

# THE IDEA PRESS

Iteration #2

April - June 2014



## Results of 10-week deep dive challenge thinking about social isolation

Team of six, living in social housing complex, develops 10 ideas for getting people un-stuck and more from public systems.

Fay changed our thinking. So did Mark. Greg. Elise. Sam. Caitlin. Tina. Kamran. Uzkul. Monica. Carol. And the 40 other residents and frontline deliverers with whom we've spent our past 10 weeks.

We moved into Apartment #303 at 7575 Kingsway to understand people's every day experiences of social isolation and loneliness. Our goal was to get behind the labels attached to people - disabled,

**Our goal was to get behind the labels attached to people - disabled, immigrant, low income, senior - and learn how to enable greater connectedness.**

immigrant, low income, senior - and learn how to enable greater connectedness. The literature is clear that disconnection poses big health & wellbeing risks. More people die from isolation than smoking.

On day four of the project we met Fay, age 63. We learned she is connected. "Fay has more friends than me and my husband combined," one of her workers exclaimed. Indeed, her social network map is full. With more than 11 positive relationships. Not to mention membership in groups, voluntary organizations, even political associations. And links to nearly every available service.

Despite all of Fays connections, she still feels lonely. Separate. Apart. In an autobiographical essay, she writes, "A handicapped child needs to feel wanted and loved, and be treated like others. A child, handicapped, will enjoy if you approve of her, and give her an opportunity

to learn and to have fun."

Fay is not isolated from people. She isn't sitting at home, by herself, all day. But, she is isolated from emotional outlets, from novel and purposeful experiences, from opportunities to use and enjoy her capacities.

Fay's story has been the norm.

Not the exception. The majority of people felt stuck in at least one realm of their life - people, place, purpose. With too few possibilities for change. Surprisingly, network size and group membership - be it in a church or a club - had little to do with people's sense of forward movement.

We've come to understand that not all connections, relationships, or groups move us forward. So many of our interactions with neighbours, friends, family members, and professionals unfold in totally predictable, patterned ways. And whilst continuity can be a good thing - enabling security and stability - too much can result in boredom, stagnation, and even, decline.

Monica used to talk. She is wordless now. For the past five years, she's spent her days sitting in the back of a Pontiac sedan, driving to parks with her life skills worker. Same routine, every day. With no shift in sight.

**Despite all of Fays connections, she still feels lonely. Separate. Apart.**

**Surprisingly, network size and group membership - be it in a church or a club - had little to do with people's sense of forward movement.**

### Prompting shifts

How could we enable people to build the kinds of connections that expand their sense of self and future? That function as an emotional outlet? As a broker to meaningful experiences? As a prompt for development over time?

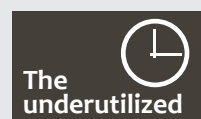
Instead, our public systems are paying for decline over time. Supports for people like Monica will cost around \$2 million over the course of her life. We can put these existing monies to better use.

It's not only direct costs we can reduce. We can also lower the indirect costs of lost human resources. Isolation from developmental experiences - from ways to use our capacities - dampens economic productivity. Eliminating excess unemployment amongst immigrants in Canada would yield more than \$30 billion in additional earnings.

We've got 10 ideas for using public resources and underutilized human resources better. Some are big ideas. Some are small ideas. Each idea is framed around a particular segment. A segment is a group of people, categorized not by their demographic label, but by what's keeping them stuck or what's propelling them forward. We've grouped residents and frontline staff together in our segments.

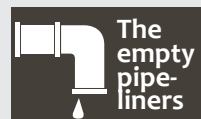
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### Six segments to re-design supports & services



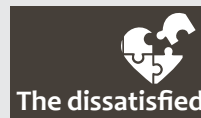
**The underutilized**

People with knowhow, skills, interests, and curiosities which are totally untapped. Or which are unknown, and may be on the decline.



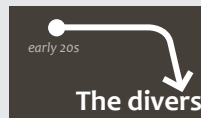
**The empty pipeline**

People without a source of new ideas and experiences. Or people with a source of ideas, but without the resources to apply them.



**The dissatisfied**

People whose story focuses on a concrete block or barrier. As well as people whose story is one of dull dissatisfaction. They need help pinpointing what exactly could change.



**The divers**

People on an upward trajectory until an event, or transitional point, knocks them off their path. Most often boys in their 20s, who have lost a sense of purpose or status.



**The pleasers**

People who have adopted the words & expectations other people have of them. Be it their family members or professionals. They don't often know what they want.



**The positive deviants**

These are the people who view most everything around them as a resource. Whether it's a professional they encounter, or a TV show they watch. It's all fodder for learning and trying new things.



**What Systems Want vs. What They Do**

Read page 8



Watch Fay & Greg talk about their stories

vimeo.com/99185413

Me, Us, & Them Project

Team

Sarah Schulman (InWithForward)  
Jonas Piet (InWithForward)  
Muryani Kasdani (InWithForward)  
Janey Roh (posAbilities)  
Laura Cuthbert (SFSCCL)  
Sabrina Dominguez (designer)

Debriefers

Susan Stanfield (Spectrum Society)  
Jack Styan (CLBC)  
Margaret Manifold (City of Burnaby)  
Rebekah Mahaffey (City of Burnaby)  
Maggie Vilvang (Community Living Innovation Venture)  
Theresa Huntly (SFSCCL)  
Joe Erpenbeck (Building Caring Communities)  
Teddy Chan (BACI)  
Hemant Kulkarni (posAbilities)  
Christine Scott (SFSCCL)  
Doug Behm (MCFD)  
Karen McKittrick (MCFD)  
Lindy and Jim McQueen (EPIC)  
Richard Faucher (BACI)  
Jean-Claude Ndungutse (CLBC)  
John Bergman (MSDSI)  
MJ Buck (Burnaby Services)  
John Woods (BACI)  
Mackenzie Dean (Burnaby Neighborhood House)  
Soheila Ghodsieh (CLBC)

Advisors

Al Etmanski (PLAN Institute; SIG)  
Lidia Kemeny (Vancouver Foundation)  
Gord Tulloch (posAbilities)  
Shelley McNellis (MSDSI)  
Stephen D'Souza (Burnaby Community Services)  
Margo Fryer  
Darcy Riddell

Visitors to #303

Ben Weinelck (Think Jar Collective)  
Brooks Hanewich (Think Jar Collective)  
Megan Tardif (CLBC)  
Zaimun Bahadshah (CLBC)  
Jennifer Wheadon (CLBC)  
Shameem Hawe (MSDSI)  
Jandy Anderson (MSDSI)  
Nick Birch (posAbilities)  
Katherine Neale (posAbilities)  
April Carmody (posAbilities)  
Margaret Eberle (Metro Vancouver)  
Mark Gifford (Vancouver Foundation)  
Keltie Craig (City of Vancouver)  
David Young (Sources Community Resource Centres)  
Caroline Bonesky (Family Services of Greater Vancouver)  
Vicky Cammack  
Jesper Christiansen (MindLab)  
Nora van der Linden (Kennisland)  
Chris Sigaloff (Kennisland)

Organizations we've shadowed

Simon Fraser Society for Community Living  
Burnaby Association for Community Living  
posAbilities  
Spectrum Society  
Mosaic  
City of Burnaby  
Burnaby Citizen Services  
Vancouver Career College  
Douglas College  
Burnaby School Board  
Fraser Health  
Vancouver Foundation  
CLBC  
MCFD  
City of Vancouver  
MSDSI  
Fraser Side



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# 5 unlikely pairs and 1 positive deviant family



Stories help us to understand people in their contexts, and find the gaps between what people say versus what they actually do.

Melissa is 13 years-old and failing most of her classes at school. Tina is 40 years-old and struggling to find a good job. Not a recycling job, like her other 'disabled' friends have. Both have internalized a story that says they are not good enough. Why does this matter?

Because to enable Melissa to do well in school, and Tina to get a good job, they'll need to tell themselves a different story. But that's not what after school programs and employment preparation services help them to do.

Melissa and Tina are two of six unlikely pairs. People of different ages and backgrounds who share similar underlying motivations and barriers.

We use stories to identify the specific mechanisms for change. What is it that we need social services and community programs to actually do to improve outcomes?

Stories are not simply nice anecdotes. They are rigorous case studies. That produce a type of data that public systems do not currently have. Data about lived experiences. Surveys, focus groups, and consultations can tell us what needs to change, but not how to achieve that change. Because they are collected out-of-context, and based on what people say versus what they actually do.



We share stories back with people to spark reflection about what they would like to see change.



At first glance, Sam and Mark have little in common.

Mark lives alone. In a sparsely furnished apartment. With just one plate in the cabinet. And one 5x7 family photo hanging from the wall.

Sam lives with his wife and children. In a colourful apartment with handcrafted furniture and treasured family artifacts. Teapots from Albanian grandmothers. Swords from Mongolian cousins.

Mark has never left Canada. Sam and his wife had never heard of Canada. When they were asked by the UN Refugee Agency to pick a country. That was 15 years ago, after the Kosovo War. Sam misses home. He streams live video from Kosovo to his big-screen TV.

So the sights and sounds are never too far away.

Mark spends his nights listening to classic rock. To mask the silence. He spends many of his days sleeping. To pass the time. Mark has never worked, albeit not by choice. He knows others see him as s-l-o-w. But he graduated college. The photo on the wall is proof. Sam never graduated from college. He learned to fix cars by fixing them. He learned to build cabinets by building them. He does little of that now. He's exchanged fixing and building for delivering newspapers.

Sam lives two floors and two apartments away from Mark. They have never met.

If Sam and Mark met, they would find that beneath their system labels - refugee and disabled - they share

**Meet Sam and Mark**  
Sam /// father, husband, newspaper deliveryman, baker, builder, mechanic, refugee  
*"Some days I ask, why come to Canada, it's no better off than being in a refugee camp."*

**Mark /// brother, music lover, "person served"**  
*"It's the same thing over and over again. I want something different. But I get so tired from the anxiety. I stay up until 4am. I binge-eat."*

the same frustration. For more than a decade, Sam and Mark haven't used their full capacities and skills.

Groundhog days

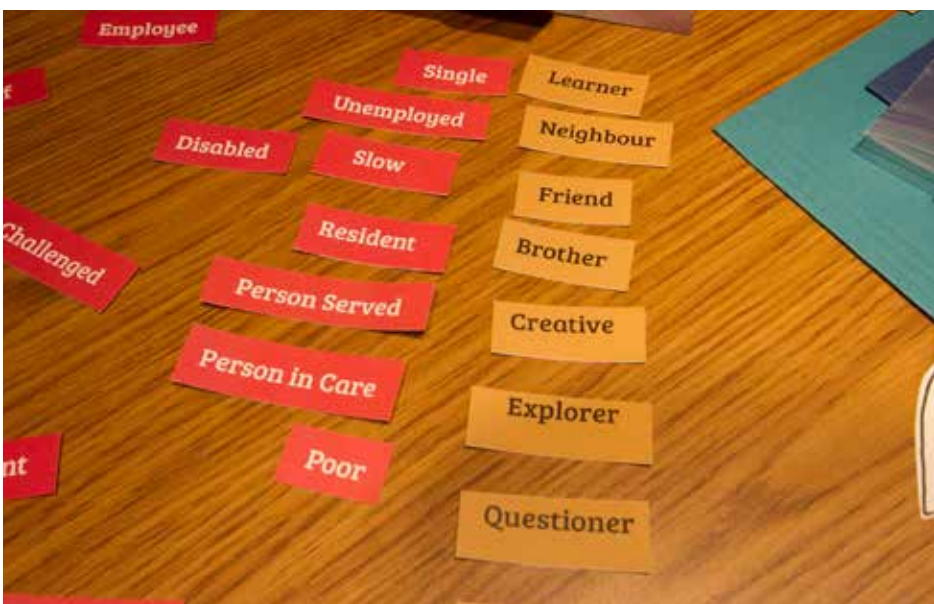
When Mark isn't sleeping, he goes along to a day program for people with developmental disabilities. There, Mark does the same activities on repeat. He's learned to make the same dish for 13 years. "I'm tired of making spaghetti. I'd really like to learn to make a roast."

Sam's days are also on repeat. He sleeps during the day, eats dinner with his kids, and heads out to deliver newspapers. Night after night. "I get 20 cents per paper a night, and I have to pay for gasoline."

On paper, Sam is a success story. He's got a job. He's not on welfare, because as he puts it, "You get \$800 and 900 headaches."

On paper, Mark is a typical story. He's one of 83% of people receiving services from Community Living British Columbia (CLBC) who is also unemployed.

In practice, both Sam and Mark's skills are unrecognized and underutilized. OECD data tells us that Canada loses at least \$2.5 billion a year to skill under-utilization.



The red labels are words people use to describe Mark, while the yellow ones are words Mark uses to describe himself.



Delicious sweets Sam made when we came for dinner.



**Meet Fay and Kelly**  
Fay /// daughter, volunteer, single, challenged, questioner, special, "slow"  
*"My days are mostly doctor's appointments. I used to like to go to movies. It's been a few years."*

**Kelly /// mom, wife, carer**  
*"I have to be on top of my game to keep everything organized. You have to grind your teeth at professionals sometimes."*

If Fay's filing cabinet could talk, it would tell a big story. Of being born blue. Of diagnostic testing. Of living in an institution. Of moving to group homes. Of finishing school. Of two marriages and two divorces. Of completing 7 continuing education certificates. Of finding work, sporadically, as a bus person, as a mail sorter, as a Salvation Army kettle worker. Of surgeries, and near death. And now, of the mundane particulars of every day living.

Lots of support, little change. Fay gets 9 hours a week of life skills support. They go to Walmart, to the pet store, to rehab appointments, and to the hospital to visit her 96-year old mom.

Life is a seemingly endless series of errands. Lots of people come and go in a week. To help out. Three different support workers, two dog walkers, a psychiatrist, three good friends, and neighbours.

We've seen first hand the extent of the redundancies. The mental health, aged care, and disability systems pay for generic day programs and drop-in centers where the experience is exactly the same: activities to pass the time (movies, cooking, bowling) rather than to expand interests or networks. The aged care, disability, children with special needs, and immigrant systems each pay for 1:1 support workers. They all go by different names, but they have the same role: helping with everyday tasks, and signposting to other services.

We've seen first hand the extent of the redundancies. The mental health, aged care, and disability systems pay

No shifts in sight

Years of nothing to do have taken their toll on Mark. His anxiety and depression have worsened.

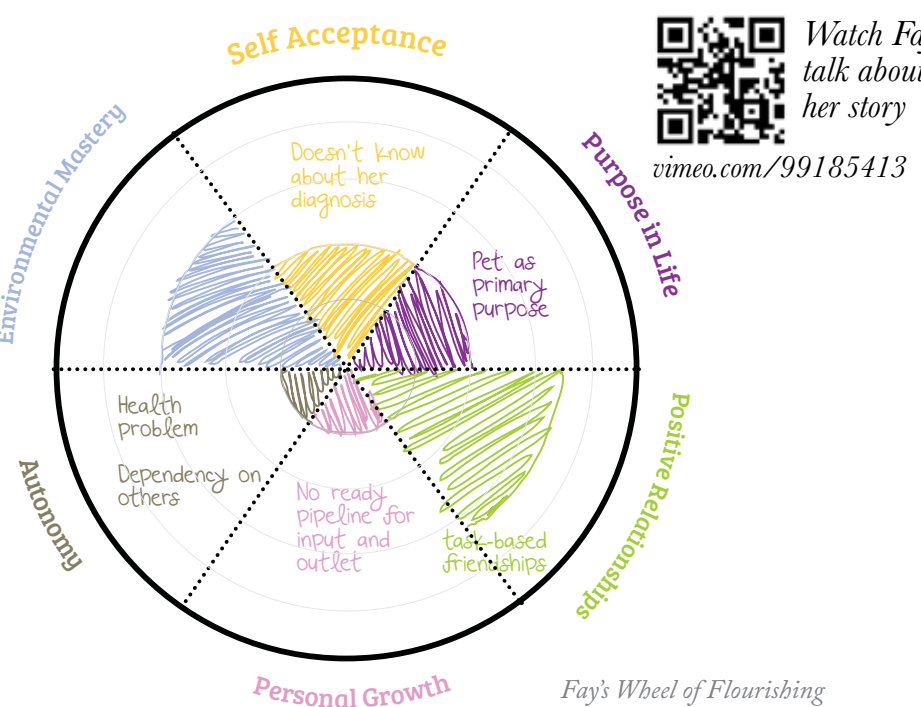
The services in his life - home health workers, life skills workers, psychiatrists - react to the mounting symptoms of distress. Mark is surrounded by their analysis of him. Their language. He uses words like "self-induced vomiting and socially isolated" to describe himself now. It takes putting visual prompt cards in front of Mark to trigger a conversation about his passions and interests. He used to like maps and travel. But where will Mark travel to next?

Sam isn't sure what's next for him either. His support services have long since stopped. Many years ago, he and his wife got help from a Welcome House. "The Welcome House was not

so welcoming." They knew no one. And whilst they got material support - money for food, furniture for their new apartment - they received little other personal guidance.

Over the years, Sam and his wife have cobbled together a vibrant community. African families, Muslim families from the Mosque, next door neighbours. Still, this network hasn't functioned as a springboard to new opportunities. For a while, Sam tried fixing cars of other immigrants he knew. But he was losing money. Nobody could pay.

It was easier to make a good living in a refugee camp, than it has been here, living in an apartment. Still, Sam and his wife generously invite people around to share a meal. To eat the delicious sweets Sam makes in the hours between sleeping and working. To at least enjoy the present, together.



Still, Fay feels she's all by herself. "Sometimes it feels sad to be alone," she says. "All I have is Rocco. He's my baby. And my friend."

Despite a fair amount of external input, there is little new output. All of the stuff in Fay's life seems to reinforce the same basic idea: life is about getting by.

Wanting but not knowing different But, what if her connections to the outside world - to workers, to friends, to neighbours - translated into some novel experiences. Experiences that were about enjoying life and trying new things? Fay would like things to be different. But she can't imagine how they could be that different. It's difficult to imagine what you've never seen or experienced. Her best year ever was Expo 86.



Watch Fay talk about her story  
vimeo.com/99185413

## Re-designing systems & supports

From page 1

Were we to design public systems and social supports around each of these segments, we'd get to a very different organizing structure of government. We would no longer procure separate and redundant services for disabled adults, children with special needs, older people, individuals with mental health illnesses, and immigrants.

Each of our 10 ideas, then, could operate within a single system or cross-cut systems. That's because we're developing service models that appeal to people according to their motivations & aspirations. Rather than their diagnoses.

Not all of our ideas are about traditional services, delivered by professionals to clients. Some are platforms for families and professionals to access the same learning content. Some are non-

professional roles in communities. Some are tweaked interactions that can be integrated within existing programs.

Of course ideas are just that. Ideas. Our ambition is to test and tweak the ideas, at a small scale. So we can demonstrate how to re-allocate existing resources and get to measurably better outcomes at a larger scale. Outcomes that are about people living fuller lives of self-acceptance and purpose.

From page 3

"I'd like to get back to swimming, and the movies. I haven't been to the movies in a few years. Maybe when I get better, I will walk to McDonald's by myself. I will go to the job centre too."

**"I'd like to get back to swimming, and the movies. I haven't been to the movies in a few years."** - Fay

Fay liked working. She felt useful. She got feedback. "They told me I was a team player." The money would be good too. So she could shop at her favourite store, and go to dinner. "It would be nice to have a guy as friend, so we can go out to dinner together. But not somebody who is abusive. I don't need a boyfriend."

Fay is a true rebounder. Experienced at standing back up after being pushed down. Then again, standing up isn't the same as moving forwards.

**Little support, little change**

Kelly stands at 1.4 meters. She's diminutive in height but not in energy. She's the primary carer for her daughter, Alice. Hoisting her into the chair. Getting her dressed. Making sure she is presentable. Alice is taller than her mom. Even though she's only fifteen.

It's been fifteen years of coordinating a seemingly endless parade of medical professionals, social workers, and respite workers. Not all have been good. Then, there's the workers Kelly thought were good. Only to find out that, behind closed doors, they lacked patience. Because Alice does not speak, Kelly worries about all of the interactions for which she is not present. Sometimes, Kelly feels like she and Alice are one in the same person.

That's one of the reasons Kelly quit her job. So she could be more present. Since Alice was diagnosed with spina bifida, few of her family members of have been present. "They were scared away, I think."

**"It can be too much, sometimes.."** - Kelly

Without work colleagues and family members, Kelly's network of medical professionals are her primary source of information and ideas. "It can be too much, sometimes. It all flows through me."

**Appearances aren't what they seem**

Kelly has a lot of medical input for Alice flowing into her pipeline. But she has very little social or emotional output. There's no time for relaxing or expressing how she feels. Nor is there space for trying new things as a family, or testing new communication patterns. Physical health and appearance are the priorities. Kelly's main reference points are the "kids living in group homes" who are wheeled around town by their workers, looking unkempt. She knows of no positive reference points. Where is the inspiration?

**The dissatisfied**

When Greg laughs, you laugh. It's that simple. He tilts his head back, opens his mouth, and releases a sound that can only be described as guttural glee. If only the glee wasn't so temporal. Replaced by anxiety. By loneliness. By a deep desire for a different life. For a girlfriend, then a fiancé, then a wife.

Greg is 56, on the cusp of turning 57. His last girlfriend was in 1987. Those were the "good old" days. The days when people weren't distracted by their smart phones. The days when people had time for one another. "If you people could do one thing for me," Greg earnestly asks us, "could you bring the 1980s back?"

**"If you people could do one thing for me," Greg earnestly asks us, "could you bring the 1980s back?"** - Greg

**Meet Greg and Gayle**

Greg /// son, brother, friend, single, cat lover, slow  
*"I have rattlesnakes in my head sometimes. I get so lonely. Is there hope for me?"*

Gayle /// mom, friend, employee  
*"I've got to keep a strong face for the kids. There's not really an opportunity to feel."*



Greg lives with his two cats. On a good day, Greg goes to Subway for a meal, or does tasks around the house. On a bad day, Greg likes to stay in bed.

**A better time**

Gayle also longs for a different time. When her mother was still alive. They were an incredibly close-knit family. Living together, eating together, laughing together. Over the past three years, Gayle has had to do it all alone. Juggling a full-time job to pay the bills, whilst taking her 3 kids to their hockey games and music lessons. "It can be overwhelming at times. My anxiety has been rising."

**"How terrible, I can't think of what I want anymore."** - Gayle

It's not the life Gayle predicted. 6 years ago she was a proud home owner. But the condo leaked. It was a bad investment. Unable to keep up with the payments, Gayle downsized her family into an apartment. She thought the apartment would be temporary. One or two years. It's been five years. Strange how you stop aspiring for more, Gayle tells us. "How terrible I can't think of what I want anymore."

**Missing in action**

What both Greg and Gayle do think a lot about are the things which are absent in their lives - a confidante, an emotional outlet, a source of feedback, validation, and instrumental support.

Worry over what's missing subsumes Greg. He has little else to distract him. There's his cats, going to Subway for two hours every night, watching the Mod Squad, talking to his mother on the phone. His brother and sister don't really 'get' him. They never understood what it was like to be bullied in school. To have to escape to the girls' restroom for respite. All because he was seen as slow.

Gayle also battles other people's perceptions of herself. As a single mother. It's a label she dislikes. And yet she's not so sure of the alternatives. Both her and Greg struggle to answer the question: how would you describe yourself?

How, then, might we coach people like Greg and Gayle through their specific worries and open up the space to imagine who they want to be?



Gayle barely has time to think and reflect on what she wants to change. She's busy juggling her work schedule and her kids.



Watch Greg talk about his story  
 vimeo.com/99185413

Greg told us that his best year was Expo 1986 because there were so many things going on, the pavilions, people from all around the world. "People would call me and asked where I am. I said I am not going home, I am having a good time!"

**The pleasers**

**Meet Tina and Melissa**

Tina /// daughter, survivor, friend, good worker, normal, high functioning, slow  
*"I got tired of people always saying I was dependent. I heard that word so many times I thought it was true."*

Melissa /// daughter, sister, friend, gamer  
*"I don't really know why I am not like my brother"*

Tina has just re-decorated her apartment. It's an eclectic mix. Images of flashy cars. Collections of coins and spoons. Stuffed animals. Muir cats on the bookcase. Unopened DVDs on the shelf.

It feels like stepping into a children's fantasy world.

But is it Tina's world?

The muir cats come from her friend Sandy. The DVDs from her older brother. The pictures from an old calendar her father gave her. The stuffed animals from her mom.

"Everyone gives me stuff, and I take it," Tina explains.

**Whose identity?**

Tina doesn't just adopt their stuff. But their words too. "Valerie says it's best if I stay living here, that I couldn't find

a better place. Alex says I should do my best and try and look happy."

Maintaining a positive exterior is important to Tina. "It's all good, everything is good," is a frequent refrain. Even when the reality might be more nuanced, and complex.

For the past 7 years, Tina has volunteered three days a week at a childcare centre. Cleaning their toys. She's always wanted to work in a daycare. She event went to college to be an early childhood assistant. But she never found a paid job. So she's relied on her disability check. Funds are often so tight by the end of the month that Tina resorts to canned food.

