

Personal learning through participation in a social innovation lab

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Executive Summary

Introduction

The Edmonton Shift Lab was developed as a partnership between the Edmonton Community Foundation and the Skills Society Action Lab in a response to the work of EndPovertyEdmonton. The approach embodied by this social innovation lab draws on the strengths, empathy, creativity, and wisdom of the collective participants to explore new ways of making progress and studying the intersections between poverty and racism.

The research is focused on the documentation and analysis of the learning experiences of the Shift Lab's core team through their participation in the social innovation lab. The prototyping approach within labs relies on feedback loops and continuous learning in order to refine ideas towards the goal, while the process itself is creating group knowledge and furthering understanding of complex community issues and their root causes (Social innovation labs, 2014). Learning through action is an integral component to the success of a lab and achieving systemic change in communities and institutions (Velji, 2016).

The lab was designed for participants to collectively explore and adapt as learning emerges to allow for experimentation with solutions. Thus, the primary question for this project is as follows, "How does the core team participants' understanding of the intersection of racism and poverty transform as a result of on-going involvement in a social innovation lab?"

Secondary research questions focus on individual learning and changes in attitudes and perceptions:

- Does participation in the social innovation lab influence an individual's capacity in other aspects of their life (work, community, family)?
- Do participants experience an increase in confidence to addressing the intersection of racism and poverty after participating in the lab?
- What activities in the lab do participants feel are most influential for personal learning and skill development?
- What are the perceptions of the lab stewards on the change in knowledge and understanding from the core team? How does that influence the development of lab activities?
- How did the relationships developed throughout the lab process influence participant learning?

Methods

The primary analysis this project is qualitative, based on participant self-reflections and perceptions of their personal learning development and increased understanding of the intersection of poverty and racism. A range of methods were employed during this study including written evaluation questions, interviews with various members of the

Edmonton Shift Lab core team and stewarding team, and observations made during the lab sessions and community campfire events. The research takes a comprehensive look at lab participation, individual roles within lab activities, and self-reflection to determine how the core team participants' understanding of the intersection of racism and poverty transform as a result of on-going involvement in a social innovation lab.

Additionally, a review and analysis of academic journal articles, blog posts, essays, online guides, and books on social innovation lab processes, developmental evaluation, and experiential learning is included in the methodology for this research project.

Key Findings

Participants were eager to share their experiences, thoughts, suggestions, and attitude shifts as well as comment on the learning that took place for them individually as a member of the Edmonton Shift Lab. Participants often related their experiences in the lab to the context of their personal and professional lives.

Eight themes were developed from the observations made during lab sessions and the feedback collected from lab core team and stewarding team members. The themes encompassed 1) scheduling, 2) creating a safe space for participants, 3) participant demographics, 4) openness to learning, 5) personal commitment, 6) new approaches to problem solving and deepening understandings, 7) the local context, and 8) breaking down the complex system.

These themes, when compared and contrasted with the literature, resulted in the identification of three overarching concepts. The first focused on participant learning and capacity building as it relates to utilizing a developmental approach to evaluation. Second, the demographics and context of the local community and how a lack of on-going engagement of persons with lived experience affected the lab process. The third concept regarded the challenges and opportunities that accompany navigating complexity through a social innovation lab.

Recommendations

Based on these findings, the following five recommendations are presented as options for future stewarding teams to consider implementing:

1. Adjust the timing of the lab to allow more time for individual and collective learning and self-reflection,
2. Integrate more opportunities for diverse community participation to ensure the voices of those with lived experience are well represented throughout,
3. Embrace challenging conversations in order to enhance the participant learning experience and the overall advancement of the design process and prototype testing, and
4. Maintain the use of a developmental evaluator to enhance the learning experience of participants in the lab and to bring timely adaptations to the overall process,

5. Implement a process to monitor and assess participant learning and the ability to transfer knowledge into skills beyond the life of the lab.

If resources will not allow all options to be implemented simultaneously, it is suggested that the stewarding team focus on the first two recommendations to ensure adequate time and capacity to work collectively with community.

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1.0 Introduction

The Edmonton Shift Lab is a social innovation lab developed to complement the work of many local initiatives tackling the complex community problem of poverty and how it intersects with racism. By working with community to co-design solutions, the Edmonton Shift Lab participants tackled the complex challenge of racism and poverty through a solution-oriented human centred lab process (About the lab, 2017). They also went through a rigorous experiential learning process that was enhanced through developmental evaluation.



Figure 1: Edmonton Shift Lab Logo
(Edmonton Shift Lab, 2017)

1.1 Project Objectives & Research Question

The purpose of this research project is to document and evaluate the personal learning experiences of the core lab team and how their understanding of the intersection of racism and poverty transformed as a result of their participation in a social innovation lab. Specifically, the evaluation explored the activities in the lab and the personal commitment of the participants to embracing new ways of thinking and acting through a human-centred design process.

A developmental evaluation process was integrated into the lab to place equal emphasis on the importance of the learning journey and the final outcome. Indeed, the Shift Lab collective noted the learning “[that emerges as a result of participation in] the lab is a vital part of the process” (What we’re learning, 2016; The collective, 2016). The lab was orchestrated for participants to collectively explore and adapt as learning emerged to allow for experimentation with solutions.

