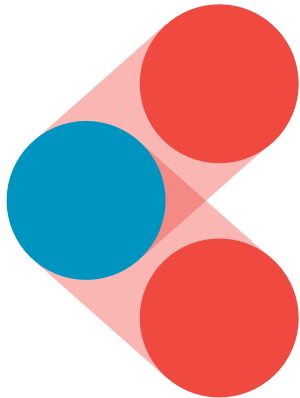


## LEARNING FROM OUR FIRST YEAR



Proudly supported by:





“The Edmonton Shift Lab’s deep dive social innovation lab approach to address racism in our city is a strong and concrete initiative that will move our community forward to action”

**Bishop Jane Alexander, Co-Chair, EndPovertyEdmonton**



The Edmonton Shift Lab is based in amiskwaciwâskahikan on Treaty 6 territory, traditional meeting grounds for the Cree, Saulteaux, Blackfoot, Dene, Nakota Sioux, Métis, and Inuit.



[edmontonshiftlab.ca/](http://edmontonshiftlab.ca/)

Proudly supported by:



[skillsociety.ca/action-lab](http://skillsociety.ca/action-lab)  
[ecfoundation.org](http://ecfoundation.org)

## SHIFT LAB

The Edmonton Shift Lab is a social innovation lab convened by the Skills Society Action Lab and the Edmonton Community Foundation, which built on the initial research of EndPovertyEdmonton on poverty and racism in Edmonton. From the outset, a guiding principle of the Edmonton Shift Lab was that the lab was going to generate prototypes of solutions, learn from the journey, share what worked and share what needs to be changed and adapted. This report captures the learning from the first year of the Edmonton Shift Lab.

Addressing racism and discrimination continues to be identified as a critical piece of the puzzle in how we reach the big goal of ending poverty in a generation in Edmonton. Building on the work of many local initiatives, the diverse collective making up the Edmonton Shift Lab is stewarding an exploration to develop potential service, policy, system and community action prototypes that will help reduce racism as it contributes to poverty. We want to be bold and explore how to Shift ideas. Shift attitudes. Shift systems and Shift into new ways of solution finding with community.

“Aboriginal people, immigrants and refugees experience discrimination in workplaces, housing, services and facilities that exclude them from opportunities and put them at risk of poverty.”

**EndPovertyEdmonton Strategy 2015**



*Celebrating our launch at the Intercultural Centre with 150 community members*



*Core team testing prototype themes with industry*



*Core team in the early days getting to know each other*



*“A social innovation can be a product or new service but it can also be a principle, an idea, a piece of legislation, a social movement, an intervention, or some combination of them.”*

**Stanford Social  
Innovation Review (SSIR)**

## EDMONTON SHIFT LAB THEORY OF CHANGE & METHODS

### What is Social Innovation?

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

### What are Social Innovation Labs?

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



*New forms of public engagement at the launch of Shift Lab*



*Matt Ward system sensing in the early days of Shift Lab*

### Want to learn more about social innovation?

Check out the Social Innovation Generation (SIG) Knowledge Hub which has resources on everything social innovation including labs, corporate social innovation, scaling, impact investing and more.

Read more here:  
<http://sigknowledgehub.com>.



# EVOLVING LAB METHODS

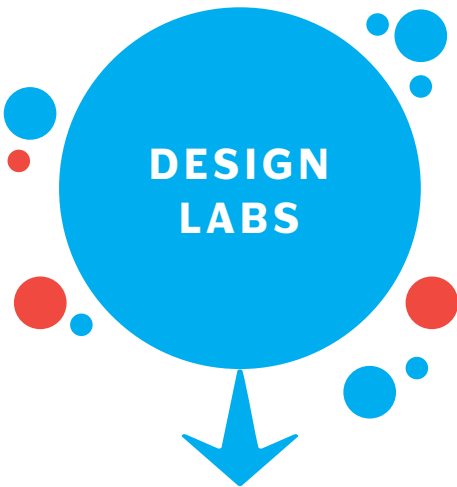
There is no one way to design and lead a social innovation lab. Lab design and methodologies always need to be custom-tailored to the context of the lab. Although many different lab process approaches are possible, there are three that are typically used: design labs, social innovation labs, and social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

Want to learn more about Social Innovation Lab Process Stewardship?

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



Leans towards user lens  
(Often smaller teams)



**FOCUS ON:**

Improving systems by addressing practical issues through research, co-design, prototyping

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

Bottom up approaches

**Can be short sighted if only applying Design Thinking**

**USE WHEN:**

You have a somewhat narrow and clear challenge scope

When you have less time for your lab

When you want to prototype a service or program



Attempts balance



**FOCUS ON:**

Assissting lab participants to better understand and work with the dynamics at play in complex problem domains

Often a mix of systems thinking and design thinking

Bias towards action and prototyping solutions

**Might lean a little more towards design approaches**

**USE WHEN:**

You have a bit more time to explore

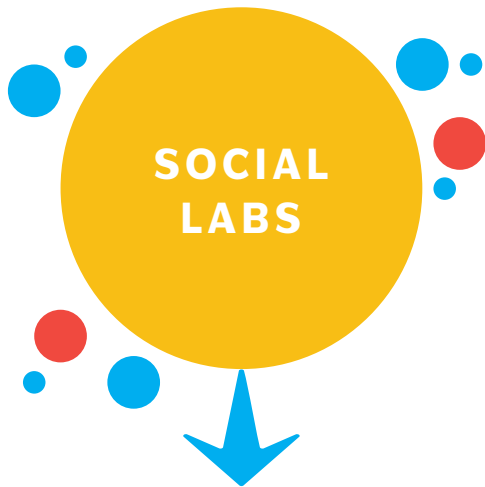
When you have a complex challenge but a somewhat defined scope

You have systems challenges

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



Leans towards systems lens  
(Often big groups)



**FOCUS ON:**

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

A lot of group dynamics work

Questions lead to more questions

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

**USE WHEN:**

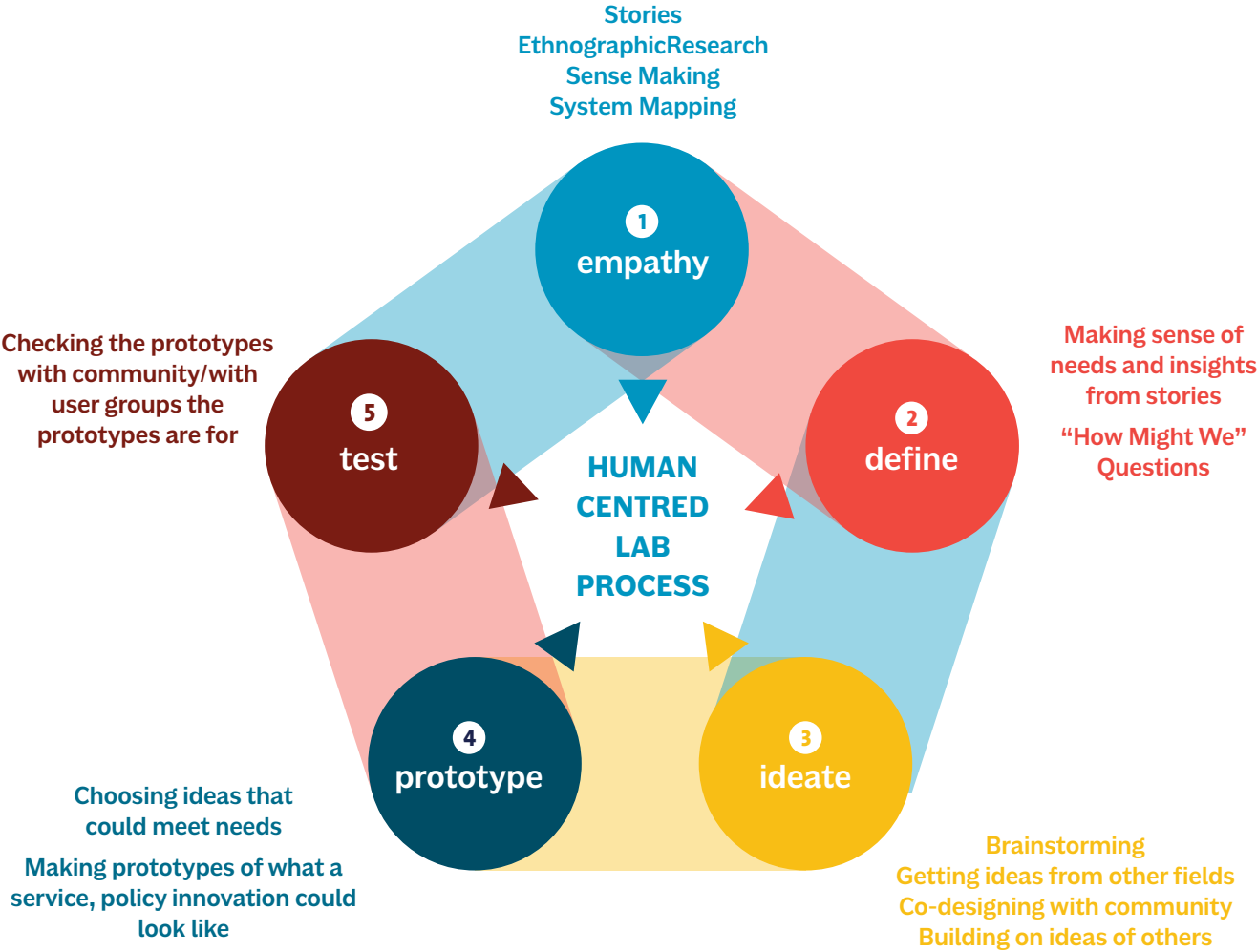
You have a lot of time, high tolerance for ambiguity, and don't need to necessarily land on tangible prototypes of solutions

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

# HUMAN-CENTERED DESIGN

In particular, the Shift Lab used a methodology known as “human-centered design” over the course of the lab. Human-centered design is a disciplined creative process that begins with empathy to dig deeper into the core needs and motivations of the people and systems connected with a complex challenge. Once insights have been generated from people with the context experience of a challenge,

there is a process of facilitated ideation which leads to the development of prototypes of solutions. Finally, these prototypes are tested on the ground to see if they truly meet the needs of people. As evidence emerges of what prototyped solutions are working, those solutions can be scaled and spread to create systemic change.



## Why apply a social innovation lab approach in addressing racism and poverty?

Efforts to address the complex intersection of racism and poverty are not new: individuals, organizations, and communities have been fighting for progress in this area for a long time. In Edmonton, this effort frequently draws from a human rights framework to inform grassroots movements and media campaigns which influence societal attitudes, systems, and policies with different orders of government. Current anti-racism projects, including the Shift Lab, would not be possible without the decades of groundwork these interventions have laid. Such interventions need to continue to be supported as part of a collective approach to eliminating racism and poverty. The Shift Lab wanted to contribute to this ecosystem of interventions by experimenting with a methodology that diverges slightly from traditional activist-informed approaches. Multiple kinds of interventions in multiple locations are necessary in order to address complex challenges and we hope social innovation lab approaches such as the Shift Lab will complement existing approaches and become a key piece in eliminating racism and poverty.



Core team generates insights from ethnographic research



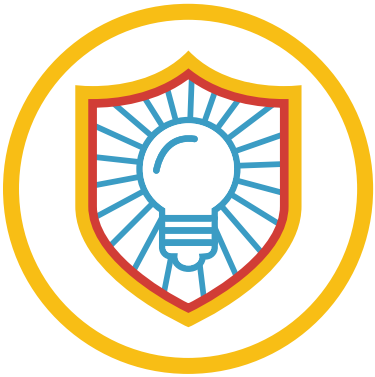
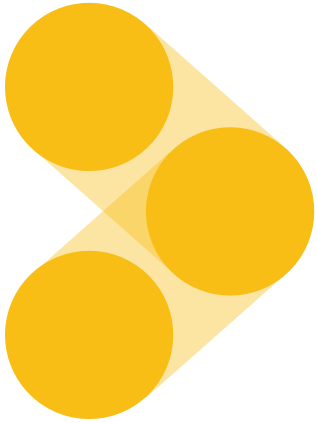
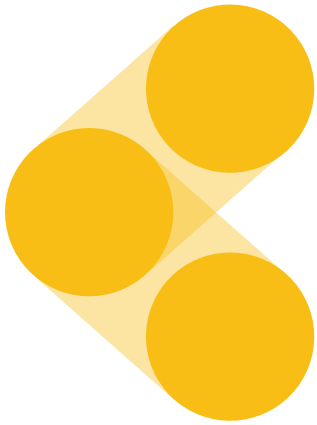
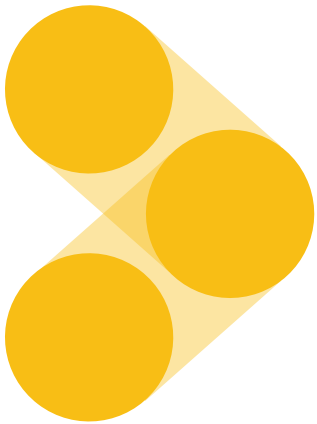
Red Team sharing key features of their prototype

# GUIDING PRINCIPLES UNDERLYING THE SHIFT LAB 1.0 JOURNEY

Guiding principles are not rules to adhere to but rather reminders to help guide a process. The initial four guiding principles of the Shift Lab were established by the Shift Lab Stewards to help convey the approach of the Lab when explaining and engaging the various stakeholders.

Once the Lab was underway, the Core team added the following guiding principles:

- Share air time, make space for all voices
- Recognize trauma can be triggered
- Own your shit!
- Embrace what challenges us
- Innovaction = Innovation and Action!
- Hold ideas lightly
- Keep information confidential



**We foster a safe experimental space**  
This work is complex and often messy. In the Edmonton Shift Lab we choose to create a fun, open, and inclusive environment where we strive to be aware of our biases and bold with our ideas. We believe the opportunity to come together in a space that values making mistakes along the way builds trust and infuses learning, laughter, friendship and community building into the process.



**We create solutions with community**  
Working in complexity is tricky. We believe the wisdom generated from the coming together of a diverse collective helps us get to more thoughtful solutions. Together, we build opportunities to learn from others, co-design with community, and test our solutions with people to ensure that they actually work.



**We embrace new ways of thinking and acting**  
To get to better solutions we need new patterns of thinking and acting. Through human-centered design thinking and processes to explore root causes of a complex issue we are opening up new ways of collaborative solution finding. Our exploration integrates creative problem solving practices with rigorous methodologies to help us carve new ways forward while navigating complexity.



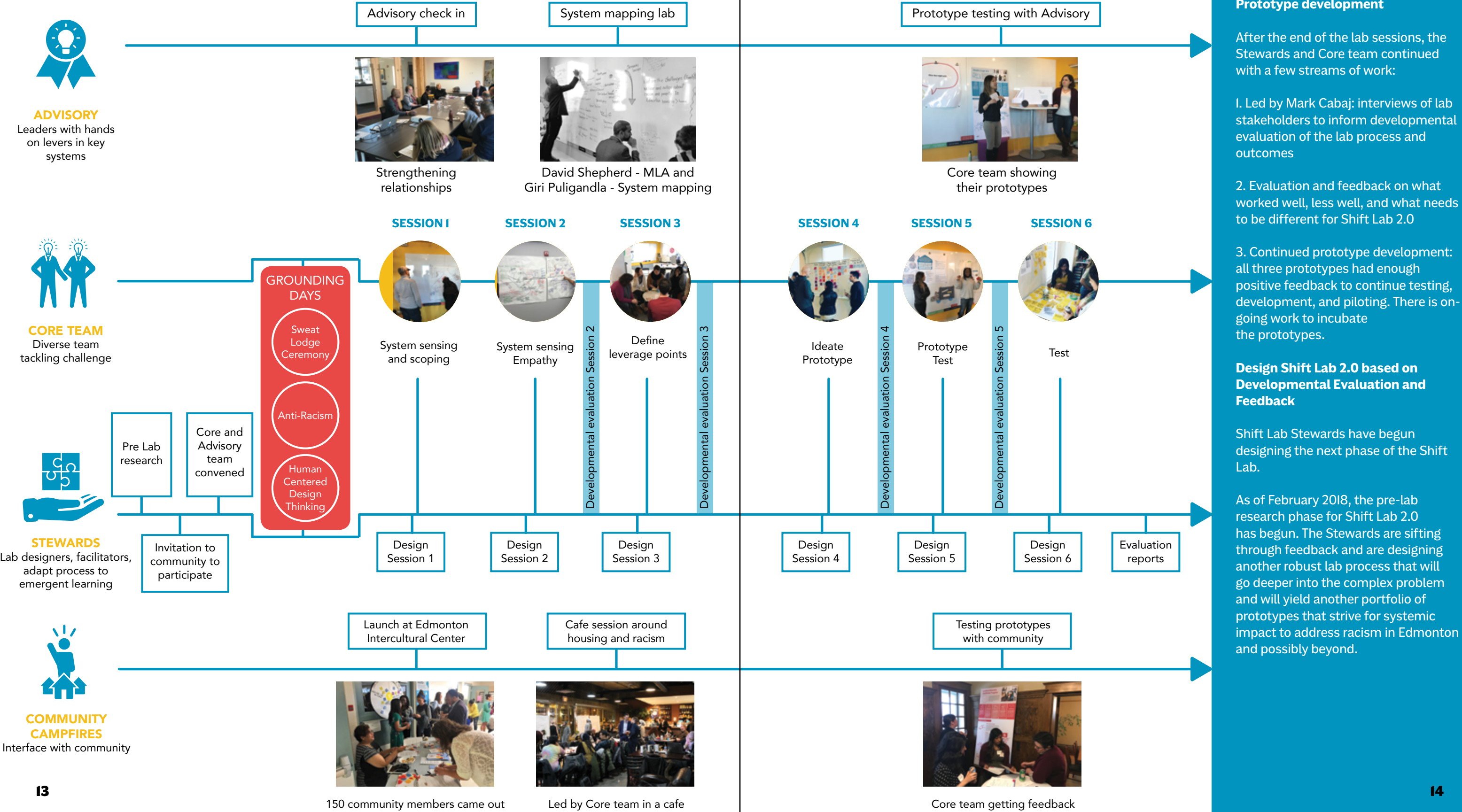
**We focus on impact**  
Getting to solutions that work for the people we serve is at the core of the Shift Lab. By working with people, using a creative process, and testing what we come up with, we believe we can discover some potential solutions to the messy, complex, and tricky problem of racism and its intersection with poverty.