**Lonely independence**

Tina relies on little else beyond her disability pension. She no longer has a life skills worker because, "They wanted me to be on my own. So I said to myself, you've got to feet, Tina, use them." Many days, Tina feels a bit too much on her own.

Over the last year, Tina lost a lot of her friends. There was a conflict. She's down to one good friend. To go the pub with, and walk around town. "Me and Alex do everything together," she says in one breath. In the next breath, "He and I can fight a lot. I'd just like the future to get back to where it was." And the breath after, "I think it's going to be a good year."

What does Tina believe? What does Tina want? How might we help her explore her own identity? The last time Tina remembers really looking at herself was at camp. When she was a kid. They took pictures of her -expressing different emotions, with different body language, and helped her to be more

**"I'd just like the future to get back to where it was."** - Tina



Among the ideas that we showed Tina, she liked the 'Get me out of here' service best. She would like a change of scenery sometimes.



Tina's collection of stuffed animals

self-aware. That was many years ago now. She's not sure what would have changed. Other than her age.

**To be or not to be**

Melissa doesn't like her age. Thirteen. Too young to go out. Too old to be carefree. "I don't know," is her favourite answer to most things.

**"I don't know why I'm not Ian. I know I stress mom out."**

- Melissa

Not surprisingly, I don't know is her mom Rachel's least favourite answer to most things.

Rachel doesn't understand why Melissa is so different to her older brother, Ian. Ian excels at school. At sports. At dance. At music. And he's long known what he wants to do. "I'll enrol in college as an art history major, then work at a museum," he adamantly tells us.

Melissa rolls her eyes. "I'm not high achieving and stuff." Melissa is failing most of her classes at school. She's often in detention. Her teachers want to hold her back a grade. Rachel cut her TV and computer privileges. So she just went to her uncle's house.

Down the street. Video games and the book The Host (about an alien living inside a girl) are the two things Melissa actually likes.

Talk about Melissa's lack of motivations and interests fills much of the family's conversation space. Rachel is at a loss of what to do. "I use my intuition when parenting. But the two are so different, I just don't understand."

Rachel and Ian immigrated from Poland 15 years back.

Melissa was born here, in Canada. Rachel has a conflicted relationship with Canada. She's struggled to find work, or get help after a workplace injury. Money has been incredibly tight. They haven't been able to make rent every month. Rachel is vocal that her two biggest stressors are Melissa and money.

"I don't know why I'm not Ian. I know I stress mom out," is Melissa's reply.

How might we help Melissa create her own life script? How might we support Rachel to embrace multiple family scripts?"



A private high school that Melissa might go to.

early 20s

## The divers

### Meet Dave and Uzkul

**Dave** /// brother, (former) forklift operator, poet, “disabled”

*“Although I used to think it was a good thing to be free. It’s not so colourful an attitude anymore...I don’t think I use my skills as much as I could...I think I’d do better if I had more responsibility.”*

**Uzkul** /// brother, student  
*“I go to school.”* What will you do next? Shrugs. *“Don’t know!”*

accomplishments - multiple track and field trophies, a first place ribbon, and his forklift operator’s certificate. Among the photos is a mini-shrine to a deceased former girlfriend whom he misses dearly. Like that girlfriend, many of the best things in Dave’s life seem to live in his memories, in the past, before epilepsy became a larger part of his life.

#### Low to Average Points

Then there was the warehouse accident. Life just wasn’t the same afterwards. He moved to Burnaby. He stopped working. He no longer saw colleagues. That was over 10 years ago now.

These days, Dave’s world spans a few square blocks in the Edmonds neighbourhood and his predictable routines make the days blend into each other. He visits the credit union when he needs money, “which is often”. Most afternoons he hits “the strip” as he calls it, alternating between going to Starbucks or Waves, Burger King, Subway or McDonald’s.

In contrast to the memorable periods earlier in his life, Dave considers most days ‘average’ now—not too good, not too bad—but can’t specifically describe what could make them better. “A lot of stuff I’d do would be in hindsight...that’s kind of the way I live my life.” His main reference points for a good life are seem to be his brothers. “I think they’ve achieved more.”

#### Milestones

Uzkul and his family just celebrated a major achievement: graduation from



*Dave rarely uses his kitchen, he goes to Burger King or Subway for his meals.*



*Uzkul graduated from high school and is transitioning to college or a day program.*

high school. He crossed the stage, shook the principal’s hand, took his diploma, and smiled broadly.

Most of Uzkul’s peers will move on to university or jobs. Whilst Uzkul will return for a second year 12. To prepare him for the “real world.” Realistic is a phrase his teacher uses often when talking about her ‘special needs’ kids. She notes, “It’s not a fair question to ask someone like Uzkul what they want to do with their future. Most things are unrealistic. Realistically, Uzkul could do something like sweep floors.”

Uzkul likes to help out. He also loves music, dance, and world cultures. He’s fascinated by Turkey. It’s location on the map. It’s sounds. It’s foods. It’s history.

History, humanities, and cultural studies are a long way away from retail, food services, or electronics. The

three course options Uzkul will have if he transitions to Douglas college. It’s either Douglas college, or a day program for Uzkul.

#### Constrictions

The narrowing of choice comes at a time when many young people are widening their sense of what’s possible. When they are exploring their interests, their passions, their values, their sexuality. As developmental psychologist Eric Erikson noted, “Teens need to develop a sense of self and personal identity. Success leads to an ability to stay true to yourself, while failure leads to role confusion and a weak sense of self.”

How might we enable Uzkul to stay true to himself and his interests? And not experience the social emotional dip Dave did? A dip characterized by a loss of purpose and possibility?

Bespeckled, bearded, and tall, Dave is softer and more gentle than his build would suggest. His soft speech is frequently broken by a chuckle and a toothy smile - especially when he’s being self-deprecating.

The walls and shelves in his humble apartment are adorned with photos of loved ones and reminders of ac-

**“I used to go dancing. I used to live in a house with girls and guys. I used to ride my bike. I used to take martial arts. I used to make bird houses. I used to not need massages.”** - Dave

## The positive deviants

### Meet the Underwoods

**Alex, Eric, Randi, Jerry** /// Initiators, advocates

*“We see things and think, we can do that at home! Just show us and we can do things as lay people”*



When Alex’s brother, Eric, started picking the locks of the house, they didn’t punish him. They encouraged his problem-solving. When other kids in Alex and Eric’s classes taunted them, mom Randi and dad Jerry came to school for the morning. And explained autism.

Autism. Such a deceptively simple word. Were it not for a segment on Oprah, the Underwoods might not have fought the doctors for a diagnosis. Not because they wanted to label their kids. Far from it. They wanted to enable others around their kids to understand. So they created their own brochure. In plain English. With the words to use to trigger action from professionals.

#### Shaping services

Taking initiative is another speciality of the Underwood Family. Help and supports are meant to be shaped. Not statically delivered. As Jerry says, “If you qualify for community living funding, you disappear from regular society. You just go bowling or to Tim Horton’s in a group.” - Jerry

Using individualized funding, they’ve hired people themselves. Like a speech pathologist. Who didn’t just stick to the speech pathology box. But who shared personal stories of raising her

boys. Then there was Mary-Lyn. Who didn’t lower her expectations of the boys. But incorporated university level content, having them write essays and practice improv.

#### Taking and applying

It’s not only the boys who have learned to improvise. The whole family regularly practices taking content from unexpected sources. And acting on it. Books, random TV shows, inspirational speakers, everyday people. “I met a fellow who takes pictures of birds and we thought about how we might use that to open up a different world of communication,” Jerry recalls.

In their morning family check-ins, they all practice talking to each other. And being clear about what the day holds. Jerry and Randi both work full-time jobs. Randi at the grocery store. Jerry as a construction worker. Money isn’t expendable. Still, their dream is that the boys, find a way to live life independent of government funding. Although they are grateful for community living dollars, the paperwork can take over, literally. “We had no dining table for 10 years,” they laugh. “We want Alex and Eric to find their place in society and pay tax.”

Interacting with Alex now, it’s hard to believe their was a time, not long ago, when he was barely verbal. When we arrive, he’s sitting at the computer making an animated short film. Part of the multimedia course he’s now taking at the Institute of Technology. With the help of a fellow student and mentor.

#### Teachable moments

Finding diamond capacities in the rough is something of a speciality for the Underwood Family. As they put it, “You have to take individual talents and encourage them. We used the obsession with computers as a teaching tool.”

Every curiosity and incidental moment doubles as a teachable moment.



Our door @ Stride Place

# What systems want vs. what they do

Donald refers to himself as a bureaucrat. Not in an apologetic way. More matter-of-factly. So he was characteristically matter-of-factly when he looked across our work and said, "I'm puzzled. I thought we were already contracting for services that develop people. What's actually new about what you do?"

Reading government white papers, inter-ministerial reports, roundtable summaries, and annual reports across mental health, community living, refugee and children & family services, it's easy enough to confuse intent and practice.

Lots of good words are written down: Independence, self-sufficiency, self-determination, well-being, social inclusion, community connectedness, and stakeholder engagement.

We're seeing big differences between what's written on paper and what's happening in real life. Beyond audits, satisfaction surveys and annual reports, our public systems & social services have little intelligence. They simply don't know people's lived experiences. And most importantly, they don't know what kinds of service interactions actually prompt change in people's lived experiences. So that independence, self-sufficiency, well-being, and social inclusion become realities rather than rhetorical flourishes.

Have a read of the three of the biggest disconnects we've seen between words and actions.

**Independence. Self-sufficiency. Self-determination. Well-being. Social inclusion. Community connectedness. Stakeholder engagement. We're seeing big differences between what's written on paper and what's happening in real life.**

## Quality of Life: Are services delivering?



Increasingly, government recognizes that it's role isn't just to dole out money and deliver services. But to help bring about a better quality of life. Both the mental health and community living systems have embraced this larger mission, and are even attempting to measure quality of life.

Community Living BC uses an eight-domain framework, including emotional well-being, physical well-being, material well-being, rights, personal development, self-determination, interpersonal relations, and social inclusion. Fraser Health uses 8 different domains: self-respect, self-care, hopefulness, self-confidence, meaning & purpose, control, safety, and relationships.

Nice constructs on paper. That "person-served" and "clients" encounter, at best, once a year. In a survey format. With questions like, "I know I am a worthy person: Very negative to Very positive."

But, what does feeling worthy look like? What is the person saying or doing when they feel worthy? And what does an outreach worker or a life skills worker actually do to influence their sense of



worth? Much of the leverage these systems have to shape outcomes flows through face-to-face interactions with support workers.

George gets two hours of outreach work a week. Dave gets one hour of home support a week. Mark gets six hours of life skills a week. Fay gets nine hours of life skills support a week. These interactions are their only regular points of contact with systems.

And yet the face-to-face interactions we've observed between support workers and people are remarkably generic across all systems. They are interactions which revolve around basic

living tasks: house cleaning, shopping, cooking, banking. These are tasks which influence physical well-being and safety, but which have little direct impact on most other domains - like emotional well-being, self-determination, social inclusion, meaning & purpose, control, or hopefulness.

If services are to have an impact on quality of life, they'll need to track which variables influence quality of life, for whom. And then develop interventions to shift those variables. Indeed, quality of life measured at one point in time tells us little what exactly enables good living over time.

## Just words? Person-centered, Individualized, Strengths-based

This is the vocabulary of every system we've shadowed. The words signal a desire to move away from a needs-based, deficit-oriented approach. And start with people's gifts.

Yet the only way we've seen these words operationalized is through once-off intake processes and yearly planning processes. Where now there are sections on the assessment and planning tools about interests, strengths, and goals.

Monica's individualized service plan lists her strengths & interests as TV watching, singing, swimming, walking, and going to parks. Monica isn't verbal, so her workers and her family members have answered the questions on her behalf.

These interests & strengths are taken as static conditions. All of Monica's goals are framed in terms of interest-based activities. Like going swimming once a week. Six years of going swimming once a week, and the interest has been extinguished. Far from drawing on Monica's interests and strengths, the

system has inadvertently depleted her interests. Nor has she developed any new interests.

Interests and strengths don't make

**Interests and strengths don't make up a whole person. Were we to be truly person-centered, we would embrace all parts of the person.**

up a whole person. Were we to be truly person-centered, we would embrace all parts of the person. Fay knows she was diagnosed as "mentally retarded" all those years ago. She hates the word. But she doesn't actually know what it means. Other than that she is a slow learner.

When we ask Fay for more details about what it means to be a slow learner, she points to her oversized filing cabinet. With clinical reports. She has access to all of this information, but she doesn't own the information. There is no shared

discourse about both her challenges and her strengths. The paradox, of course, is that the professional discourse around Fay is still framed almost exclusively in terms of her challenges. To qualify for community living, mental health, housing, and home health care services, Fay has hit the high needs box. It's just that none of this discourse is shared with Fay. She's not part of the system's conversation, or in control of her full narrative.

The most person-centered approach we've observed has been within the context of a family system, not a formal system. Where the Underwoods decidedly owned their autism diagnosis. They learned everything they could about autism, and how to leverage their sons' curiosities to address some of the challenges.

To turn our formal systems into truly person-centred systems, then, we need to take a page out of the Underwoods' playbook. And start with a different language. One that is more honest and less superficial.



Above: Improving Services to People with Developmental Disabilities, 2011, Province of British Columbia

## Social innovation & service sustainability: Moving from what to how?

"If you keep doing what you've always done, you'll get what you've always got." The systems we've shadowed understand this adage. They see that to improve outcomes and achieve efficiencies, they'll need to change how they work.

And yet systems seems to think that their only mechanisms for achieving change are structural. Setting up cross-ministerial committees, rearranging hierarchies, creating new roles & boxes on the organizational chart.

Out of the organizational chart, and on-the-ground, these new roles do more of the same-old, same-old: signposting and referring to existing services. There's the new navigator role as part of the Services to Adults with Developmental Disabilities (STADD) Pilot Project. There's the MCFD Family Consultants as part of the Community Poverty Reduction Pilot Project.

Both Pilot Projects explicitly aim to "engage families in the conversation" implement "individual plans" and move towards a "one government" approach. But because both Pilot Projects invested in structure first - offices, staffing, backend systems - there is little scope to work with families to design the roles or test whether individual plans are actually the mechanism for change.

We would argue that starting with a pre-set structure, rather than with a rigorous research & testing process, actually wastes money. Such a sequence leads to 'new' services being imposed on people, and far more insidiously, to the manufacturing of human needs.

This is what we've observed with the STADD Pilot Project. As staff tried to cajole a potential user to call a Navigator, telling her she needed to think about her future care. Her response, "Why do I need yet another person to call? I've already made it clear I will not go into a nursing

home." It's a similar reaction MCFD family consultants seem to be getting. In nearly 18 months of operation, with 7 family consultants already hired, only 72 families took part. And what did they get? Referrals to the same-old services in the community.

As government convenes a panel of top officials and community leaders as part of the Social Services Innovation and Sustainability Roundtable, there is an opportunity to shift how government conceptualizes and invests in service innovation. They want to re-think service design, procurement, contracting, operational efficiencies, workforce sustainability, and strategic relationships. Great. Instead of allocating money for a top-down pilot to implement a set of recommendations, there is another way. Working from the bottom-up to research and test new service delivery models - along with the backend contracting & operations - before putting in place expensive and inflexible staffing and infrastructure arrangements.

Similarly, as the Disability White Paper moves forward, the opportunity is to move beyond a structural approach to change. Rather than put money in new organizational functions and pilot projects (like the \$1.5 million proposed for innovative training at public post-secondary institutions), what about resourcing research & development processes that co-develop new models from the ground-up? Testing what actually prompts change along the way?

So many of the themes in the White Paper come through in the stories of the people we've met: employment, inclusive communities, accessible service delivery. But it's not the themes that will create change. It's the mechanisms government invests in to turn those themes into reality.

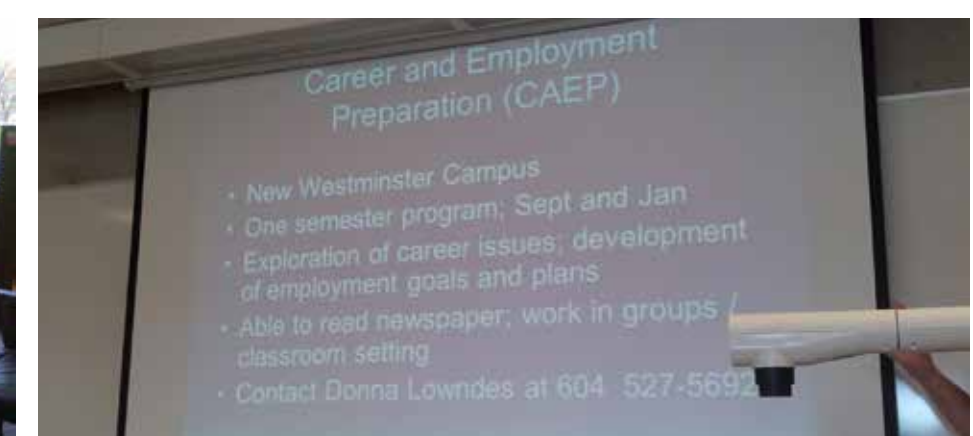
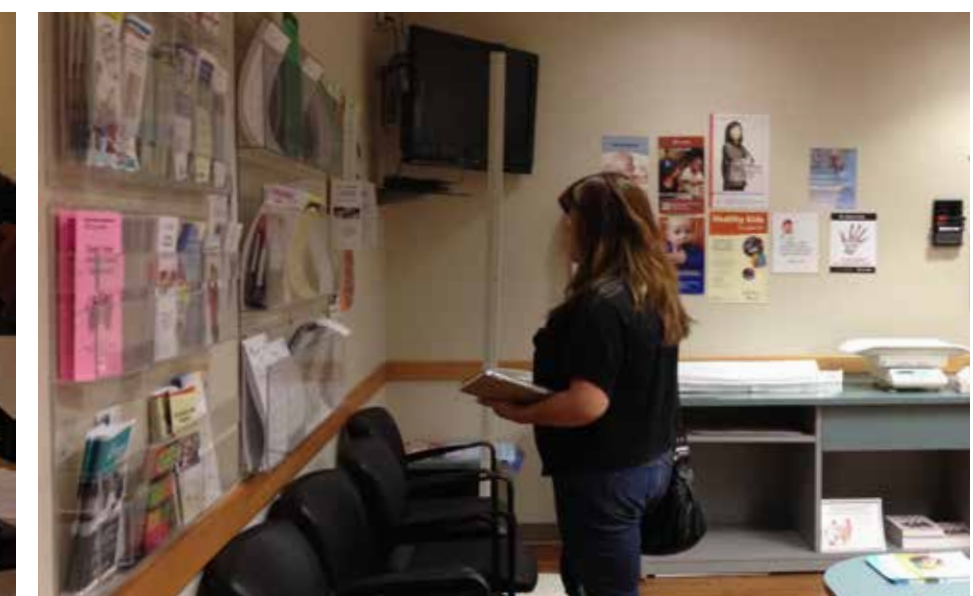


**Systems seem to think that their only ways for achieving change are structural. Setting up cross-ministerial committees, rearranging hierarchies, creating new roles & new boxes on the organizational chart.**



Shadowing service providers

Clockwise from left: Janey takes in a wall of information at the Fraser Health Licensing office; CLBC staff review Quality of Life survey results for BACI; Douglas College Career & Employment Program presentation; Sandra from Simon Fraser Community Living Society



# What's a good idea?

## Getting clear about our values & design principles

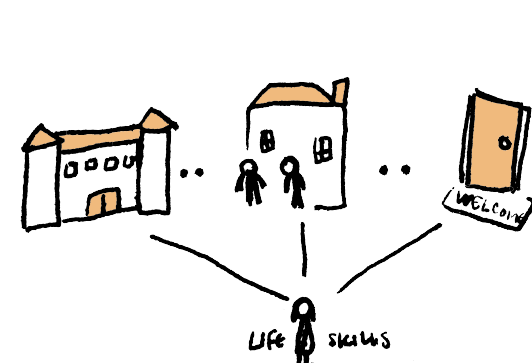
'Values' is one of those words that means so much and so little all at the same time.

Our work starts with a set of values, which we tidily summarize into, "We're about trampolines, not social safety nets." By that we mean we want our welfare systems, our social services, and our communities to enable people to bounce up and move forwards. Not merely to protect, to safeguard, to reduce risk.

We also like to say that our work starts with a group of people, in a particular place, ill-served

by the current social safety net. We work with these people to co-develop solutions. This all begs the question: what kinds of solutions?

Here we have to try and make our values practical. And very rooted in the particular context - steeped in what we're seeing and hearing from people. We call these practical values 'design principles' as they become a kind of criteria from which we brainstorm and organize our early ideas for solutions.



PRINCIPLE 1

### Create informal & formal supports that change with users' lives

Fay moved out of an institution, into a group home, and finally, into her own apartment. She has physically moved-on, but her pattern of service usage has not. Fay spends nearly all day, Monday to Friday, with a life skills worker or a home support worker. To keep her workers busy, Fay writes down a to-do list every night. She's had so many services in her life for so many years, the most different activity Fay can imagine doing is going to a movie, or bowling.

Stories like Fay's exemplify the difference between services that function as a safety net versus supports that serve as a trampoline.

Most of the existing service provision we've seen is designed to keep things from getting worse. It's about maintaining the status quo. Not disrupting it. Even where services focus on goal setting, we've seen little that's about developing new interests, exploring hidden capacities, or exposure to different futures. We don't hear much about how services & supports intentionally bend over someone's life course - so rather than accessing the same service repeatedly, there are different phases, intensities, durations, and avenues for entry and exit.

#### We're asking ourselves:

How do we design check-in points into formal services & informal supports? Even after your 'case' has been closed or your 'plan' has been set?

How do we measure change over time? And make that visible to users?

How do we identify & draw on the knowhow of people who have moved on from services? As a role model or resource for others?



PRINCIPLE 2

### Curate learning experiences that provide exposure to a range of reference points and hone critical thinking and creative doing capacities

Kamran did not like her grade 12 equivalency class. She was a 44 year old woman. With three school aged kids. It didn't feel right to sit in a staid classroom. Plus, she was lost. So she went down to grade 11. She still felt lost. So she went down to grade 10. But learning math out of an old textbook felt useless.

Jo also felt learning out of a textbook was useless. She wanted to work in social services, and yet there was little that was social about her six-month course at the career college. Lots of PowerPoint presentations and written assignments, without much modelling of practice. Even in her practicum, Jo had limited exposure to the range of practice out there.

Inspirational and useful adult learning opportunities seem to be few and far between. At least that has been one of the connective threads between the people and frontline staff with whom we've spent time.

Social service managers frequently lament that their frontline staff lack creativity and the ability to put innovation into practice. We'd say that has far more to do with the quality of training and professional development.

We met more staff that were hungry for good quality learning than staff who purported not to care. The same was true for most of the refugees and people living with a disability - who often had stopped going to classes and day programs, not because they weren't interested in learning, but because they were totally bored.

#### We're asking ourselves:

How do we design shared learning experiences - so for staff and the people they help or between family members?

What would a liberal arts approach to adult learning look like? Rather than a vocational job training approach?



PRINCIPLE 3

### Tap into surprising community resources, and prompt unexpected exchanges

Navigators, facilitators, social workers, family consultants, employment specialists. Every public system we've encountered has a user-facing coordinator role. For the users, this looks like an initial needs assessment followed by a range of referrals and signposting to existing information, services, or work placements. The assumption is that the current mix of information, services, and opportunities are the right mix. That if people just accessed what was available, their needs could be met.

We do not think this assumption is holding true. We've met people using every available service whose life remains stuck.

What we see missing is an explicit catalyzing role and methodology. A coherent way for services to create new opportunities and experiences. To go out into the community and activate local resources - be it freelancers, small businesses, larger employers, or community organizations - by creating value propositions and shaping local capacity. This requires looking at freelancers, small businesses, larger employers, or community organizations as another user group.

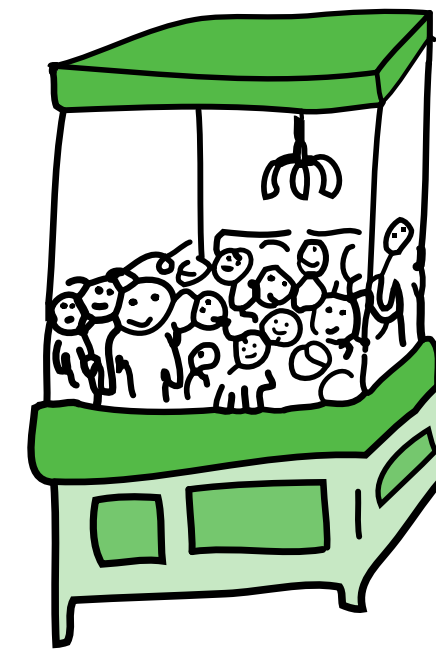
#### We're asking ourselves:

How would we develop new roles around the catalyzing function?

How could we catalyze the positive deviants in our communities?

What's the best way to match-up community resources with people?

How do we design intentional matching processes?



PRINCIPLE 4

### Segment services by motivations and resources. Re-sort people across vertical ministries & services: refugee, community living, mental health, children with special needs.