Thus, the primary question for this project is as follows:

- How does the core team participants’ understanding of the intersection of racism and poverty transform as a result of on-going involvement in a social innovation lab?

Secondary to this research question are the following questions focused on individual learning and changes in attitudes and perceptions:

- Does participation in the social innovation lab influence an individual’s capacity in other aspects of their life (work, community, family)?
- Do participants experience an increase in confidence to addressing the intersection of racism and poverty after participating in the lab?

- What activities in the lab do participants feel are most influential for personal learning and skill development?
- What are the perceptions of the lab stewards on the change in knowledge and understanding from the core team? How does that influence the development of lab activities?
- How did the relationships developed throughout the lab process influence participant learning?

1.2 Organization of Report

This report is organized into nine written sections, including figures and tables, and three appendices. It begins by providing the reader with background information on the Edmonton Shift Lab and its goals and outcomes, and then articulates the methodology for the research that was undertaken. The three sections following that introduction and background speak to the findings of the research and include a literature review, a narrative of the Edmonton Shift Lab experience, and a description of overarching themes established based on observations, written feedback, and interviews. The findings are analyzed together and discussed, leading to a section containing recommendations for consideration, and lastly a conclusion.

2.0 Background

2.1 The Edmonton Shift Lab

The Edmonton Shift Lab is a social innovation lab designed to address the intersection of racism and poverty in Edmonton. Developed as a partnership between the Edmonton Community Foundation and the Skills Society Action Lab, it is a response to the work of EndPovertyEdmonton and emphasizes the value of bottom up approaches to social change and working with community to co-design solutions (Edmonton Shift Lab, 2017). The lab process involved the exploration of these two interconnected topics in order to develop prototypes that would address changes to programs, policy, or community action to help reduce racism as it contributes to poverty (About the lab, 2017). This concept for the lab stemmed from research completed by EndPovertyEdmonton that suggests “shifting attitudes about those who experience poverty is an integral piece of poverty elimination” (Eliminating racism, 2016). “Addressing racism and discrimination continue 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” (About the lab, 2017).

The Edmonton Shift Lab is an example of the global movement of how “innovation teams and labs [are being created] to help... find new ways of tackling the complex challenges of the 21st century” (Price, 2015). The approach embodied by this social innovation lab draws on the strengths, empathy, creativity, and wisdom of the collective to explore new ways of making progress and studying the intersections between poverty and racism. The lab was not just a place to talk about issues with community, but a place to develop and test solutions to these complex community problems alongside community.

2.1.1 Partners and Initiatives

The Edmonton Shift Lab was made possible through the significant support of both the Edmonton Community Foundation and the Skills Society Action Lab. Also integral to the development of the lab was the foundational work of the EndPovertyEdmonton initiative.

Edmonton Community Foundation

The Edmonton Community Foundation (ECF) achieves its goal of uniting communities by connecting community builders with funders in order to create vibrancy and foster innovation (About, 2017). The Edmonton Shift Lab is one of the Edmonton Community Foundation’s many initiatives in which the foundation works in collaboration with other community organizations and takes an active role in community building (Initiatives, 2017). ECF also provides guidance for the creation of community endowment funds and awards several grants to individuals and organizations in support of innovation and community leadership (About, 2017). One of the members of the lab stewarding team is an employee of the Edmonton Community Foundation who works to find targeted granting opportunities that support an inclusive Edmonton.

Skills Society Action Lab

The Action Lab is a social enterprise of the Skills Society, an Edmonton-based service organization that supports individuals with disabilities and their families through creative and inclusive collaborations and many projects and initiatives (About, 2017). The Action Lab itself is a space designed to host groups wanting to explore creative thinking, collaborative strategy development, and innovative problem solving (Action Lab, 2017). The lab understands and promotes the importance of “bottom up approaches to social change”, and it was with this sentiment that the Edmonton Shift Lab was created (Edmonton Shift Lab, 2017). One of the members of the lab stewarding team is an employee of the Skills Society Action Lab as the Senior Leader of Research and Social Innovation.

EndPovertyEdmonton

The EndPovertyEdmonton initiative is transforming the way poverty is addressed in Edmonton by working in collaboration with community to build creative solutions to poverty reduction and advance equal opportunities for all who live here (About us, 2015). EndPovertyEdmonton began as a task force of the Mayor of the City of Edmonton in 2014 and resulted in the development of a Road Map implementation plan of 35 priority actions focused on ending poverty within a generation (About us, 2015). The Edmonton Shift Lab utilized the learnings shared in the EndPovertyEdmonton strategy to start their exploration into the intersection of racism and poverty (About the lab, 2017). EndPovertyEdmonton representatives participated as part of the Community Voice and Lab Advisory groups for the Edmonton Shift Lab.