OUTLINE OF THE JOURNEY OF THE 4 KEY GROUPS OF THE SHIFT LAB COLLECTIVE

Designed by Melissa Bui

JUNE 2016 ..... AUGUST 2016 ..... DECEMBER 2016 ..... APRIL 2017



# SNAPSHOT OF THE SHIFT LAB 1.0 JOURNEY

**Key activities**  
The first year of the Edmonton Shift Lab was broken into three distinct phases:



**Four Key Groups of the Shift Lab Collective**  
There were four key groups who had different roles and responsibilities in the Shift Lab; these teams were recruited at the outset of the project. The Stewards designed and facilitated the entire process. The Core lab team underwent the lab process and were responsible for developing prototypes. The Lab Advisory team were community champions who could help with access and insights in key systems, perspectives on testing prototypes and help in how to navigate complex systems. The Community Voice Collective were community members who could provide feedback on prototypes.

Read bios and learn more about who the collective was on our website:

[edmontonshiftlab.ca/the-collective/](https://edmontonshiftlab.ca/the-collective/)



**Lab Advisory**  
A diverse group of leaders who have lived experience with the challenges we are addressing, are champions for creative processes that spark critical change, and/or are leaders within key systems that can influence change.

This group will support the lab by providing input when critical questions arise in the lab process and act as key levers supporting the public presence of the Shift Lab.



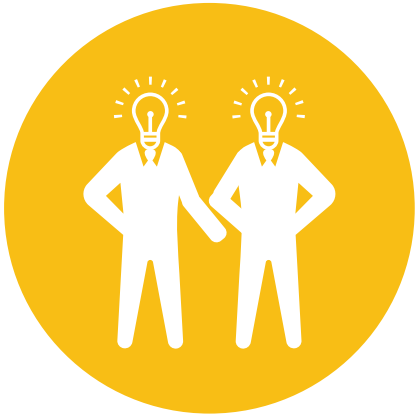
**Community Voice**  
An ever growing collective of organizations and people that are interested in or already working on addressing racism and poverty in Edmonton.

This group will act as a bridge connecting community experiences to the lab process. This will support sensemaking around racism, poverty, and systems and provide a link to people to co-design solutions with community.



**Lab Stewardship**  
A group of 5 people that represent diverse ethnocultural community perspectives and have knowledge and know-how around the coordination of human-centered design thinking and change labs.

This group will steward the design of the lab, research and gather data to ensure the lab is rooted in sound principles, coordinate and organize the logistics of the lab, and help co-facilitate lab sessions.



**Core lab team**  
A diverse group of people with backgrounds in human rights activism, design thinking, systems thinking, anthropology, service innovation, community building and human services.

This team will undertake on the ground research with community to first explore assumptions, ideas, and realities around racism and poverty in Edmonton and then co-design and test solutions with people.



## PHASE 2

# LAB EXPLORATION

The Lab Exploration phase lasted for 6 months and contained a number of different elements:

### Grounding days

At the beginning of the Lab Exploration the Stewardship and Core teams underwent three full-day grounding sessions. The Center for Race and Culture helped the teams get grounded in Canada's history of racism, privilege, and anti-racism approaches. The teams were also invited by Lab Steward Jodi Calahoo-Stonehouse to participate in an Indigenous sweat lodge ceremony to help ground the lab in Indigenous ways of embracing community challenges and coming together as a collective. The final grounding session covered the basics of human-centered design.

### Six half day workshops

After the grounding days, there were six facilitated workshops based on the different phases of a human centered design process. Through the six sessions, the Stewardship team facilitated the workshops and adapted the design of each workshop based on emergent feedback and needs of the Core team. In each session a Core team member would volunteer to be a "participant observer" to observe how well everyone embodied the guiding principles of the Lab. At the end of each workshop, the participant observer took time to surface any tensions they noticed and made suggestions about what to keep in mind for subsequent workshops.

An important aspect of any social innovation process is to have a specific scope or problem area in mind. Although the Shift Lab was intended to investigate racism and poverty, the Stewards heard in the Pre-Lab phase that they should not choose a specific scope within racism but rather uncover the scope with the Core Lab team. The first workshop was dedicated to narrowing down this scope; the Core team eventually settled on barriers to housing and belonging in community for racialized people living in poverty.

### Community Campfires

During the course of the Lab Exploration phase, the Shift Lab also hosted three Community Campfires. These events were mostly designed by the Core team and offered in accessible community settings such as coffee shops and community hubs. Although there wasn't any actual fire involved, the Campfires allowed the teams to connect with Edmonton community members to share insights and solicit feedback and ideas on prototypes. This feedback was instrumental in the development and evolution of the prototypes.

## PROTOTYPES THAT EMERGED FROM THE LAB JOURNEY

The Core Lab team divided themselves into three prototype teams, each with a different focus on how to approach racism in housing. These teams became known as Yellow team, Blue team and Red team, affectionately named after the different colours of sticky notes that were an instrumental part of the Lab process.



## YELLOW TEAM

The Yellow team created the Journey to YIMBY prototype. They proposed gathering lessons from successful and unsuccessful affordable housing projects in Edmonton to create a comprehensive guide for nonprofits, particularly those which want to develop and sustain affordable housing projects for racialized people throughout the city. The guide is meant to demonstrate how to create ideal conditions for an affordable housing project from before the plans are drawn to years after the project is complete. The team prototyped how to use data, empathy building, and transparency as tools for success. In the Post-Lab phase, the Yellow team has been working with a non-profit to hand off the prototype for further testing and piloting.



### YELLOW TEAM



Matthew Ward



Fren Mah



David Rauch

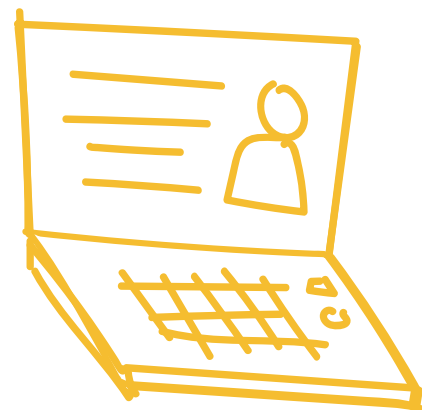


Pieter de Vos



## RESEARCH QUESTION

How might we... design an inclusive community that embraces affordable housing?



## PROTOTYPE:

# JOURNEY TO YIMBY

### Who is this for?

This guide is for nonprofits who want to develop successful affordable housing for racialized people throughout the city of Edmonton. It would be a tool for organizations to consider the important aspects of developing affordable housing projects, with special consideration for addressing racism and stigma associated with some of these housing projects.

### Why this group?

Nonprofits are one of a small handful of players responsible for developing and managing affordable housing in Edmonton. Based on the fact that over 4,500 families in Edmonton were on the affordable housing wait-list as of 2016, commercial developers are clearly not providing enough affordable housing. The Municipal Governing Act of Alberta does not allow cities to mandate the construction of affordable housing like in other provinces or countries. Nonprofits are often put in the position of managing community expectations of these projects and the expectations of federal, provincial, municipal, and private funders.

### How to do it?

The guide will walk nonprofits through each step of the process of establishing a successful affordable housing project, from different lenses to use when determining a site to how to ensure your tenants feel connected to their community. Distribution and impact: The City has said that they would consider sharing the guide with prospective nonprofits looking to provide affordable housing in Edmonton. Various nonprofits already providing affordable housing have expressed interest in sharing the guide as well. The guide could also have a web presence which would allow sections of it to be used nationally or internationally. This project should be framed as a living document and should include the changing experiences of nonprofits across the city in their initiatives and approaches.

### What next?

The framework and foundation for the guide has already been determined based on our ethnographic research and literature reviews, however, the guide would need to be further validated with potential users to ensure it would satisfy their needs. Then, the guide's content would need to be fleshed out and written. Nonprofits and others would need to

be engaged to continue to gather additional best practices. The results would need to be laid out and designed for both a physical document and a website mirroring the content. A press release and media event would be needed to promote awareness of this resource, and various partners would need to be engaged to ensure they share the materials with those who need them. The guide would need to be updated at least every couple of years to ensure the data is reasonably up to date.

### Consider this?

This guide could be used by many different stakeholders. Citizen advocates can use the maps to identify mismatches between communities with people in need and the amount of affordable housing. Citizens could also reference the engagement best practices if a developer is proposing or managing a development and not following best practice.

This guide could leverage components of other Shift Lab projects including encouraging nonprofits to get certified in embracing diversity or ensuring the mobile tenants' rights bus makes regular stops at the affordable housing facilities under their management.

## KEY ELEMENTS



### Choosing where to build

A series of maps and statistics will help nonprofits find where affordable housing already exists in each neighborhood.



### Tell the story of your neighbours

This part of the guide will humanize those using affordable housing by collecting stories of people in Edmonton who use or need affordable housing.



### Buying in!

Based on our ethnographic research and reviewing Edmonton-based case studies, there are best practices which include a commitment to transparency, engaging the community before development permits or building designs are complete, and finding community partners.



### Project sustainability

We propose guidelines to ensure affordable housing projects are supported for the future by the community and provide adequate professional supports which are culturally sensitive.

### Community integration

This section collects best practices in Edmonton on how to build connections between affordable housing projects and their community that is diverse and inclusive.

# BLUE TEAM

The Blue team created the Mobile Legal Aid prototype. They proposed creating a mobile team with resources to help racialized persons who were facing struggles navigating landlord/tenant relationships due to prejudice. The mobile team would set up in the parking lot of a housing complex, in a neighborhood with rental units, or at

a community location such as a YMCA, community league, library, or school to offer their support and services. In the Post-Lab phase, a member of the Blue team has looked into stewarding a feasibility study in their organization to see what it would take to pilot this prototype.

## RESEARCH QUESTION

How might we... create a targeted program that meets the needs of racialized tenants in their relationships with non-racialized landlords?

PROTOTYPE:

# MOBILE HOUSING RESOURCES

### Who is it for?

We propose to consolidate resources and create a one-stop pop up shop of service provider contacts and referrals, which will remove these barriers through mobile service delivery. This model allows us to rotate in staff from various agencies to meet specific needs, all under one model of mobile service delivery. It also enables us to deliver ‘legal triage’ — someone with a degree of legal knowledge (like a law student) can sit down with a client for 10 minutes and point people to the right process, or suggest the need

for further legal advice, etc. Our current prototype is staged, with Stage One delivering information and resources, some degree of legal advice/assistance, and service navigation/-connection. Stage Two of our prototype would expand the services available through the van to include services like direct referrals, assistance with producing video/photo evidence, and higher capacities for legal advice (whether through on-board service provision or a video link).

## BLUE TEAM



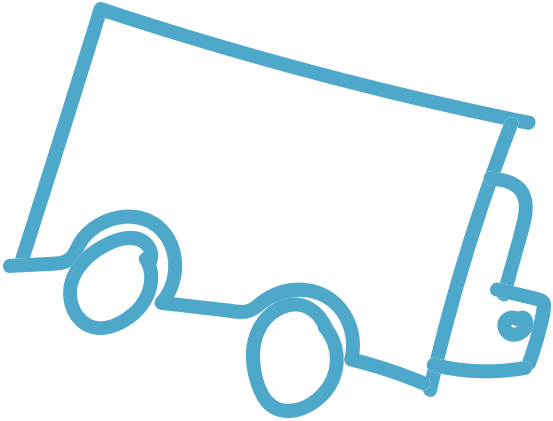
Brandon Wint



Vanessa de Koninck



Vivian Kwan



### Why this group?

We learned that racialized individuals are more likely to face issues with their landlords, due to factors such as prejudice and bias, cultural practices, and family structure. Different communities of colour have different specific needs, but we learned that many experiences are broadly shared across communities, and that lack of knowledge and lack of access to resources and services are common barriers to tenant empowerment.

### How to do it?

We propose to consolidate resources and create a one-stop pop up shop of service provider contacts and referrals, which will remove these barriers through mobile service delivery. This model allows us to rotate in staff from various agencies to meet specific needs, all under one model of mobile service delivery. It also enables us to deliver ‘legal triage’ — someone with a degree of legal knowledge (like a law student) can sit down with a client for 10 minutes and point people to the right process, or suggest the need for further legal advice, etc. Our current prototype is staged, with Stage One delivering information and resources, some degree of legal advice/assistance, and service navigation/connection.

### What next?

The next step is to identify which organizations would be included, and in what roles, and to design the stakeholder and funder support model. Rollout of the van service would also require an evaluation plan, to test some of the van’s capacity to effectively deliver connection to services and

resources. Some questions to test include the effect of landlord response to the van on individual attendance, any negative consequences for tenants after the van attends (which we could test with a follow up survey or similar with those who attend), and whether the van is reaching its intended audience (which we could test by setting clear targets for demographics of who is served through the van and verify if these are being reached through data logging).

### Consider this?

- How to counter unintended effects like stigma
- How to build stakeholder support like trust and confidence in anonymity
- Where to find funding, staffing
- How to keep staff inside van safe
- What kind of data/info to track, and how to use that to understand gap, push for change, etc
- Where can the van operate (private property concerns, safety concerns)
- Which organizations would be included, in what roles?
- Who owns this (the van, the insurance, etc)?
- How will our daily/weekly route map look?
- How will we balance scheduling needs with community needs, etc?



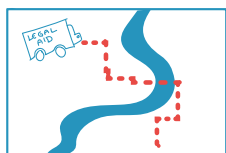
Blue team in action

## USING THIS PROTOTYPE



### Identify need

Staff consult with community organizations and community connectors to get ideas about where the van should go.



### Create route

Staff cross-validate these addresses with geo-based data about problem properties, areas of least affordability, vulnerable neighborhoods, etc to create prioritized service delivery routes. This information can be fed into an app.



### Set up shop

The van parks and sets up an outdoor area and the inside space. This could be in the parking lot of a housing complex, in a neighborhood with rental units, community organization, community league, library, or school.



### Provide services and resources

In addition to the direct provision of services and resources to those who attend the van because they are facing a problem with their landlord, it will also be valuable to provide educational and informative seminars on the importance of establishing inclusive communities.



### Happy tenant, happy town

We also need to create and value landlord buy-in. We will do this through outreach and education for ALA and CLA; carrying resources on board that explain landlord responsibilities; providing advice/clarification to landlords about their situations and liaising through service providers with landlords who will welcome the van for engagement opportunities.

## RED TEAM

The Red team created the Landlord Diversity Certificate Program prototype. Their prototype aimed to improve awareness and knowledge about anti-racism practices and provide tools and skills to help address racism by way of a training program for large-scale building management companies and landlords who work with diverse tenants. The prototype of the training consists of four phases: the initial training program; working with a consultant to integrate anti-racism practices into building policies;

a celebration of the completion of certification; and ongoing follow-up and evaluation of the rental property. Successful landlords would receive visual marketing in the form of "Diversity Approved" branding (stickers/decals), as well as promotion through a website that potential renters could access. In the Post-Lab phase, the Red team has decided to further develop the prototype themselves and move towards a pilot in the new year.

## RESEARCH QUESTION

How might we... create a tool that identifies racial prejudice in accessing housing?



Red team in action



## PROTOTYPE: LANDLORD DIVERSITY CERTIFICATE PROGRAM

### Who is it for?

This tool is designed specifically for Edmonton landlords and building management companies. Generally, our prototype is for larger-scale landlords who own multi-unit or apartment-style buildings, or multiple properties. This prototype may be adapted in the future to respond to the needs of landlords and tenants in small-scale, private home rental suites.

### Why this group?

We were intentional about trying to address roots of racism - that is, creating a prototype that moved the onus/responsibility off of racialized people themselves, and onto those who may be complicit in reenacting discrimination and racism. Our prototype helps to address the issue of housing at the intersections of racism and poverty because it provides tangible avenues for change, both for racialized people and for landlords who rent to racialized people. Our prototype is empowering for both groups.

### How to do it?

We want to create a movement that acknowledges the necessity of safe and secure housing that is simultaneously anti-racist and promotes diversity. Companies and businesses can get on board with the 'Diversity Certified' stamp of approval as a way to promote their business, show they are one of the 'good guys' and get greater publicity and exposure. Landlords and building managers are enticed by the increase in demand by people looking for safe, secure housing, as well as a more community-minded, safer neighborhood that respects and supports diversity.

### What next?

We need to find partners to help with development and design of the program, making sure this has a distinctly Edmonton flavor and context. We will partner with anti-racism subject matter experts to help develop content, and use the stories of racialized people who have experienced barriers to housing. We will also look for partners to endorse the program, like City of Edmonton, Edmonton Police Service, Capital Region Housing, housing agencies, and building management companies.

### Consider this?

We need to consider the best way to increase buy-in and find the early adopters, creating a bit of social pressure and social responsibility for others to follow suit. We want to connect with partners who can help us develop an incentive structure, like tax breaks or funding for maintenance and operations. We also need to consider the recertification process in more detail. In the future, we might consider how we create a more global movement, expand the project, and partner with other cities to brand the Diversity Certification.

#### RED TEAM



Sheida  
Azimi



Soni  
Dasmohapatra



Noelle  
Jaipaul

## USING THIS PROTOTYPE



### Hear about the program

Are you a landlord or building management company? Are you looking for innovative ways to find and maintain tenants who contribute positively to building trust, community, and safety? Are you looking to foster a safe and stable rental community that respects the diversity of Edmontonians? Are you a tenant? Are you looking for a long-term place to call home and build community with neighbors?

### Training

Participants will walk away with key skills and tools to fight racism including: an Edmonton-based film on discrimination in housing, an extensive curriculum by subject-matter experts, and strategies for developing and maintaining a successful diversity plan. The film will show the daily experiences of being racially discriminated against when trying to access housing. We want to make sure that our ethnographic research, including the voices of those who are affected, is heard. Not only do we want to hear these stories, we want others to know they are not alone in their experiences and that there is a way to assert your rights to safe, secure housing.



### Create policies and procedures

Consultants will provide support to participants to create policies and procedures, catered to their unique needs and that promote diversity and community in their building. Participants will also be provided with strategies to enact their policy and keep it front and centre.



### Public event graduation

Participants officially receive their Diversity Certification, complete with the certificate and branding to proudly mark their building. The milestone is marked by a celebration, bringing together tenants, community members, and prospective renters.



### Sustainability check-up

Participants will look at how they continue to celebrate diversity over the long-term, with a recertification workshop every three years, as well as ongoing opportunities to evaluate and improve their commitment to anti-racism, poverty reduction, and diversity.



### PHASE 3

## POST-LAB



The report you hold in your hands in the results of the effort from the Post-Lab phase. The Shift Lab Stewardship team is currently planning what's known as Shift Lab 2.0, with plans to continue to support the above prototypes and run another lab process to go deeper into the problem area of racism.