Some days, Clarissa wishes she were just a bit "dumber." She explains, "If my IQ was 10 points lower I would qualify for community living supports." Instead, Clarissa relies on her husband. His own health isn't so great. She's not sure what will happen when he can't help her with the day-to-day tasks anymore.

Public systems are always in a state of resource scarcity. Demand for social services typically outstrips supply. So services are rationed to people by need. As monies get tighter and tighter, the tendency is to raise the threshold of need. Such that people have to hit crisis before they can receive some sort of help.

But there is also a significant cost of overly targeted services. Not only is crisis care more expensive, but narrower eligibility requirements squeezes out the people who might have been the resource: those doing a bit better. We've seen time and time again what happens when frontline deliverers have a more balanced caseload - instead of just encountering the folks with high needs. These staff experience less burnout, and have tangible reference points to share with others.

That said, we don't think the answer is totally universal, non-differentiated services. We think the answer has to do with better segmenting services. With grouping people by their motivations and resources, rather than by their needs. When you do this, you often create efficiencies. Sam, the underemployed refugee from Kosovo, and Mark, who lives with a developmental disability, can support each other to build skills and find good employment.

What would be the basis for re-segmenting?

What are the implications for staffing when you work with a broader grouping of people?



PRINCIPLE 5

### Appeal to people's positive motivations; their desire to be recognized for doing good, not bad.

The first time Eduardo got specific 1:1 feedback about his job as a home support worker was when he was in trouble. He knew what he did wrong. He didn't know what was right, or what was good.

All of the public systems we've seen start with a Hobbesian view of people. A view that says people will do bad things. So we need to name, shame, and publicize the offenders - in order to deter future offenses. It's a view that assumes people are motivated to act right out of fear of doing wrong.

We've seen this view play out in the documentation and reporting processes that we have shadowed. More time is spent documenting what went wrong rather than what could be different.

There is another view. A view that says people are essentially good. That what motivates them are positive examples, recognition, inspiration. Indeed, we have found that people want to know what to work towards, rather than what not to do.

#### We're asking ourselves:

What would it look like to have an underlying positive psychology approach?

How would we change the language around risk & accountability?



PRINCIPLE 6

### Question what it means to be a professional, in which contexts. See professionalism as the art of discernment versus the application of rules.

George knocks on the door of Apartment 303 at 10:58pm at night. To talk through some of his worries before going to bed. When George doesn't get a good night sleep, his anxiety rises three-fold the next day. 10:58pm is decidedly outside the bounds of 9-5pm public services. Except when George's late night private concerns aren't attended to they risk becoming public concerns the next day.

Trouble is, formal services seem to be conflating professionalism with strict public-private boundaries. Such that to be a professional is to stay within the lines.

We'd argue that to be a professional is to be intentional and discerning. This requires attentiveness to context. It requires understanding what might be effective, for whom, when. Sometimes what's effective is blending the public and the private. It is having a coffee with Greg at a cafe at 8pm, rather than meeting him in the office at 3pm.

#### We're asking ourselves:

How do we design more flexible roles that can unfold at different times, places, and with different interaction styles?

How do we recognize and draw on relevant personal experience and knowhow? Rather than relying only on formal training and credentials?

# Me, Us, Them: By the Weeks

## Week 1: Hitting the ground running



With no time to spare, we started making recruitment materials our very first week.

“The team clicked right away and it made working together a breeze. In the early days, orientation quickly gave way to learning by doing, whether it was through role play or mere trial and error. It was a busy but fun week scheming of interesting ways to recruit ethnography participants.” - *Laura*

## What happened this week that was such a high point?

- We shadowed people and systems in a more focused way, meeting more unusual suspects
- Clear themes emerged
- In 1 night, we pulled created a Synthesis Wall, that helped to make sense of it all...



This is the Synthesis Wall we built for our second Debriefing Session with emergent themes



Things aren't as sunny as they seem. The team is tired, lost and frustrated, but we finally voice our uneasiness.

## What was the low point?

“Exhaustion has set in. It is mid-point in the project and the team is not feeling it. It is difficult to feel so unproductive after a week where everything came together. A visit from Stephen, a member of our Advisory Team, helps us to articulate what we've all been feeling but been reluctant to voice. A low point in the project, but an important and necessary tension. An opportunity to voice fears and concerns about the plausibility of our ideas, and develop a more honest team conversation style.” - *Janey*



Shadowing BACI day programs out in the community

## How did you get the momentum back?

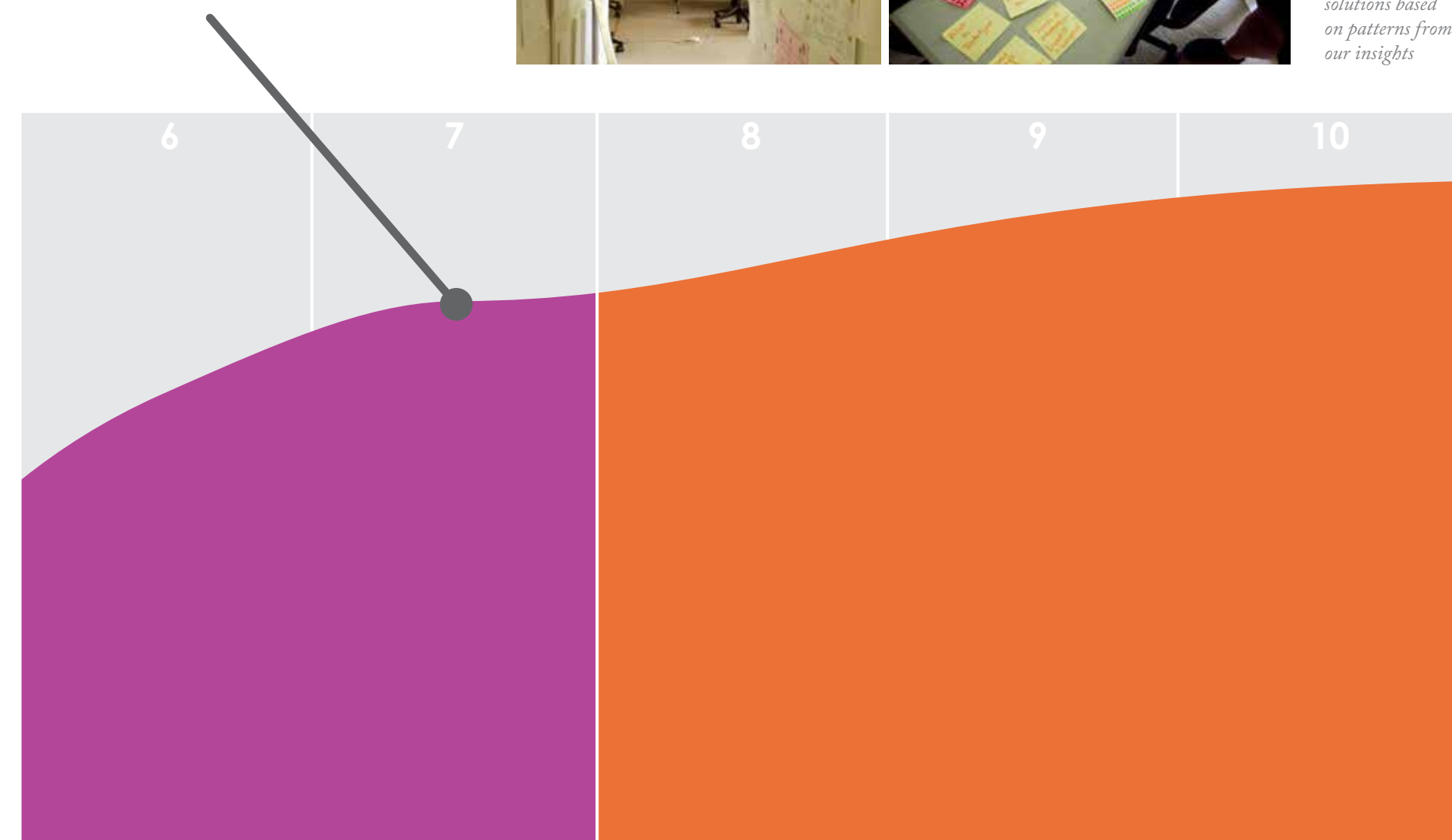
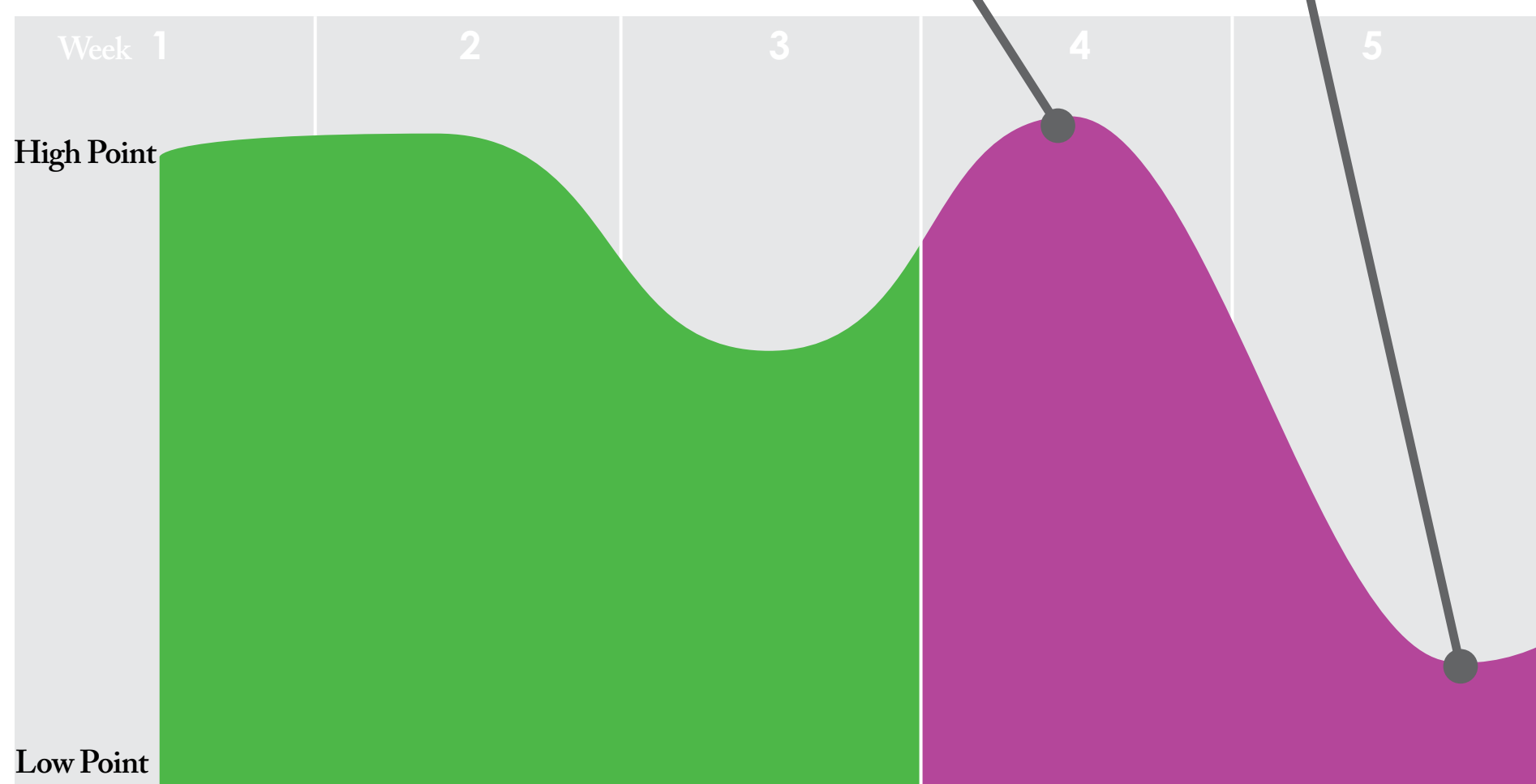
- Held a movie night & watched Temple Grandin
- Changed the scene, left the apartment and went back out into the community to see more
- Met with people who hadn't been initially open to meeting with us
- Shared drafts of our stories back with people



## Hard at work

Grouping our findings, writing, and ideating solutions based on patterns from our insights

## The Team's Emotional Journey



## Understanding the Gaps

Weekly questions

- What is the lived experience of people on-the-ground and staff in systems?
- What does belonging and isolation really look like?
- What do services & systems think they are doing?
- Where are the disconnects?
- How is our own team identity being shaped?

Actions

- Getting to know each other
- Creating recruitment materials
- Recruiting and meeting with people
- Developing research materials & prompts
- Starting ethnographic fieldwork

## Challenging 'Good' Outcomes'

- How do we write-up stories of people and identify their versions of good outcomes?
- What factors are influencing people's sense of self and future?
- How do we zoom into roles and interactions we think could shift (e. g. navigator, facilitator, incident reporting, life skills, employment, adult learning?)
- Do we have an understanding of system barriers?

- Identifying missing perspectives & viewpoints
- Digging deeper into the social science literature
- Comparing & contrasting people's life courses
- Writing and sharing stories back with people



Shadowing CLBC management meeting  
“Shadowing systems - even systems I knew well - gave me new insights into how decisions are made. The majority of people we met were open and receptive to change, but didn't always know how to get there.” ~ *Janey*

## Generating Ideas to Close the Gaps

- How do we visualize people's stories so we can see patterns, spark reflection, and start ideation?
- What are the most revealing segmentations and groupings? What does they tell us about the kinds of solutions to create?
- How might the solutions unfold? What interactions do we have a hunch will prompt change, and for whom? What can we test?
- How do we share our learnings with outside stakeholders?

- Segmenting people we have met
- Generating & pitching early ideas
- Writing scenarios & fleshing out interactions
- Visualizing learnings to external stakeholders

Weeks 1-3

Weeks 2-7

# Breaking the ice, with ice-cream!

## How we met the folks of Stride Place

Door knocking. Such a simple term but a far more daunting exercise. We began working in Stride Place in April. The goal was to meet as many people living in the building as we could. The challenge was how to actually go about meeting them. What could we do to get folks to trust us enough to let us into their homes and their lives?

Our first act was to develop a new service offer for residents of the building. We called ourselves the

In-Home Helpers. We created a door hanger that detailed our list of free services: breakfast in bed, home repairs, ice-cream delivery. Basically anything that we could possibly do. We hung the door hangers on one half of the building.

For the other half of the building, we baked up a batch of chocolate chip cookies. While the cookies were still warm, we went door to door, introduced ourselves and the project, and tried to secure dinner meetings with as many people as we could.

We wanted to create an experience that was surprising and delightful for residents. Where there was a joint value exchange. So we transformed the elevator into a life sized colouring book. Because it was Easter, we hung coloured eggs from the ceiling, filled with prizes that could be redeemed at our apartment. We also hung apples and granola bars with our information so people could contact us to arrange a free dinner, if they wanted.

### Mixed Messages

Some people were so eager to tell us about themselves that the project became secondary. Many of them had not had someone over for dinner in years and some had never had company. We asked folks for per-

mission before recording anything to paper or taking photos. Many people were eager to participate in the ethnographic activities we had created for our dinners.

Some were a bit confused about us and the project. They wanted to meet for dinner, but weren't sure why we

wanted to meet with them. Over dinner, we explained who we were

and what the project was about. People were then quite open to tell-

ing us about their lives. They shared stories of past events, like fleeing from a war torn country, to life now, to hopes for their futures. Doorslam. Some people did not want to engage with us at all. That was okay. In fact, these are the people that we wanted to engage with the most! People that don't usually sign up for things or don't usually voice their opinions. This meant that we needed to come up with some creative ideas to engage them - like coffee before work and cold drinks at the end of the day.

### Did it work?

So have we met all the people that we wanted to meet? The answer is not so simple. We have met over 50 people. But numbers are not a good proxy for the quality of information gleaned. Our goal is to hear from the extremes of the bell curve - from the people doing poorly and the people doing surprisingly well. We find that if you design with and for the ends of the bell curve, you come up with interventions that work for the middle. And whilst we've met individuals & families at both ends, there's a segment we haven't heard from: the busy young families in the building. Next time, we would develop a value proposition specifically for them.

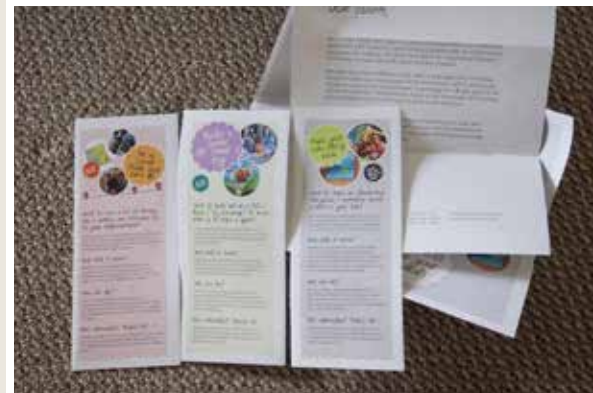
## 5 Things We Did To Meet People



### Or How to Get to Know Your Neighbours

1. Offer people drinks or ice cream on a bad day
2. Provide help with everything from mundane chores to bringing them breakfast in bed
3. Go door-to-door with plates of warm cookies and big smiles
4. Surprise people! Transform an every day action, like taking the elevator, into something fun
5. Ask kids to be your tour guide around the neighbourhood

**Other things we tried:** a pop-up cafe in the parking lot to catch the morning crowd and decorating our front door



One of the many ethnographic dinners we held with building residents.

An average dinner would last 2-3 hours. We would bring over food for everyone, get to know each other, explain the project and, after dinner, use visual materials to prompt deeper discussions.

# Ethnography: It's what sets us apart

## Why bother?

We like to say we're in the change business, not the research business. But in order to prompt the kind of change in people's internal and external worlds that can lead to flourishing, we must understand those worlds first. Here in Burnaby we've been curious about how people conceptualize their identity; the types and intensities of relationships in their personal networks; how they internalize labels and norms; what their interpersonal and system interactions look and feel like, among other things.

What about these could be different? What could spark change in what people, think, feel, say and do? What might be added, modified or removed from their direct environment or wider context to bring about change? We believe that we can only answer these questions by immersing ourselves in people's everyday lives.

**What could be different? How could we prompt change in what people, think, feel, say and do?**

## How to Find the Gaps

The first stage of our approach aims to uncover the disconnects between what people say and what they do. These disconnects are fertile opportunities to intervene and trigger change. Doing short interviews or distributing questionnaires does not uncover these elusive gaps. You can only uncover them by hanging out with people, in context—in their homes, workplaces, on walks to grocery stores, etc.—and over time. This involves spending days, evenings and weekends with people, getting a feel

for their lives at different times of day, in different places and situations.

We met and spent time with over 50 residents from the building and service providers from different organizations. At times, our deep ethnographic immersion smelled like honey-glazed Turkish deserts, sounded like classic rock, looked like high school graduations and family birthday parties, and felt like scales on a snake (at the local pet store). It included: going for dinners to Subway, riding along to hospital appointments, sitting in on ESL classes, visiting group homes, helping with Math homework, walking dogs, watching movies, attending board meetings, going to a lake with a day program, applying for jobs at the mall and many other ordinary and extraordinary situations.

## The Un-usual Suspects

When we do ethnography, we don't just look for the Average Joe. We are far more interested in what happens at the edges, the positive and negative extremes. We're after the people who would never show up to a community event or meeting, join a focus group or complete a voluntary survey. They are

**We're after the people who would never show up to a community event or meeting, join a focus group, or complete a survey.**

the ones our solutions need to work for in order to matter. To learn what has worked or is work-

ing for people, we search out the positive deviants. These are folks who, despite coming from similar situations or contexts to others around them, are doing things differently and achieving more positive outcomes for themselves. We want to know, what is it they're doing to succeed? How have they done it and why?

## Being a sponge

When we're out doing ethnography, we're a lot like sponges. We try to capture the environments we occupy, the objects and messages we see, the conversations and scripts we hear, and the behaviours and interactions we witness. When found and deciphered, everyday artifacts like what people have on their walls, what's in their calendars or what's on their bookshelf can offer fresh

insights into behaviours, motivations, hopes and fears. Information that you wouldn't uncover by simply asking direct questions. Similarly, when shadowing systems we're fascinated with every interaction: be they things like forms, brochures, staff meetings, manuals, log notes or orientations. Regardless of whether these interactions are physical, virtual, or human, they show us how organizations actually operate, what they measure, and what they're doing to realize their intentions. We look at the quality of these interfaces and ask, what could be different?

Indeed, our role isn't to document what is happening, but to use our observations as a springboard for idea generation. For us, research is both an analytic and a generative exercise.



# Prompting & Sparking Conversation

## Making materials to elicit reactions

Sometimes words aren't enough. It can be difficult for anyone to answer questions about themselves verbally on the spot with a stranger. Rather than hope for rich answers to our questions and endure long silences, we prefer to put things into people's hands and garner their reactions, or have them show us what they mean.

Tangible materials help focus attention and discussion by giving participants a physical way to organize their thoughts and let them reflect as they go.

A successful material helps us to understand how people see themselves, what shapes their thinking & behaviors, and to identify the potential hooks for change. We find materials can also be a more engaging and fun way of gathering information for everyone involved.

In this project, we made more materials than we typically do because of the range of language and cognitive abilities. What worked for one individual, perhaps someone new to Canada, was not guaranteed to work for the next person, like someone with autism. This meant we had to try and test multiple versions of our tools. We found writing prompts were effective for individuals who struggled to verbalize, but felt too much like school for refugees in ESL classes. For people entrenched in mental health systems, we had to be careful to not make our materials look like psychological testing.

Behind each tool was a theoretical construct - like social stigma - that we wanted to unpick. Using materials, then, became a quick, useful and easy way to compare and contrast people.



## Some of the materials we designed



### Identity Labels

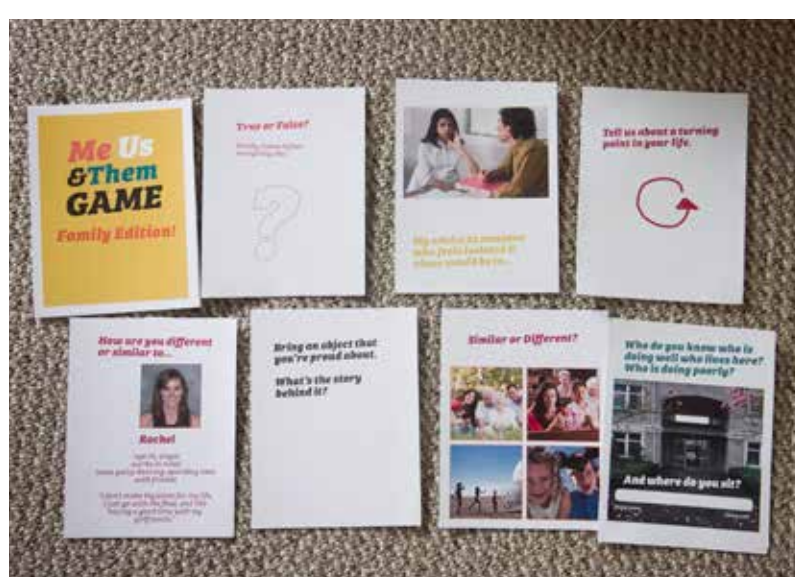
#### How did we use them?

People were asked to pick and choose from two sets of labels—red for labels services might use to describe them like 'disabled' or 'unemployed', and yellow for role-oriented ones like 'survivor,' 'friend' or 'brother.' Folks were quick to organize the labels into the ones they embraced, rejected or were uncomfortable with. We also employed different contextual photos to investigate whether people perceived themselves differently based on the environment.

#### Tested & Explored:

Identity & Self-concept  
Internalization of labels  
Social stigma

Who accepts, embraces, redefines or reframes labels?



### Me, Us & Them: Family Game

#### How did we use it?

This game was a fun and interactive way to elicit narrative responses in family settings. We placed all the cards face down and took turns (us included!) answering the same question. It was a useful way to have a different kind of conversation that also revealed family dynamics and interactions. Types of cards included: Are You Similar or Different To..., True or False, Tell us about a time when... and Show & Tell.

#### Tested & Explored:

Sameness/Relatedness  
Identity & Self-concept  
Family Scripts

What or who do people compare themselves to? How do they reconstruct the past?



### Idea Cards

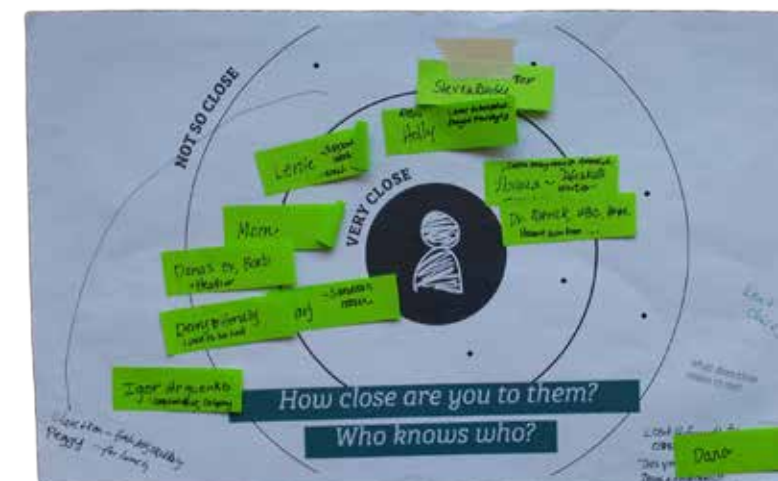
#### How did we use them?