2.1.2 Goal and Objectives of the Edmonton Shift Lab

The goal of the Edmonton Shift Lab was to lead a team of diverse individuals on an exploration into the intersection of racism and poverty that would result in the creation of prototypes to help reduce racism as it contributes to poverty in Edmonton (About the lab, 2017). It was focused on transforming community learning into bold, innovative actions that would shift current systems and challenge the status quo. The individuals participating in the lab were expected to uphold the objectives established at the onset: to foster a safe experimental space, to create solutions with community, to embrace new ways of thinking and acting, and to focus on impact as they journeyed through the lab process (About the lab, 2017).

2.1.3 Participants of the Edmonton Shift Lab

Four key groups and a developmental evaluator were originally planned to steward the work of the Edmonton Shift Lab. Their roles are described below and in more detail in section 5.1.

The Core Team

A diverse group of ten paid individuals made up the Core Lab Team, undertaking on-the-ground research with the community to explore assumptions, ideas, and realities around racism and poverty in Edmonton. These were “people with backgrounds in

human rights, activism, design thinking, systems thinking, anthropology, service innovation, community building and human services” (The collective, 2016).

The Backbone Stewardship

The Lab Backbone Stewardship consisted of five paid staff stewarding the lab design and process, coordinating activities, and organizing the logistics of the lab including the six core sessions and three pre-session workshops on the topics of racism, poverty, and human-centred design that set the context for the core team. Members of the stewardship team brought a combination of personal and professional expertise in human-centred design, anti-racism work, and poverty reduction.

Developmental Evaluator

A developmental evaluator was hired to enhance the learning of both the core team and the stewarding team as they progressed through the lab. This individual provided insights and observations that informed how the stewarding team designed activities for lab sessions in order to best progress the work of the core team.

The Lab Advisory

The Lab Advisory was a collection of seven community leaders and champions supporting the public presence of the lab and the issue of the intersection of poverty and racism. This group of volunteers were witness to a round of prototype testing prior to the presentation of the prototypes to the broader community.

The Community Voice

The Community Voice was intended to be a group of volunteers focused on connecting community experiences to the lab process and consisted of ABSI Connect, the City of Edmonton, EndPovertyEdmonton, and Action Lab (Social Innovation Lab of Skills Society). Unfortunately, a process was not formalized for this on-going connection with community, resulting in this group having a lesser role than originally intended in the outcome of the lab.

2.1.4 An Introduction to the Lab Story

The lab followed a human-centred design process of 1) empathy through ethnographic research, sense making, and system mapping, 2) definition through the development of how might we questions, 3) ideation from brainstorming, additional research, and building on existing ideas, 4) prototyping based on identified needs and advancing services or policies, and 5) testing prototypes with community and user groups.

Core team members attended three introductory workshops on the topics of human-centred design, racism, and poverty prior to beginning their core lab sessions. During the core lab sessions, these participants were led by the stewarding team through an assortment of activities that allowed them to narrow their focus, develop how might we questions, complete ethnographic research, discover leverage points, and begin prototyping. The core team worked in three groups to build prototypes that addressed their how might we questions. The teams tested their prototypes three times: first with

each other, then with the Lab Advisory group, and lastly with community. Between each round of testing, the groups utilized feedback to improve the quality and effectiveness of their prototypes.

Three community campfire events were hosted by the Edmonton Shift Lab at different times during the lab as a way to build connections between participants in the lab and the community. These events were utilized to share and test ideas with community members so that their feedback could be incorporated into the outcome of the lab.

As a result of the engagement of a developmental evaluator in the lab, the stewarding team was able to utilize feedback to implement on-going changes to the lab process. One of the primary focuses of this evaluation approach was to enhance the learning journey of all participants in the lab, including both the stewarding and core teams.

The Lab Story is described in further detail in section 5.2.

2.2 Project Client

The client for this project is Aleeya Velji, Lab Steward with the Edmonton Shift Lab. Her role includes helping steward the Shift Lab process, supporting the design and implementation of solutions alongside the community, and supporting learning in action in order to enhance the learning of all. She is a social innovator working with both the Government of Alberta and ABSI (Alberta Social Innovation) Connect.

The client is interested in the documentation and analysis of the learning experiences of the Shift Lab's core team through their participation in the social innovation lab and recommendations to further enhance participant learning in future labs. Miss Velji's contribution to the Shift Lab focused on enhancing the learning of all while supporting the design and implementation of the Shift Lab process.

2.3 Project Aspirations

Aspirations for this project included documenting the participant experience in the lab, specifically as it relates to the experiential learning journey, and unpacking these understandings of the participant learning experience in order to clearly articulate the challenges that existed in the lab and opportunities for advancing future iterations. This led to the development of recommendations that could be implemented by stewarding teams in future labs to enhance the participant learning experience and the collective journey of core team members.

2.4 Limitations and Scope

One limitation of the report is connected to the use of perception-based tools for evaluation. The data collected is representative of personal thoughts, opinions, ideas, and frames of reference so it is difficult to set a baseline for comparison other than one of individual feeling. In order to address this limitation, preliminary and final questions were similarly structured to allow for an accurate comparison.

An additional limitation included the time frame for the lab and available resources. Lab participants were engaged for a period of five months, so capturing the personal learning as it develops and unfolds in this short time frame was challenging. To mitigate this limitation, the researcher attended all core team sessions and two community campfire events in order to best capture the group and individual progress throughout the lab.

