direct ones.
3. We are committed to a triple-helix approach.

That leads to... **WELL BEING**

in order to... **REDUCED RACIST BEHAVIOURS**

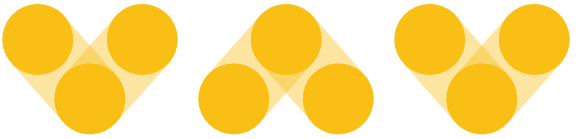
Trying to increase... **CAPACITY** | **MOTIVATION** | **OPPORTUNITY**

Focused on...

- *How might we reimagine what it means to be a treaty person?*
- *How might we create an interactive empathy experience that strives to reduce racist behaviour over time?*
- *How might we create encouraging pathways that help potential allies for racial justice overcome white fragility?*
- *How might we design intervention(s) that de-escalate public displays of overt racist behaviour?*

Shaped by political, economic, social and environmental factors

Employing... **SYSTEMS THINKING** | **DESIGN THINKING** | **CREE PERSPECTIVES**



RESOURCE LIST

REQUIRED READING LIST

- Shift Lab I.0 Report
- Shelly Tochluk Video: http://www.edmontonshiftlab.ca/video-of-shelly-tochluk/
- Daryl Davis Video: http://www.edmontonshiftlab.ca/video-of-daryl-davis-2/
- Trevor Phillips Video: http://www.edmontonshiftlab.ca/new-year-updates/
- On-ramps and lanes on the racial justice freeway: http://witnessingwhiteness.com/on-ramps-and-lanes-on-the-racial-justice-freeway/
- White Fragility: https://drive.google.com/drive/folders/IHlkltsKjLuCvj0SPX6BDMrjrmw0yDEmd

RESOURCES THAT INFORMED THE DESIGN OF 2.0:

Over the course of the last two years, Shift Lab has drawn inspiration, advice, and guidance from countless people, projects, and papers. We can't capture all of it, but here are some highlights:

- Deep Diversity: Overcoming Us and Them by Shakil Choudhury
- Social Labs Revolution by Zaid Hassan
- WISIR Social Innovation Lab guide: https://uwaterloo.ca/waterloo-institute-for-social-innovation-and-resilience/sites/ca.waterloo-institute-for-social-innovation-and-resilience/files/uploads/files/I0_silabguide_final.pdf
- Social Innovation Generation: Fostering a Canadian Ecosystem for Systems Change by Geraldine Cahill and Kelsey Spitz https://www.thesigstory.ca/
- "Evaluating Prototypes" by Mark Cabaj https://www.tamarackcommunity.ca/hubfs/Resources/Tools/Aid4Action%20Evaluating%20Prototypes%20Mark%20Cabaj.pdf
- At odds or an opportunity? Exploring the tension between the social justice and social innovation narratives by Marilyn Struthers https://thephilanthropist.ca/20I8/03/at-odds-or-an-opportunity-exploring-the-tension-between-the-social-justice-and-social-innovation-narratives/
- "The COM-B Theory of Change Model" by John Mayne https://www.researchgate.net/publication/32386856I_The_COMB_ToC_Model4
- NuLab Economic Immigration Lab: https://docs.wixstatic.com/ugd e077I9_5433596252a54bI78056b8a34dc5I23I.pdf
- All Together Now Australia: https://alltogethernow.org.au/a-solution-to-racism/
- Winnipeg Boldness Project: https://www.winnipegboldness.ca/