We created a card deck of real and imaginary services & informal supports that we gave to people to browse through and tell us what they would choose. Services advertised ranged from massages, laughing therapy, second medical opinions, to a 'Get Me Out of Here!' network and a punching bag. These cards were effective at uncovering the stress points or challenges in people's lives, without directly asking about uncomfortable topics.

#### Tested & explored:

Experiences of distress  
Emotional outlets  
Needs fulfilment  
Loneliness

What's missing for people? What kind of help do people have or seek out?



### Network Map

#### How did we use it?

We asked people to map their connections, both personal and professional, and the duration, intensity, and quality of those connections. This exercise later evolved to include describing what kinds of needs these relationships fulfilled - like money, touch, practical help, emotional advice, laughter, etc.

#### Tested & Explored:

The relational self  
Needs fulfilment  
Loneliness & isolation

How were the quantity and quality of people's relationships related to levels of loneliness? What's the ratio of professional to personal relationships?



### Profile Poster

#### How did we use it?

We supplied people with an array of stickers that related to personal and collective identity; hobbies and interests; narratives, values and outcomes. Together, we created collages that provide a visual summary of people's sense of self. It was great to see the layering of stickers and concepts. Some people enjoyed the end product so much they asked for copies.

#### Tested & Explored:

Identity  
Narratives  
Source of purpose

How do people self-identify? What are their avenues for self-expansion and development?

# Slicing & Dicing

## The Art of Segmentation

Age, disability, level of need, and risk factors are the most common ways people are grouped together and then funnelled into service streams. Segmentation is different. When we segment, we look at people's motivations, aspirations, and resources. We think that by segmenting people this way, we can find some surprising groupings that tell us about the types of interventions we might design and the underpinning mechanisms for change. These are interventions which can cut across demographic groups, create efficiencies, and reduce stigma.

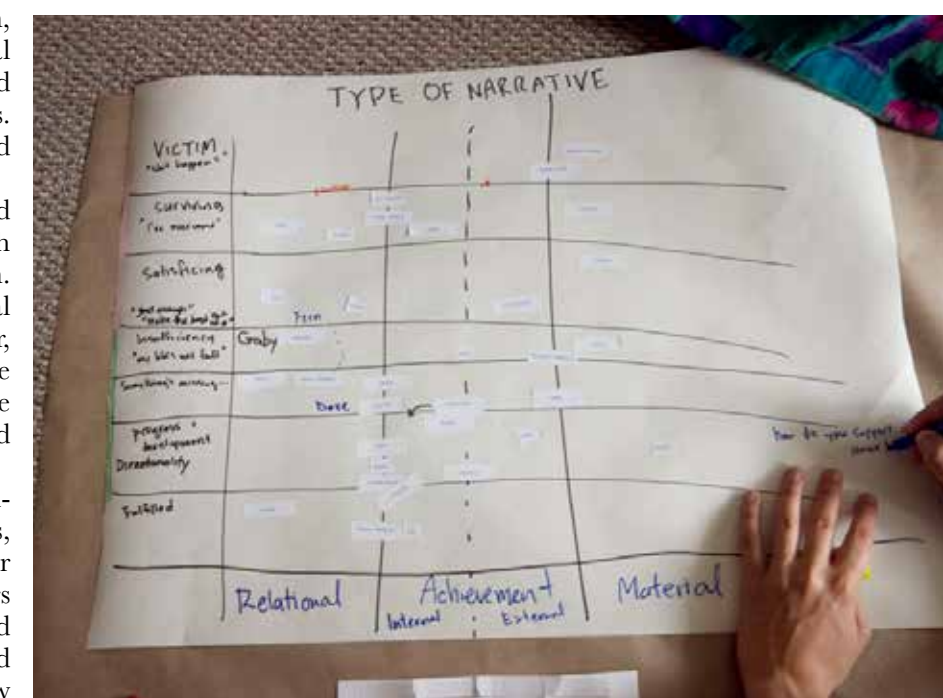
To do segmentations, we draw on a range of social science theories as well as people's stories.

One theory we found particularly useful was "Positive Human Functioning" (Ryff, 2006). Carol Ryff looks at psychological wellbeing and its six foundational areas: self acceptance, purpose in life, environmental mastery,

positive relationships, personal growth, and autonomy. We created a radial graph for each person we met, based on our interviews and observations. Comparing people's radial graphs led to some unexpected commonalities.

Shelby, a support worker, and Kamran, a mother of three, both have little sense of personal growth. Clarissa, a woman getting minimal support for her disability and Mahtir, a refugee from Iran, both have positive relationships. But these positive relationships don't seem to be linked to a sense of purpose.

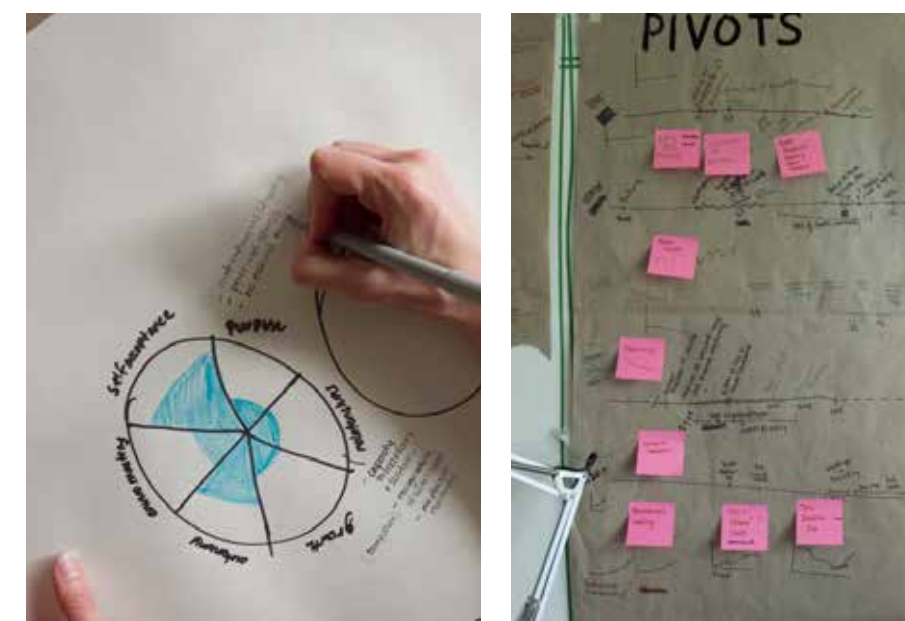
We also looked at people's narratives, their capacities, their networks, their levels of service, and their exposure to new ideas. Using stickers of each person we met, we grouped and re-grouped until patterns started to emerge. Patterns that opened up new possibilities and concrete ideas.



Re-grouping people we met based on the stories they tell themselves: victim, survivor, good enough, not good enough, fulfilled.

### Some Segmentations We Mapped

- Coping strategies against stress levels
- Cost to the system against capacity used
- Number of relationships against sense of purpose
- Quality of relationships against personal growth
- Sense of self against desire for change
- Service utilization against stuckness
- Amount of inputs against use of inputs

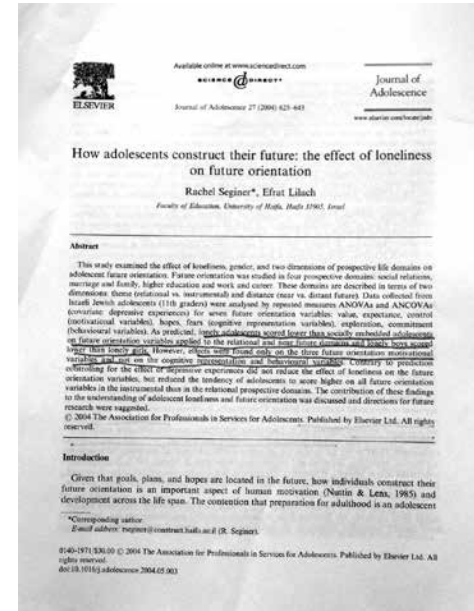


Left: Radial graph charting 6 factors of well-being borrowed from Carol Ryff  
Right: Timelines of people's pivot points and life courses: Where could we intervene?

# Theoretical Polygamy

So we're just going to come right out and admit it: We can't settle down. With just one theoretical framework, that is. We believe in multiple intellectual partners. At one time.

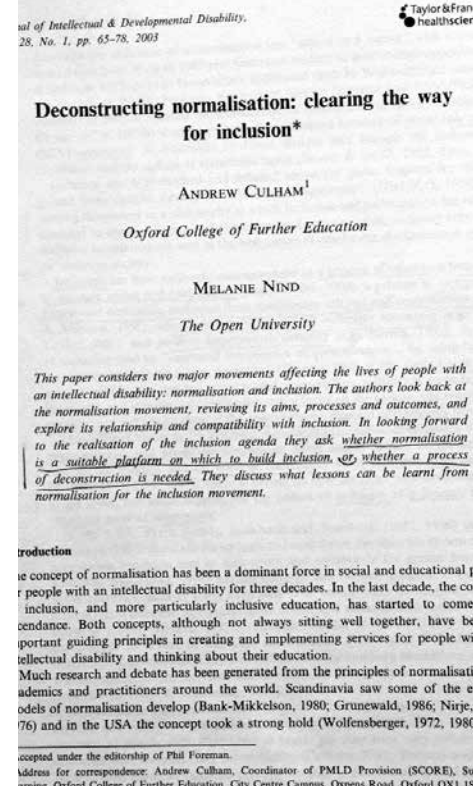
Monogamy is over-rated. Particularly when you're in the idea generation business, like we are. We use theory as a jumping off point. A lens through which we see alternative explanations, and alternative solutions.



## Lonely hearts: Psychological perspectives on loneliness

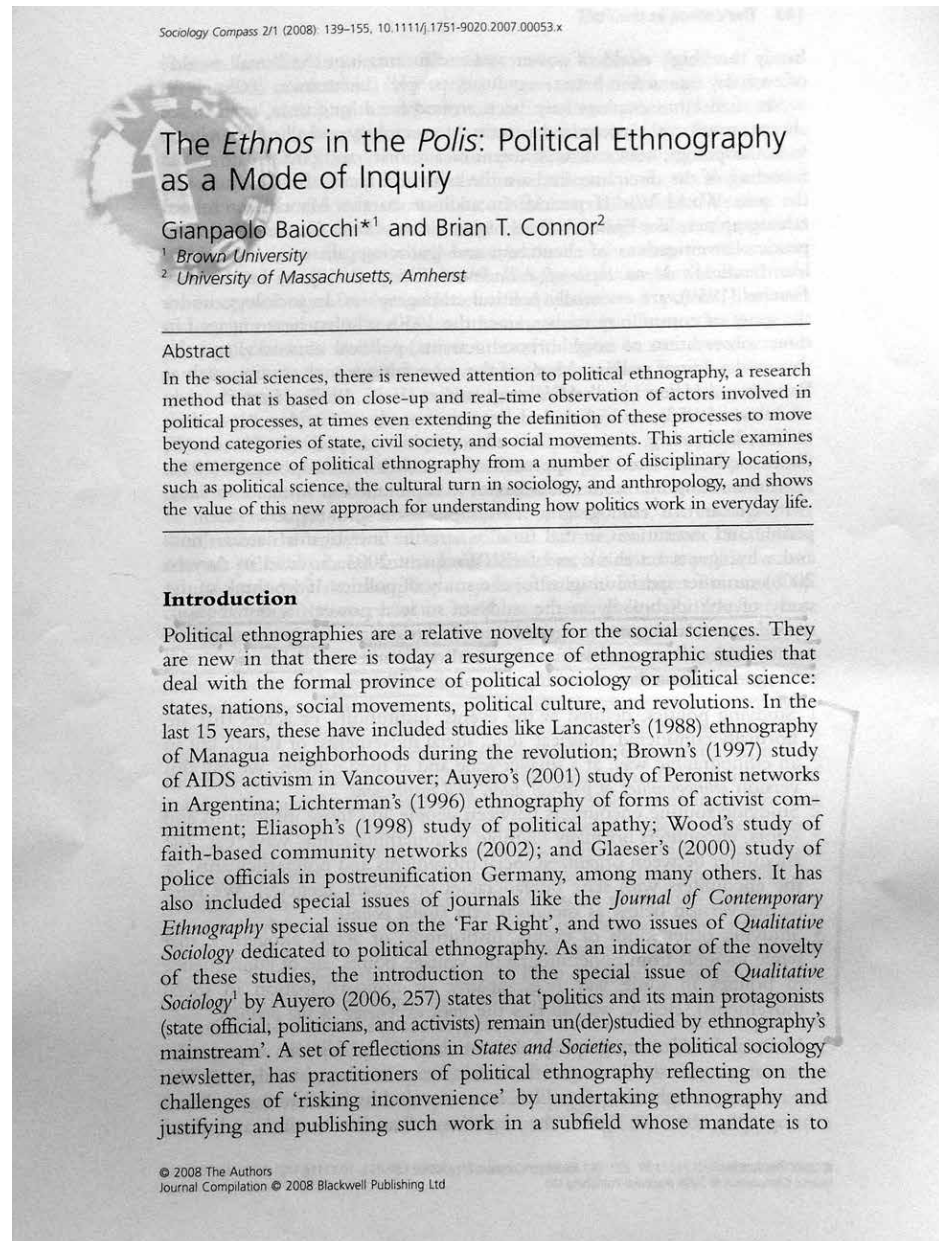
JOHN M. ERNST and JOHN T. CACIOPPO  
The Ohio State University

**Abstract**  
Loneliness is a complex set of feelings encompassing reactions to the absence of intimate and social needs. Although transient for some individuals, loneliness can be a chronic state for others. We review the developmental, social, personality, clinical, and counseling psychology literatures on loneliness with an emphasis on recent empirical findings. Chronic feelings of loneliness appear to have roots in childhood and early attachment processes. Chronically lonely individuals are more likely to be high in negative affectivity, act in a socially withdrawn fashion, lack trust in self and others, feel little control over success or failure, and generally be dissatisfied with their relationships compared to nonlonely individuals. Loneliness has also been associated with a variety of individual differences including depression, hostility, pessimism, social withdrawal, alienation, shyness, and low positive affect. Loneliness is also associated with depression, hostility, pessimism, social withdrawal, alienation, shyness, and low positive affect. Loneliness is also associated with depression, hostility, pessimism, social withdrawal, alienation, shyness, and low positive affect. Loneliness is also associated with depression, hostility, pessimism, social withdrawal, alienation, shyness, and low positive affect.



## (Some) of our reading list:

- Asset-Based Community Development: A Literature Review by Sarah Keeble
- Generating Tools for CoDesigning Nonverbal Communication in the Context of Dissociative Processes by Thomas G. Arizmendi, PhD
- Interventions to Improve Communication in Autism by Rhea Paul, PhD
- Language Characteristics of Individuals with Down Syndrome by Gary E. Martin, PhD, Jessica Klusek, MS, Bruno Estigarribia, PhD, Joanne E. Roberts, PhD
- Narrative Therapy by Brian Matthews and Barbara Matthews
- Remedial and Special Education: Effects of Implementing the Picture Exchange Communication System (PECS) with Adults with Developmental Disabilities and Severe Communication Deficits by Carl G. Conkin and G. Roy Mayer
- Social Stories Written Text Cues, and Video Feedback: Effects on Social Communication of Children with Autism by Kathy S. Themann and Howard Goldstein



## solutions? The answer was no. So we moved on to the next article & theory.

Our favourite article so far? Carol Ryff and Burton Singer's, 'Know thyself and become what you are: A Eudaimonic approach to psychological well-being'

Yes, there are a lot of different frameworks out there describing well-being & quality of life. We like this one because it doesn't conflate the ingredients of a good life with actually living

- Visual Feedback on Nonverbal Communication: A Design Exploration with Healthcare Professionals by Rupa A. Patel, Andrea Hartzler, Wanda Pratt, Anthony Back and Mary Czerwinski, Asta Roseway
- Community Integration or Community Exposure? A Review and Discussion in Relation to People with an Intellectual Disability by Robert A. Cummins and Anna L. D. Lau
- Foundations of Place: A Multidisciplinary Framework for Place-Conscious Education by David A. Gruenewald
- Understanding the Community by Pramila Aggarwal
- Building Community Connectedness in Broadmeadows by Cemile Yuksel Colleen Turner
- Connectedness: A Review of the Literature With Implications for Counseling, Assessment, and Research By Katharine C. Townsend and Benedict T. McWhirter
- In The Social Networks of People with

a good life. Sure you might have a job, a social network and a supportive family. But that doesn't mean you feel good about your life. Feeling good about your life, Ryff and Singer conclude, comes down to six variables: self-acceptance, purpose in life, environmental mastery, positive relationships, positive growth, and autonomy. We've used these 6 variables to compare and contrast the 50 people we've met, and to brainstorm what might be the levers for change.

# Ethical Quandaries With Ethel

This week I answer questions from designers and social scientists surrounding the tricky grey areas of immersive ethnographic research. Sometimes it can be a pickle. Situations will emerge that you simply cannot predict. Staying reflective during your process will help you identify and deal with ethical challenges sensitively. Here's a little advice to help guide your moral compass.



## Dear Ethical Ethel,

**When you are doing a project that involves building relationships and trust with people through ethnography, how do you make sure that you maintain your boundaries?**

### - Blurry Lines

Dear B.L,

Ethnographic work requires immersing yourself in a person's life. For a short, intensive period. You spend so much time with a person that conversation becomes more natural and less guarded. We see people at all times of day, in the morning, late at night, on the weekends. We share details of our own lives too. What's the boundary, then, between researcher, neighbour, and friend? There is no absolute line.

Instead, we like to say there is an intentional line. We clarify the time-limited nature of our relationship from the start. We try and explain, in writing and verbally, the purpose of our relationship. To learn what kinds of services and supports might help them. And then we try hard to show them the information we have gleaned from our interactions. Whether this is the scribbles in our notebook, or our more crafted stories of them. We hope this puts them in a position where they can let us know what they want in their story and

what they don't. And if they don't want their story shared at all, then that's okay too.

## Dear Ethical Ethel,

**When doing ethnographic work, how far do you take it? How do you know if you have pushed too far?**

Pushing for answers is part of what we do. We try to uncover information through the use of visual prompting materials. Sometimes our materials reminded people of negative past interactions and so we needed to improvise in the moment. Other times our materials were simply too much. We have to be conscious to give people the explicit opportunity to say no. We try and remind people that they are in control and can kick us out at any time.

## Dear Ethical Ethel,

**When you live and work in the same building as the people you are trying to get information from, how do you make sure people feel comfortable enough to say no? Do you use information from casual and public interactions?**

Living in the building has given us unusual richness and depth. We are able to build more meaningful relationships over time. And we see people's ups & downs more prominently: their natural interactions with family, their work

schedules, their late night drinks.

We observe not to judge, but to understand. We try hard to be transparent from the start about our dual roles - as neighbours and researchers - and we do not include information in our write-ups that people have asked us not to share. We also anonymize stories and change key details to provide some level of cover (unless someone has consented to us using their name and photo).

## Dear Ethical Ethel,

**When you are working with people of diverse backgrounds, how do you make sure that people understand what you are doing and what it means to give consent to use the information you have gathered?**

We worked with an incredibly varied group of folks in this project. Our materials and project communications were not always clear to people - particularly those who spoke English as a second language, or those who struggled with verbal speaking skills. At times, we found it hard to know how much people really understood about the project and its purpose. We had a handful of advocates and service providers who expressed concern on behalf of residents of the building. So we iterated our communications, and tried another way of talking about the project. In the form of a letter, co-signed by the owner of the apartment complex. Were we to do the project again, we

would send out such a letter right from the start. Although doing so might give rise to another ethical tension: turning off the people who do not like the organization owning the building. We wonder who best to align ourselves with early in the project to give us legitimacy, but also sufficient independence. We do not want to be perceived in an authoritative or power position. Our hunch going forward is that we need a bigger range of communication materials, that can explain the project from different vantage points and organizational affiliations.

## Dear Ethical Ethel,

**What do you do when people divulge sensitive information about themselves?**

Well, it's certainly happened more than once over the course of this project. We met a few people who disclosed personal information about their mental health concerns. One gentleman told us he had been up drinking all night and was feeling suicidal. We spoke to him, expressed our concern, and let him know that we needed to contact someone who could help. We called his family and fortunately, they were aware of the situation. The next day, we had a discussion with this gentleman about our conversations with his family members. We believe it's critical to be honest and open with people about our concerns, obligations, and courses of action.

# Penny for our thoughts



## Sabrina

I began the project curious about the kind of implications our work would have at the scale of the community, the neighbourhood and possibly the city, but I end up more fascinated and bewildered by a slightly smaller but no less complex scale—that of organizations.

It's not hard to find an employee of a public institution or non-profit who will lament the dire states of the systems in which they operate—the lack of funding, the resistance to change, the risk-averse culture, regulatory constraints etc. Many of our debriefers and guests frequently named the above challenges, but they were also eager to imagine alternatives. Their palpable hunger for change and optimism was hugely refreshing. I was genuinely surprised by their positive reactions to some of our early, very rough ideas. So often, I've had early ideas be met with skepticism and be shot down with all the reasons they won't work that I had almost come to expect it. But our partners threw out their cynical lenses and came along for the messy, ambiguous and emergent journey—and I'd like to thank them.

But a desire for change and good intentions are not enough; and the inertia of large systems is enough to bring even the feistiest change agents down. Fortunately, there are so many opportunities to do things just a little differently that could realize big outcomes.

One of the most reliable gaps we've observed is the massive disconnect between senior and mid-level management to frontline workers and—in particular—end users. And I've seen it time and time again in other fields—architects designing inhabitable spaces, city officials thwarting citizen desires and urban designers neglecting to accommodate diverse users because they assume they know what people want. Many organizations seem to believe that simply by pursuing their missions and strategies end users will get what they need or want. Asking people at the end of a process how satisfied they are on a 5

point scale, does not equate to knowing your user.

The standout difference in the work we've done here at Stride Place to my past experiences, is the depth of ethnographic research. We really got to know people. I got to know when people took their meds, when they were low on money, whether they were bullied at school, what their dream careers were, what books they read and music they listen to, the rhythms of their days, their routines, their hopes, their pains, what their childhoods were like and where they liked to go for dinner among a million other things. These stories are in me now and I can design with real people in mind, not the fabricated unrealistic personas often used in design or abstracted demographic caricatures that might pepper policy. Will this visceral experience be transmitted through our stories in a meaningful enough way to affect change?

I think the quality of public and social services would improve dramatically if more people in positions of power spent more time with the

**These stories are in me now and I can design with real people in mind**

people they're meant to serve. It's not easy, it takes time and is not yet valued as a productive or efficient use of time or money, but understanding and improving services requires it.

## Janey

Take a tour around the Edmonds area, create a new type of smoothie, make a pizza with 9 slices, all with different toppings while creating a new ordering system. This was the first day of what started as the Burnaby Starter Project. From the first day to the last, the pace of the project has been rapid, immersive, and intense. There have been moments of confusion. Major confusion. And maintaining the belief that this project could be the start of shift, a change within existing systems was challenging at times.

This experience has been a journey for me both personally and professionally. It has left me questioning when I stopped challenging things. Really challenging things. I remember comments from my report cards in school, "Janey needs to stop asking why and get to the task at hand." I remember always wanting to know, asking questions all the time. I cannot pinpoint when that stopped. At some point impatience got the better of me and I became too focused on outcomes and results and not so much on the process of getting there.

Outcomes. That is what drives most systems. How many hours, how many dollars, how many people can you funnel through channels of service. Through this process, I have had the opportunity to meet many people. People like Greg, Dave, and Fay. They all say that they are surviving. Their stories are not so happy and at the end of this project I can't help wondering what their endings will look like. Will systems be able to change in time to make a difference in their lives?

I think we can. I don't think that this project has provided all the answers. In fact, I think that it has given rise to even more. But I don't think that that's such a bad thing. It's questioning that allows for progress and growth. For real critical thinking and learning. That is my biggest takeaway from this project.

It's to question what we are doing and why. The methodology behind the decisions we make and services we implement. We need to question things. Right from the start, if we want to get things right. We need to think about prototyping not piloting. Prototyping allows for us to try things at a small scale. To actually test things out with actual users in order to see what's working and what isn't before scaling it out. Prototyping allows for rapid iterations. To be able to really create something that is effective and efficient.

This was our method while doing ethnographic work. Rapidly iterating materials as determined by the user. Being able to incorporate design into the materials was significant in drawing out information. Answers to questions that we didn't even have to ask.

This project and the people that I have met have shown me that change is possible. That people want something different. People that are receiving services and people that are providing them. Changes can be as slight as changing the way we ask people to document incident reports

**This project and the people that I have met have shown me that change is possible.**

and log notes and how we conduct staff training, to much larger, in changing the way people are funnelled into services. Perhaps we can begin looking at people as complete persons and not just by their diagnosis and behaviour. Maybe this can mean that we can do something different. That we can work together to enable people, including us, to lead the best possible life.

I hope that this project is just what it started out as, a starter project. A start to really changing things for the better.