The scope of this project was to look at the internal changes within the core team's participants' knowledge and understanding as it relates to the intersection of racism and poverty. The core team participants are active in the fields of anti-racism work, poverty reduction, and/or human-centred design, so their learning journeys were affected by the personal and professional experiences they brought to the lab, already grounded with knowledge and perceptions related to the topics being explored. No research has been conducted on the impacts this change in participants' knowledge has on the community or the general public or whether or not public perceptions have been altered.

3.0 Methodology, Methods and Analytic Framework

3.1 Methodology

The primary analysis for this project is qualitative, based on participant self-reflections, perceptions of their personal learning development, and increased understanding of the intersection of poverty and racism. According to Kersh, Evans, Kontiainen, and Bailey, self-evaluation of personal competencies is an important tool in “encouraging learners to develop their knowledge of what they are doing, and the learning styles that work best for them” (Greenwood et al., 2001, p. 109 as cited in Kersh et al., 2011, p. 291). Taking into consideration the concept of experiential learning and the “cyclical pattern wherein the learner moves from experience, through reflection, to conceptualizing and then action”, self-evaluation and self-reflection were used to validate the importance of individual competences, perceptions, and experiences and how they change as a result of participating in different activities (Mason, 2006, p. 122 as cited in Kersh et al., 2011, p. 293; Kersh et al, 2011).

Additionally, a review and analysis of academic journal articles, blog posts, essays, online guides, and books on social innovation lab processes, developmental evaluation, and experiential learning is included in the methodology for this research project.

3.2 Methods

A range of methods was used for this research project including written evaluation questions, interviews with various members of the Edmonton Shift Lab, observations made during core team sessions and community campfire events, and a literature review.

Data sources for this project include:

- Written evaluations completed by participants at the end of certain lab sessions,
- Interviews with members of the core team,
- Interviews with members of the stewarding team,
- Observations during the six lab sessions, prototype presentations to the Lab Advisory, and community campfire events, including activities chosen by stewarding team for participation and engagement, and
- Academic journal articles, blog posts, essays, online guides, and books.

Research tasks included attending and observing lab sessions and events, reviewing lab agendas and handouts, developing written evaluation questions and interview questions, and scheduling and completing interviews intermittently throughout the lab process. An example of a lab agenda is included in Appendix A. On-going communication with the lab stewards and developmental evaluator was required in order to capture their observations and perceptions of the collective learning taking place and how it influenced their decisions and the development of activities. Additionally a thorough search and analysis of the literature available on social innovation lab processes, developmental evaluation, and experiential learning was completed.

3.3 Analytic Framework

An analytic framework was used to assess personal learning through participation in a social innovation lab. The framework was constructed by the researcher and based on evaluating personal perceptions of the learning experience in relation to an individual's frame of reference (previous knowledge, experience, and understanding). It takes a comprehensive look at lab participation, individual roles within lab activities, and self-reflection to determine how the core team participants' understanding of the intersection of racism and poverty transform as a result of on-going involvement in a social innovation lab. This framework was constructed based on Mason's description of the experiential learning process, described above, and after the researcher was provided a thorough understanding from the lab stewarding team of how the participant experience was designed for the Edmonton Shift Lab.

A depiction of the analytic framework for the research is shown below:

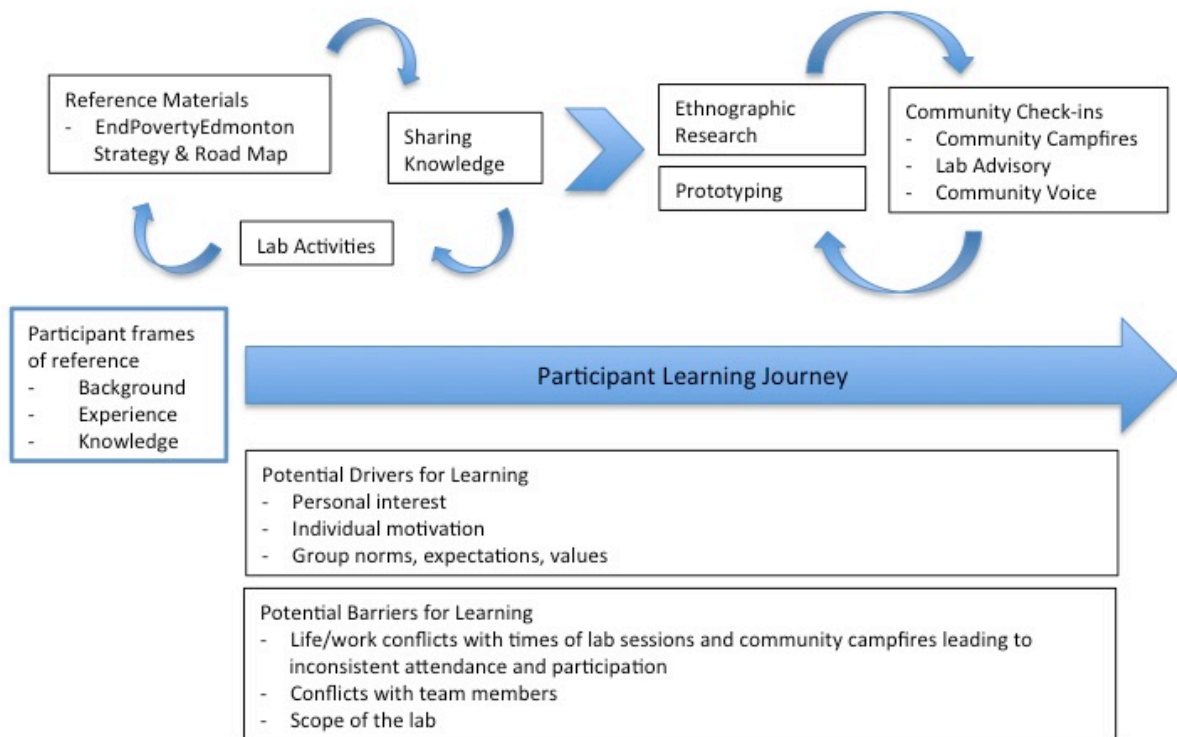


Figure 2: Analytic Framework

3.4 Data Analysis

Data was collected and analyzed for patterns that emerged from both the observations of the researcher and through participant interviews and written evaluations. The observations from lab sessions and the community campfire events were used to build the narrative for the lab provided in section 5. These observations were also utilized alongside notes from interviews and the written participant feedback to establish the eight most prominent themes for the participant learning journey, articulated in section 6. These themes were correlated with the existing literature on the topic of learning in a social innovation lab and through collective action. A series of recommendations were developed based on the themes confirmed through this data analysis.

4.0 Literature Review

The focus of this literature review is on the following concepts:

- The practice of social innovation labs,
- The experiential learning process in social innovation, and
- The use of developmental evaluation as a tool for advancing social innovation.

These themes are explored through a collection of academic journal articles, blog posts, essays, online guides, and books that make up the resources available on learning and developmental evaluation practices in an environment of social innovation. By focusing on these themes and utilizing a wide variety of sources for this literature review, the topic of learning in a social innovation lab can be broadly explored as it relates to building solutions to complex, systemic community problems. The utilization of human-centred design principles inherently leads to an environment of significant learning opportunities for participants and personal development can be greatly influenced through developmental evaluation, if that approach is taken by the stewards of the process.

VanAntwerp describes the messiness of the challenges labs are tackling and identifies part of the role of the lab “to enable stakeholders to deepen their understanding of the challenge” and to learn and reflect together (VanAntwerp, 2014). Learning through action is an integral component to the success of a lab and achieving systemic change in communities and institutions (Velji, 2016). The prototyping approach within labs relies on feedback loops and continuous learning in order to refine ideas towards the goal, while the process itself is creating group knowledge and furthering understanding of complex community issues and their root causes (Social innovation labs, 2014).

Social Innovation Labs

Living labs are user-centred spaces in which “new approaches to integrated design... [are utilized] to make cities more responsive to their citizens” (Frost, 2010 as cited in Hawk, Romaine, & Bartle, 2012, p. 225). They focus on co-creation, collaboration, and sustainability to enhance quality of life in cities (Franz, 2015, p. 53) and demonstrate the “transformational potential of collective action” (Edwards-Schachter, Matti, & Alcantara, 2012, p. 675). Recently, they have moved from primarily existing for the purposes of technological or economic improvements to finding purpose in the “context of social sciences” with the recognition that cities are the heart of social change (Franz, 2015, pp. 53-54). Franz describes the characteristics of socially oriented living labs as they differ from those focused on technological advancement, including the involvement of individuals with lived experience in order to build legitimacy in the process and a user-centric approach that results in “empowerment, participation, [and] co-creation” with community members (Franz, 2015, p. 56). However, also in her paper, Franz references a study on citizen-centric innovation that concluded it is challenging to engage individuals and groups that are representative of the topic being addressed

(Bergvall-Karenborn & Stahlbrost, 2009, p. 368 as cited in Franz, 2015, p. 57). She questions the ability of a lab to have adequate representation of the local demographics, especially when it comes to vulnerable populations and those with “under-represented voices in the community” (Franz, 2015, p. 63).

Spaces in labs are predominantly occupied by those with the most interest in the subject matter rather than those who from a community development and inclusion perspective should be included (Franz, 2015, p. 63). This in itself reinforces the power dynamics and privilege that can stifle a truly community-centric approach, and is contrary to the practice of social intervention through innovation as described by Scharmer and Yukelson. They consider this practice to be “a process that allows individuals, groups, and systems to transform [collectively] and shift the level [and quality] of awareness” from where they started (Scharmer & Yukelson, 2015, p. 37). Through this process of “co-initiating”, the convening of the individual minds and experiences proves more effective at collective action than the process of designing in isolation and obtaining buy-in from community after the fact (Scharmer, 2009, p. 285). In this way, a change in power dynamics is possible and can transform the process to be about belonging rather than ownership of ideas, plans, and actions (Scharmer, 2009, p. 285).