### Want to be involved?

There are a number of ways to support and be involved with the Edmonton Shift Lab.

- Do you want to be a champion or host of one of our current or future prototypes?
- Are you a funder interested in exploring how to scale either the Shift Lab process or one of the prototypes?
- Do you work for an organization who is interested in connecting with us for some ethnographic research?
- Interested in participating as a Core team member?

If you answered "yes!" to any of these questions, get in touch:  
[info@edmontonshiftlab.ca](mailto:info@edmontonshiftlab.ca)

To keep an eye on what we're doing, check us out online ([www.edmontonshiftlab.ca](http://www.edmontonshiftlab.ca)) or on Twitter (@YEGShiftLab).



*Advisory feedback to Core team on prototypes*



*Center for Race and Culture grounding day with Stewards and Core team*



# WHAT WE LEARNED ABOUT SOCIAL INNOVATION LAB PROCESSES IN ADDRESSING COMPLEX CHALLENGES



Ben Weinlick



Jodi Calahoo-Stonehouse



Aleeya Velji



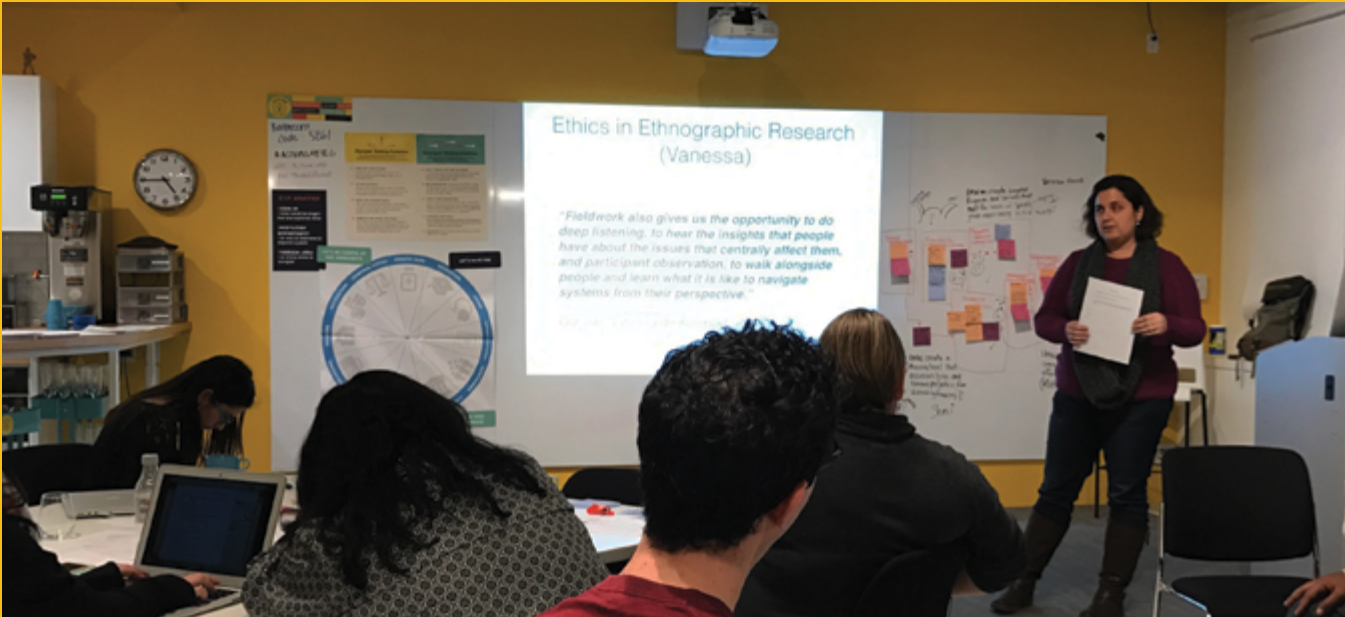
Ashley Dryburgh



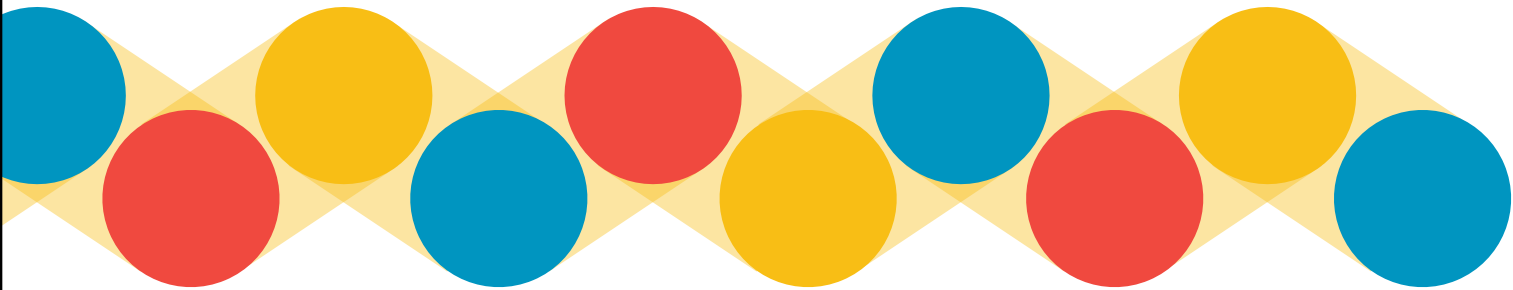
Sameer Singh

Stewarding a social innovation lab is an emergent and adaptive process. Labs require agility and adaptability to be inclusive and responsive. Balancing the needs and perspectives of stakeholders while maintaining the process of a lab is quite complex and tricky to navigate. Nevertheless, designing and facilitating a

social innovation lab can lead to important learning and practical interventions that have potential for positive impact. Here we share the Stewardship team's learning from the first iteration of the Shift Lab's social innovation lab process.



Core team member and anthropologist Vanessa de Koninck sharing ethics considerations in ethnographic research



## CREATING SPACE FOR EMERGENT LAB ROLES

Careful consideration went into what knowledge, diverse experiences, skills and balance of privilege and power would be required to support a successful social innovation lab. In addition to the four teams making up the Shift Lab collective, we learned over the course of the journey that we had to adapt and make space for other necessary lab roles. These included:

### Developmental Evaluator Role

Developmental evaluation was vital to capture learning and help adapt to emergent feedback. We brought on Mark Cabaj, a locally based, world renowned developmental evaluator. The value of a developmental evaluator supports innovators in being responsive to emergent feedback and in balancing individual lab member learning with learning from the system being explored.

### Graphic Designer

Mid-way through the lab exploration we learned that it is easy to lose key learning in an iterative process. We realized we required visual ways of capturing knowledge artifacts to help communicate complex ideas. We brought on a graphic designer, Molly McMahon, to help share the story of the lab. As the lab progressed, and because of Molly's stellar systems and design perspective, this role developed to the point where she worked with each prototype team to help visualize their prototype concepts.

### Research Broker Role

We learned that for the next Shift Lab iteration, an embedded research broker role will help to increase research rigour and help teams to both connect and respond to existing approaches and knowledge in the problem domain. We see this research broker role being almost like a librarian who can help to find articles related to a research area and synthesize the findings into digestible information for lab participants.

### Mediator for tough conversations

In tackling a deeply personal and messy topic such as racism, privilege and power are at play in conversations and stewardship of the process. We heard repeatedly that the Core lab team wished they could have dug deeper into difficult conversations. In the future we think a mediator lab role will help when conversation tensions get tricky to navigate. A mediator role would also help keep power and privilege in check and maintain healthy relationships amongst core team.





## THE ROLE OF POWER AND PRIVILEGE IN A LAB

Talking about the intersection of racism and poverty is messy. Stewarding a collective to find leverage points in a system around which to prototype is also messy, not only due to the complexity of the system but because participants bring their own experiences, biases, and preferred familiar ways of problem solving to the lab. Conversations, suggested ideas, and solutions were not just weighed on their utility, but by the degree of power and privilege held by the person suggesting the idea. This meant that it was quite tricky to unpack “truths” about racism and find common ground to design prototyped solutions around. In general we learned that it is important for all lab participants -- Stewards and Core team alike -- to strive to question our assumptions and biases and how deeply our mental models influence how we see potential solutions in system.

### What we did to strive to address power and privilege:

**Convene with diversity in mind:** A strong effort was made to convene diverse Stewardship, Core Lab, and Advisory teams with a wide range of ethno-cultural backgrounds as well as other diversity markers (including class, age, sexuality, and gender).

**Adapt to feedback:** The Stewardship team strove for honest feedback and changed workshop plans to meet both the design process needs and the emergent needs the Core team identified.

**Participant observer role:** Each workshop, a Core team member would volunteer to be a participant observer. This person's job was to observe the interactions of everyone in the lab and report back at the end of each session as to how well we embodied the Lab's guiding principles as well as to make suggestions for improvement for subsequent sessions.

**Rigorously test suggested solutions:** A social innovation lab should not create solutions in isolation. Neither should a lab create prototypes with the expectation that they will be adopted just because they are fancy or look and sound nice. A lab has to be willing to throw a prototype away if it's not meeting needs. As such, the prototypes underwent three rounds of initial testing. To test prototypes, the Core team did an amazing job presenting them with humility and a willingness to be challenged. The teams tested the prototypes with each other, with the Advisory team, and then with the greater community, refining the prototypes after each round of feedback. Currently, the teams are exploring further testing with people with context/lived experience.

### What we are going to do next time:

- Create more space and time for lab participants to step out of the design process, voice what's on their minds, what's not sitting well and explore how implicit biases and power could be influencing workshop insights and outcomes.
- Enlist a mediator to explore tough conversations
- Engage in more grounding days for the teams around power and privilege
- Clarify who holds power in decision-making related to lab activities

## NARROW THE CHALLENGE SCOPE IN THE PRE-LAB PHASE

It was a conscious decision by the Stewardship team at the outset of the lab to not narrow the scope of the lab beyond the intersection of racism and poverty. We heard that our scope would have more legitimacy if it was decided in consultation with people outside of the Stewardship team. However, experience demonstrated that it was a mistake to start with such a large scope in the time we had available. We either should have engaged in broader consultation before beginning with the Core lab team or given ourselves more time for the lab process. Social innovation labs often carry the hopes of a community that there is a magic formula or process to solve very big and complex challenges in a short amount of time -- sadly, this is not true. In our experience, we found that the scope of the lab needs careful consideration and conversations need to be had with the stakeholders connected with the lab to manage expectations.

### What we learned to better scope a challenge for a social innovation lab:

**Explain the tension:** People and community without much experience with social innovation labs will often want to apply a lab approach to a very broad challenge. Explain that the broader challenge, the greater the need for time and resources. Also explain that if the scope is too narrow and specific, systemic root causes of complex challenge can be missed.

**Pre-Lab Research:** A major factor of the Pre-Lab research phase is to identify promising signals and leverage points in the system being explored. There are typically three avenues to explore to uncover these signals: consult with the wider community to surface key assumptions about the challenge, gather learnings from organizations, community groups, and others who are already working in the challenge area, and explore papers, books, journal articles, case studies, and other research about the challenge domain.

**Right Scope, Right Lab participants:** One of the great values of a social innovation lab is how they can positively harness the creativity and valuable experience of a diverse collective. Labs strive for diverse perspectives not only because it will help balance power, but also because better ideas emerge if lab participants don't all think the same way or are from the same domain. As narrower scope leverage points are identified in the pre-lab phase, a stewardship team is better equipped to find the right mix of perspectives and expertise. There needs to be a mix of people with domain expertise and fresh, new perspectives.

# GETTING THE RIGHT MIX OF LAB PROCESS METHODS

We knew from the outset of the Shift Lab that we wanted to use human-centered design (HCD) as our underlying process coupled with systems-thinking tools. This aligned with our commitment to running a social innovation lab, which try to strike a balance between design thinking and systems thinking. However, due to time constraints, we leaned a built more heavily toward design methods. Design thinking allowed teams some insight and empathy into people’s needs and pushed the teams towards designing tangible prototypes in a very limited timeframe, but the downside was the process pushed participants to begin creating prototypes from a limited number of insights, which meant that it was harder to know if prototypes were robust enough to get at systemic root causes.

## What we are going to do next time:

- We will adapt our HCD process to be more robust and develop more strategies, techniques, and tools that are the roughly right mix of methods for the next iteration of the lab to go deeper.
- We began to integrate Indigenous ways of knowing and sense-making in Shift Lab I.O and want to increase this. What would it look like if we weaved together Indigenous epistemologies with design thinking and systems thinking? Stay tuned to find out!
- We will create more time and space for design methods, ethnographic research, systemic thinking, reflection and constructive tension and debate among lab members.



Team learning and practicing prototyping and co-design

# TRIANGULATING DATA AND INSIGHTS

A key aspect of social innovation labs are the insights that are uncovered. These insights are a vital piece to inform the development of prototypes. Insights are typically generated from two sources: the lab process and prototype testing. Good lab process help teams to find insights in both unlikely and likely places and should help teams make informed decisions around what to do with the data/insights that emerge. Design thinking and systems thinking have slightly different processes for uncovering insights. Design thinking focuses on ethnographic research with people who are struggling with a challenge or system in order to find out how to design interventions that will meet users’ needs. Systems thinking methods often involve a group of stakeholders collectively identifying and mapping a systemic problem in order to both uncover leverage points for creating interventions and to reveal the mental models and biases of the group.

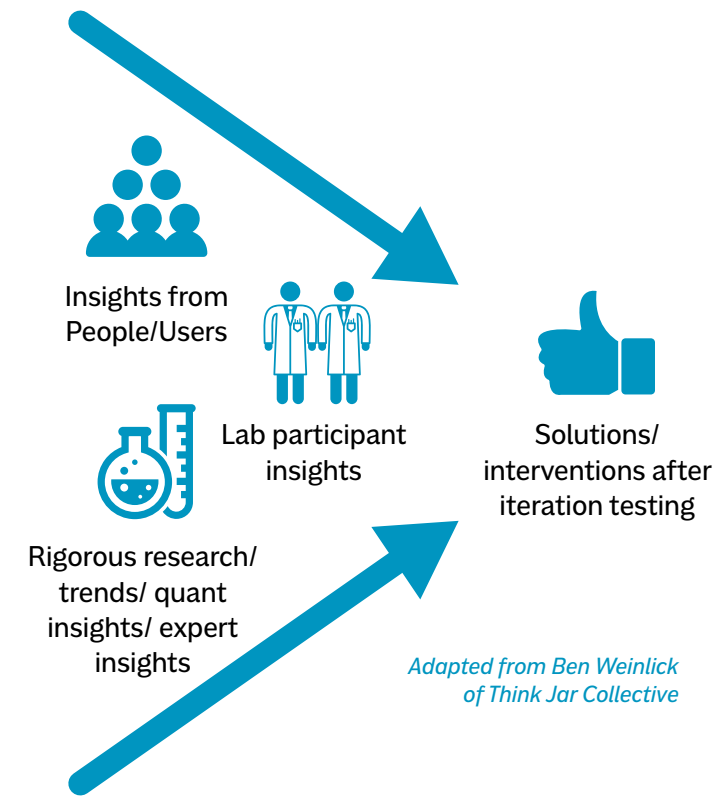
## What we Learned

Design thinking and systems thinking methods for generating insights both have their strengths and flaws: design thinking is limited by the skills of the ethnographic researchers and how “deep” they can go and mainly focuses on users needs rather than all system players, whereas systems thinking doesn’t usually produce rigorous data and the insights can be difficult to explain to those who were not a part of the insight-generating exercises (for example, systems maps are almost incomprehensible to anyone other than those who created them).

Insights from design and systems thinking methods mainly come from people’s intuition after hearing stories from field work, listening to expertise, or having conversations and mapping the heard, felt, and sensed system challenges. These intuitive insights are deeply important and valuable, AND they need to be triangulated with rigorous data insights.

## What we are going to do next time

- Hire a research broker to help align data insights with ethnographic and systems insights
- Continue to improve how the Shift Lab generates and triangulates insight data in order to more rigorously check the balance between intuitive insights, evidence, and whether interventions are addressing systemic root causes.



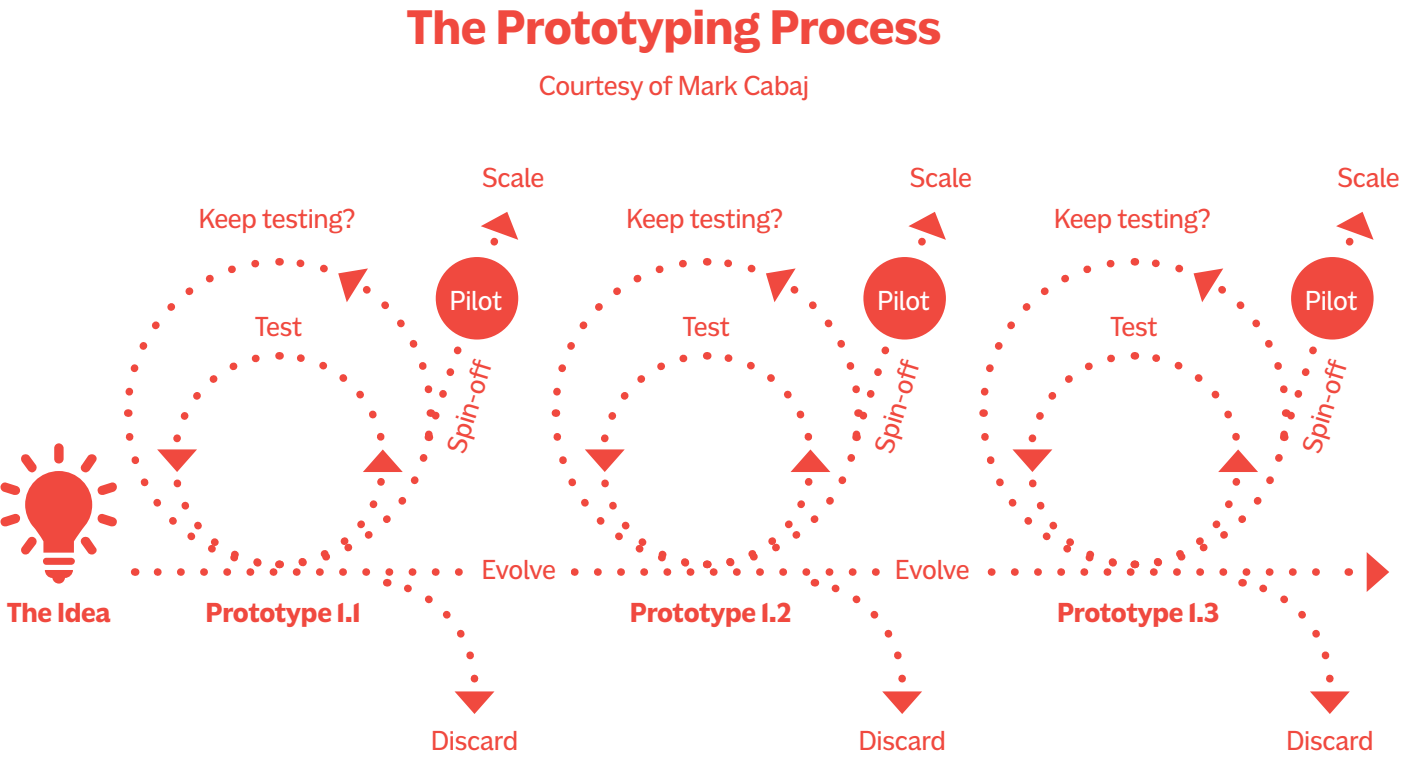
# GRAPPLING WITH LAUNCHING PROTOTYPES ONCE TESTED

The Shift Lab was fortunate to have an innovative funder (Edmonton Community Foundation) as a partner who wanted to not just invest in a lab, but also help in getting tested prototypes off the ground. It is quite rare for social innovation labs to have support for launching prototypes and is key for impact.