## Sarah

This is project #7. I've lived with young people in British housing estates; families in a South Australian suburb; older people in care homes; young children getting ready to go to school; folks struggling with drug addictions on the streets of Toronto; and women living in domestic violence shelters in Apeldoorn.

But, this project in Burnaby was a first.

It was the first time multiple social service providers, in one place, came together to support & advocate for this kind of work. And it mattered.

Our past interactions with social service providers have too often been layered with resistance, skepticism, and concern. In our youth work in the UK, social service providers were one of the major barriers. In Australia, social service providers were less a block, but they were also less engaged. Participating on the periphery, but not putting a whole lot of skin in the game.

Here, we've had chief executives picking us up from the airport, furnishing our apartment, eating dinner with us, and being in contact with us nearly every day. They've held the space for us to ask the difficult questions, and critique both intentions & practices.

But, they also haven't been in the role of funder, commissioner, or contractor. Because they have not financed the Starter Project, and instead contributed significant in-

**What a difference to have chief executives from local agencies fronting innovation work. And being so vulnerable: admitting to the system that current services don't always work, and seeking out change.**

kind resources, there is not the usual power divide. We are equals: each bringing a different set of skills and perspectives to the table.

Our partnership has given us such different leverage with public systems. What a difference to have chief executives from local agencies fronting innovation work. And being so vulnerable: admitting to the system that current services don't always work, and seeking out both radical and incremental changes.

Our hunch when we set-up the Burnaby Starter Project was that a short, intensive 3-months would surface the disconnects, generate the ideas, and build the momentum to propel us towards prototyping. I feel a momentum I've yet to experience before.

Of course, we still don't know if our hunch will turn out to be true. Stay tuned to our website to track what happens in the weeks and months to come.

## Jonas

"I've gotten to know people better in this 10-week project than projects over the course of a year. When you're neighbors with the people you're working with, you have so many more interactions and moments. It feels much more shared. It's also intense to have no separation. We're ready for a break!"

# SPECIAL IDEAS EDITION

Radical ↑  
Degree of Change  
↓ Incremental

### Reciprocal Service Agreement

Turning services into a two-way exchange. Service users add their skills and knowhow to a skills bank in exchange for service. Users become preferred vendors of small jobs.

Link to: CLBC, MCFD, Intake & Assessment, Discovery & Employment Readiness



A new role and introductions service in apartment complexes & high-rises. Connecting neighbours with specific social interests & practical needs.

Link to: Housing BC, Community Benefit policies, Community Foundations



1:1 coaching to bust social & emotional barriers in real life situations.

Link to: MCFD & CLBC, Respite, Life Skills, Counselling



A badging system enabling young people to widen & deepen their interests, build new networks, and craft bespoke roles.

Link to: After-school Programs, Day Programs, Respite, ESL & Vocational Training, Discovery & Employment Readiness

### Family Scripts

A package of supports for families in caring roles. Get peer-to-peer mentoring, storybooks, family dinners, and camps.

Link to: Assessment & Planning, Carer Support

### Bounce

A distributed helpline for people to get feedback & validation on their course of action. Asking socratic questions versus giving advice.

Link to: Life Skills, Counselling

### Service Sabbatical

A literal holiday from services to reset routines, try new experiences, and go on 'tours' of alternative supports.

Link to: Services to Adults with Developmental Disabilities



A platform delivering shared learning moments for two. Between professionals and people, and people to people.

Link to: Professional Development, Recreation and Education

### Microbiz

Backend & functional supports to recognize & turn people's niche skills into tiny businesses. Like Caitlin's remote-control fixing service.

Link to: Work BC, Youth Employment Services



Small system tweaks & tools for reflection, rather than reporting-up.

Link to: Professional Development, Risk Management, Intake & Assessment, Person-centered Planning



## i • de • a

**noun**

*a thought or suggestion as to a possible course of action*

There are two kinds of ideas. Bold, daring, radical ones. And understated, incremental ones. Whereas the radical ones are designed to shake-up existing systems by changing the underlying assumptions - incremental ones are meant to help the existing system perform better.

We've got both kinds of ideas. Ideas that are about connecting people to the kinds of resources & relationships that expand their sense of self and future.

So that people are less stigmatized, less likely to hit crisis points, less dependent on acute services. And, most importantly, so that more people feel good, are able to use their capacities, and lead flourishing lives.

We use the word 'people' intentionally. Not clients, patients, refugees, seniors, youth with special needs, or people with a disability or mental illness. These are ideas which can

cross the disability, mental health, refugee, children & family services systems. Whilst we might start by prototyping an idea within a single system, the big long-term ambition is to work between systems and sectors.

We want to demonstrate how to re-sort services and supports according to people's motivations & resources, rather than their diagnoses or labels.

That's how we generated ideas. We took each of the segments to emerge from our on-the-ground research (see page 2), and with our design principles in mind (see page 10), developed concepts for tweaks within the system, new services inside the system, and informal supports outside of or between systems.

### Freelance Union

A new structure & approach to hiring exceptional support workers. Moving from paid staff assigned to jobs to freelancers matched with people.

# Five Big Ideas Unfolded

## COACH in your CORNER

George does not know how to start and end conversations to make friends and build intimate relationships. He does not find social skills classes useful because they are out of context. Read how Coach in Your Corner helps George to bust this barrier in real time and real context.

Go to page 25



## Curio

After visiting Fern's ill mother in the hospital, Fern and her worker, Jania, need to have a conversation about grief and death. Jania does not know how to start this conversation with Fern. Read how Curio helps Jania and Fern to have a healthy discussion about these tough topics, and add new input into their pipelines.

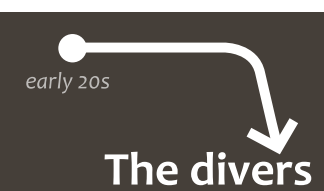
Go to page 29



## KUDOS

Mark loves maps. His biggest passion is traveling. But he graduated from vocational college without a job or a road-map. Now he's stuck in a day program cooking the same spaghetti over and over again. Read how Kudos changes that.

Go to page 33



## nok nok

What does Madmen and curry have to do with neighborhood connections? Read how Nok Nok brokers a relationship between Gayle, a single parent with two teenage daughters, and her neighbour Elly.

Go to page 37



## CRITICAL LEARNING REPORT I-Ethno

Jo has been a life skills worker for 9-months. She knows what bad practice looks like, but she doesn't really know what good practice looks and feels like. Read how Critical Learning Reports and I-Ethno shift the way Jo approaches her work.

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# A New Kind of Pub Crawl Coach in Your Corner Busts Social & Emotional Barriers in Real Life Situations



## COACH in your CORNER



Scan this QR code and watch an animated video of Coach In Your Corner

vimeo.com/99114871

On Saturday, George went on a pub crawl. It wasn't a typical pub crawl. It was a chance for George to try out some new places to meet people and practice having actual conversations. Something he has been struggling with for two decades. This time, George had a coach in his corner to help him along the way. Someone who could model, provide feedback, help develop strategies and approaches in real time and in the places he finds challenging.

Anxieties, fears, bad past experiences, and unawareness keep people like George from living the life they want. From maintaining relationships, from forming intimate connections, from feeling like they really belong. They are profoundly lonely. George has a life skills worker and a psychiatrist but these existing interventions don't work. Life skills workers, aged care workers, and residential care workers address the practical, everyday tasks. Psychiatrists and psychologists can only talk about the challenges. Coordinators and navigators signpost people to the same self-help groups and services.

Systems and the services they offer too often perpetuate the cycle of need. Because life skills & outreach work doesn't address the underlying issues that impact supported persons' ability for growth and development, there is no exit strategy.

Instead, people receive the same pattern of services for the duration of their lives. Coach in Your Corner attempts to get at the root of feelings of loneliness, anxiety, and lack of meaningful relationships in order to help people move forward. It is not meant to replace professional therapeutic services, but to act as a complement in order to reduce the chronic need for services.

As George puts it, "Coach In Your Corner is a service that is good for people like me. It's useful. It's for people with a people problem."

At the pub, live music and a dance floor were all George needed to get going. George had no trouble striking up conversations with people. That was easily observed. What he did have trouble with was holding a conversation and ending one. He made several attempts to talk to people and after each one was given feedback on his interactions. Coach in Your Corner is something that people like George can use and access for short term intensive coaching to help break down existing barriers for positive change.

George is excited by the idea of this type of service. "What number do I call to sign up?"

Dig deeper into the idea on the next page.

# For whom?



**People like George. Who have dissatisfied narratives and are high service users.**

George can tell you exactly what's missing in his life: a girlfriend. He's 57 and his last date was in 1987. For over 30 years, George has received support from community living and mental health services. His use of mental health services has ramped up in recent years, as the 'rattlesnakes' in his brain have worsened. George spends most of his days with his two cats.

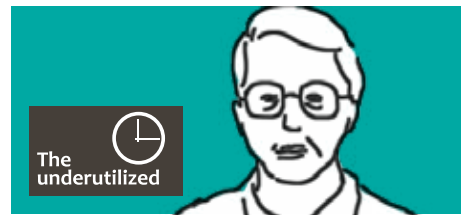


*George goes to Subway for dinner nearly every evening, but he says, "Going to Subway to have a sandwich and a pop just isn't satisfying anymore."*



**People like Tina. Who adopt other people's narratives and are light service users.**

Tina often wonders whether there is something more to life. She had a falling out with her friends, and spends her nights watching TV. It would be nice to have a "sweetie" in her life, and to repair those relationships, but she's not sure it's possible. Tina doesn't regularly interface with mental health services, but she has been a member of the local community living association for many years.



**People like Viktor. Who have underused capacities and limited service utilization.**

Viktor migrated from Poland to Canada 10 years ago. There, he was a sought after counsellor. He hasn't been able to find work in Canada because his training isn't recognized. His wife found work cleaning homes, which helps to pay the bills. He'd like to use his experience and build relevant skills, without having to go back to school.

# What's different?

## Identifying barriers versus setting goals

Most existing services - including life coaching - start with a goal setting process. Asking users to name what they want and need. And yet people like Tina - with 'insufficiency narratives' - struggle to verbalize their wants and needs. Coach in Your Corner will start with stories, activities, and exercises to identify specific barriers.



*Insufficiency Narratives: Tina often says, "My dad says this..." or "The building manager says this..." but does not really know what she wants. She listens to what people tell her she should want and do.*

## Use of existing community resources

Coach in Your Corner is not another professional-led service. The key to the concept is unlocking untapped community resources. People in the community who have relevant, but underutilized skills and deep personal know-how. Nearly all of the immigrant families we've met are working in roles that do not draw on the depth of their experience.

## New employment pathways

By investing in volunteers, and offering ongoing learning & development opportunities, Coach in Your Corner can be a catalyst for new kinds of jobs. Coaching is a growth industry. In the US, coaching generated \$2.4 billion in revenue in 2008. We see Coach in Your Corner helping to build both the demand and supply for niche coaching services in all types of communities.

## Time-limited

Coach in Your Corner is designed to be an intensive, short-term intervention. Not long-term therapy or ongoing skills development. Nearly all of the services we've shadowed in the community living space have no clear end point. The same is true for the services we've seen in the chronic mental health space, despite the fact that their frame is rehabilitation. By zeroing in on specific barriers, we envision clearer benchmarks of success and exit.

## Learning by doing, seeing, and reflecting

Rather than sitting on a couch and talking, or learning social skills in a classroom, Coach in Your Corner takes place in the context where the barriers manifest. For George, that might be in pubs and restaurants. For Tina, that might be over the phone, or at her friends' houses. Coaches will help to model different practices, create space for people to actually try out that practice, and give on-the-spot feedback. What people like George and Tina are missing most is validation, and someone to bounce ideas off of.

# Funding Coach in Your Corner

We believe Coach in Your Corner can be funded using existing respite and life skills dollars. Coach in Your Corner is unlike other services - in that it generates resources, rather than simply expanding dollars. By drawing on people in the community with unused capacities, and matching them with people stuck in the same holding patterns of services, we can reduce chronic service usage. The inability of our current services to address underlying emotional and social

needs too often leads to a crisis point and acute service interventions, from which too many people never recover.

Coach in Your Corner is one way to address these underlying needs before crisis hits, giving people a chance to exit service rather than continue for the duration of their lives.

## Better use of existing resource.

Right now, 'clients' of the community living system can use their individualized budgets to purchase skills development and respite services. The trouble is, uptake of individualized budgets is low AND there is a limited supply of helpful services. That means, people are purchasing the same old services. Coach in Your Corner could be a far more effective mechanism for building people's skills that would enable them to exit services through the use of dollars that are currently being spent on respite and life skills.

## Long-term cost savings.

Isolation, loneliness, and poor mental health cost public systems significant dollars. In 2011, the direct costs of mental illness were estimated at 42.3 billion dollars. Mood and anxiety disorders being the most prevalent. Coach in Your Corner is one new way of addressing specific social anxieties. It can complement existing, far more expensive, therapeutic approaches in order to reduce long term costs for supportive services. Particularly in the community living system, where folks like George with a 'dual diagnosis' represent nearly 40% of the population. Beyond emergency services &

crisis-point behavioral management, there are no preventative social & emotional programs.

## Generating pro-bono resource.

Coach in Your Corner will catalyze new community resources. We will recruit and train skilled volunteers, and form partnerships with Coaching Associations and Professional Associations to tap into their know-how and human resources. As a result, the system's resources would be matched with pro-bono support, delivering far more bang for buck.

## Three options to prototype this idea

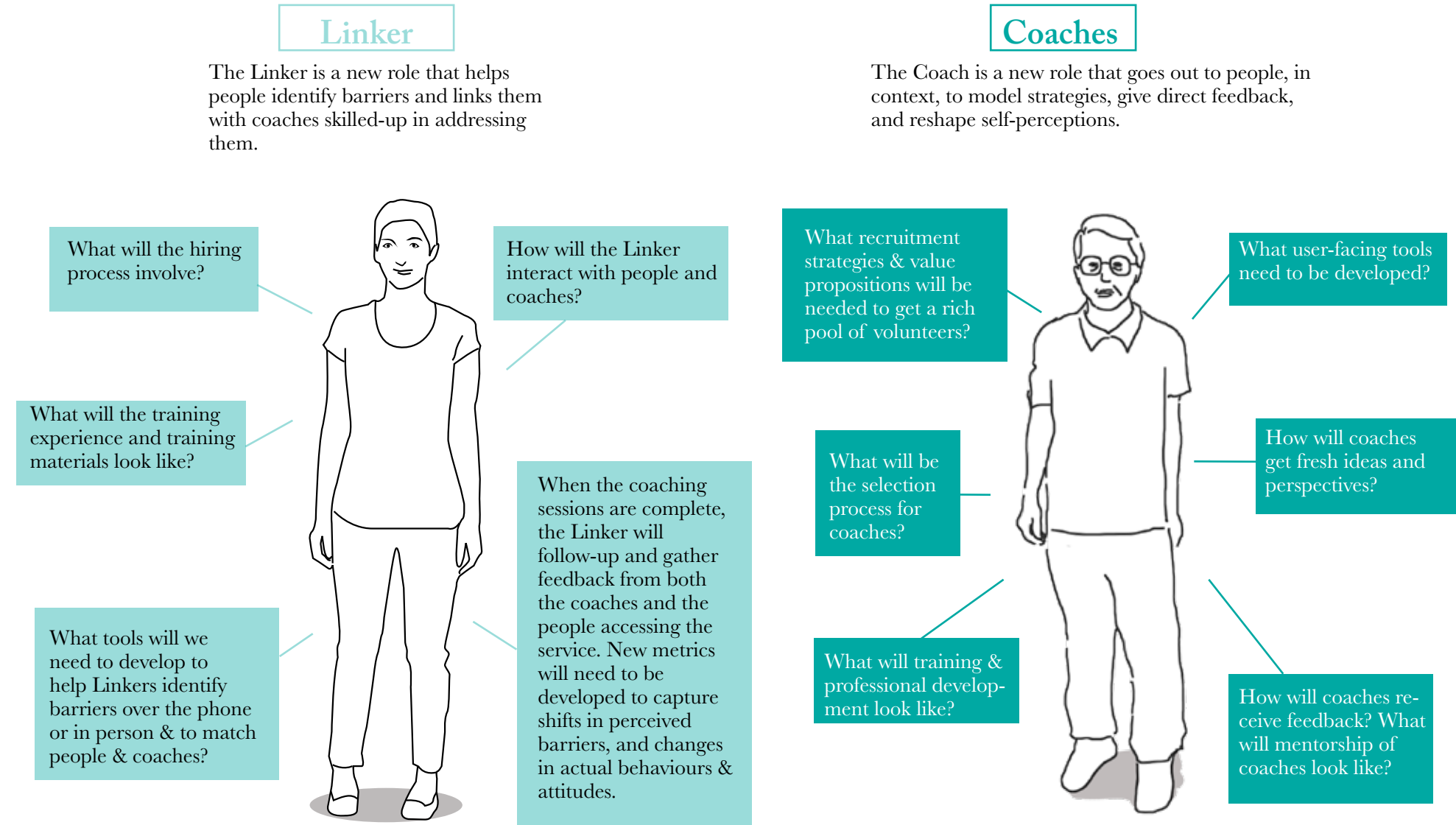
**Community Living British Columbia**  
We could prototype this idea as a new way to deliver skills development within the Community Living System.

**fraserhealth**  
We could prototype this idea as a new service stream that works between the Mental Health & Community Living Systems.

**Community Living**  
We could prototype Coach in your corner as a stand-alone service, outside the system, which service providers, people with individualized budgets, and families could directly purchase.

# Two New Roles

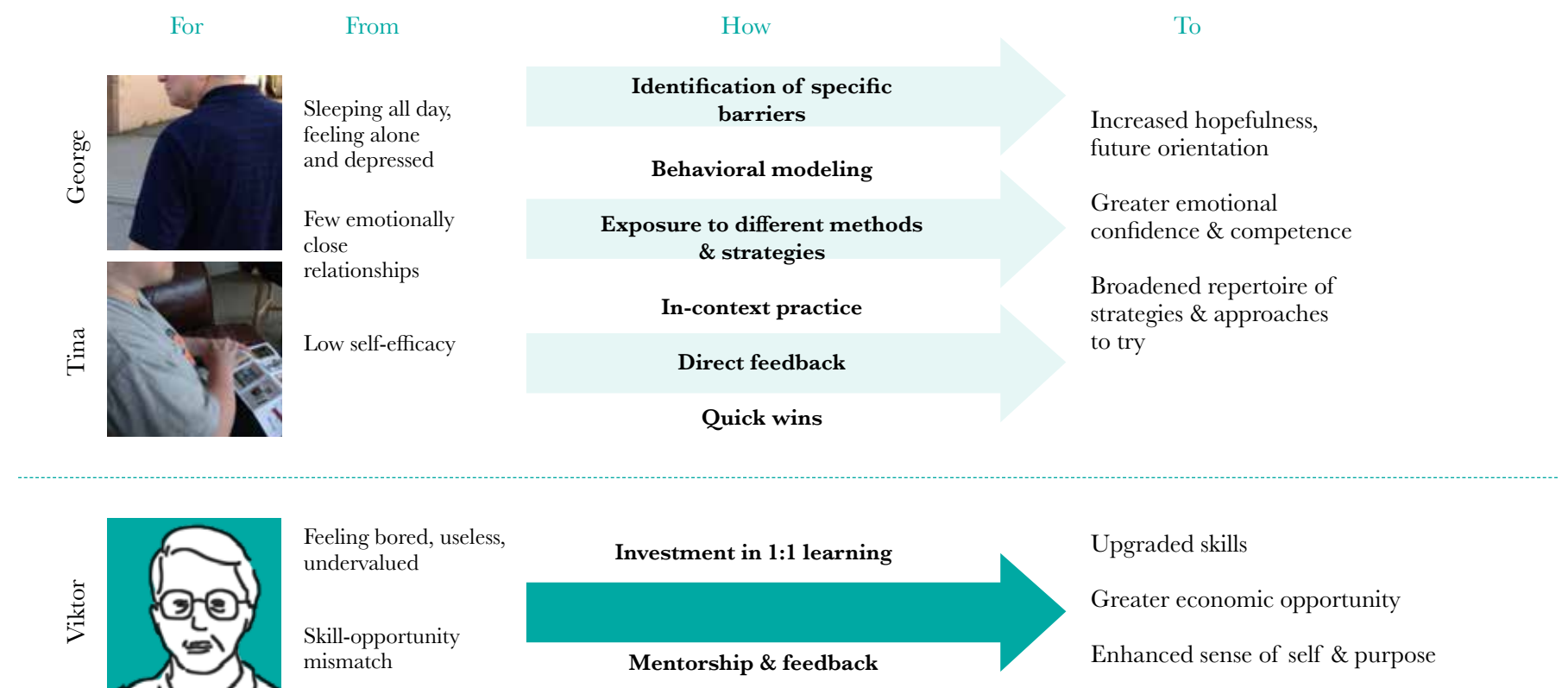
We would be testing two new roles, supported by a bespoke backend system, along with ways for the system to contract this service & re-allocate resources.



<b>Backend System</b>	Profiles of coaches and people	Documentation of interactions	Dashboards recording progress	Coach-to-coach wiki & forums
<b>Contracting</b>	Expanding contracting language to include broader definitions of service (e.g respite)	New monitoring & quality assurance tools	MOUs with professional coaching organizations around training & mentorship	

# What creates change?

Our hunch is that change will come from enabling people like George and Tina to see and experience ways to overcome their social and emotional barriers. That modeling, feedback, and validation are the core mechanisms for change. Mechanisms which are absent from existing service provision.





Role playing CURIO at Debriefing Session

# Changing Up Conversations

Curio curates shared micro-learning moments for pairs of people



Scan this QR code and watch an animated video of Curio

vimeo.com/99114870

Fern and Jania are returning from the hospital where they visited Fern's frail 96 year-old mother. The whole situation puts a lot of stress on Fern physically and emotionally. Her support worker Jania is not sure how to help Fern cope. This was not covered in staff training. She's worried about Fern's wellbeing when her mother passes away. While they're driving, Jania initiates a conversation about losing loved ones and grief. She talks about different stages of grief, and her own experiences when her father died. Jania's honest conversation with Fern was prompted by Curio.

Jania accessed Curio through her work subscription. She spoke to a curator who asked questions to uncover what format would work best for her and Fern. She received a link in her email to some curated conversation starters, stories and advice. She read about encouraging people to express their emotions, how to talk through fears

and what to avoid. One of the concrete suggestions was, "Acknowledge the reality of death by telling a story about overcoming loss in your own life". When she had a spare moment she also browsed related content on her phone, and the suggestions led her to easy exercises that help reduce stress while grieving.

*Dig deeper into the idea on the next pages*

# What's the need?

We met people from all walks of life who are feeling bored and stuck personally or professionally. For many of these people, every day at home or work feels the same. They might be stuck in predictable routines they've had for years. Single, lonely people

eat lunch and dinner at the same fast food stops. Workers go with individuals they support to the same park day in, day out. Parents don't know how to get through to their children over and over again. Individuals who crave interaction have the same conversations

with their neighbours everyday.

These people have something in common. Many of them lack a steady stream of new and varied ideas coming into their lives—or pipelines of exposure. Pipelines are sources of new ideas, information, behaviours,

activities or reference points. They can include the people we meet and interact with, the media we consume, the places we go, formal or informal education, the conversations we have or our everyday experiences.

## For whom?

People like Kamran and Uzkul. Who have few fresh ideas and reference points coming into their lives.



Kamran is a 40-something year old mother of three. Her and her husband immigrated to Canada 20 years ago and have been struggling to get by ever since. Kamran has tried attending ESL classes multiple times to improve her English, but they've never been a good fit. They're too formal, too difficult and she doesn't feel like the high school curriculum applies to her life.

When her oldest son Uzkul was born and diagnosed with Down Syndrome, Kamran was afraid and uncertain of how their lives would unfold. From not knowing how to interact with him as an infant to being concerned about his language development in school, Kamran has, at times, felt overwhelmed. Other than some practical advice from a nurse after birth, Kamran has not had much new input to shape how she interacts with Uzkul.

*It's hard for people to do things differently if they have little exposure to new or different ideas.*

People like Fern and Jania. Who have some inputs, but whose actions and experiences remain unchanged.

Jania is a life skills support worker in her early 60s who used to be a fourth grade special education teacher in her native Poland. She loves her job and wouldn't trade being a frontline worker for a more senior position. She enjoys the flexibility of working alone, but gets lonely. "I don't even know my co-workers," she says. Between all the driving and scheduled hours with people she supports, she often runs out of time to do her paperwork and completes it at home.