The concept of prototyping is future-looking, encouraging participants engaged in the process to look beyond the past and current ways of the system and strive to make more than slight modifications to existing work (Scharmer & Yukelson, 2015, p. 38). It is foundational to design thinking and embraces the idea of early failure for the purposes of learning and achieving success at a faster rate than through other methods of social transformation (Hillgren, Seravalli, & Emilson, 2011, p. 173). This requires participants in the process to operate within an unfamiliar and often uncomfortable space, sometimes with much uncertainty and ambiguity (Scharmer, 2009, p. 289). This is especially true for the early stages of a social innovation process when decision-making is most arduous due to the “high complexity and high uncertainty” that exists (Roth, 2015, p. 331). The benefit to this place of uncertainty, however, is the opportunity to transform the unknown into the known through intention and action (Scharmer & Yukelson, 2015, p. 58). Uncertainty is, in fact, a driver for social innovation that needs to be embraced in order to achieve the impact required for sustainable social change (Cederquist & Golüke, 2016, p.3).

Social innovation for community change involves a place-based approach to problem solving (Enabling city, n.d.). It holds linkages to global dynamics but maintains focus on the realities of a local setting (Westley, n.d., pp. 8-9). The Tamarack Institute provides a list of lessons and skills necessary for effective social innovation in communities. They focus on building and bridging social capital at the local level to ensure multi-sector networks are activated and the process is grounded in trust and authenticity (Cheuy, 2016). It is noted that innovation efforts at the community level should not ignore “the unique context of [the local] community” as opportunity can take many forms based on

the distinctive skills, experiences, knowledge, and ideas of individuals (Cheuy, 2016). Social innovators for community development require the ability to leverage the emergent at the local level (Cheuy, 2016). A place-based approach is one way to help social innovators work through the complexity of wicked problems facing communities as it is specifically designed to meet the unique needs and circumstances of the area (Government of Canada, 2011, p. 5).

The Experiential Learning Process in Social Innovation

Crucial to effective experiential learning for an individual is social interaction (Yardley, Teunissen, & Dornan, 2012, pp. 161-162). A blog post on the Social Innovation Generation website articulates the idea of how “learning [can be] maximized and accelerated through...act[s] of trial, error and communicat[ion]” emphasizing the collective need to “talk about, celebrate and learn from failure” in order to achieve innovation (Krainer, 2014). Prototyping in itself is a “journey of sensing, discovering and learning by doing” and in a social innovation lab, participants are able to build their understanding of complex societal challenges in a safe, collaborative, and creative environment (Scharmer, 2009, p. 285; VanAntwerp, 2014). This is echoed in Franz’s work with the acknowledgement that social innovation processes foster cooperative learning and an environment in which sharing experiences, knowledge, and ideas is encouraged and required in order to achieve the intended outcome (Franz, 2015, p. 63). By building and maintaining a safe space for experiential learning, participants are more likely to experience deeper learning (Kisfalvi & Oliver, 2015, p. 713).

The use of participatory action research in a setting such as a social innovation lab reinforces the importance of experiential learning as an authentic process in which knowledge is able to become practice (Baum, MacDougall, & Smith, 2006, p. 854). The purpose of participatory action research is to affect change through a greater shared understanding of the system and how it can be improved (Baum et al, 2006, p. 854). Similar is the notion of action research described by Glassman, Erdem, and Bartholomew, in which interventions into systemic societal problems are constructed and actioned based on education and research that explores transformative community change (Glassman, Erdem, & Bartholomew, 2012, pp. 272 & 277). These concepts, as methods for adult education striving for social change, are linked to that of engaged scholarship in which participative research is conducted on complex problems by gathering the perspectives of key stakeholders and exploring the differences in knowledge and experiences of this diverse set of participants (Glassman et al., 2012, p. 285; Van de Ven, 2007, p. 265). Research being conducted in this manner heightens the significance of the collective learning experience where participants on the research team build a foundation of mutual respect from which to move forward together (Van de Ven, 2007, p. 276). This occurs through the sharing of knowledge and experiences with one another and the offering of diverse opinions on the topics being discussed, resulting in a deeper understanding of these societal issues (Van de Ven, 2007, p. 276). Research teams are often challenged with ultimately “reconciling [these] divergent viewpoints generated [through this] engagement” process, which may require

additional research to both “deep[en] and broad[en]” the scope of the problem “before [attempting]... [to] resolv[e] it” (Van de Ven, 2007, pp. 283 & 286).

Kajner’s chapter on scholarship, engagement, and social transformation emphasizes the need for equality when utilizing participatory action research (Shultz & Kajner, 2013, p. 9). Embracing this concept is both a movement towards “the democratization of knowledge” and an acknowledgement of the researcher’s accountability to marginalized populations (Holland et al., 2010, p. 24, as cited in Shultz & Kajner, 2013, p. 14). Glassman et al. also articulates the importance of open dialogue, not bound by a hierarchy, when conducting research aimed at social change and the nonacceptance of destructive behaviours that reinforce power imbalances in the group (Glassman et al., 2012, p. 274). By breaking down barriers to participation at the community level, dynamic knowledge can emerge (Shultz & Kajner, 2013, p. 18). Kajner describes this dynamic knowledge as “fluid, contextual, and temporal”, occurring as a result of enhanced relationship building and inclusive practices (Shultz & Kajner, 2013, p. 18).