Social innovation labs throughout the world struggle with the “who, what, and how” when trying to roll out prototypes. Often a stewardship or convener team doesn’t have the capacity to project manage each developed prototype, create business models, or go out into community to pitch an intervention to stakeholders or networks who might adopt it. The Shift Lab continues to want to break this trend and

do some field building to uncover better patterns and pathways to support the launch of social innovation prototypes.

By the end of the first iteration of Shift Lab, the Core team developed prototypes to a point where they had enough testing and feedback to decide that each could go to a deeper stage of incubation. At the end of the Lab Exploration phase, questions arose in the Stewardship team around how to best support prototypes to launch. It became apparent that there wasn’t a one-size-fits-all approach for prototype support; each team had different needs and capacity to further develop their interventions.



# 3 TEAMS, 3 PROTOTYPES, 3 INCUBATION PATHWAYS

At present, there are three ways Shift Lab is supporting further incubation of prototypes after Shift Lab I.O:

**Self Starters:** One team wants to further develop their prototype on their own and is undertaking further testing and looking for ways to launch a pilot.

**Embedded Hosts:** One team has a member deeply embedded in a racism and diversity training organization and is looking at stewarding a feasibility study and deep testing of their prototype with the community their organization serves.

**Warm Hand-off:** The last team has already won an award through a city data innovation event and a community organization approached the team to see how they might take on their prototype as a supported pilot.

## Promising signals around supporting prototype development after a lab exploration:

### Consider where and who might be best to implement

It is often assumed that social innovation lab collectives will also implement promising prototypes, pilots, or interventions that emerge from a lab process. We want to keep in mind that this might not always be the best way forward, as often a lab team is not necessarily the right group to adopt and implement an intervention. We are also mindful of who the intervention serves, and who in the challenge domain ecosystem might be a good champion to steward a pilot.



Core team presenting and testing their prototype at a community campfire session



**Consider readiness factors for organizations piloting an intervention**

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

**Consider how insights will be passed on**

Once the initial lab exploration is finished, it can be tricky to hold on to the insights that were generated. If the plan is to hand-off the prototype to another partner for development, it might be wise to include some members of the original prototype team in order to not lose knowledge and insights. If the original prototype teams will continue to develop the prototypes, establish a way for them to access the archive of materials from the lab exploration.

**Consider it might be better to have smaller implementation teams**

With implementation, smaller teams seem to be better for sorting out details and having agility. As Stewards we are considering how to balance keeping the previous lab collective informed and engaged in some way while ensuring implementation teams are not too unwieldy.

**What are we going to do next time:**

- Consider how to balance supporting the development of the first round of prototypes with developing Shift Lab 2.0 and new prototypes
- We will continue to experiment with models of prototype implementation. For example, we may explore developing a living lab model that can grow the lab participant group to be responsive to the topics in which the prototypes are built upon. This model can support how we develop a distribution system for prototypes that are produced in the lab. We will continue to learn, be inspired by, and draw from many social innovation labs across the globe.



*Core team member Noelle Jaipaul sorting feedback on her prototype*

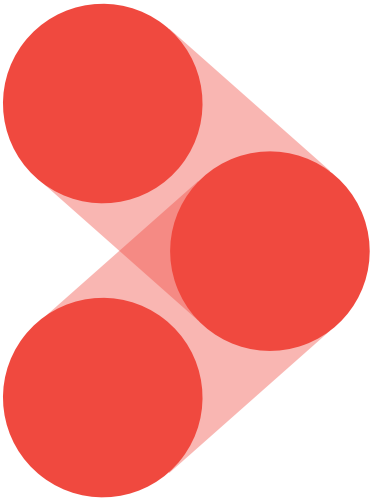
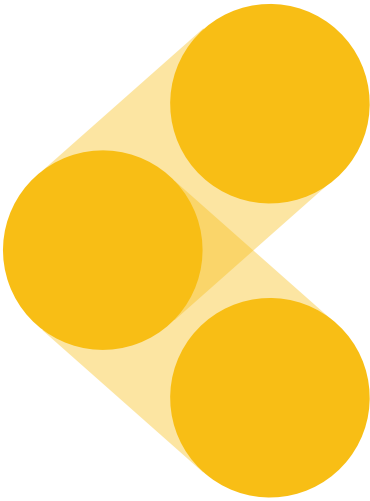
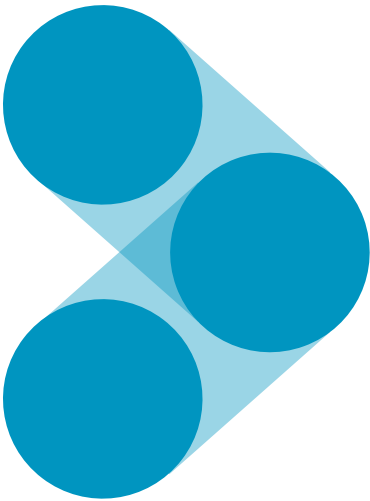


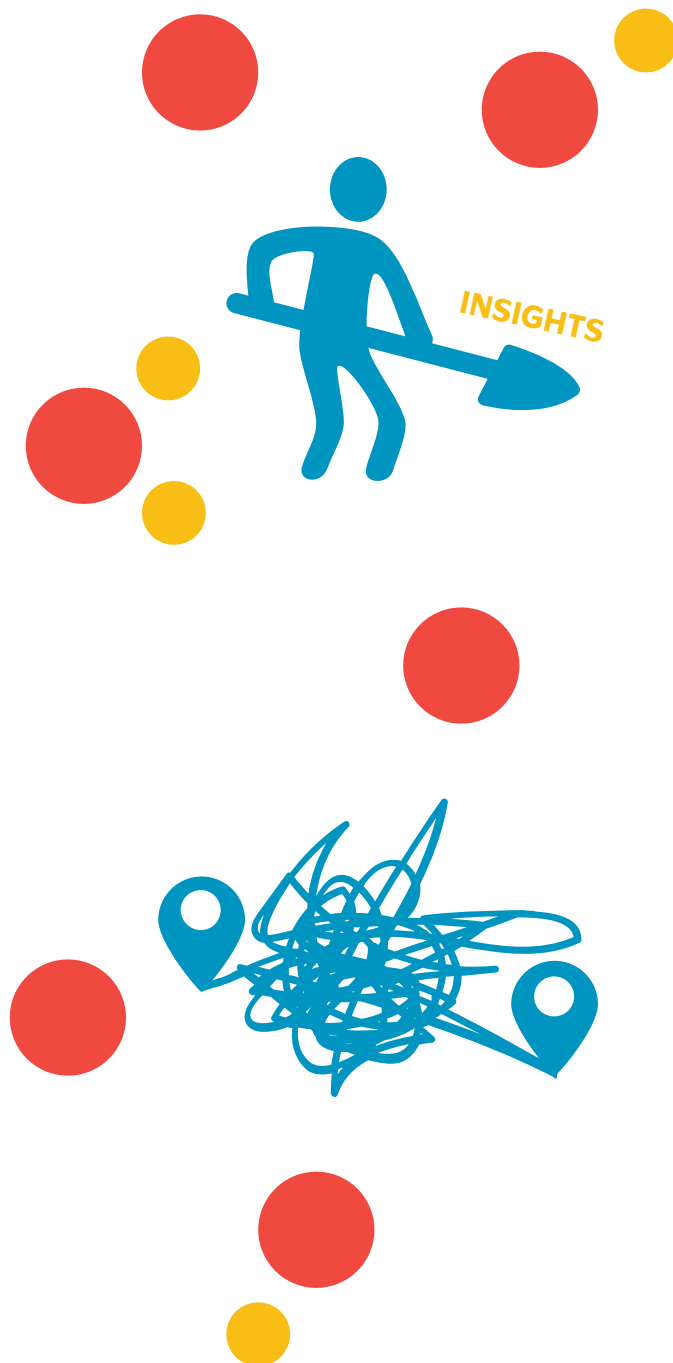
*Near the end of Shift Lab 1.0 relationships deepened and were key to success*

**THE PARADOX OF CO-DESIGN**

Co-design is a process wherein potential solutions are generated with insights and input from users/ people with lived experience of the challenge and who will be impacted by or using potential solutions. Co-design is often misunderstood as a method that enables people with lived experience to design and create innovations and systemic delivery systems that support themselves and others. Social innovation labs are in the process of figuring out how to steward authentic, ethical, and meaningful exchanges with the people a social innovation lab is trying to support while designing solutions that keep the biases of lab explorers in check, so that solutions actually work for people.

Often when people first learn about social innovation labs and the concept of co-design, they rightfully get excited that work will be done to listen to the too-often forgotten voices of people with lived experience of a complex problem domain. While the excitement around co-design is well placed, what is often missed is that good solutions require multiple perspectives and insights from all stakeholders in a system, including those who might traditionally be viewed as antagonistic to the perspectives of people with lived experience. In the case of the Shift Lab, the Stewards do not come from traditional design education backgrounds, but from education and experience in social justice and human rights approaches to systems change. The notion of co-designing solutions with the most marginalized is deeply aligned with our values and human rights advocacy. As Stewards, we understood that power is unbalanced in systems and too often the voice of lived experience is missing from solutions in business-as-usual approaches to problem solving. It was tricky balancing this commitment with the knowledge that we needed to hear from multiple perspectives, particularly in a problem area like racism which has a long history of well-intentioned (but misguided) interventions by people with power. Shift Lab 2.0 is going to further explore this tension.





## What's Positive about Co-design

- Can help with keeping biases and assumptions of designers/lab explorers in check
- Strives for deeper input and insights from people for whom a potential solution is intended to support
- Acknowledges that good ideas can come from anyone and anywhere in a system
- Often more engaging community consultations than simply conversations. More interactive consultations can lead to deeper insights about what is needed

## What's Tricky about Co-design

- Can be interpreted as design by committee, where more value is placed on ensuring everybody contributes to a solution rather than whether a contribution addresses the challenge being tackled
- Can place a large burden on marginalized people to not only identify what isn't working in a system, but also to generate systemic solutions
- Moving beyond tokenistic engagement of people with lived experience
- Ethics and ensuring that people with lived experience that help design solutions are fairly compensated for involvement and are not subjected to "over researching."
- Navigating co-design efforts with humility to help ensure lab leads keep power and privilege in check

As we move forward into Phase 2 of the Edmonton Shift Lab we are thinking about these complex dynamics and will share back how we work with the paradox of co-design.

In many ways, the Edmonton Shift Lab was an experiment: is a social innovation lab a useful tool for a problem as complex as racism? What is the right mix of processes, people, and resources? We have learned an enormous amount over the past year and look forward to uncovering new insights about racism in Edmonton, about labs, about prototypes and about scaling for systemic impact.



# DEVELOPMENTAL EVALUATION

By Mark Cabaj

Inspired by the call to action issued by the hundreds of supporters of End Poverty Edmonton – the city’s comprehensive poverty reduction plan -- they volunteered to experiment with new ways to ensure that everyone in the community – regardless of race – can live free of poverty.

They were not alone. They were backed by a leading Foundation, guided by an experienced facilitation team and supported by a diverse collection of everyday citizens.

This section of the report describes Lab participants’ activities, results and learnings, as well as their next steps and recommendations for further action.

## SECTION OUTLINE

- ↓ Introduction
- ↓ The Challenge
- ↓ The Evaluation
- ↓ The Outcomes
  - Insights About Racism & Poverty
  - Three Promising Prototypes
  - New Capacity with the Lab Methodology
  - An Urge to Go Deeper
- ↓ Moving Forward



*From September 2016 to June 2017, a dozen Edmontonians came together to tackle one of the toughest challenges in our city: racism and poverty.*

## THE CHALLENGE

### The Challenge of Race and Poverty

Edmonton is an increasingly diverse city. The Statistics Canada Census show that the number of Edmontonians born outside of Canada increased from 205,445 (25.8%)<sup>1</sup> in 2011 to 308,610 residents in 2016 (23.8%). The number of Indigenous people jumped from 52,000 to 76,205 (5.9%) in the same period.<sup>2</sup> Overall, the number of people who are visible minorities increased by over 40% from 254,995 (22.4%) in 2011 to 363,990 (28.1%) in 2016.<sup>3</sup>

Eliminating racism in the city is a “game-changer” in the community’s effort to address poverty. Indigenous people, immigrants and refugees experience much higher rates and greater depth

of poverty than their neighbors do. Indigenous residents, for example, are twice as likely to be poor and ten times as likely to be homeless as non-Aboriginal residents.<sup>4</sup> While recent immigrants have roughly the same employment rates as the general population, they earn significantly less income.

While the causes of poverty are complex, racialized Edmontonians also “experience discrimination in workplaces, housing, services and facilities that excludes them from opportunities and puts them at risk of experiencing poverty.” (End Poverty Edmonton Strategy, 2015).

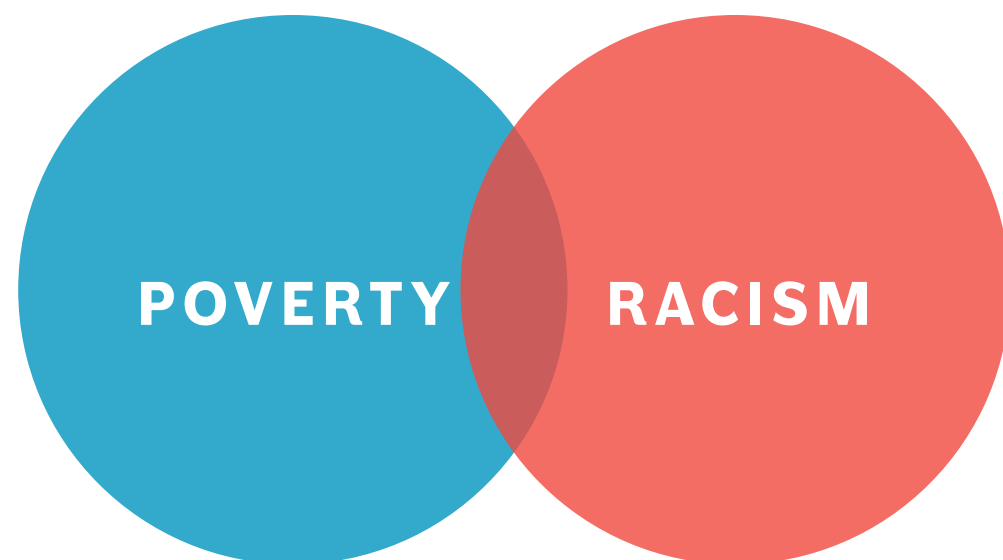
<sup>1</sup> <http://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-CMA-Eng.cfm?TOPIC=7&LANG=Eng&GK=CMA&GC=835>

<sup>2</sup> <http://edmontonjournal.com/news/local-news/edmonton-region-continues-to-have-canadas-second-largest-indigenous-population-census>

<sup>3</sup> <http://www12.statcan.gc.ca/census-recensement/2016/as-sa/fogs-spg/Facts-CMA-Eng.cfm?TOPIC=7&LANG=Eng&GK=CMA&GC=835>

<sup>4</sup> [http://encdhomelessnessyeg.ca/wp-content/uploads/2017/08/Edmonton-Full-Booklet\\_FINAL\\_WEB.pdf](http://encdhomelessnessyeg.ca/wp-content/uploads/2017/08/Edmonton-Full-Booklet_FINAL_WEB.pdf)





This surfaces important questions about the link between poverty and racism in our city:

- *How does racism contribute to, or amplify poverty?*
- *What are the causes of racism?*
- *How can racism and poverty be reduced?*

The Skills Society Action Lab and Edmonton Community Foundation volunteered to try to answer these questions. They developed the Edmonton Shift Lab, an innovative new approach that seeks to uncover new solutions to eliminating racism.

*"We cannot solve the problem of poverty ... unless we honestly unravel the complex and continuing connection between poverty and race."*

Alan Jenkins, End Poverty Edmonton

**Want to know more about Edmonton's plan to end poverty?**

Go to the initiative's website at:  
<https://www.endpovertyedmonton.ca/about/>

## DEFINITIONS

The participants of the Shift Lab explored many different ways of understanding and defining racism and poverty. They decided to use the "working definitions" employed by the EndPovertyEdmonton strategy and the local Center for Race and Culture.

### DEFINITIONS: POVERTY

"Edmontonians experience poverty when they lack or are denied economic, social and cultural resources to have a quality of life that sustains and facilitates full and meaningful participation in the community."  
**(EndPovertyEdmonton)**

### DEFINITIONS: RACISM

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

Want to know more about racism? See Center for Race and Culture at <https://cfrac.com/>



*Prototype feedback session*

*It was good that evaluations at the end of each session were being incorporated. Feedback from those evaluations was noticeably incorporated and adjustments made based on prior sessions' evaluations.*

Lab Participant

## THE EVALUATION

The Shift Lab adopted a Developmental Evaluation (DE) approach to the evaluation of the project. DE is an approach to evaluation that allows social innovators to obtain real time feedback on the design and implementation of the work so that they can respond and adjust to new learnings and insights

The evaluation was organized to answer four broad questions:

1. What is working well and not so well in the Lab? How can we improve the Lab?
2. What are we learning about racism and poverty and how might it be addressed?
3. What is the likely feasibility, effectiveness and support for the prototypes that emerge out of the Lab?
4. What are implications for future efforts to address racism and poverty in Edmonton?