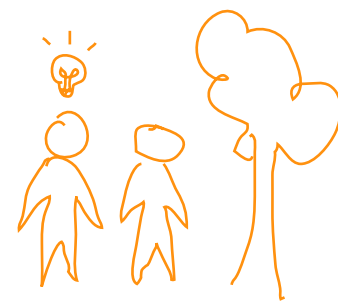
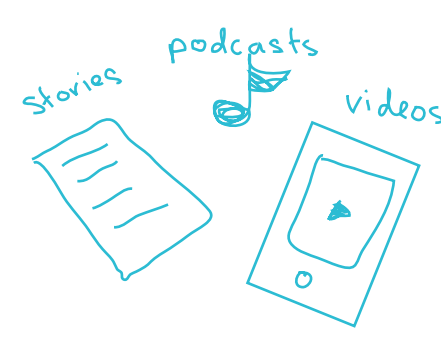
Fern and Jania have been paired together for 9 years. They spend 3 hours a day, 3 days a week together. Most days they drive around doing errands. Some days, they can spend over an hour in the car, just making small talk. They buy groceries at Wal-Mart, have lunch at Ikea, pick up dog food, attend medical appointments and have recently been visiting Fern's 96-year old mother in the hospital. She isn't doing well and the

visits have been difficult and emotionally draining for both Jania and Fern.

Little has changed for Fern over the last 7 years. The only thing that seems to vary is her health. She has the same conversations with Jania about her dog and her mother over and over again. Her days look very similar and don't build on each other.



# What's different about Curio?



## Learning for 2

Most learning is delivered to an individual without much regard for the people in their lives who could share and mutually benefit from the learning. Curio delivers interesting micro-learning moments to groups of two or more people who have a pre-existing relationship. These relationships might be personal or professional, but the intention is the same—to inject reflection, learning, novelty and surprise into everyday situations between people who already spend time together.

### Possible pairs:

- Parent-Child
- Teacher-Student
- Sibling-Sibling
- Client-Worker
- Spouse-Spouse
- Patient-Doctor

## Tailored to you

There is no shortage of content in the world. But too often it's difficult to access or it's packaged in a format that doesn't suit you best. Continuous education and professional development are dominated by formal environments, workshops, power point presentations, webinars and workbooks. These interactions do not effectively inspire change or encourage practice and development.

Curio adapts to what works best for you. Curators get to know your preferences and needs through guided questioning and help find the best fitting content from a wide range of formats—videos, print, digital, audio, experiential.

## On-demand, in-context & actionable

When we get a lot of information at once, out-of-context, and with no way of immediately putting it into action, we're unlikely to remember and apply it. Most staff receive training, but it doesn't help them on the spot - when they need an idea of what to try, where to go with an individual, or what to talk about. Some managers are exposed to new theories or practices in their professional development, but the learning rarely trickles down to frontline staff.

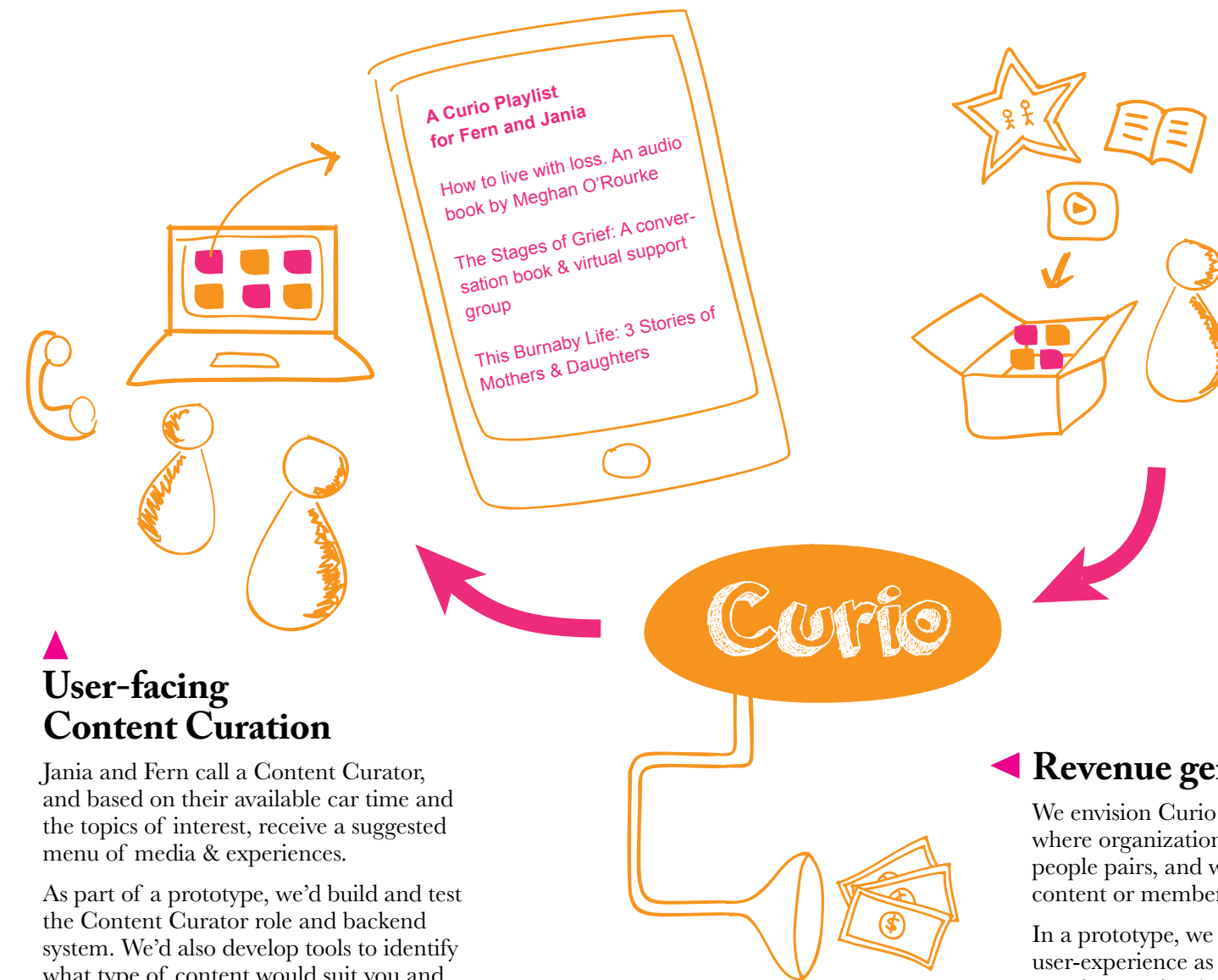
Curio chunks content into varying lengths and intensities, making it more accessible and usable in a wide-variety of situations—in the car, while shopping, walking your child to school. You choose when to use it. And it always provides you with something to do or try immediately.

## User-generated best practices

Though there are parents and workers who might not know where to look for inspiration or know how to experiment, there are plenty of exceptional families and frontline workers who proactively seek and try new and different things. They amass knowledge from observation, first-hand experience, trial and error, and broad formal and informal learning. These positive deviants are an untapped resource whose knowledge is rarely transmitted.

Curio will allow these exceptional users to become content generators and share their experiences with other people in similar situations. Being exposed to positive things other have done can be a transformative for individuals and families.

# How might it work?



## User-facing Content Curation

Jania and Fern call a Content Curator, and based on their available car time and the topics of interest, receive a suggested menu of media & experiences.

As part of a prototype, we'd build and test the Content Curator role and backend system. We'd also develop tools to identify what type of content would suit you and the context best.

## Behind-the-scenes content creation

Curio finds and packages up existing bits of content, as well as commissions new bits of content from positive deviant families and frontline workers. This might be stories of new practice; short films of helpful strategies; podcasts around emergent themes.

During the prototype, we will test how to source existing & new content. Including addressing sticky issues like intellectual property and rights.

## Revenue generation function

We envision Curio as a subscription-based service, where organizations buy subscriptions for worker-people pairs, and where families could also purchase content or membership on a sliding scale.

In a prototype, we would test the pricing and the user-experience as a subscriber. How do we engage people over time?

# The Argument

Though service hours are being met, the quality of those hours has frequently proven to be unexceptional. Engaging and training frontline workers is often cited as a barrier to change and delivering on quality of life outcomes.

Maybe the current methods of inspiring change—sporadic staff training sessions and newsletters—are not sufficient. A more interactive and adaptive way of delivering professional development on the job could make learning more accessible, interesting and habitual. Since a more reflective and experimental culture would be instrumental to improving the quality of services for people, Curio could be a transformational platform if embedded into workplace practices.

## Better use of human resources

Staff and individuals are spending hundreds of hours doing the same old things, with little to show beyond hours expended. Fern's life skills work costs the system over \$10K a year. We could get far more for that spend. At the same time that frontline staff help people with practical day-to-day tasks, they could also be jointly developing social, emotional, and intellectual capacities. Making the job more interesting could increase retention of quality staff, and lower costs of staff absenteeism. For persons-served, the quality of support could be dramatically more rich, engaging and interesting—leading to higher satisfaction, and most importantly, greater well-being.

## Better use of existing training funds

Organizations already allocate funds for professional development - but it's hard to track the results. We're seeing a lot of professional development for senior managers that never makes its way down to frontline deliverers or people. By funneling professional development to professional-people pairs, Curio can show the measurable effects of learning & development. So that dollars spent aren't wasted.

## More meaningful engagement

If informal caregivers are equipped with ways to understand and relate better to family members with challenges—especially in childhood—it could reduce strain on formal services, lower stress, and enable better partnerships between families and professionals.

# What's the change?



FROM

- Not knowing how to relate to her son
- Having little discourse around Uzkul's disability
- Not enjoying many shared experiences



TO

- Focusing entirely on tasks
- Repeating the same routines
- Fern being bored & not having a wide variety of experiences

## MECHANISMS FOR CHANGE

- Guided exploration of what formats and content might suit her best
- Exposure to new methods, strategies and activities
- Stories of other families to learn from

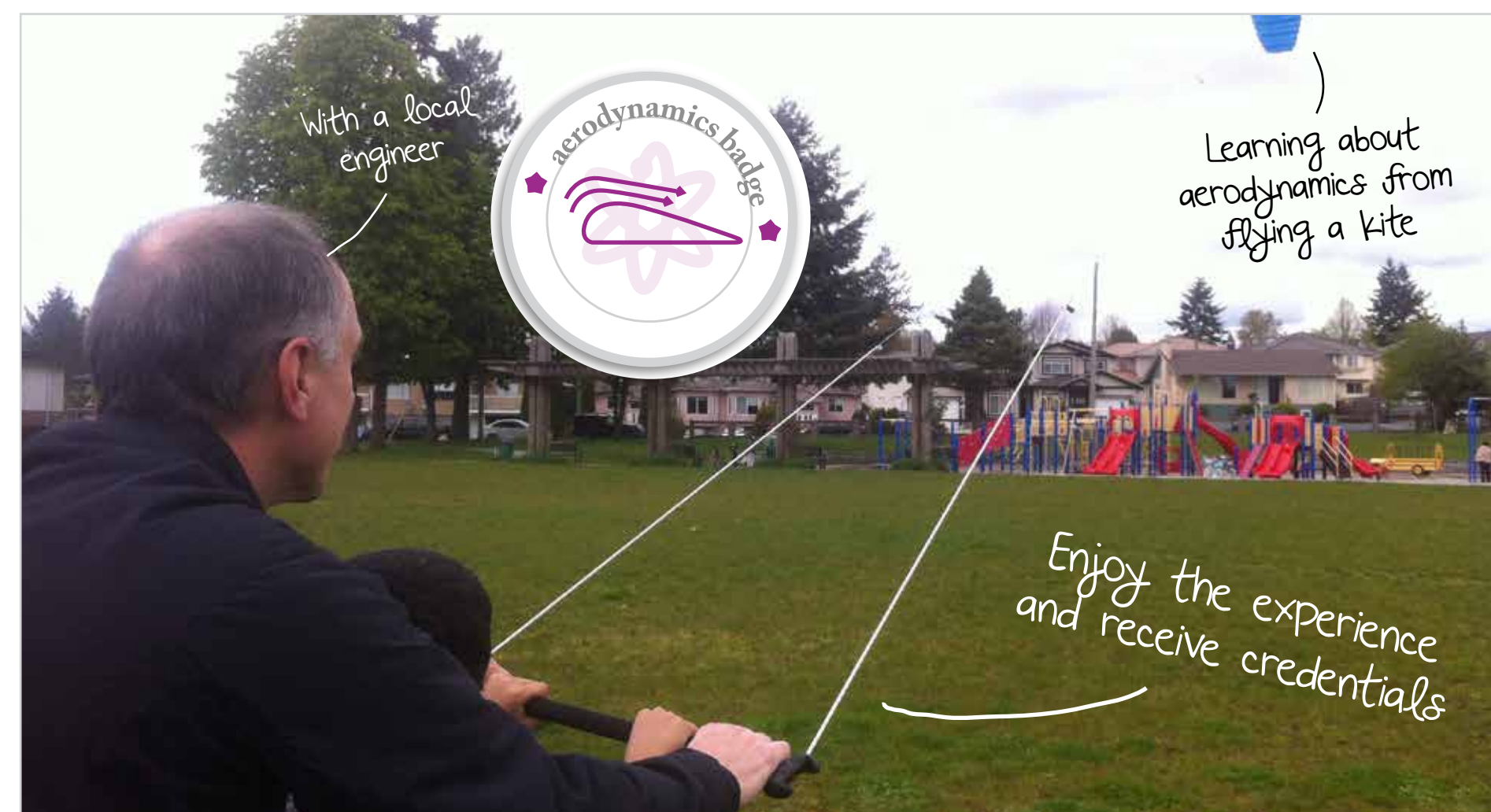
- Easy access to learning-on-the-job
- Specific suggestions of things to put into action immediately
- Chunked content for a variety of situations and time-constraints





The making of Kudos video.

## Outside the Box, Inside Community: New badge system connects youth & adults to experiences that widen & deepen their skills, networks, and roles



### KUDOS



Scan this QR code and watch an animated video of Kudos

[vimeo.com/99172546](https://vimeo.com/99172546)

When Mark was eighteen, he wanted to get lost in maps. To see, feel, and taste different worlds. Instead, he ended up in a decidedly mundane world. Learning how to chop vegetables and clean tables. He graduated vocational college without a job and without a roadmap.

That's all starting to change. Since Kudos was introduced, 36-year olds like Mark have bonded with 17-year olds like Alvin. They've discovered their shared love of Turkish music. Both Mark and Alvin are working towards their World Music badge, where they complete challenges, both individually and in small groups. Challenges like interviewing the owner of a local music store; learning to play an unconventional instrument; recognizing 10 international musical scores.

Kudos is a badging system that enables people of all ages and backgrounds to embark on self-guided, experiential learning

adventures in the community and to be recognized for their informal learning and skill development in new ways. It's like Scouting meets Massive Online Open Courses.

Tour guides develop badge content streams, and build community partnerships to host relevant local learning experiences. Participants explore and select badges based on their interests and curiosities. They work at their own pace and, once ready, demonstrate their learning to earn the respective badge issued by a business owner, institution, non-profit, community group or verified individual.

Mark discovered an uncanny tal-

ent for obscure music memory, and along the way, got connected with a local music professor. Now, he works one day a week organizing the professor's music archive. Mark's badge not only opened up a door to a new hobby, but also to a new role and a new professional network.

*Dig deeper into the idea on the next page.*

# What's the need?

Kudos is a universal alternative to after-school respite, day programs, and ESL learning. We've seen the poverty of developmental experiences and meaningful milestones for kids with special needs, adults with developmental disabilities, and refugees.

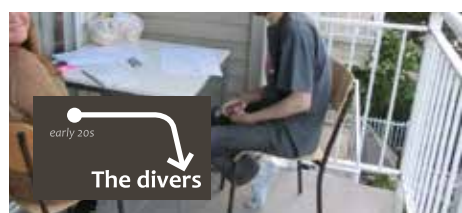
Too many young people spend their after school hours with a respite worker, isolated from others, and with few ways to discover new interests or build community connections. The same is true for many adults with the 'developmental disability' label. Who too often move from school to generic day programs. Where they are

grouped according to their disability - rather than by their motivations and aspirations. Sadly, people like Mark languish in day programs. Learning to cook the same spaghetti dish over and over again. Without milestones, or possibilities for exit and growth.

people with a 'refugee' label. Nearly every refugee we met is either unemployed or in a job that does not recognize their prior experiences. Without Canadian credentials and Canadian social networks, they have few options.

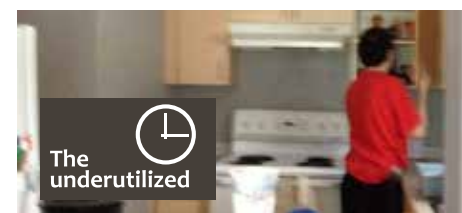
Kudos is another route for recognition and network building. It's experience-based credentialing.

# For whom?



**Alvin/ The (future) divers**

Alvin is 17 years old, and in the special education program at his high school. He's set to enroll in Douglas College, where he'll have one of three vocational options: retail, electronics, and food preparation. None of the options interest him.



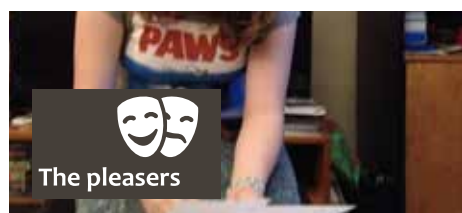
**Mark / The underutilized**

Mark is 36 years old, and graduated Douglas College 12 years ago. He has no job, and spends his days in the same day program, cooking the same spaghetti dish.



**Sam / The underutilized**

Sam dislikes his job as a newspaper deliveryman. He's 45 years old and immigrated from Kosovo. Back home, he was a successful mechanic.



**Melissa/ The pleasers**

Melissa, age 12, isn't sure what she's successful at, yet. She's failing many of her subjects, whilst her older brother is at the top of his class.



**Small business owners, not-for-profits, and larger employers.**

With latent community mindedness. These are organizations who want to build a local profile, attract talent, and give back - if it's easy and low-cost.



# What's different?

## Not a targeted service

Kudos doesn't have eligibility criteria. Kudos works with people based on their interests - not on their ages, background, or ability levels. Not only do we want to reduce stigma, we

also want to broaden our available resource pool. By attracting a broader range of folks, we think we can broker connections and decrease the need for expensive professionalized supports.

## Catalyzing fresh resources

Kudos isn't another signposting and referral service. It's actually a generator of new kinds of experiences in the community. These experiences are pulled together within a content stream, giving people an opportunity to explore a passion (history of hock-

ey), a skill (fixing things), a craft (mechanics), a discipline (urban studies), etc. So within the history of hockey badge, a local sports journalist, a hockey coach, a facilities manager, and an equipment store manager might share their know-how and get linked up to folks who share their passion.

## Experienced-based credentialing

We see badges as a new kind of credential. Signaling someone's personal experience and knowhow. These badges could go on people's

resume, and over time, be recognized by employers. As another source of information about someone's depth of understanding and background.

## Celebrating new milestones

When it comes to life milestones, there's the standard ones: graduating high school, getting a job, finding a partner, having a family, retiring. What happens when there is no job? There is no partner? There is nothing to retire from? That's the reality for

people like Alvin and Mark. Whose sense of self is devoid of much of the most common markers. Kudos can create new markers. Achieving a badge could serve as both an internal motivator, and an external sign of achievement & recognition.

## Facilitating relational employment

Internships, fellowships, and paid jobs come from knowing people. Research suggests 60-80% of jobs are procured through personal networks. Yet few existing services help you to build a bridging network, a network made up of people who can bridge you to fresh

opportunities. We envision Kudos building that bridging network by putting people in direct contact with business owners & community leaders, and explicitly helping to shape new roles - both paid and unpaid.

# Funding Kudos

Hundreds of millions of dollars are already being spent on after school respite, community day programs, and refugee learning. This money buys hours of care and hours of teaching, but it's not buying development or learning. Investing in a system like Kudos would not only deliver better value for cur-

rent money, but would also reap substantive cost savings. In the form of reduced unemployment and mental health costs. Plus, Kudos can actualize much of the (empty) government rhetoric around individualization and person-centeredness.

## Better use of existing resources

Government is already expending significant resources on children & young people with special needs. Just in the Tri-cities, \$3.4 million is spent on after school, respite, and other services. What does this money buy? Hours of care. Rather than concrete, measurable outcomes. This money could be more effectively spent connecting young people to developmental experiences that build their capacities and in-community networks.

That's just money for youth with special needs. The amount of money spent on day programs and community inclusion services for adults with cognitive disabilities exceeds \$200 million in BC, including \$10 million for employment supports. Supports that start with the false premise that people know what they want.

Then there's the cost of adult education programs for refugees and new immigrants. British Columbia spends nearly \$40 million on language & adult education courses for this population group. This is not including employment related services.

Efficiencies could be made by creating an experience-based badging system that recognizes the common barriers these three population groups face in finding meaningful employment.

## Long term cost savings

Over 80% of adults receiving assistance from Community Living British Columbia are long-term unemployed. Conservative estimates suggest a lifetime earning losses of over \$800K per individual. Lifetime earning losses of immigrants are similarly high. Eliminating immigrant wage gaps and excess unemployment would yield more than \$30 billion in additional earnings - about 2 percent of GDP\*.

Kudos could help to create new jobs in communities suitable for people with a range of needs.

*\*globalnews.ca/news/1074811/immigrant-unemployment/*

## More effective mechanisms for social inclusion

For all the rhetoric of person-centeredness we hear, most of the after school programs, day programs, and adult education programs we've shadowed are generic. You may be able to choose the provider of your service, but that's about it. None of the services are segmented based on interests or future aspirations.

Existing programs & services isolate people in their demographic groups - so immigrants with other immigrants, people with cognitive disabilities with other people with cognitive disabilities. This increases stigma, rather than community inclusiveness.

## Three options to prototype this idea

We could prototype Kudos by working with young people and adults interfacing with one after school care provider and/or one day program.

We could prototype Kudos by starting with one neighborhood and community school - and working with young people with & without special needs, adults in local day programs, and immigrant families.

We could prototype Kudos by re-imagining the Discovery & Planning process in most employment training programs - for adults with disabilities as well as new immigrants.

# What it might look like...



*Alvin is preparing to graduate from high school. It is time to make some future plans. Like so many young people, he doesn't know what he wants to do. His teacher says that students like him have gone on to Douglas College, or to a day program.*



*This year, there's something new to try. Called Kudos. With Kudos, he can work towards badges of his choice. He selects the History of Hockey badge.*



*To get the badge, he collects a set of experiences. Like meeting a local sports journalist, watching old games at the library, and volunteering at a minor league game. Somebody called a Tour Guide helps to catalyze the experiences.*



*A month later, Alvin demonstrates his hockey history know-how and is awarded the badge. In a special ceremony. Next he chooses to work towards the World Culture badge. Along the way, he meets the owner of a Mexican restaurant. They bit it off, and create a special role for Alvin as the party starter!*

## What we would make:

### New roles

**Tour Guide:** a person with a passion in a particular topic, craft, or discipline. Who helps develop the content for a badge, goes out into the community to find surprising experiences, and helps to award badges.

In a prototype, we would test the role description, training, hiring, incentives, and work flow.

**Hosts:** community members, small business owners, and organizational leaders. Who share what they do in short experiences.

In a prototype, we would test the value proposition and terms of engagement. Why would someone engage? How would we shape the quality of the experiences they provide?

### New tools

**Catalogue:** an online or paper-based listing of all the badges, challenges, and host experiences. With exercises and prompts to help people choose.

**Passbook:** some sort of way for people to keep track of their experiences: who are they meeting, what are they learning, what are the future possibilities?

**Talking Prompts:** materials for family members of people working towards the badge. So they can ask questions, and participate in the process.

In a prototype, we would experiment with different touchpoints for different people: what works, for whom?

### New interactions

**Host-participant experiences:** the learning moment between a person working towards a badge, and a local host.

In a prototype, we would try out a number of different experiences. What makes a good learning experience for both?

### New metrics

**Purpose, Autonomy, Growth:** three constructs we would track over the course of the prototype. Along with new connections and new roles.

In a prototype, we would test how to measure these constructs, along with where the data goes. How could the data be fed back to people? How could it be used within the system to re-design the system?

### New systems

**Databases & Dashboards:** for people to keep track of their progress, connect with other people doing the badge, and to community hosts.

## Intrigued by what you see here?

We have more.



InWithForward creates learning packages for organizations. With stories, podcasts, and short films. From our work in Canada, The Netherlands, and Australia.

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## Curry and a Late Night Talk. Nok Nok brokers surprising neighbor exchanges.



**Property Manager:**  
A property manager's role is to collect rent, look after the building, arrange for repairs, and answer complaints.

**nok nok**

**Introducer:**  
An Introducer's role is to get to know residents, collect skills & strengths, and serve as a neighbour-to-neighbour matchmaker.



It's 9:30pm on Thursday. Gayle and her two teenage daughters have returned from soccer practice. Instead of stopping by McDonald's for the second time this week, they head upstairs and knock on Kamran's door. Kamran has made extra portions of her special curry to share. By 11pm, the kids are in bed, and Gayle takes a breath. Elly from down the hall pops by with the latest episode of Madmen. Gayle and Elly let off some steam. "It's such a relief to have an outlet."

Gayle's connections with Kamran and Elly are thanks to Nok Nok, an Introductions Service in housing complexes and high-rises which links-up neighbours based on niche interests (like, Madmen) and practical needs (like home-cooked dinners).

Gayle was used to interacting with Property Managers. They deal with the physical maintenance of the building. But she'd never heard of a People Introducer before. **The concept was simple: a resident in the building trained-up to broker surprising 1:1 relationships.**

*Dig deeper into the idea on the next page.*

# What's the need?

Gayle, like many of the people we've met, is connected. She's got relationships with friends, family members, and work colleagues. And yet these relationships aren't always reducing strain or stress, enabling fun & relaxation, or drawing out her hidden capacities & interests.