In a group setting, it is important to consider “how different levels of experience might affect... [individual] perceptions” and influence how participants process new information as part of a collective (Yardley et al., 2012, p. 163). The development of trust, respect, and an atmosphere of non-judgement leads to individuals’ increased willingness to share thoughts and ideas resulting in increased learning and innovation (Kisfalvi & Oliver, 2015, p. 713; Baker, 2010, p. 107 as cited in Kisfalvi & Oliver, 2015, p. 735). This shift towards openness amongst participants is a key element of the transformative learning experience and dependent on both self-reflection and ingenuity (Cranton, 2006 & Mezirow, 2000 as cited in Kroth & Cranton, 2014, p. 3; Dirkx, 2001 as cited in Kroth & Cranton, 2014, p. 3). Included in this learning experience is the commitment by participants to “adapt [their] own viewpoints and practices” in order to achieve the collaboration needed from a diverse set of individuals working to solution together (Social Innovation Generation, 2017). Co-creating solutions in a social innovation setting requires a “mindset of learning fast” (Bliss, 2014), so the development of trust within the team and the maintaining of a safe space throughout the process is essential to successful outcomes.

The experiential learning process of participants in a social innovation lab draws parallels to Fetterman’s concept of empowerment evaluation in which a flexible evaluation approach is taken so as to “foster self-determination” and build individual capacity (Fetterman, 1994, pp. 1-2). It is closely linked to on-going self-reflection in an effort to create a “dynamic community of learners” who are focused on personal development, and is an approach that “provides communities with the tools and knowledge... to monitor and evaluate their own performance” (Fetterman, 1994, p. 8; Empowerment Evaluation, n.d). The evaluation process begins with understanding the current state as it relates to participants’ goals, followed by the development and implementation of strategies to achieve them (Worthington, 1999, p. 2). This includes

documenting and self-reflecting in order to determine if progress is being made (Worthington, 1999, p. 2).

Developmental Evaluation for Social Innovation

Social innovation labs are dynamic, complex, and evolving initiatives for which traditional evaluation techniques are not accustomed (Preskill & Beer, 2012, p. 7). In fact, traditional summative forms of evaluation are likely to suppress innovation whereas an evaluation approach that supports individual and team development is better suited for a setting in which innovation is attempting systems change at the community level (Fagen, Redman, Stacks, Barrett, Thullen, Altenor, & Neiger, 2011, p. 646; Patton, 1994 as cited in Fagen et al., 2011, p. 646). “Developmental evaluation... helps manage uncertainty in complex... environments, giving [entities] greater confidence to experiment with solutions” in the unknown (Preskill & Beer, 2012, p. 21). A developmental evaluator for social innovation is embedded in the innovative process in order to bring timely contributions to the adaptive process (Preskill & Beer, 2012, p. 18).

The process of developmental evaluation in a social innovation setting results in strategic learning, a state occurring as teams incorporate data and reflection into their on-going work and adjust their plan and decision-making accordingly (Preskill & Beer, 2012, pp. 3-4). When strategic learning takes place, feedback collection and analysis becomes entrenched in the lab process and continuously influences the direction of the team (Preskill & Beer, 2012, p. 3). Interventions in the process become rapid and continuous when utilizing an evaluation technique that perpetuates adaptations and encourages dynamic flexibility (Patton, 1994, p. 313).

A developmental evaluation approach recognizes that though individuals might be participating in a collaborative process and working towards the same goal, “where they end up [may] be [very] different for [each] participant” (Patton, 1994, p. 313). By taking a complex systems approach to the evaluation, it is of interest to unpack and understand “the ways in which program elements... [are] interact[ing]” and realize which activities and connections affect which areas of the system (Preskill & Beer, 2012, p. 10). This analysis might inform why individuals are in different places by taking into consideration their previous experiences and knowledge and their current commitment to the process, as both are unique parts of the system.

Summary

In summary, the practice of social innovation labs is inherently linked to the learning experience of participants. The sharing of thoughts, ideas, actions, and reactions that take place within a lab are driving factors for both individual learning and the developmental evaluation process. Utilizing developmental evaluation to progress the learning experiences of lab participants as well as advance the final outcome by revealing opportunities for interventions is a significantly valid investment for social

innovators as it enables participants to manage uncertainty and pursue solutioning in the unknown.

5.0 The Lab Story

5.1 The Lab Participants

Four key groups and a developmental evaluator were originally planned to steward the work of the Edmonton Shift Lab. Part way through the lab an additional role was added, that of a graphic designer, to help with on-going lab communication and continuity.

5.1.1 The Core Team

A diverse group of ten paid individuals made up the Core Lab Team, undertaking on-the-ground research with the community to explore assumptions, ideas, and realities around racism and poverty in Edmonton. These were “people with backgrounds in human rights, activism, design thinking, systems thinking, anthropology, service innovation, community building and human services” (The collective, 2016). They participated in three pre-session workshops and six core lab sessions, engaged in community research explorations, ethnographic research, and personal reflections to support the learning journey of the lab. After exploring assumptions, ideas, and realities about racism and poverty in Edmonton, and through research with the community, the core lab team co-designed and tested solutions through a process called prototyping.