The evaluation was carried out continuously through the Lab. It included:

- Evaluator participation in Lab workshops and Stewardship team planning meetings
- End of Workshop Surveys with Core Lab team
- Mid-term Interviews with Core Lab team
- End of Lab Interviews with Core and Stewardship teams

The evaluation feedback was useful in two ways. First, it encouraged the Stewardship team to continuously adjust the Lab activities. Next, it surfaced four major themes useful for other efforts to tackle racism and poverty:

- Insights About Racism, Poverty and Housing
- Assessment of Three Promising Prototypes
- Reflections on the Lab Methodology
- The Challenge of Going Deep

These themes are explored in more detail in the following pages.

## SHIFT LAB EVALUATORS



Mark Cabaj  
Here to There Consulting Inc.



Katie Hayes  
City of Edmonton

**Interested in learning more about Developmental Evaluation?**  
See [http://www.betterevaluation.org/en/plan/approach/developmental\\_evaluation](http://www.betterevaluation.org/en/plan/approach/developmental_evaluation)



# INSIGHTS ABOUT RACISM, POVERTY AND HOUSING

One of the most important objectives of the Shift Lab was for participants to better understand how racism and poverty intersect, and how this intersection can be addressed. In addition to drawing on their personal experiences, they explored the challenges in a variety of ways, including workshops, reading research on the topic, group discussions, and ethnographic research. Here are eight insights that emerged from their efforts.

## I. Housing is a good “entry” point into racism and poverty.

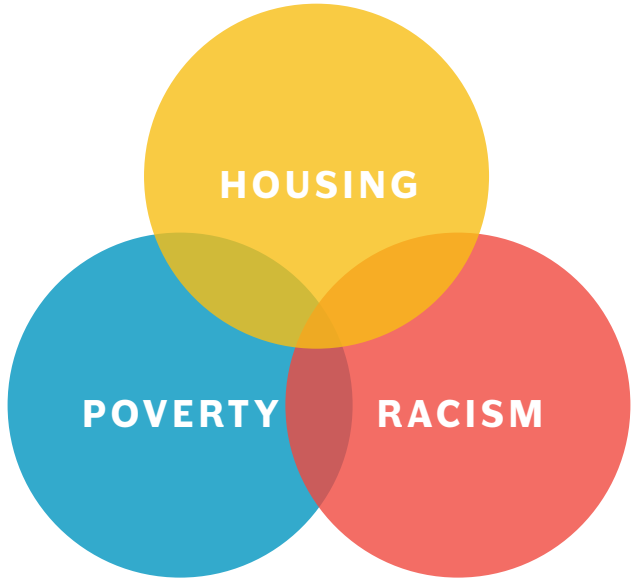
Approximately one third of the way through the initiative, Lab participants decided to focus on an area where racism and poverty intersect most severely: affordable and quality housing. Not only is housing a fundamental human need, it is essential to well-being in other respects, such as physical and mental health, education, and employment.

Racism creates barriers in two ways. First, it can make it difficult for people to secure housing.

*Many landlords won't show an apartment to an Indigenous person if they hear an Aboriginal accent on the phone. They might agree to meet, but then they don't even show up.*  
- Lab Participant

Second, racism can make it difficult to maintain decent housing.

*I learned that smudging in a housing complex is one way you might get evicted. The Lab increased an awareness about the racial patterns in the way we access things, and are rooted in cultural practices, such as the smell of food, the notion of using smoke in ceremony, etc. I was looking at my own condo documents, and found things that some tenants used to complain about the smells coming from the Vietnamese restaurant on the bottom floor. Before the lab I would have not understood this as an issue.* - Lab Participant



*From the bottom of my heart I realized the complexity of the intersection of racism and poverty and housing. Through our research and building and testing the prototypes, there were a lot of things brought forward with those topics that helped us all understand how complex this system is. I realized the depth of the complexity.* Lab Participant

Any comprehensive approach to minimizing the effect of racism on poverty in Edmonton must also focus on assisting racialized groups to access and maintain safe and affordable housing.

## 2. Different types of racism make it difficult to access housing.

Racism – and the role it plays in amplifying poverty and poor housing – shows up in the lives of people in different ways:

- Interpersonal racism** – spontaneous actions or racist events that one person or group does to another (e.g. a landlord uncomfortable with the religion or ethnic background of a recent immigrant passes over her application for a rental unit).
- Internalized racism** – a deep, unspoken belief in one's dominance, or one's inferiority in relation to a more dominant race or culture (e.g. a racialized

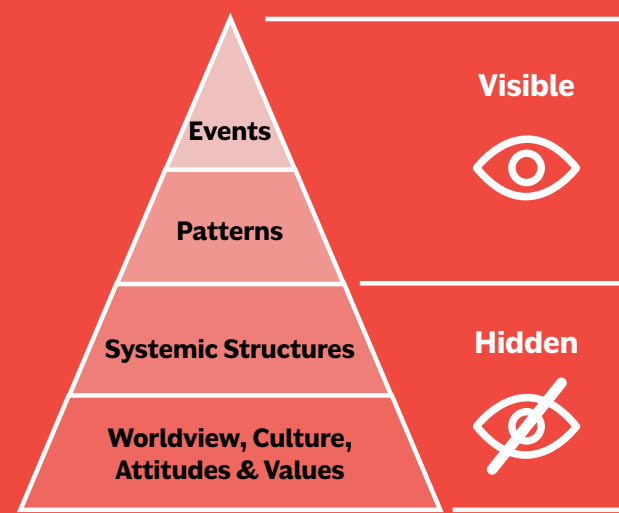
family who feels that they do not belong in a specific housing cooperative or neighborhood).

**Systemic racism** – when the values, laws, institutions and practices of one ethno-cultural group creates barriers for people from another ethno-cultural group (e.g. the Indian Act does not allow Indigenous families on-reserve to own the land on which their houses stand, so it is impossible for them to build financial equity and purchase houses elsewhere).

Each of these types of racism is rooted in a dominant western European worldview, culture, and value. Lab participants varied in their opinions as to whether this worldview was Eurocentric (with a simple bias towards western culture and power relationships) or White Supremacist (rooted in the belief that European culture is superior, and that other ethno-groups should adopt it). They did agree, however, that “changing the hearts and minds” was the most effective way of transforming racism.



UNDERSTANDING THE SYSTEMIC & CULTURAL NATURE OF RACISM



The **Iceberg Analysis** is a metaphor that illustrates how events and patterns of racism are above the waterline and therefore readily visible. By contrast, the systemic structures, mental models, and culture that produce and maintain racism are under the water and therefore less apparent.

3. Racism can be intentional and unintentional.

Racist behaviours and practices can be intentional as well as unintentional. Lab participants had varying opinions about the extent to which each was present in Edmonton. In some cases, they felt racism was explicit and intentional:

*You can't escape it. The Indian Act, reserves, residential schools, government education policies that systematically under invest in Indigenous schools and water safety are deliberate racialized policies that result in terrible outcomes. These are 100% intentional.*  
- Lab Participant

Sometimes it is more subtle and nuanced.

*I did not explicitly think of access to safe and affordable housing as a key indicator of the intersection of racism and poverty. I thought of housing from a policy perspective - the low income cut off, poverty line, spending money on rent - never explicitly thought of the actual links between poverty, race and being denied housing based on those things. Never thought about the ghettoization that occurs around social housing and affordable housing - that it is a class and race based segregation of people.*  
- Lab Participant

While all Lab participants agreed that racism existed in Edmonton, several felt it was dangerous to assume that all racialized outcomes were due to intentional acts of racism:

*Racism too broadly framed can lose its definition. If almost any action or behaviour can be framed as racist, then the goal posts are so broad that it's tough to know where the goal post are, where to start, or what progress means. For example, fire code regulations that prohibit smudging, a legitimate cultural practice by Indigenous people, is often [unintentional racism]: the code is proposed and maintained primarily by a concern - maybe an excessive concern - to adhere to a high standard of safety, not necessarily to exclude a cultural group.*  
- Lab Participant

Lab participants concluded that it sometimes is difficult to discern whether an act or outcome is intentionally or unintentionally racist. Nevertheless, it is important to be aware that both these motives may lie behind such an act or outcome.

4. The link between poverty and racism varies across communities and groups.

While the effects of racism and poverty may be widely felt across racialized communities, individual and groups may experience it differently. For example, Indigenous Edmontonians are ten times more likely to be chronically homeless than the general population. By contrast, very few recent immigrants are living on the streets. Yet nearly one in five can be defined as “hidden homeless:” they are staying with friends or family because they are unable to afford a safe place of their own.<sup>5</sup> Lab participants felt it was important to appreciate these differences.

*We didn't fully get into what kind of racial disparity there is between different racialized groups and these issues we talked about. We lumped all racialized people together. It would be interesting to look further at whether there are issues that are specific to some groups and not others and, if so, how do you work productively on those micro issues in ways that don't alienate them further.* - Lab Participant

It is important to avoid a “one-size-fits-all” analysis of the racism experienced by Indigenous people, recent immigrants and refugees, and other visible minorities when accessing housing. The same applies to the achievement of well-being in other areas, such as employment and education. We must be prepared to develop responses on a case-by-case basis.

5. There is racism across communities.

The dominant pattern in Edmonton is racism exhibited by white residents or dominant institutions towards Indigenous people, immigrants and newcomers, and other racialized groups.

*I think these issues of racism and poverty in Edmonton specifically and globally, exist in a climate of white supremacy so it is possible to do good work in addressing these issues but it is not so possible to [succeed] without upturning the white supremacist attitude. This process highlighted the nature and the limitations of doing this sort of work, because racism and poverty are both oriented by people's understanding and relationship to power. So if people are not attuned to the ways in which power is unevenly distributed anyways, we're going to cosmetically treat the wound of racism and housing, [rather than its cause].*  
- Lab Participant

However, several participants noted that racism also exists across racialized communities, who may not have the same power and privilege.

*Lateral violence racism that occurs within racialized communities that also live in poverty. When you are oppressed by an economic system that wants to keep you disadvantaged, everyone is your enemy. That is the system we live in. People are far less able to build community because of these oppressive forces keeping them in a constant state of fear or anxiety and that creates a lot of lateral violence between those races.* - Lab Participant

<sup>5</sup> [http://endhomelessnessyeg.ca/wp-content/uploads/2017/08/Edmonton-Full-Booklet\\_FINAL\\_WEB.pdf](http://endhomelessnessyeg.ca/wp-content/uploads/2017/08/Edmonton-Full-Booklet_FINAL_WEB.pdf)

While participants agreed that racism was a universal across cultures and societies, they determined that it was important to focus on the more dominant types of racism experienced by people in Edmonton.

**6. The exploration of racism and poverty – and possible solutions – is deeply personal and difficult to navigate.**

The effort to better understand racism and poverty and how it might be addressed is a sensitive one, shaped by a person’s own relationship to the issue.

*How we raise and socialize people to understand racism shapes how they go forward in the world and their discourse about it. I was not raised with the philosophy that I am ‘less than’ others because I was racialized. I have experienced racism and simply made a decision to erase it. However, the Lab has surfaced for me some new insights or understandings of the past: for example, I left a swimming team when I was younger, and now realize it was partly because someone on the team called me a Paki.*

**- Lab Participant**

In many instances, the need to navigate the delicate nature of the issues outstripped the capacity of the Core and Stewardship teams. Some shared their frustration that race and power were reproduced in the Lab itself, resulting in some participants experiencing more privilege than others during Lab activities.

*Even though we were trying to combat racism, the fact that it still happened in the Lab seemed the result of a social experiment of bringing this diverse group of people together.*

**- Lab Participant**

Others felt so vulnerable that they participated in Lab activities cautiously, guarded whenever they were asked to share their experiences, thoughts, or feelings. “I did not bring my entire self to the Lab,” noted one participant, “because it was just too difficult.” Others felt it was easier to discuss these issues more freely over time:

*I was least comfortable at the beginning, really worried about saying and doing the wrong things about race and privilege. I think some creativity was stifled and potential innovative solutions not explored in the collective because some might have held back for fear of offending others.*

**- Lab Participant**

The Lab participants agreed that the difficulties of discussing racism in the Lab were a microcosm of those experienced in society overall, and that participation in processes such as the Shift Lab created opportunities for people to move forward.

*I had some insights about privilege as a white male striving to do systems change work. I was trying to be sensitive to my privilege coming in, but the chats with Stewardship and Core team surfaced it more and made me think deeper about it. I hope it sunk in deeper to continue to keep my privilege more in check.*

**- Lab Participant**

**7. It is unclear how to change the attitudes, ideas, and culture underlying racism.**

Lab participants were comfortable identifying and addressing systemic practices that amplify racism and poor housing – such as policies, regulations, and programs. They were less clear on how to get at the deeper mental models and cultural assumptions in which racialized systems and behaviours are embedded.

*How do you change perceptions, beliefs and culture? The civil rights movement in the United States and anti-Apartheid movement in South Africa led to the dismantling of racist systems, but there are still deep racial tensions in both countries. How do you help change the hearts and minds of people? You can legislate a lot, but you can’t legislate that.*

**- Lab Participant**



Steward-Aleeya Veiji sharing an insight with the Core Team.



Lab participants are not alone in their uncertainty. Several people pointed to the experience of seasoned activists and organizations in the United States and United Kingdom, who report that they continue to struggle to find ways to understand – never mind change – deeply-held attitudes and beliefs about race and culture.

**8. There may be unique Edmonton and Alberta contexts of racism.**

Racism and poverty exist in every Canadian city. Yet several participants felt strongly that racism and poverty may have unique character in Edmonton, reflective of its particular history, geography, and culture.

*Alberta is an anomaly in Canada. It has a different history than the rest of the provinces, is resource based and heavily dominated by males driven by individualistic merit and capacity which leads to a divide in society. It is way too easy money here, which enables people to live well without an education. You don't need to worry about other things like humanity and social justice because you are taken care of and that's all that matters. - Lab Participant*

*For sure, there is the redneck Albertan story, but the economic boom has changed the dynamic. Redneck Alberta now has two of the most progressive young mayors in Canada [Iveson and Nenshi]! So, yes, racism exists, but how and where does it exist? Does it differ from rural to urban? How does it show itself? - Lab Participant*

This possibility of an Alberta manifestation of racism and poverty means that any effort to address racism must be able to do two things simultaneously: it must draw upon the experience and learnings of other communities about “what works” there and it must also develop solutions customized to the specific experience of our region and province.



Stewards sorting through the evaluation data and beginning research for Shift Lab 2.0

# THE PROTOTYPES

Once the Core Lab team completed workshops, discussion groups, and ethnographic research, they organized themselves into three smaller prototype teams. Each focused on developing ideas and prototypes that would ensure that racialized people are able to locate and maintain affordable and quality housing.

The purpose of prototypes is to develop tangible expressions of good ideas – often in the form of sketches, diagrams, paper models – that can be tested and refined with the people who might benefit from the ideas and/or eventually be involved in their implementation. The benefits of developing prototypes to address complex problems include:

- It provides a simple way for diverse people to work on something tangible.
- It is a fast, inexpensive, and low-risk way to test an idea.
- It encourages people to be creative.

The members of the Core Lab team organized themselves into three diverse prototype teams. Each developed ideas for reducing racism and poverty.

- Landlord Diversity Certificate Program (Red team)
- Journey to YIMBY - Yes in My Backyard (Yellow team)
- Mobile Legal Aid (Blue team)

The three Core Lab teams tested and refined their ideas through three iterative feedback sessions:

- Round 1: feedback from Core Lab members
- Round 2: feedback from participants of the Shift Lab Advisory team
- Round 3: feedback from the broader community

In June 2017, the teams met to review the feedback from these sessions and to decide if and how to proceed. They had the following options:

**Discard:** the prototype is unlikely to be effective, feasible and/or supported, so should no longer be pursued.

**Test:** we don't feel we have received enough feedback from people on our prototype; we need more feedback from other people.

**Evolve:** the basic idea is good, but we need to further develop and adapt prototype to reflect the changes recommended from others. Then we should test the new version.

**Pilot:** the feedback on the prototype is good enough to warrant a more formal pilot project and evaluation. Adopt or scale: The feedback on the prototype is so good that we don't need to test it further – it's ready for implementation.

**Adopt or scale:** The feedback on the prototype is so good that we don't need to test it further – it's ready for implementation.

See page 43 for a visualization of the iterative prototyping process



All three teams chose option #3 – to further develop their prototype – in the hope that it would soon reach option #4. They will further upgrade their prototypes to get them ready for full-fledged pilot projects, in cooperation with organizations in the community most able and likely to implement the idea in the future.

The strength of the three prototypes is that they represent a good “starting point” portfolio of innovations:

- 1. They are innovative. The ideas are not being implemented in Edmonton nor do they appear to be in operation in other Canadian cities.
- 2. They represent different types of interventions: YIMBY is an education project, Mobile Legal Aid is a service, and Diversity Certified is a program.
- 3. They include “upstream and downstream” responses. Diversity Certified and YIMBY seek to increase the volume of affordable and quality housing for racialized residents. Mobile Legal Aid is designed to assist people who have lost – or are at risk of losing – their housing due to racism.
- 4. They are a mix of “carrots and sticks.” Diversity Certified seeks to reward non-racist behaviour by promoting exemplary practices by landlords. Mobile Legal Aid creates a disincentive or consequences for racist behaviour that reduces housing access.

It is too early to assess if the ideas and prototypes are powerful enough to make a concrete difference in people’s lives. They first need to be fully implemented and tested in the community. However, the Core Lab team members are mixed in their opinions about how well the prototypes can address the deeper systems and attitudes underlying racism.

*I like the three prototypes. They are all distinct, approach the challenge from a distinct angle, and get us closer to solutions.*

Lab Participant

*There are some interesting prototypes that get at systemic potential on [racism].*

Lab Participant

*Our work so far has focused on dealing with the symptoms and/or negative by-products of racism, not the root causes: ignorance, lack of education, lack of connections and relationships.*

Lab Participantt

LANDLORD DIVERSITY CERTIFICATE PROGRAM



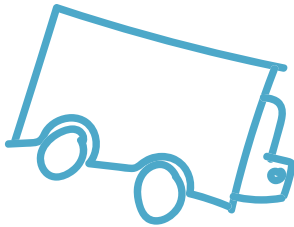
The Challenge

Racialized people often experience racism when trying to access housing. Would-be landlords are less likely to accept them as tenants because of unconscious biases, lack of empathy, or inaccurate information about such renters.