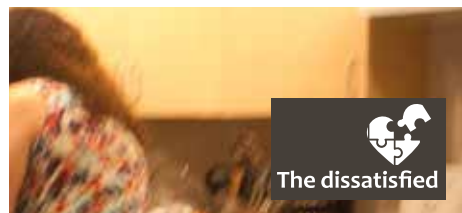
Nok Nok is designed to broker purposeful relationships between people - using the resources of a single place.

Nearly all of the place-based activities we've seen - be it a neighborhood bbq, music in the park, or community gardens - are about increasing a broad,

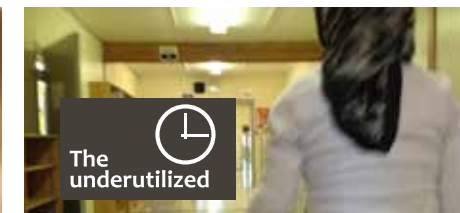
and often shallow, sense of connectedness. These events only attract the people who already value neighborliness and the people who have spare time. Gayle isn't one of these people. Nor are most of the other residents in the building.

Nok Nok is for the 60% of people we've met who we think would be open to meeting a neighbour. If and only if that connection was specific, activity or time bound, addressed a practical stressor, or made use of an underutilized skill.

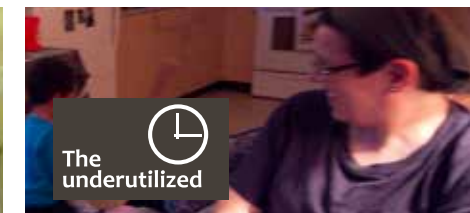
# For whom?



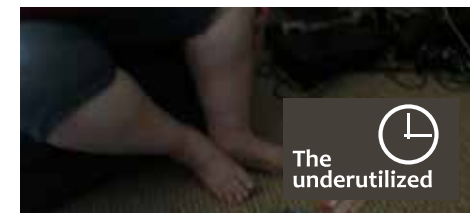
People like Gayle. With high stress, and few emotional outlets.



People like Kamran. With unused capacities, and a collective sense of self.



People like Elly. With unused capacities.



People like Shelly. With unused capacities, and an individual sense of self.

Gayle is a single parent of two teens. Her life is always on the go and she is trying to make ends meet with two part-time jobs. Things were easier a few years ago, when her dad was still alive. But since he's passed, she's felt much more alone. Even though she's got a great network of girlfriends, they don't live all that close. She misses being able to pop by their house, knock on the door, and enjoy a glass of wine.

Kamran's dream is to open up a day-care one day. She loves looking after other people's kids. Even though she's got three of her own! She really enjoys cooking big meals, and inviting friends over to share. Since immigrating from Turkey, she's not been able to find work. She takes English classes and volunteers in a women's shelter, where she sweeps floors. It's really important to Kamran to give back, and know who her neighbours are!

Elly is a single parent of a 2-year old son who lives Spiderman! She just returned from mission work in Africa. She recently found a teaching position in a Christian school after struggling to find permanent work for several months. While waiting for the work to start in September, she spends her days tutoring. It's hard to juggle finding a sitter for her son with her tutoring schedule.

Shelly works long hours as a marketing officer. She's always on the phone interacting with people, so when she gets home, she likes to have some time for herself, and her teenage son. A few years ago, Shelly took a course in accounting. And loved it. She likes doing taxes! She'd like to exercise more, and be a bit healthier, but she just can't get the motivation to go to the gym.

# What's different?

## Living & working

Over the past 10 weeks living in a housing complex, we've seen the power of an in-person role. Somebody who lives in the complex. And who can build and draw on personal relationships. Indeed, we've seen how much easier it is for residents to come to us with a question, rather than go directly to another neighbour. We think that's because we've made it our explicit role, and given people permission to ask for help, or drop by to share their latest happenings.

## Rotating roles with incentives

We've also experienced the intensity of the in-context role. And the difficulty of drawing boundaries. We think the blend of a neighbor, friend, and broker is what makes the role so powerful. To manage the intensity, then, we imagine the role being short-term. More like a fellowship, with both financial and learning incentives. The role could be a great way for folks who are unemployed to gain real work experience.

## Micro matching mechanisms

Nok Nok is based on the idea that what connects people are micro shared interests: passion for a particular TV show, love of the same kind of wine, desire to travel to the same place. One reason, we think, generic community building exercises fall flat is they assume the basis for the relationship is a shared value set - rather than a niche interest.

## 1:1 versus group

Rather than set up groups or committees or coalitions, Nok Nok facilitates one-to-one happenings between neighbors. These one-to-one happenings are more flexible - and can fit into people's schedules.



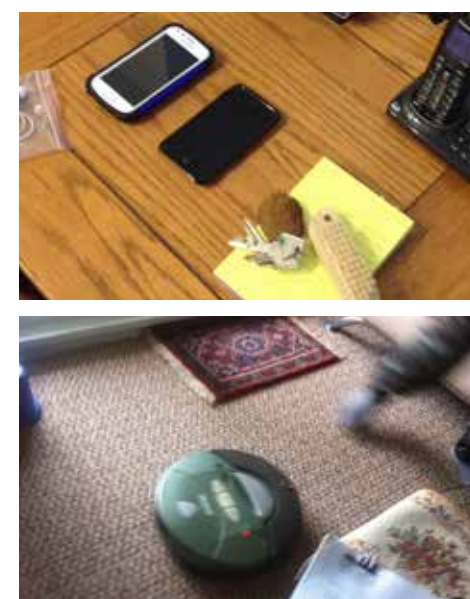
Residents in the building are invited to come to us with practical questions like how to build Ikea furniture, and emotional needs like ice-cream on a bad day.



Greg likes a late-night chit-chat. He's a night owl, who likes sharing a glass of red wine. How might he be matched with another night owl in the building?



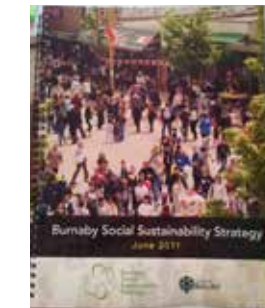
TV series could be an entry point to conversations with neighbor who shares the same interest.



Caitlin, with her gadget and electronics know-how could be matched with the Chen family who needs help fixing their robot vacuum cleaner.

# The Argument

We think cities, social housing agencies, and property developers should care about Nok Nok. It can deliver on local social sustainability strategies and serve as a novel way to actualize the intent behind the Community Benefit Bonus Policy.



"Social sustainability is about people - individuals and the community working to meet their needs, realize their potential, and prosper in a healthy environment." That's the definition the City of Burnaby uses in their June 2011 Social Sustainability Strategy.

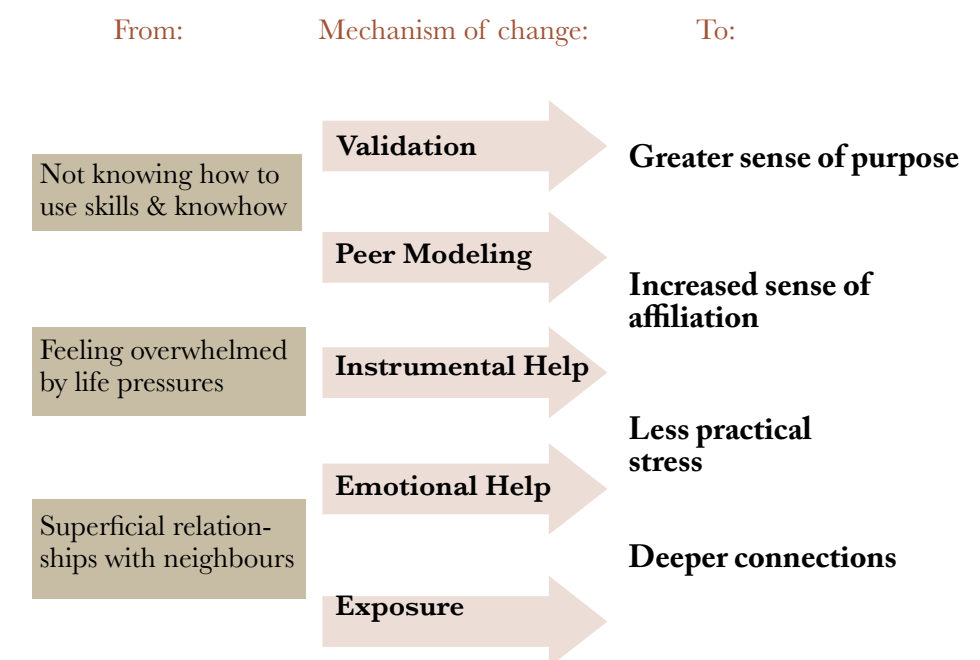
And yet beyond convening groups of people, and offering physical space to community groups, the city has few levers for connecting residents. Particularly residents turned off by group activities happening at a set time and place.

Investing in a role & introductions service like Nok Nok would not only reach many more residents where they are, but also directly shape their experience of place.

Shaping people's experience of place is what the Burnaby Community Benefits Bonus Policy is all about. This is a policy which lets the city approve of new high-density developments in exchange for a monetary contribution that has community benefit. Right now, community benefit gets defined in terms of physical infrastructure improvements & art projects; affordable and special needs housing; or a straight cash contribution. Since 1997, the policy has netted community investments worth \$115 million.

What if social improvements were included in the definition of community benefit - and roles like the Introducer could be funded from this pool of money?

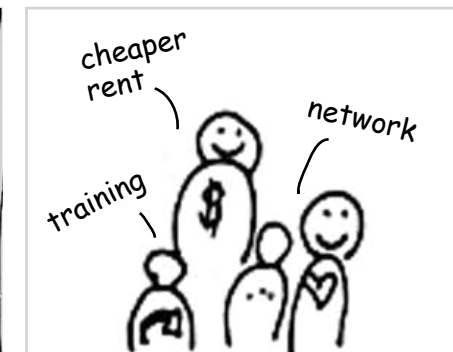
# What's the change?



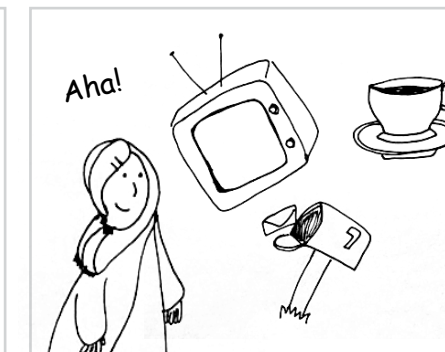
# How might Nok Nok work?



Kamran gets a note under her door from the Property Manager inviting her to apply to become the "Resident Introducer". The "Resident Introducer" is a new, rotating role. Introducers are people brokers. Their job is to get to know neighbors, and then to put neighbors who share very specific interests or needs in touch.



Kamran applies and gets selected. The 'Introducer' receives several perks: training in local matchmaking techniques, gets a discount on their rent for the year, joins a network of other 'Introducers' across the local area to swap ideas and tips.



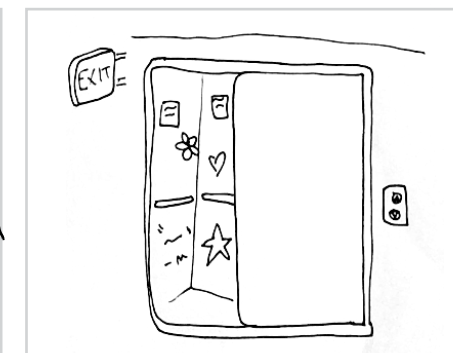
Kamran starts to build 1:1 relationships with neighbours. Inviting them over for dinner. Having an afternoon tea. Catching them by the mailbox. She begins to learn really specific things: people's favorite TV shows, movies, books; their favorite meals; a bit about their routines and schedules; the practical stuff that's stressing them out.



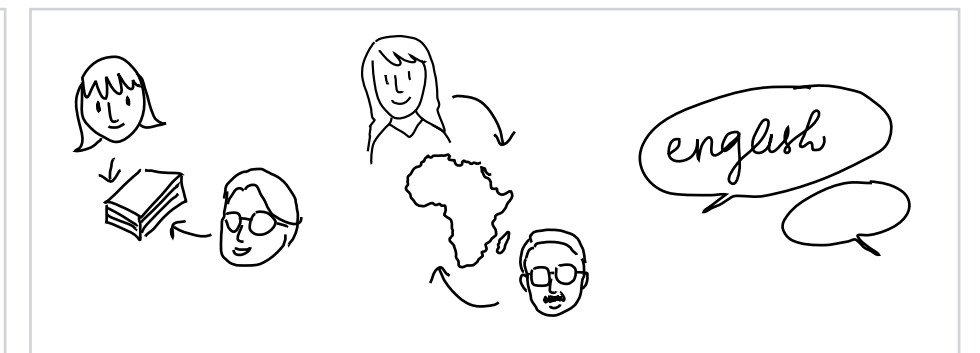
Neighbours begin to seek Kamran out. Mr. and Mrs. Chen drop by. They can't get their TV to work. Kamran knows that Caitlin loves to fix things. Kamran brokers that relationship. As a thank you, Mr. and Mrs. Chen invite Caitlin to stay for dinner. That's new - because she usually eats alone.



Kamran also brokers Elly, a single parent who is always busy working, to Yeva, an older Ukrainian woman who loves cooking, but has no one to cook for. Perhaps Elly could arrange to have Yeva cook a meal for her and the kids every once in a while - so they don't have to eat out as much?



Every month, Kamran posts a few quotes and photos of the latest meet-ups in the elevator. To start to normalize her role, and the 1:1 connections.



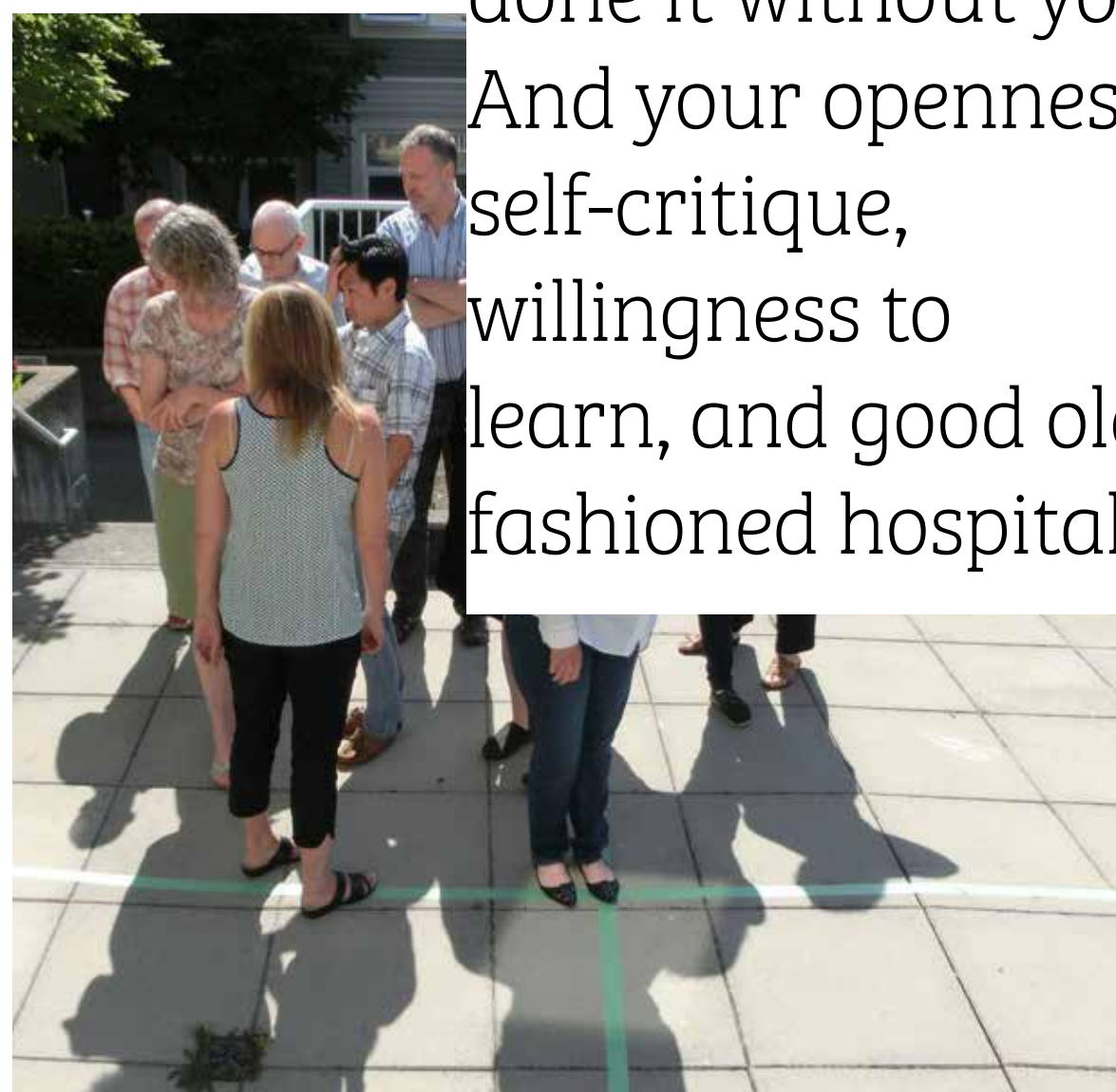
Here's some of the 1:1 connections Kamran catalyzed in June:

Melissa, age 13 and Dave, age 36 connected around the book Divergent	Eloise, age 34, and Aram, age 56 connected around their shared missionary work in Africa	Finna, age 67, and Naomi, age 26 connected to practice English
--	--	--



# THANKS PARTNERS!

We couldn't have done it without you. And your openness, self-critique, willingness to learn, and good old fashioned hospitality.



Continue to read our ideas on the next page >>>

# Small System Tweaks that Turn Boring Form Filling into Action Learning



## CRITICAL LEARNING REPORT I-Ethno

"Paperwork is always boring," Jo admits. "You fill all this information in, and you never really know where it goes, or why it's necessary. Except for covering your butt." Jo has been a life skills worker for nine-months. She hoped it would be more consistent work than house cleaning. But it's also proved to be more demanding, and lonely. She rarely sees her co-workers. Philip, one of the 19-year old boys she supports, has a history of aggressive behavior. A few months ago, while standing in line at Tim Horton's, he shoved Jo. She had to report his behavior, and spent a good thirty minutes filling out the critical incident form.

In July, Jo joined the prototype for the new Critical Learning Report. This involved logging onto the computer, as normal, but answering a different set of prompting questions. She was nudged to think about some different influencing factors. Like the family dynamic (what was her conversation with Philip's parents like when she picked him up?); his sense-of-control (who made decisions about the day's activities?); and life stressors (sleeping? exercise?).

"The thing that was most different about the form was what happened when I pressed submit. There was this pop-up box with three evidence-based suggestions of things to try with Philip. It kind-of looked like those suggestions Amazon gives you after you buy a book."

Two of the three suggestions were from Sandra, a fellow life skills worker. Sandra trained as a social worker, but couldn't find work. At school, her specialism was adolescent behavior. And she had some ideas about interacting with boys like Philip. One of Sandra's suggestions was to create a jar of annoyances. The hunch was that Philip's aggression was linked to not being listened to at home or by professionals. In a short video, Sandra described an activity she'd used before: getting the young person to share their frustrations, writing them on strips of paper, and putting them in a jar. Putting them in the jar meant they were out of your head.

Two weeks later, Jo tried out Sandra's suggestion. "Well, It didn't exactly go

to plan. Philip didn't want to write anything down."

But Jo improvised: she recorded Philip's voice on her phone. She found Philip was noticeably calmer afterwards. Perhaps he'd gotten some of his feelings out of his system, and validated? Jo logged back online and added her tweak of Sandra's activity. She'd never had a conversation with another life skills worker before about specific strategies to try. Nor had her own practice been made visible, let alone recognized so publicly before. In an organization consumed with risk management, swapping stories of good practice actually felt pretty novel.

*Dig deeper into the idea on the next page.*

# Risk minimization preventing staff learning

## The standard service script

Every in-home care service we've shadowed - whether in the children & family space, community living space, or aged care space - runs using the same basic script. (1) Determine eligibility; (2) Assess needs & goals; (3) Allocate hours of care; (4) Implement care plan. When people's behavior diverges from their plan, another script comes into play. A script focused exclusively on reporting and managing the risk.

We're seeing how this 'risk' script influences the 'goal' script. How fear of triggering a change in people's behavior means very few new things are tried. When the same routines are performed day in and day out, it's easy to see how dependencies form and stuckness settles in.

## How paperwork shapes thinking

Contrary to what you might think, the frontline workers we've met infrequently interface with the formal bureaucracy. Beyond a daily logbook

of activities, there's not much paperwork to complete. Until something goes wrong. Staff meetings are held once a month, but attendance may only be mandatory three times a year. Training rarely happens more than once or twice a year. This means there are few opportunities to develop workers' practice. Given the paucity of other touchpoints, existing paperwork plays quite a big role in shaping workers' language, thinking, and practice.

Here's a typical scenario: A staff member is out with a person. Doing the shopping with them. The person gets increasingly upset, starts yelling, and makes a scene. Because this is an 'unexpected' negative behavior, the worker must fill out an incident report. This report flows up the chain of command. To reduce the likelihood of such unexpected behavior in the future, staff do the rational thing: they try fewer new things. They start doing the shopping for the person. Quickly the worker and the person are trapped in an increasingly narrow set of routines. With few opportunities for change.

## Prompting different thinking & action

Our concept is simple. Take the existing system touchpoints - such as intake forms and critical incident reports - and turn them into prompts for mutual learning and action.

**Yes, critical incident reporting is a legislative mandate. But how that reporting happens is very much within the purview of service delivery organizations.**

By making a better form - one that's more responsive - we can cut down on the time of completion. And re-direct that time towards both analysis and idea generation. Such that staff are able to see patterns in behavior. Not just one-off incidents. And get sugges-

tions for alternative responses. We're calling this critical learning moments.

Similarly, the intake process between frontline workers and people is informational. Not analytic, or generative. The assumption is that clients know exactly what they want and need, and can articulate that information in such a way that fits the boxes on the form.

This assumption does not hold true for people with undetermined capacities. Like Monica. Who used to speak, but no longer does. Or for people with "good enough" narratives. Like Clint. Who is so used to other people talking for him, he struggles to know what he himself likes. For these groups of folks, we'd design an intake process that unfolds over time and is action-based versus talk-based. We're calling it I-Ethno. Because it's based on using ethnographic tools, rather than assessment tools.

# Small Steps, Big Ideas

70% of human service budgets are tied up in staffing. But, systems could be getting so much more for their spend. Right now, systems prompt staff to avoid tasks and maintain the status quo. With just a small investment, the system could develop another set of prompts, that nudge staff to use their time more effectively, developing capacities rather than dependencies. For all the system talk about quality of life, there are few mechanisms to help staff think from that vantage point. Tweaks like i-ethno and critical learning are just two concrete ways to change the language and culture of frontline deliverers - such that the focus is on outcomes for people.

Indeed, we would start to measure good outcomes in terms of increasing staff confidence, competence, creativity, and critical challenge. And good outcomes in terms of increasing people's sense of self. Are they using and enjoying their range of capacities (physical, emotional, social, intellectual, spiritual)? Are they developing new capacities and interests? What kind of change over time is there?

The following are our two best arguments for interventions like Critical Learning and I-Ethno.

## Get more from staff you already pay

One-to-one support for people like Monica isn't cheap. We estimate a price tag of around \$40K a year. Assuming Monica receives 30 years of support, that's a lifetime per-person cost of over \$1 million. For that amount of money, why wouldn't we prompt frontline deliverers to try new things and figure out what, if anything, develops Monica's capacities? So that regression isn't her only trajectory - but maintenance & growth are also possible.

## Turn person-centred rhetoric into reality

The intent of intake & yearly planning processes are good. To identify people's goals and strengths, and work from there. But staff have few tools for understanding, let alone shaping, goals & strengths. In fact, most staff are equipped only with a piece of paper and some questions. If intake processes weren't a one time act - but a taster process - we think we would expand people's preferences and give them greater decision-making power. After all, choosing between two options - the park or bowling - is not legitimate choice.

# Meaningless Miles?



## Carol & Monica's daily drive

Carol is running late. Monica is waiting. She climbs into the backseat, and picks up her pink stuffed animal. "Squeeze me" the bear cries. Monica squeezes back. Just like she does every morning. Monica just turned 25. For the past 5 years, she's spent her days with a 1:1 support worker. They drive around, go to parks, visit the swimming pool, maybe bowling, or a movie. Monica doesn't like crowds. So the mall is out.

Carol knows what Monica doesn't like. Because she has a binder listing all of Monica's challenging behaviors, when to medicate, and past critical incident reports. Like the time Monica was in the park, picked up dirt, and ate it. Carol is not sure what was behind this behavior. It took her 30 minutes to fill out a critical incident form. Her manager called with

follow-up questions. She was not sure what the trigger was. The message communicated to Carol was to keep a better eye on Monica.