The Idea

Create and promote a diversity certificate that acts as a stamp of approval for businesses – especially landlords – whose practices respect and promote diversity. This offers certified companies a competitive advantage in terms of potential clients and staff. It also encourages other landlords to adopt similar practices.

MOBILE LEGAL AID



The Challenge

When issues arise between landlords and racialized renters – often because of prejudice, cultural practices and family structures – the scales tilt largely in the landlords’ favour. Once an individual’s rental history includes an eviction, it becomes even more difficult to find and keep new housing. Their poverty deepens.

The Idea

A mobile van that clients can contact online or by phone for rapid legal advice and assistance in gathering important research and evidence, a list of useful contacts and resources, and counseling and referral services. This can assist them retain or rapidly secure adequate housing.

JOURNEY TO YIMBY



The Challenge

An important role played by the non-profit sector is to fill the gap in affordable housing left by the private sector. Yet the sector often faces resistance from residents, who fear such projects will negatively affect their neighborhoods (Not in My Backyard, or NIMBY). This makes affordable housing projects difficult to develop.

The Idea

A guide for non-profits – Yes in My Back Yard (YIMBY) – who want to develop successful affordable housing for racialized people throughout the City of Edmonton. It will address the stigma often associated with such projects, e.g. through data showing that housing values are not reduced by affordable

# HOW TO EVALUATE PROTOTYPES

Prototype evaluation involves inviting would be users, beneficiaries, and partners to provide feedback on the strengths and limitations of the idea.

In the early phases of prototyping, social innovators present their prototypes to would-be users and partners and get feedback through open-ended questions. For example,

- Tell me more about... [e.g. how someone would access this service]?
- Why did you choose to... [e.g. include that organization]?
- Have you thought about/have you considered... [e.g. charging a fee]?

As innovators expand on their ideas and refine the details, the prototypes become more fully developed. As a consequence, questions become more focused:

- Is the prototyped idea coherent? (Do people understand it?)
- Is it plausible? (Is it likely to work?)
- Is the prototyped idea feasible? (Do we have the capacity to do it?)
- Is it viable? (Would it be supported by key stakeholders?)

If and when a group feels confident enough to test its idea in a formal pilot project, a more fulsome evaluation design can be developed, involving a more sophisticated approach to measuring outcomes. This will enable the group to decide whether or not the idea is worthy of widespread adoption in the community.

# THE LAB METHODOLOGY

The Shift Lab provided an excellent opportunity to assess the human-centered design approach to addressing poverty and how it might be employed in the future. The participants of the Core and Stewardship teams landed on four working conclusions.

## 1. The Lab design had a good mix of research and action within a short period of time.

The majority of participants quite enjoyed the Lab methodology. It was a new experience for most of them, especially its emphasis on rapid research, experimentation and design.

*I think we spent the appropriate amount of time to get people into the space where we got enough baseline information on the topic, to get comfortable with each other, and then run the process. I am really action-oriented, and it was nice to get all this done in 6 sessions. - Lab Participant*

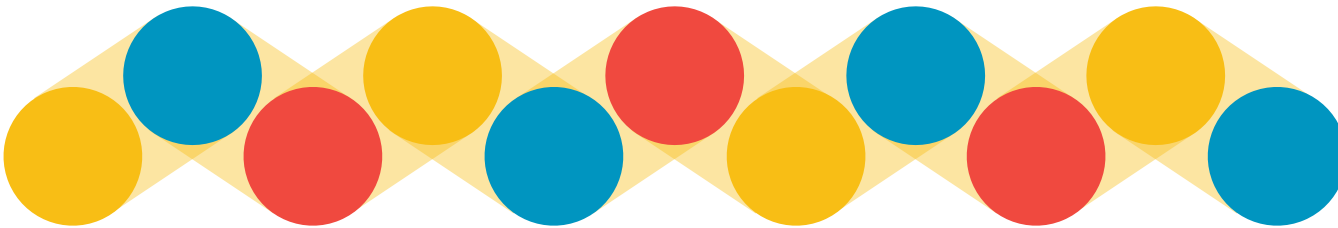
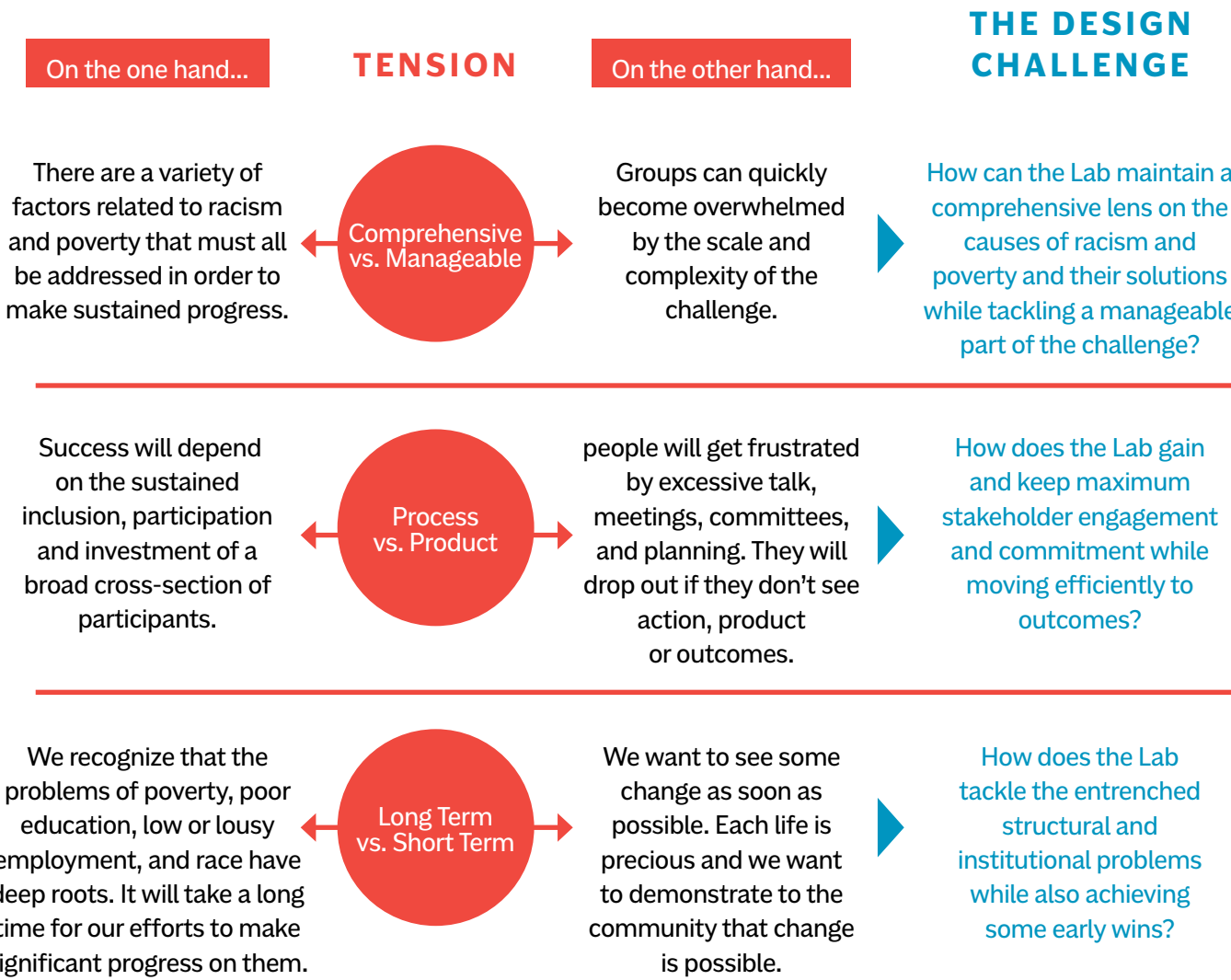
Participant feedback confirms that the mix of research and action is the strength of the human-centered design approach and distinguishes it from other approaches to social change.

## 2. The Lab implementation was “roughly right,” but there is room for improvement.

The Core and Stewardship teams were thorough in their feedback on the Lab's strengths and limitations and how to improve it in future. Their remarks included the best mix of participants, the skills and techniques used in the Lab, as well as the logistics of the initiative (see Shift Lab: Strengths & Limitations).

## 3. There are tensions in any effort to tackle racism and poverty.

Lab participants identified many tensions in the design and delivery of the Lab that likely will extend to any effort to tackle something as complex as poverty and racism. Together, these tensions create several design challenges that Lab facilitators and participants must embrace and manage in order to ensure success.



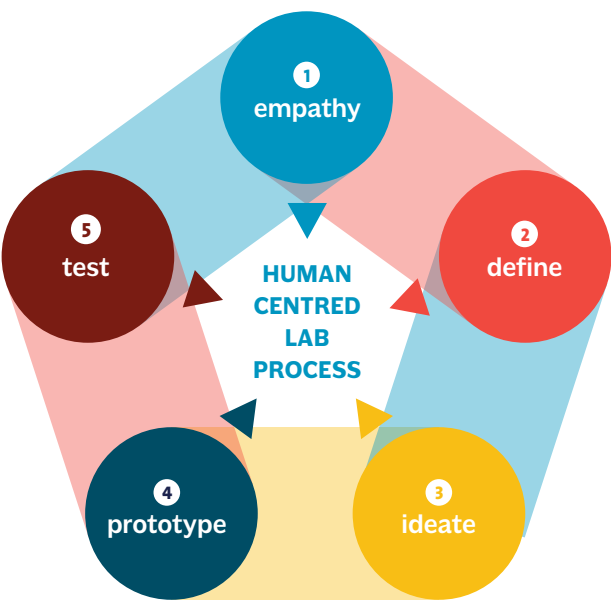
4. HCD is one of a wider mix of methodologies to address racism.

The benefits of human-centered design are clear. Still, participants also surfaced a number of its limitations in terms of the complex issues of racism and poverty. Some of these are:

- The emphasis on action makes it difficult to more deeply explore the assumptions and beliefs behind racism and how they show up in society's institutions.
- The desire to have people with very diverse experiences and perspectives converge on ideas for experimental purposes can narrow their discussions. They focus on the topics on which they can agree, rather than more controversial topics which may carry greater impact.
- The focus on developing practical responses that can be implemented in the near future tends to favour incremental – rather than transformative – ideas and solutions.

There are measures that Lab participants can take to address these limitations (e.g. investing more time in the research phase, employing planning techniques to encourage incremental and transformative ideas). Nevertheless, it is important to maintain the principles of human-centered design, which include co-design, experimentation and getting to tangible outcomes.

As a result, labs that use human-centered design should complement – rather than replace – other approaches to tackling racism and poverty. Some of these are (a) conventional education and training (e.g. workplace training, elementary education), (b) public awareness and social media campaigns (e.g. Make it Awkward), (c) community action and social movements (e.g. Idle No More) and (d) policy change and political action (e.g. legislative change, campaigning).



Highlights of Participant Feedback on Shift Lab Implementation

PARTICIPANTS		
	Strengths	Limitations
Core Lab Team	Diverse, smart, capable, and largely experienced in and/or conversant in racism.	Limited direct experience with poverty; uneven participation in Lab activities.
Stewardship Group	Diverse perspectives; good team dynamics; responsive to feedback; skilled facilitation.	Did not facilitate tough conversations or address Lab race issues as much as some participants would have liked.
Advisory Group/Community Campfires	Diverse perspectives; good use of their limited time commitment; useful for making connections with people outside the Lab.	May not have been sufficiently involved to provide deep advice. Some Lab Team members felt feedback on prototypes was too critical

LAB ACTIVITIES		
	Strengths	Limitations
Educational Workshops	Positive feedback on workshops on racism and human-centered design.	A sense that more workshops could have been added on housing.
Exploring Systems	Appreciate the introduction to systems thinking; confirmed that systems rooted in community values, culture and narrative.	A desire to explore and understand the systems which underlie racism and poverty more deeply.
Ethnographic Research	Largely enjoyed the opportunity to speak with people in the field.	A sense that research did not reach those with lived experience, was done too quickly, and was not always as robust as desired.
Expert Advice	Getting insight on the issue from Homeward Trust.	A desire for more housing expertise in the Lab.
Prototyping Processes	Positive feedback on rapid prototyping, as well as assistance with graphic support and facilitated feedback sessions.	The feedback in one session felt overly critical; missing the feedback of those currently living with racism, poverty and inadequate housing.

LOGISTICS		
	Strengths	Limitations
Length of Project	The amount of time made available to work on the issue matched many team members' ability to contribute.	Longer than originally intended; some found it too long, while others felt it was too short to go deep.
Session Formats.	Diverse perspectives; good team dynamics; responsive to feedback.	A common sentiment that things felt rushed; many wondering if fewer, longer sessions would be better (e.g. 2 or more days in retreat).
Meeting Facilities	The Action Lab facility was excellent space for out-of-box thinking.	Some felt it was important to “get out” into community settings more.



# THE CHALLENGE OF GOING DEEP

While almost all Lab participants reported that they had gained new insights into racism, poverty, and housing in Edmonton, most felt that they had only “scratched the surface” of the issues. They had a strong urge to “go deeper” in their learning (see Theory U).

Core Lab and Stewardship team members identified four things that would enable future Shift Labs and other local efforts to get a better handle on the root causes of poverty and possible solutions.

## I. Fully Engage People With Lived Experience

The learnings from ethnographic research provided participants with unique insights into how racism makes it difficult to access and maintain housing. That being said, many participants yearned for more interaction and engagement with people who were currently experiencing the issues first hand.

To create space for difficult conversations, the Core and Stewardship teams suggested the following: (a) create “learning journeys” where participants visit and experience racism and poverty first-hand (e.g. a simulation of homelessness); (b) locate workshops and meetings in the physical locations where people experience racism and poverty (e.g. an affordable housing facility); and (c) have people with lived experience participate in the creation and testing of prototypes.

## 2. Tap Into Existing Research and Experts

Participants reported feeling that other, more formal research on the topic (e.g. statistics and trends), and people with expertise in racism, poverty and housing, would have been useful as well:

*There is enormous amount leadership and research on racism and poverty and homelessness – we could have shared this with the group and then have had researchers go out and research gaps. - Lab Steward*

*I really liked it with [a local expert on homelessness] came to share his and organization's experience with racism and homelessness. I learned a lot in a very little space of time. - Lab Participant*

To better tap into this broader base of knowledge, the Core and Stewardship teams suggest the following: (a) gather, analyze and summarize the extensive academic research on the topic and create a “Racism and Poverty IOI Workshop”; (b) partner with local people who have expertise in a particular areas; and (c) interview (inter)national experts on select topics.

## Create a Space for “Tough” Conversations

Lab participants gave the Lab high marks for creating a space for conversations about racism and poverty. Many also felt that it would have benefitted from more time and structured facilitation around “tough” conversations that allowed people to debate, explore and more deeply understand the challenge.

*The fact that we never really argued is probably not a good thing. It means that we didn't ask questions of each other deeply enough. With this sort of work in racism and poverty, everyone has a different perspective so there is probably a way to deepen that closing circle framework. Where we can really talk about the human stuff that is happening in the group. To the degree that everyone is able to have those conversations, it would build trust. - Lab Participant*

Many participants reported that their difficulty in going deeper was a fundamental challenge that any group of people committed to addressing the complex challenge of race and poverty will encounter.

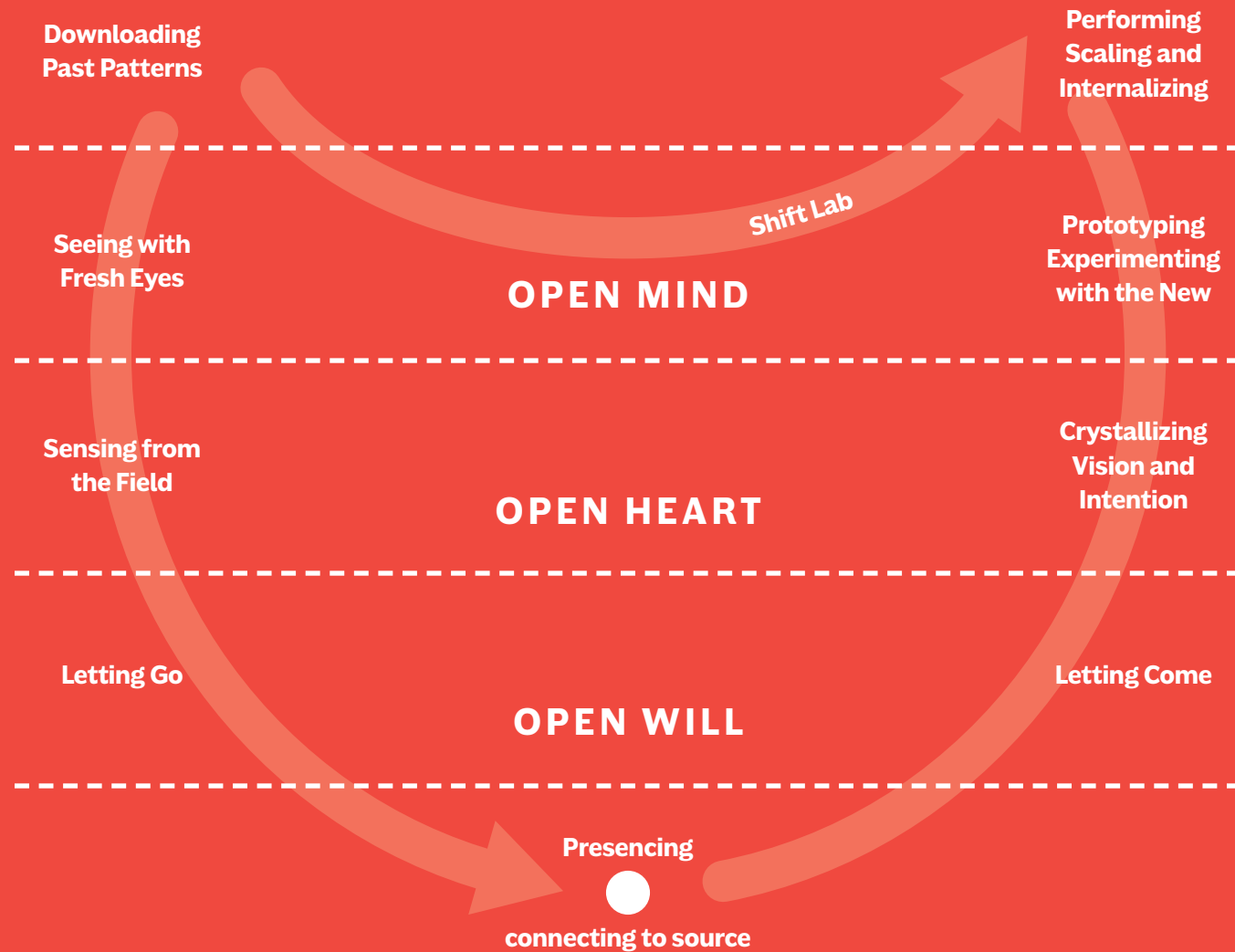
*Look, we are not good at this. We are scared of tough conversations. We are afraid to feel vulnerable. It's hard to confront our own biases. It's emotional. It's about power. The Lab made us realize that we have to find ways to break out of our superficial thinking and conversations on this. We need to get even better at creating a space for all of this. The Lab was a great start, but it's only a start. - Lab Participant*

To create space for difficult conversations, the Core and Stewardship team suggest the following: (a) acknowledge the importance of having difficult conversations at the beginning of a change effort, as well as the need to develop the capacity for such discussions; (b) employ methodologies that enable different types of conversation (see Four Types of Conversation); and (c) ensure that the facilitation team has members with the expertise and experience to guide these processes.



Steward - Jodi Calahoo-Stonehouse sharing an insight drawn from a visual association card

# THEORY U



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

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

*adapted from Otto Scharmer*

## 4 Types of Conversations

### Generative Dialogue

- presencing, flow
- time: slowing down
- space: boundaries collapse
- listening from one’s Future Self
- rule-generating

### Reflexive Dialogue

- inquiry
- I can change my view
- empathic listening (from within the other self)
- other = you
- rule-reflecting

### Talking Nice

- downloading
- polite, cautious
- listening = projecting
- rule-reenacting

### Talking Tough

- debate, clash
- I am my point of view
- listening = reloading
- other = target
- rule-revealing

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

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

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

## 3. Invest Sufficient Time

Finally, the challenge that Lab participants most frequently reported was a lack of sufficient time to more fully explore root causes of racism and possible solutions to it through tangible prototypes.

*There was a certain tension in the space that we did not fully address: the focus on speed, lightness and fast moving. It can make us flippant at times and get in the way of getting deep into spaces that are profoundly unsettling. For example, I don’t know if we went deep enough with the ethnographic piece, the human part of the design lab. That means that we did not do a ‘deep dive’ on the disempowering piece of poverty. - Lab Participant*

*We pushed the team to move quickly to get action and prototypes. So, we set it up this way, but we were not aware of how truly complex racism and poverty is. Even when this complexity become clearer, it was hard to get off the track we were on. ... We need[ed] more system sensing and discussion on issues like this. If we only push to get to prototypes, we’ll leave systems discussion behind. - Lab Steward*

The Core and Stewardship teams suggestion to expand was simple: use a greater proportion of the Lab’s total time required for the engagement, research and tough conversations required to get deeper insights and empathy into racism and poverty. As one seasoned social change maker noted, “Sometimes you have to go slow before you can go fast.”



# MOVING FORWARD

The Shift Lab that ran from November 2016 to June 2017 was a first step in employing a social innovation lab methodology to tackle race and poverty in Edmonton.

## I. Support the Transition and Evolution of Prototypes

The Core Lab and Stewardship teams are working together to support the transition and evolution of each prototype in three ways:

- I.1 Partnerships. Teams are seeking out partnerships with local organizations that are ready, willing, and able to further develop and test the ideas in the community.
- I.2 Access to Funding. The Edmonton Community Foundation has agreed to invest in the further development and implementation of prototypes, while encouraging co-investment with other funders.
- I.3 Scaling (if appropriate). All participants are ready for the possibility that prototypes will be sufficiently successful to warrant scaling up for larger impact.

## 2. Prepare for Shift Lab 2.0

The Stewardship team is preparing the groundwork for a second cycle of the Lab – “Shift Lab 2.0” – which will be adjusted to reflect the lessons learned in the first cycle of the Lab.

- 2.1 Broaden the participation of people involved in the labs to include:
  - People with more lived experience of racism and poverty;
  - Experts with keep knowledge of the different areas of poverty (e.g., housing experts, employment); and
  - People less aware of/committed to racism and poverty.
- 2.2 Narrow the focus of the Lab in one or two ways:
  - Continue to focus on one aspect of racism and poverty, such as housing, employment, education or access to food; and
  - Focus on the racism and poverty experienced by one racialized community (e.g. Indigenous communities, immigrants from East African, Syrian refugees).
- 2.3 Tighten the design of the Lab to include shorter, rapid cycles of scoping and prototyping, which allow more people to come in and out of the Lab process.
- 2.4 Go deeper into the investigation of causes and possible solutions of racism and poverty:
  - Carry out more fulsome ethnographic research with people with lived experience;
  - Utilize more existing research and content experts, with a special emphasis about what is known to work or not work when addressing the systems, culture and mental models underlying racism and poverty; and
  - Create time, space and techniques for tough conversations about racism, poverty and power.

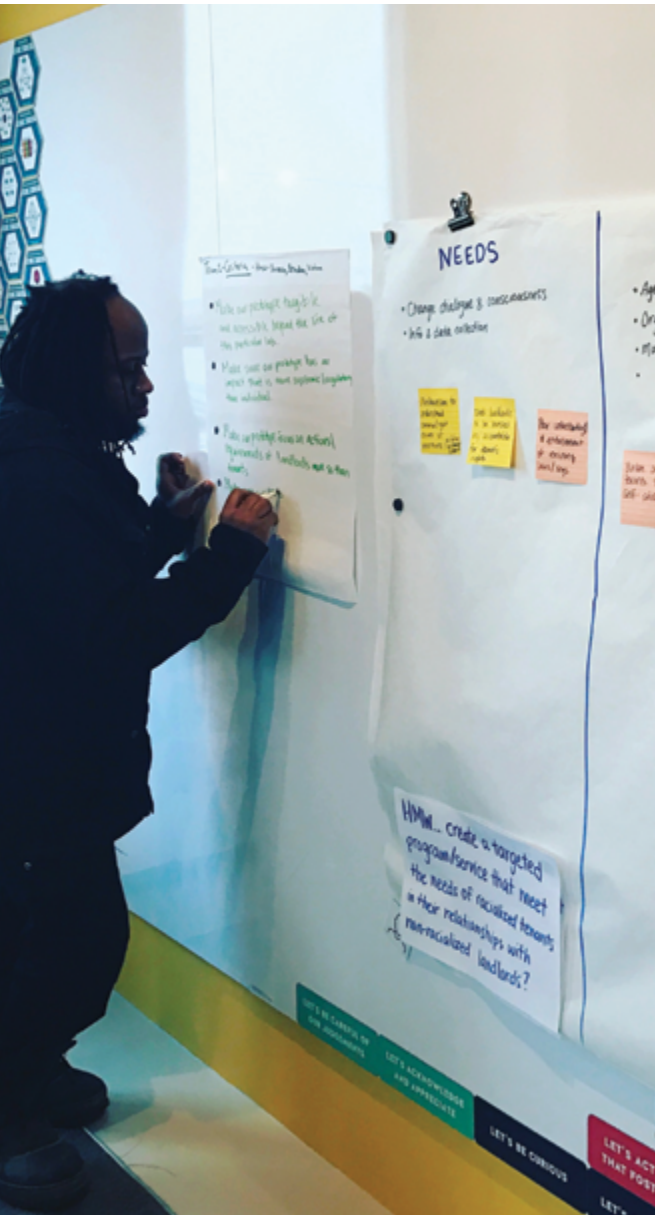
## 3. Strengthen Local Conditions for Addressing Racism

The Core and Stewardship teams can strengthen other local and provincial efforts to tackle racism and poverty in a variety of ways:

- 3.1 Share learnings about the nature of racism and poverty, the challenge of understanding the systemic causes and solutions, and the Lab methodology.
- 3.2 Link up with other poverty reduction and racism initiatives to explore if and how each effort might strengthen the rest (e.g. have representatives from Make It Awkward campaign share experiences at Lab workshops, partner with affordable housing initiatives to design joint initiatives).
- 3.3 Encourage the more systematic gathering and use of data on public perceptions of racism and poverty, both to create a baseline for tracking progress over the long term and to surface areas or issues that deserve attention.

**Interested in learning more about the next steps in the Lab?**

*Get in touch: [info@edmontonshiftlab.ca](mailto:info@edmontonshiftlab.ca).*



Core team member - Brandon Wint creating design criteria for his prototype



# SOHKIMAMITONEYIHTAMOWIN, THINKING DEEPLY:

Indigenous Realities and Social Innovation  
Processes—Are They Compatible?

by Jodi Calahoo-Stonehouse

This is a written record of an oral presentation by Shift Lab Steward Jodi Calahoo Stonehouse. We wanted to preserve as much as possible the oral nature of the piece, but have tried to provide signposts by way of section titles and written grammar. Nevertheless, we encourage you to read it aloud.



## Introduction

My Cree name is Ka pa pam askum kinak eskwew, my Mohawk family name is Gwarakwanti and Kariho (Bishop Grandin changed the spelling to Calahoo) and I am from the Michel First Nation. We are a family band of Cree/Mohawk and Metis peoples. It's fascinating to think Michel, a Mohawk who was born in Kahnawake, Quebec is a signatory of Treaty #6 in Alberta. I come from reserve #137.

Academically I have been blessed to have studied under Dr. Val Napoleon, Dr. Hadley Friedland, and Dr. Shalene Jobin, specifically in the areas of Indigenous Legal Traditions, Indigenous Feminisms and Indigenous Governance.

I have been privileged throughout my life to be a student in Nakota Sioux kinship systems, beginning with my first teacher, Sykes Powderface from Morley, who introduced me to Treaty Rights, Sovereignty and Nationhood. I also owe a debt of gratitude to my Sundance relatives from the Alexis Nakoda Sioux Nation, who continuously welcome the questions, challenges and the people I bring to the lodge. I appreciate their unwavering support and guidance when navigating such tumultuous waters. I honor that they have adopted me as a relative. I appreciate that they have opened their homes, their lodge, and their hearts not only to this work, but to the people that I have brought along with me while trying to figure out how we do this work together in a good way. I appreciate that they embraced our collective and that they believed that we might possibly be able to do some work that could contribute to the lessening of the disparity that comes along with poverty and racism. I pray that our work is able to make an impact so that they along with others might themselves witness a shift and experience their lives in a kinder manner. I graciously thank Charlie and Martha Letendre, the firekeepers, the song carriers, the pipe carriers, the aunties, the uncles and all of the cousins for allowing the Shift Lab to enter Nakoda Sioux space, spiritually, physically, intellectually and emotionally. Metakiyawsin.



*Jodi sharing what to keep in mind with research and Indigenous communities*



*Jodi and Matt Ward deep in conversation*



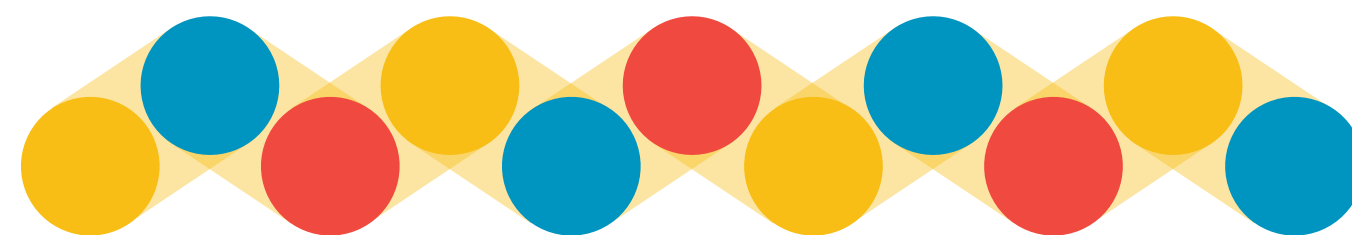
Jodi presents at the Indigenous Innovation Summit

I have spent the past 25 years investigating and exploring Indigenous processes, histories, ceremonies, stories, and traditions from many Indigenous communities' perspectives. I am not an expert in any particular field of study; I have just simply listened, observed, and participated when appropriate. As Indigenous peoples we are in a very complicated time as we become aware of the societal impacts due to colonization, the Indian Residential Schools, and systemic racism. We, as a people, have been so busy trying to stay alive and avoid persecution that this is the first time in my life that I have been able to experience the exploration of our thinking and our way of life as a source and mobilizer for systemic change, not only for our communities but across Canada. We are now in a position to say, to share, to access something that was once illegal as a method to change lives.

I think it's an exciting time, but it's also a time to be mindful. I take very seriously the responsibility of trying to honour our practices to the best of my ability, to ensure that whenever the Shift Lab engages with Indigenous communities and

our processes, it's done in a genuine, authentic, respectful way. The current Canadian socio-political reality is what I would call "sex-positive" for Indigenous worldviews. What I mean is that since the Truth and Reconciliation Commission calls to action were issued, we are seeing the integration of Indigenous peoples in positions of institutional authority, we are hearing land acknowledgments, and all kinds of folks trying their best to respond to a particular call to action.<sup>1</sup> More critically I see this particular work of exploring social innovation with Indigenous thinking as not simply just an act of reconciliation but rather I see it more as an opportunity to leverage thinking that has existed long before it was time to reconcile. These traditions, processes and practices are thinking tools that have been fractured by the legacies of colonialism, Indian residential schools and systemic racism. Social innovation processes themselves are a tool that can be used to support the rearticulation, the reimagining and the revitalizing of our traditions in order to to make changes in our communities and within the Canadian State.

<sup>1</sup> [http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls\\_to\\_Action\\_English2.pdf](http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls_to_Action_English2.pdf)



## SHIFT LAB, SOCIAL INNOVATION, AND INDIGENOUS WORLD VIEWS

Shift Lab I.O was about learning and exploring to see how Indigenous processes were applicable and compatible to social innovation processes. I was learning how to facilitate, observe, and engage in this field of study, to see the relationship and compatibility with Indigenous worldviews. I've learned that there are many opportunities for collaboration, for fusion, and for the lifting of each other's work. Ultimately, changing systems is the intention of both Indigenous processes and social innovation. They are both infused with the hope that somehow what we do will change something that is harmful/useless to people into something better. We want to improve the quality of life for people.

In my work with the Shift Lab, I have tried to draw on Cree principals that align with the western concepts that reflect notions of systemic changes to racism and poverty. For example Miyo-pimatisiwin in the Cree language means "living your best life" or "how to live well." This could be eating traditional food, drinking clean water, praying and going to ceremony,

looking after your family: I am healthy, I am alive, I am well.<sup>2</sup> The opposite of thriving in the Cree language is Kitimakisiwin, being poor. Pakwatitowin, like racism, is the hatred of certain people or groups. Within the Cree language there are what I would understand as philosophies. These philosophies provide a larger context for words and suggest ways in which one should conduct themselves in relation to that specific word. A Cree word/philosophy that can connect miyo-pimatisiwin, kitimakisiwin, and pakwatitowin<sup>3</sup> is Wahkotowin, or relationships. Wahkotowin can be understood as a form of governance: it is good relations and good governance between people, between yourself, and between the land/water. It's how we govern ourselves and the decisions we make to do the things we are going to do.<sup>4</sup> This work of drawing on Cree principles was done as a reflexive exercise, as scaffolding for the next phase and will enable us to articulate the framework of the Shift Lab from an Indigenous Epistemology.

<sup>2</sup> I learned about Miyo Pimatisiwin from Dr. Brenda Parlee, I came to understand Pimatisiwin from Barbours Grandjambe, Georgie Cardinal and Robert Grandjambe

<sup>3</sup> Cree Language credits to Dorothy Thunder and Elder Jerry Saddleback

<sup>4</sup> I learned about Wahkotowin from Dr. Shaylene Jobin. I understand Wahkotowin because of my sister Roxanne Tootossiss and Dorothy Thunder and our Mushum.





Jodi Calahoo-Stonehouse

A second part of this work in the Shift Lab was analyzing and comparing epistemologies from both the western world view (in which social innovation is embedded) and Indigenous world views. How might Indigenous world views compare and or compliment systems, processes and design thinking and find connections, moments of parallel intentions and juxtapositions? For example, no one quite knew what to expect when the Lab teams was invited to a sweat lodge ceremony. It wasn't until we conducted our evaluation that we learned just how much of an impact this experience had on the thinking process of our group. People truly were taken outside of their comfort zones and were confronted in a very real way with evidence of another worldview. An important mindset social innovation lab explorers need to have is to be able to embrace the unknown and hold tensions without jumping to conclusions too quickly. Participants reflected that in a sweat lodge, embracing the unknown and ambiguity is a real, visceral experience that many drew on for strength and insights later in the lab exploration. This enabled participants them to do their work a little differently than they might have otherwise.

I think a couple of things about possible links between social innovation and Indigenous problem solving processes:

1. Social innovation processes like human centered design and systems thinking are tools that Indigenous communities can access and adapt to support their work on reclaiming, revitalizing, reconstructing their legal traditions
2. There are possibilities for social innovation thinking and Indigenous thinking to merge and create processes that will facilitate change for people in both worlds. When I think about developing sustainable prototypes and pilot project to address the societal issues that impact Indigenous communities -- clean drinking water, the number of children in care, missing and murdered Indigenous women, the housing crisis on First Nations communities -- an important factor is going to be Indigenous peoples bringing

their Indigenous thinking, traditions, cultures, and worldview together to work with system design thinkers.

3. When making modifications to these existing models, you want to aim for the sweet spot where the new model is inclusive of both ways of thinking. This will create productive collisions that will lead to robust change making processes. However, inclusivity is not prescriptive; there will be moments where an an Indigenous process is the best tool for making change or vice versa.

### Guiding principles for weaving Indigenous epistemologies with social innovation approaches:

The Shift Lab hasn't created a set of guiding principles for how to weave Indigenous processes into social innovation and I would be cautious to create a universal structure to follow, particularly because Indigenous peoples are very diverse and have different language groups, social norms, and practices. The beauty of social innovation is that it makes space for and thrives in difference and tension. Social innovation, if I could speak for it, loves when you bring all these different elements of thinking and imaging and being creative and diverse together, to come up with something really beautiful. So there is no possible way to create a "guide of Indigeneity to social innovation" because each community has its own particular way of engaging. What is foundational, however, is the way in which social innovators engage in consent and consultation practices. It is paramount that the folks who you will work with, about, or on are fully aware of what your intentions are with the work that you're

about to embark on and how it may impact them, their work, their life, and their community. Following the movement created by Linda Tuhiwai Smith,<sup>5</sup> we need to ensure that not only researchers but also innovators are engaging in meaningful consent and meaningful relationships with communities.