There is no tracking of Monica's positive behaviors. Of when she smiles, focuses on activities, or sings. Whilst there is a section of the binder called 'Personal Support Planning' with a list of Monica's preferred activities, it remains both a static and generic list: puzzles, watching TV, walking, going to playgrounds, eating food, looking at magazines. This list was completed at one point in time - during intake. Carol says, "To be honest, I don't ever look at that paperwork again."

Carol only recently took over supporting Monica from another worker, Rachel. She and Rachel were never able to meet, exchange ideas, and communicate the intentionality behind activities. The activities do not seem to be building towards anything. Indeed, the goals in Monica's yearly plan read more like a set of tasks. "Go swimming once a week." "Visit Granville Island once a month." And sadly, the goals have become less ambitious over time. As Monica's verbal skills have declined, and her medications have been increased.

Monica isn't growing and learning. Nor is Carol.

**CRITICAL INCIDENT REPORT For**  
UNLICENSED HOMES AND COMMUNITY INCLUSION ACTIVITIES and  
LICENSED HOMES FOR INCIDENTS NOT REPORTABLE TO LICENSING

**GENERAL INFORMATION**

Name of Residence / Service / Activity \_\_\_\_\_ Phone Number \_\_\_\_\_  
Address \_\_\_\_\_ City/Town \_\_\_\_\_ Postal Code \_\_\_\_\_  
Name of Service Provider \_\_\_\_\_

**PERSON(S) INVOLVED**

Supported Individual  Visitor  Other (please specify) \_\_\_\_\_  
F  M

Name of Person \_\_\_\_\_ Birthdate (YYYYMMDD) \_\_\_\_\_ Gender \_\_\_\_\_ List All Person(s) Adversely Affected: \_\_\_\_\_ (attach list if necessary)

**TYPE OF INCIDENT - REPORTABLE TO CLBC**

<input type="checkbox"/> Physical Abuse	<input type="checkbox"/> Suicide Attempt	<input type="checkbox"/> Medication Error	<input type="checkbox"/> Use of Seclusion
<input type="checkbox"/> Sexual Abuse	<input type="checkbox"/> Sentinel Event	<input type="checkbox"/> Motor Vehicle Accident	<input type="checkbox"/> Exclusionary Time Out
<input type="checkbox"/> Emotional Abuse	<input type="checkbox"/> Use/Poss of Weapon	<input type="checkbox"/> Aggressive/Unusual Behavior	<input type="checkbox"/> Communicable Disease
<input type="checkbox"/> Financial Abuse	<input type="checkbox"/> Use/Poss of Illicit Drug	<input type="checkbox"/> Missing/Wandering Person	<input type="checkbox"/> Infection Control
<input type="checkbox"/> Neglect	<input type="checkbox"/> Fall	<input type="checkbox"/> Use of Restraint	<input type="checkbox"/> Bio Hazard Accident
<input type="checkbox"/> Death	<input type="checkbox"/> Disease/Parasites	<input type="checkbox"/> Other Injury	<input type="checkbox"/> Restriction of Rights
<input type="checkbox"/> Poisoning	<input type="checkbox"/> Unexpected Illness	<input type="checkbox"/> Service Delivery Problem	

**DETAILS OF INCIDENT**

Date of Incident (YYYYMMDD) \_\_\_\_\_ Time of Incident \_\_\_\_\_ Location of Incident \_\_\_\_\_

What Occurred (attach additional page if required):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1  
Disclaimer: The personal information requested on this form is collected under the authority of and will be used for the purpose of administering the Community Living Authority Act and/or the Freedom of Information and Protection of Privacy Act (FOIP/PA). Under certain circumstances, the collected information may be subject to disclosure as per the FOIP/PA Act. Any questions about the collection, use or disclosure of this information should be directed to the Director, Information, Privacy and Records Services Branch (250)387-0620, PO Box 9702, 5th Flr Govt, Victoria, BC V8W 9S1

The current Critical Incident Report. Used by support workers in the community living system.

**CRITICAL INCIDENT REPORT For**  
UNLICENSED HOMES AND COMMUNITY INCLUSION ACTIVITIES and  
LICENSED HOMES FOR INCIDENTS NOT REPORTABLE TO LICENSING

Action Taken:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NOTIFICATION**

Family <input type="checkbox"/> Y <input type="checkbox"/> N	Date (YYYYMMDD) _____ Time _____	Licensing <input type="checkbox"/> Y <input type="checkbox"/> N	Date _____ Time _____
Name _____ Relationship _____ Phone Number _____	Fire Department <input type="checkbox"/> <input type="checkbox"/>	Police <input type="checkbox"/> <input type="checkbox"/>	Coroner <input type="checkbox"/> <input type="checkbox"/>
Person In Charge Notified: <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> n/a	Health Care Provider Notified: <input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> n/a	Other (Specify) <input type="checkbox"/> <input type="checkbox"/>	

Name of Person Reporting Incident \_\_\_\_\_ Position \_\_\_\_\_ Signature \_\_\_\_\_ Date (YYYYMMDD) \_\_\_\_\_ Time \_\_\_\_\_

Name of Witness/Attending Staff \_\_\_\_\_ Position \_\_\_\_\_ Signature \_\_\_\_\_ Date (YYYYMMDD) \_\_\_\_\_ Time \_\_\_\_\_

Name of Supervisor \_\_\_\_\_ Position \_\_\_\_\_ Signature \_\_\_\_\_ Date (YYYYMMDD) \_\_\_\_\_ Time \_\_\_\_\_

(Rev July 2009, V. 3)

2  
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**PERSONAL SERVICE PLAN**

This is an annual PSP meeting for \_\_\_\_\_ (name), held on \_\_\_\_\_ (date).

Authorization:  
1. \_\_\_\_\_ (name) \_\_\_\_\_ (signature)  
2. \_\_\_\_\_ (name) \_\_\_\_\_ (signature)

Names of Attendees:  
• \_\_\_\_\_  
• \_\_\_\_\_  
• \_\_\_\_\_  
• \_\_\_\_\_

**INSTRUCTIONS**

- Review last year's goals and their outcomes.
- Ensure that the discussion covers all the identified categories and set goals where applicable.
- Set goals for the current year which are SMART:
  - S - Specific
  - M - Measurable
  - A - Achievable
  - R - Relevant
  - T - Timed
- Determine if each goal is important to, or important to the individual. Have this completed hand-written document authorized.
- Enter all goals on the individual's Observation site under Goal Measurement Chart.
- Go monthly after the meeting, review the goals and complete section 2, enter these outcomes on the Goal Measurement Chart.
- At next year's PSP, complete section 3 and then begin a new PSP form.

Note: If all identified goals cannot fit on this document, use a second PSP form.

Revised: February 5, 2014

**Personal Planning Meeting:**

Meeting Date: \_\_\_\_\_ Name: \_\_\_\_\_

Discussion about personal expectation summary - likes, dislikes, hopes, and dreams.  
\_\_\_\_\_  
\_\_\_\_\_  
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Discussion about risk factors associated with personal expectations from services.  
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Name of individual Receiving Support \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Revised: February 5, 2014

The Planning forms used by Life Skills workers in the community living system.

# Six system tweaks we'd like to try

## (1) Make responsive forms.

Incident reports include a long list of tick boxes, many of which are irrelevant to workers. By creating a 'branching' questionnaire - such that only related groups of questions appear - we could save workers time. Time that we can put to better use.

The current Incident Report online form

The current Incident Report with a long list of questions and tick boxes that are irrelevant to workers

### New idea

A branching system only showing related groups of questions.

"Expand" and "collapse" buttons can help staff to navigate through the questions quickly and fill out more relevant information.

## (2) Add prompt questions.

Right now, critical incident reports only ask about the immediate negative event. We would add questions about the context in which those behaviors occurred. And collect that data in a more systematic way so that trends could be identified. To balance out negative event reporting, we would also ask for a contrasting positive data point. We find comparing and contrasting extreme events leads to new insights.

### New idea: nudge people to identify contextual variables to identify trends.

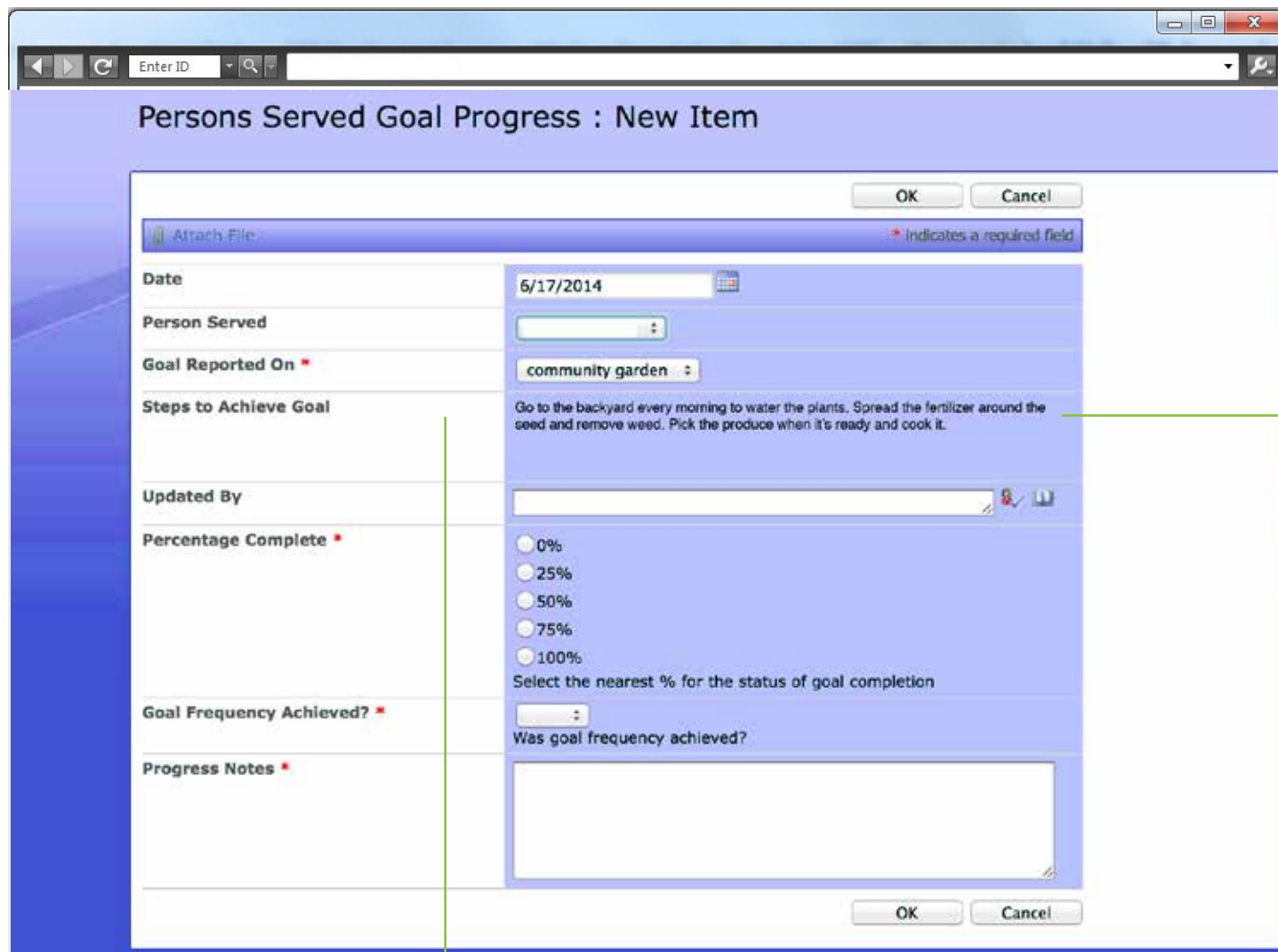
### New idea: prompt people to think about contrasting events and behaviours

## (3) Create a database of staff suggestions.

Paperwork always flows up the chain of command, with little coming back down. We think data should be tit-for-tat. Fill out a form, and get back something that's useful. Like 3 suggestions for alternative activities to try, with a little story to read or video to watch. To do this, we would create a database with specific staff suggestions. Tagged by context, interest area, type of behavior. So that we could generate suggested responses just like Amazon generates suggested titles. By making great staff practice more visible and usable, we can start to shift the culture.

### New idea: offer evidence-based suggestions from other staff in order to raise the visibility and usability of good existing practice

The current online Logbook



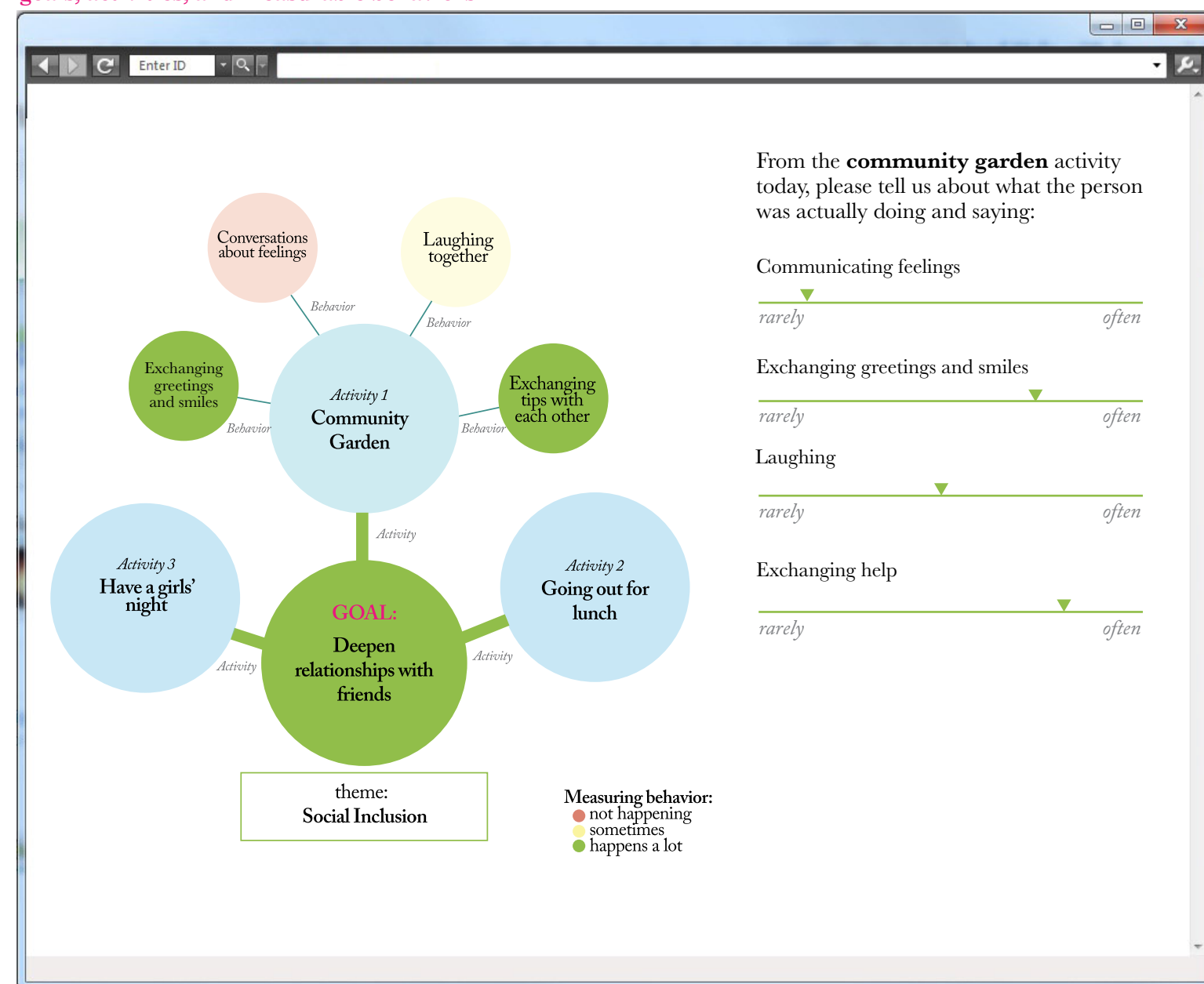
This only tells us about activities and tasks, not behaviors or goals.

(4) Turn the logbook into a pattern book.

At the moment, logbooks merely record a set of activities. While the intent is to connect activities with the person's goals, we're finding that goals are getting conflated for tasks. Such that "going swimming once a week" becomes the goal, rather than "improving stamina" or "feeling relaxed."

Instead of connecting activities to goals, we'd prompt staff to record activities against behaviors and goals. Goals would be the person's emotional reaction, body language & communication, new behaviors, level of focus, reported learning. Knowing which activities correlated with which goals would give us far more useful data about what works for whom, when.

New idea: a pattern book with visualized data linking goals, activities, and measurable behaviors

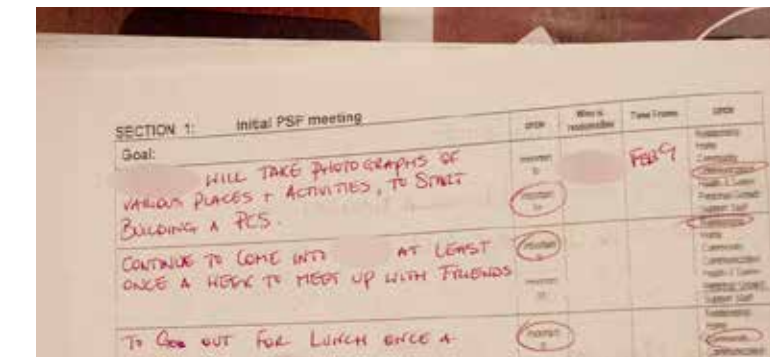


(5) Integrate visual scenario planning tools.

All of the intake & person-centered planning tools we've seen are very text based. Goals (or more often, tasks) are recorded in a matrix. Which then goes into a binder that sits on a shelf, or into the backend of a database. And is often not used by either the worker or by the client until annual review time.

We would turn annual goal setting into something more like visual scenario creating. A deck of cards or a pad of prompts or a board game that builds over time, to enable people to visualize what they want from their days: what they want to see, to feel, to taste, to experience. We would also create a storybook of other people's scenarios so that workers, families, and people have a range of reference points.

The current Personal Support Plan form that includes goals.



I-Ethno

New idea: using stickers and pictures as prompts to make a profile map about someone: their likes, dislikes, hobbies, how they see themselves, their value sets, the people in their lives, etc.



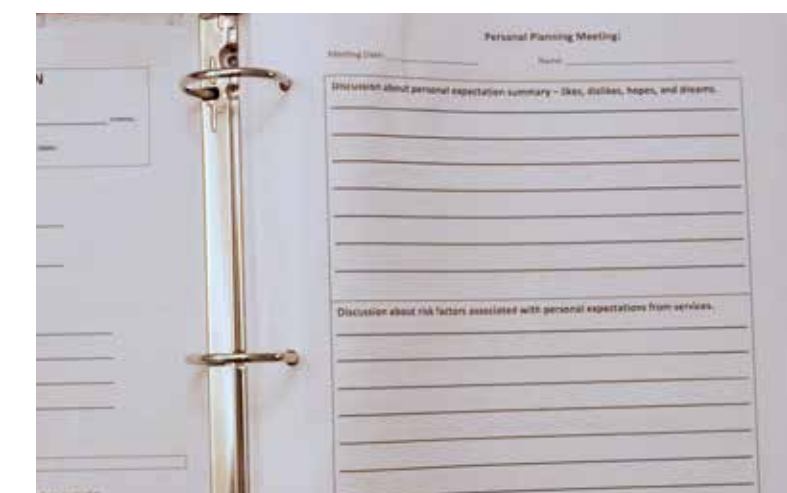
A range of different ideas that contain both existing and non-existing services, and products, can also be used as prompts into conversations about what people would like to have in their lives.

(6) Shift the intake meeting into a taster session.

Intake sessions feel like meetings. The worker asks a lot of questions, and records the answers on a form. What if intake sessions weren't based on question-answer dialogue, but on trying out experiences?

Workers could come with a range of materials - from games to sports equipment to musical instruments to books to videos of places and learning activities. Rather than ask direct questions, workers would observe responses and build up a picture of things to try.

The current Personal Support Plan relies on basic questions to understand someone's likes, dislikes, hopes and dreams. This format does not work for many of the people we met who find it challenging to articulate what they want through direct, verbal conversation.



I-Ethno



Doing experiences together first - before planning - would help workers to see things that are usually not picked up during conversations. People cannot ask for what they do not know. Different materials such as books, music, video can also be tried to prompt conversations where direct questioning does not work.



# InWithForward seeking partners for prototyping new service delivery models

We don't see ideas as recommendations. That sit on a shelf for someone else to implement. We see ideas as proposals for collective action.

We act by prototyping. By working from the ground-up to make small-scale models of new services and informal support networks. The purpose of a prototype is to:

- 1) Understand what attracts and engages people.** What are the mechanisms of change? Who doesn't engage? Who doesn't experience change? How do we design for these groups?
- 2) Work out how to spread & scale the mechanisms for change.** What new roles, tools, training, operational processes, and governance models are needed? What's the funding model? How would systems procure the service? What would the contract say? What metrics & quality assurance tools would the system use?

**3) Build system and organizational capacity for service redesign and social innovation.** How do we transfer immersive research, co-design, and prototyping methods to staff teams? Using secondments, fellowships, and action learning groups?

A prototype is not a pilot. Whereas the goal of a pilot is to implement a new program, the goal of a prototype is to make a new service delivery model with end users and community stakeholders.

Prototypes carry less risk than pilots. They operate at a smaller scale and within a rigorous testing framework to ensure that money is not wasted on interactions that don't work. Until we know what works for 30 people, we

can't know what will work for 30,000. It's much more cost effective to work out the kinks and system perversities first - before replicating and magnifying their impact across the system.

And because prototyping directly engages hard-to-reach users, prototypes are far better at countering the usual resistance and turning critics into co-designers.

When we look across existing 'service innovations' (e.g Family Poverty Reduction Initiative, STADD) we see little use of co-design and prototyping approaches. Instead, we see large-scale

consultations and focus groups leading to a set of recommendations. These recommendations are codified into a Request For Proposals, or put into a contract for a Consultant to deliver. Staff are hired, offices are leased, back-end systems are created before understanding what the service needs to do to create change with and for people. We think this sequencing yields expensive, and too often ineffectual, services.

It's time to create more efficient and effective innovation processes. How can we expect to get different results if we're using the same-old consultation and piloting approach?

## What's different?

	Pilots	Prototypes
<b>Purpose</b>	To implement a new program or service	To develop a new service delivery model & spread capacity
<b>Size</b>	Hundreds to thousands of people	30-50 people
<b>Risks</b>	Poor engagement of end users Little impact, without a methodology for figuring out what would create impact Few mechanisms for spreading lessons or program models	Not enough space granted by system to design around system barriers and perversities
<b>Deliverables</b>	Project Plan Evaluation	New roles, tools, training, organizational & procurement processes Business case for taking forward Trained-up local teams & documentation of learning

Table: comparing prototypes and pilots in service development

### At a glance What are the deliverables from a prototype?

- Role descriptions & hiring processes
- Training materials & experiences
- Metrics & backend databases
- Frontline tools & materials
- Value propositions & communication materials
- Procurement guidelines & contracting language
- Principles for quality assurance

## What would a prototype look like?

Our ambition is to bring to life at least two concrete ideas: one inside existing services & systems, and one between or outside existing services & systems.

This means building a partnership with local organizations and system funders, and selecting a community within which to start. We don't just ask for financial resources from partners, but their time and energy in cordonning off a space to try new things.

To do the prototyping, we form an interdisciplinary team of designers, social scientists, and folks with local knowhow. We create fellowships and short roles for service staff. A prototype involves service delivery, research & evaluation, and service design all at the same time.

Our first priority is to understand what would engage people in the new service. We test multiple offers and value propositions, and sign people up to take part. We then work out the interactions: what is it that people encounter over time? How do these prompt change? We make new job descriptions, hiring processes, staff training, tools, and materials. Most of what we make doesn't work the first time around, so we constantly revise.

Once we understand which interactions are creating change, we make, test, and tweak the system level artifacts: contracts, procurement guidelines, quality assurance processes, and business cases.

### At a glance What happens after a prototype?

During a prototype, we're working out how to take the new model we've created forward. Every model is different and requires a different structure.

We might form:

- A new organization to deliver a newly contracted service
- A new organization to provide training & quality assurance to existing service providers
- A new partnership between agencies to deliver a newly contracted service
- A new network or campaign outside of existing agencies

## Examples from past prototypes in Europe and Australia



In the UK, we prototyped a new model of universal youth services called Loops. We recruited 30 young people; hired 12 people to test two new roles; created new training, produced new youth-facing and community-facing tools; and developed new commissioning guidelines & performance metrics. Loops measurably increased young people's sense of purpose and possibility, and the diver-

sity of their social networks. Sadly, a change in political leadership meant funding was withdrawn from scale.

In Australia, we prototyped a new model of family support called Family by Family. We recruited 10 families who had been through tough times and come out the other side, trained them up to share their knowhow, and matched them with 10 families going

through a time time. This required testing and revising the value proposition for the network; tools for matching families; a new role for supporting families; and ways for measuring & documenting change over time. Out of the prototype, we developed a business case for the network. Family by Family now runs in multiple communities, with the support of government, and is successfully keeping families from using crisis services.