Part of the work of the Shift Lab was ethnographic research. As an Indigenous person, this raised concerns as documented by Professor Smith about the damage researchers have done with Indigenous peoples and in Indigenous communities. I wanted to shift the ways in which we understood research and engaged in it with Indigenous peoples. That meant explicating for folks in the Core Lab team Indigenous protocols of reciprocity and the historic relationship to research. There is no "Indigenous way" of engaging in research, but I wanted to ensure that our group was as mindful as possible to acknowledge the local practices of the people in the local territory. For Cree people, that meant the offering of protocol, tobacco, a gift and compensation for their time and knowledge and acknowledgment to their contributions.

The caution of Indigenizing a lab is that it becomes a romantic prettying of the process and doesn't actually facilitate rigorous engagement with Indigenous processes or thinking. You have to be really careful not to just dress it up as tokenistic "engagement." The ways in which the Shift Lab was accountable to this was having elders accessible to advise us and constant dialogue amongst the stewards where we pushed one another to ask the questions: are we doing enough? Is this right? How does the community feel?

<sup>5</sup> See Linda Tuhiwai Smith's book *Decolonizing Methodologies: Research and Indigenous Peoples*



# WHAT ARE WE GOING TO DO DIFFERENTLY NEXT TIME?

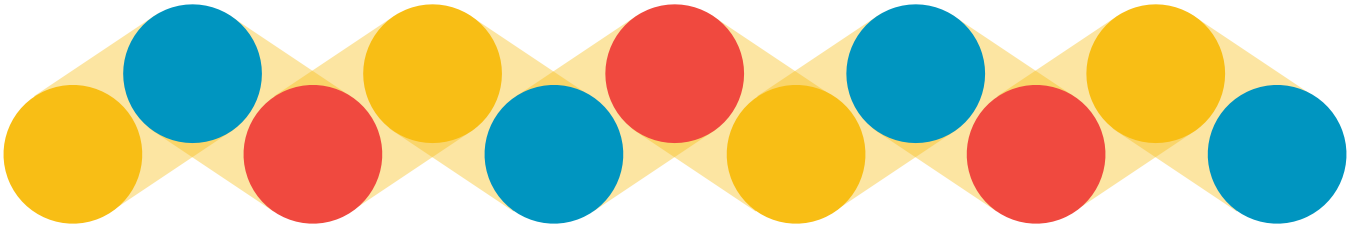
In Shift Lab 1.0 we were intentional in inviting elder Gilman Cardinal to our launch. Gilman is a Cree elder who is very much aware of municipal politics. He is a keen man to support change and he is committed to changing the lives of indigenous people in this territory. During this iteration, we also spent time with Charlie and Martha Letendre. Charlie is a Nakota Sioux elder from Alexis First Nation. He welcomed our team to his lodge and offered prayers to support the work we were about to embark on. We will continue to ground our efforts in relationships with community.

For Shift Lab 2.0, there has to be a way to have more clear support to help articulate the Indigenous process. This support could mean the Stewards being able to sit with Professor Dr. Friedland & Dr. Jobin, Elders and community members and say, “this is the next thing” and be open to feedback. Consultation is always an opportunity to do emergent work. This is a critical inclusion in our next iteration.

Mnemonic devices and their usefulness to Indigenous worldview and critical ability to maintain story and maintain value, practices, and tradition through the visualization of an object are important to think about. How can we take this skillset and transfer it to the skills of engaging in the lab? Would it be possible to have folks build something with their hands? We see a contemporary version of this with the moosehide campaign -- it’s a mnemonic device to remind people of the story of men who are supporting women and want to lift women out of abusive relationships and it reminds men not to be violent to women. The square of moosehide is this symbol and device, it’s a national one; how might we create or support a process to remind people not to be racist?



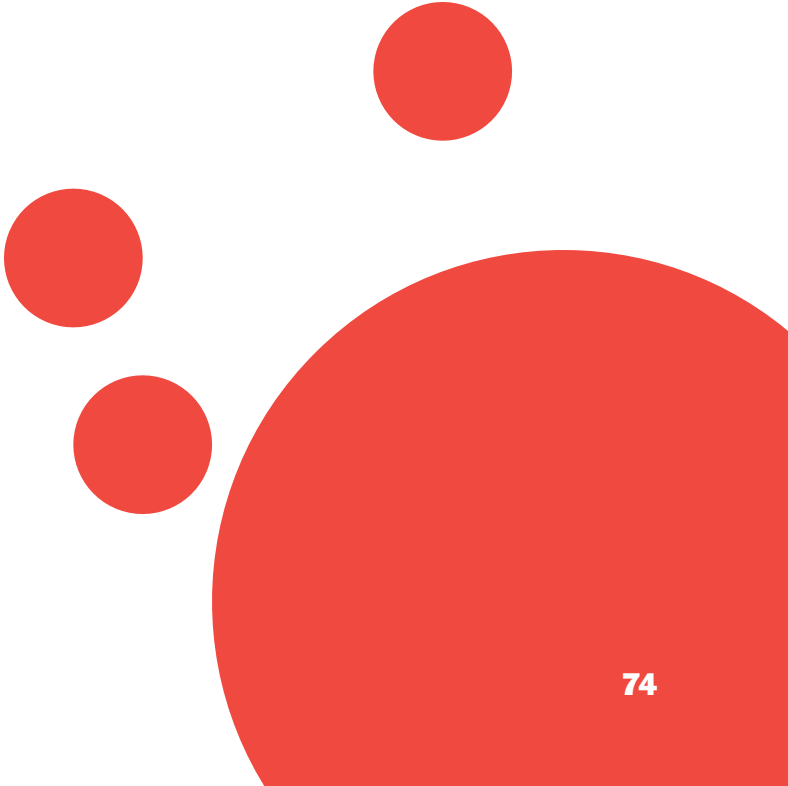
Elder Gilman Cardinal helped us launch the lab



One critical piece is ensuring that we have helpers. Eskapios in the Cree language are the helpers to elders. These folks, male or female, ensure that the right protocol is in place for you to do the work that you need to do and there are many different helpers: political, spiritual, and institutional. In order to engage meaningfully, Shift Lab 2.0 will engage helpers to ensure that Elders are engaged in process and also supporting the elders to ensure that they had the context in their own language around the work that we are intending to do. Another way to say this is: Eskapios are the experts of the genres. So whatever form of knowledge, advice, guidance we are accessing, it is really important to make sure we have the experts in that area, because sometimes people just glaze over the elders, but we have elders in different genres of study and making sure we have the right helpers meant that we have the right kind of support that we need. Pragmatically, they also make sure folks have food, water, and are looked after. That’s also a very real role.

This is an exciting opportunity for me as a citizen of Treaty 6, as a learner of culture, and a learner of languages. This particular work of social innovation was an opportunity for me to learn a new language

and new cultural practice. And I think there is a really genuine exciting opportunity for Canadians and Indigenous people to come together to start tackling, wrestling with, and strategizing about how we are going to solve some of the deplorable issues of murdered and missing Indigenous women, children in care, and poverty and racism. Shift Lab 2.0 will be more explicit about our Indigenous process. We are going to articulate and find the moments where Indigenous process and social innovation can be explicated in a way that makes sense to both Indigenous people and innovators so we can sit together and start solving problems using a framework that we both understand. It’s going to be contentious, it’s going to be exhausting, but I’m sure we can all agree that tackling racism is of benefit to all of humanity. No one said making the world a beautiful place was going to be easy. Hiyhiy Nanaskamon, see you all in 2.0.



# A DEEPER DIVE: LEARNING ABOUT FUNDING SOCIAL INNOVATION LABS

by Steward, Ashley Dryburgh



## How did ECF become involved in funding a social innovation lab?

Edmonton Community Foundation (ECF), like many of the other 190+ community foundations across Canada, works with donors (both individuals or organizations) to create endowments that support their charitable aims. A portion of our available granting dollars are discretionary, which allows ECF to respond as we see fit to community priorities.

Currently, much of ECF's discretionary funding can be described as extensive rather than intensive: we support almost all areas of the charitable sector (environment, arts, social services, health, education, recreation) but generally can only provide one-time grants rather than ongoing funding.

In 2014, ECF's Board decided to dedicate some of its discretionary funds and one FTE position to see what kind of impact we could have if we chose to fund more deeply in a focussed area. At the time, the Mayor's Task Force on the Elimination of Poverty (the precursor to EndPovertyEdmonton) was getting underway and ECF decided to base its area of focus on the work of this group. The initial report of the Task Force noted that eliminating racism was a "game changer" in the fight to end poverty and ECF decided to dedicate resources to this focus area.

Concurrently, ECF staff were investigating the best intervention model to use. The practice of social innovation was beginning to pop up in Edmonton and other organizations were talking to us about funding.

Not only did a lab model look ideal for a complex problem like racism, but ECF wanted to see what it could learn about funding labs and prototypes. As no one at ECF had any experience with social innovation labs, we went looking in the community for expertise, which is how the partnership with Skills Society Action Lab was born.

We did not know it at the time, but what ECF was doing was quite different: usually social innovation projects have to chase down funding, rather than the other way around! Also, funders typically have a hands-off relationship with the projects they fund, but in this instance an ECF staff person was embedded as a member of the Stewardship team. Our grant dollars not only supported a project that sought to eliminate racism, but created capacity for innovative approaches in our organization and in the wider community. We hope the leadership we have shown over the course of the Shift Lab inspires other funders to begin to explore new approaches and relationships with their grantees.

Below, we share what we learned and what funders should keep in mind if approached to support a lab or other social innovation project more generally. We recognize funders will not always be embedded with these projects so keep in mind that the first section is more about the experience of an embedded funder whereas the second section has more general advice.



## WHAT DID ECF LEARN?

The first phase of the Shift Lab was a massive learning experience for everyone involved. As it pertains to funding, four key learnings emerged:

### 1. This took longer than we thought

ECF and Skills Society Action Lab began to work together in the spring of 2016. Our original timeline included a summer of research, recruitment, and preparation; a three month lab cycle beginning in September 2016, and support and implementation of prototypes in early 2017. It didn't take long to realize that this was wildly optimistic -- the Stewardship team was not full-time and no one wanted to rush laying the important groundwork for an issue as complex as racism and poverty.

The formal part of the lab began in November 2016 and was slated to conclude in February, but due to the December holiday season and the deep commitment and vibrant intellectualism of the Core Lab team, we did not officially conclude the Lab Exploration phase until June 2017.

### 2. Our current granting process would make it very hard to fund a social innovation lab

ECF's flagship granting program, Community Grants, is a one-stop shop for applications from across the charitable sector and supports everything from

operations to equipment purchases. ECF does not have set priorities for funding; we let applicants tell us why their project is important and evaluate each application holistically. We are repeatedly told by applicants that our application process is easy and accessible and that they appreciate our responsiveness to community needs and our willingness to fund the "unsexy" stuff that others funders generally avoid.

Despite all this, it's possible that we would have had a very difficult time funding something like the Shift Lab if we weren't already directly involved. There are a few reasons for this. Before the Shift Lab, we did not have a lot of experience with social innovation projects and processes so staff and committees would not have had any background on them. Also, our application process (like most) asks about outcomes, something a lab cannot accurately predict at the start of a project. Finally, the idea of failure and risk -- an important part of the prototyping process -- is a sensitive subject in the not-for-profit world.

Since the advent of the Shift Lab, we have funded some other (non-lab) social innovation projects and will likely see more applications in the future.





*Martin Garber-Conrad, Edmonton Community Foundation's CEO, at the launch of the Shift Lab*

### 3. When you are respectful, people want to help.

ECF is not an expert in the field of racism. This is in fact one of the reasons why we decided to pursue racism as our area of focus. We are an unusual player in this field and felt it was important to communicate that racism is a system in which we are all implicated: some of us benefit from it and many of us suffer beneath it, but we're all involved. By publicly stating our commitment to eliminating racism, we hoped to galvanize other organizations, donors, and community members who might also not have considered participating in this conversation.

Nevertheless, we were worried that the organizations who have spent decades working in this area would resent a new player lumbering into the field with broad proclamations about how we were going to eliminate racism; indeed, there are lots of past examples of this very thing happening. In our initial conversations with organizations and community partners, we made sure to highlight the fact that we were new to this field and wanted to build on and support work that has been happening for a long time. This was essential to building solid partnerships; by the end of the first phase, organizations who had initially expressed skepticism and concern were champions of the Shift Lab.



*System sensing in the early days at ECF*



*Core team system mapping*

### 4. Autonomy is key

Social innovation labs are somewhat unpredictable and require the time and space to be able to properly develop effective prototypes without undue outside influence. It's naive to imagine that there are never any political considerations when investigating complex problems, but the more distance a lab can have from an agenda other than its own, the better. For example, although the Eliminate Racism focus derived from the work of EndPovertyEdmonton, the Shift Lab was very clear that we were not a City of Edmonton project and did not seek financial support from them. This meant the Shift Lab didn't need to worry about speaking on behalf of the City, which gave us a bit more freedom in how and what we communicated.

Ultimately, as a funder we had to be committed to the process and what it would produce, without knowing what that would be. Even with an embedded staff person, we couldn't expect to unilaterally guide or steer it. Letting go of these expectations can be difficult, but a social innovation lab is the wrong tool if these expectations of control are present.



*Stewards and Core team in the Skills Society Action Lab*



# WHAT SHOULD FUNDERS KEEP IN MIND?

## I. How to evaluate a social innovation lab application

Although social innovation labs draw from decades of established practices in multiple fields, they themselves are still a maturing practice. For funders who are encountering them for the first time, knowing how to properly assess and evaluate an application for funding can be tricky. You might have to use a different application process or make an exception to some of your guidelines. Whatever your administrative process, here are a few key pieces to assess:

### Is there a specific, complex problem to be solved?

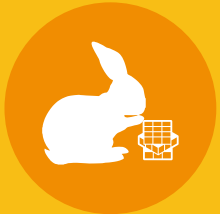
Social innovation labs are designed to address complex (also known as “wicked”) problems. Using a lab to solve a simple problem is like killing mosquitoes with a shotgun. Complex problems are those where there is little agreement on both how the problem should be solved and what effective solutions look like.

### Is the intervention timely?

Complex problems exist all around us, but there are better and worse times to tackle them. Is there a window of opportunity that means movement on this complex issue is possible? At the very least, is there not an insurmountable major obstacle in the way of making change?

## Simple, complicated and complex problems

Adapted from Alberta Co-Lab, Frances Westley, Brenda Zimmerman and Michael Quinn Patton



### Simple Problems

A Rubik's Cube is tough, but there is a single, agreed-upon solution.



### Complicated Problems

It's tricky to send a rabbit to the moon, but there is shared wisdom and rules to follow.



### Complex Problems

Raising a litter of bunnies is hard! Each bunny is different and they don't come with instructions.

### Outputs, not outcomes

One of the many strengths of a social innovation lab is that it doesn't seek to predict in advance precisely what will happen. This means that specific outcomes are not likely to be able to be presented up front. However, a lab should be able to generally describe its outputs. How many people do they anticipate being involved? How many meetings? Planned products and communications pieces?

### Key players involved?

Social innovation labs work best when there is representation from a wide swath of stakeholders with multiple perspectives who are impacted by the complex problem. Does the social innovation lab seem to have a great mix of usual and unusual players from across different sectors, or at least a plan to recruit said players? Does the lab have partnerships with people who have insights and access to the system it wants to change?

### Methodology and evaluation

As social innovation labs are still maturing in practice, there is not yet consensus on overall best practices, though there are some specific methodologies emerging from different organizations (e.g. REOS Partners, Roller Strategies, Waterloo Institute for Social Innovation and Resiliency). Subsequently, you might see different methodologies from different applicants, but nevertheless, there should be a robust description of the specific methodology planned for a lab with an attendant evaluation plan. Developmental evaluation is a common evaluation method, but there may be others that are appropriate.

The field of social innovation can at times be quite jargon heavy. While one would hope an applicant would speak in plain language, we would encourage funders to ask for clarification if they don't. Sometimes an over-reliance on jargon can signal a lack of comprehension on behalf of the applicant.

### 2. Tolerate failure

Failure is a delicate subject in the not-for-profit world. How much risk can organizations take when designing their programs? How do they properly report on failure without fear of losing funding? What even counts as failure? These are questions that funders have a role in answering, but in terms of social innovation labs, it's important to remember that failure is intentionally part of the process. “Failure” in this context is related to prototyping: not every prototype will be worth pursuing; in fact, most prototypes probably won't be. Also, social innovation labs embrace emergence; the original question of the lab might change and shift as the process moved forward. Funders should be prepared to expect these kinds of “failures” and, ideally, support a culture of “failing forward.”

### 3. How much will this cost?

Depending on the scale of the project, costs for social innovation labs can be in the millions of dollars. This isn't to suggest that all labs will cost that much. Common costs might include personnel, research, evaluation, honoraria for participants, design and communications pieces, venue rentals for meetings, technology infrastructure, prototyping support costs, and more.

If you are surprised at the expense, a good question to ask might be the cost of the problem on the system. If the proposed cost of the social innovation lab is only one or two percent of that cost, does that not seem reasonable?



Steward - Ben Weinlick facilitating the teams in uncovring leverage points in their system maps

#### 4. Train your staff and review teams

Because social innovation labs are a different beast than traditional not-for-profit projects, it is important to provide context for your staff and review committees so that they are properly able to evaluate requests. This can range from a presentation from someone who has participated in a lab, some introductory articles, or a webinar. If you anticipate that you will receive many applications it might be useful to have someone on staff or a committee who is more of an expert, but otherwise the basics should be sufficient.

**Have more questions about funding social labs or want to learn more about ECF?**

Check out our website: [www.ecfoundation.org](http://www.ecfoundation.org) or get in touch: [adryburgh@ecfoundation.org](mailto:adryburgh@ecfoundation.org).

## Want to be involved?

There are a number of ways to support and be involved with the Edmonton Shift Lab.

- Do you want to be a champion or host of one of our current or future prototypes?
- Are you a funder interested in exploring how to scale either the Shift Lab process or one of the prototypes?
- Do you work for an organization who is interested in connecting with us for some ethnographic research?

- Interested in participating as a Core team member?

If you answered "yes!" to any of these questions, get in touch: [info@edmontonshiftlab.ca](mailto:info@edmontonshiftlab.ca)

To keep an eye on what we're doing, check us out online ([www.edmontonshiftlab.ca](http://www.edmontonshiftlab.ca)) or on Twitter (@YEGShiftLab).





**MAKING  
SHIFT  
HAPPEN.**