5.1.2 The Backbone Stewardship

The Lab Backbone Stewardship consisted of five paid staff stewarding the lab design and process, coordinating activities, and organizing the logistics of the lab including the six core sessions and three pre-session workshops on the topics of racism, poverty, and human-centred design that set the context for the core team. They worked closely with the developmental evaluator to ensure that feedback received from the core team and insights and observations were integrated into the agenda setting and outcomes for future sessions. Members of the stewardship team brought a combination of personal and professional expertise in human-centred design, anti-racism work, and poverty reduction. Their unique skill sets were leveraged throughout the lab journey in order to provide the most effective support to the core team through the many stages of the lab process.

5.1.3 Developmental Evaluator

A developmental evaluator was hired to enhance the learning of both the core team and the stewarding team as they progressed through the lab. This individual was highly engaged with the lab stewardship throughout the entire lab process and provided insights and observations that informed how the stewarding team designed activities for lab sessions in order to best progress the work of the core team.

5.1.4 The Lab Advisory

The Lab Advisory was a collection of seven community leaders and champions supporting the public presence of the lab and the issue of the intersection of poverty and racism. This group of volunteers were witness to a round of prototype testing prior to the presentation of the prototypes to the broader community.

5.1.4 The Community Voice

The Community Voice was intended to be a group of volunteers focused on connecting community experiences to the lab process and consisted of ABSI Connect, the City of Edmonton, EndPovertyEdmonton, and Action Lab (Social Innovation Lab of Skills Society). This group was to “act as bridge connecting community experiences to the lab process” (Join us, 2016). Unfortunately, a process was not formalized for this on-going connection with community, resulting in this group having a lesser role than originally intended in the outcome of the lab. This was due to time and resource constraints within the lab. Despite the full role of the Community Voice not being actualized, these volunteers were still invited to participate in the Community Campfire events in order to provide a sense check for the work of the lab’s core team.

5.2 Lab Activities

The lab followed the human-centred design process shown below. All lab session content and participant work done outside the lab fell into one of the five phases of the process.

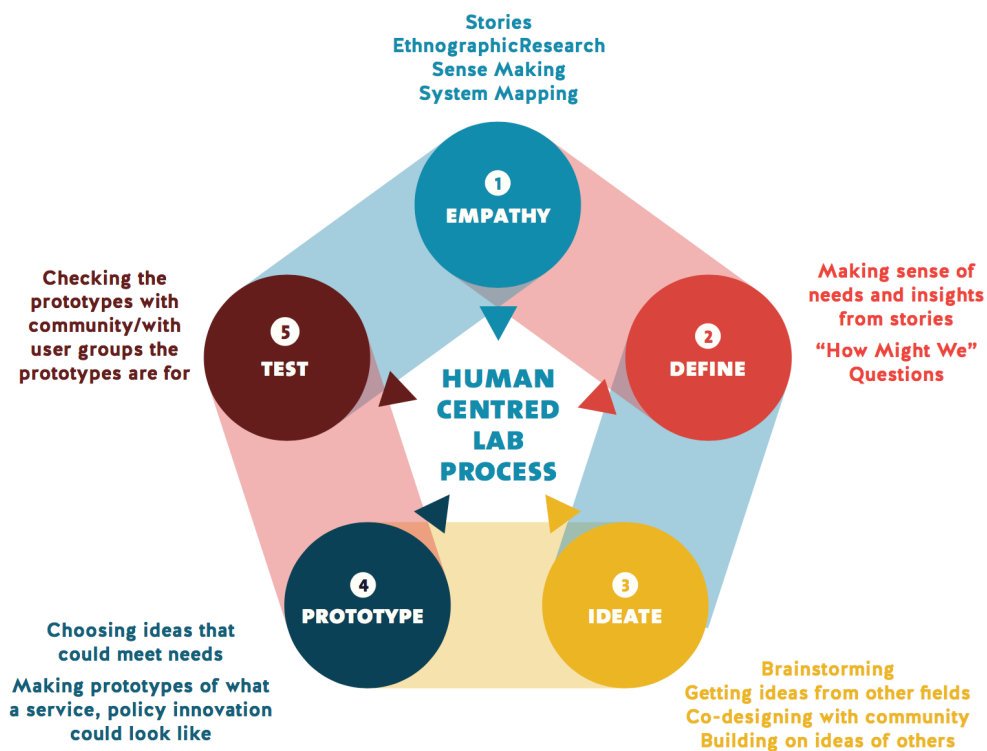


Figure 3: Human Centred Lab Process (Edmonton Shift Lab, 2017)

5.2.1 Introductory and Core Sessions

The core team participated in three introductory sessions on the topics of racism, poverty and human-centred design, and six core lab sessions, led by the stewarding team.

Participants committed to adhering to the established guiding principles of the Action Lab and together created their own unique ones that included sharing airtime, recognizing that trauma can be triggered within these topics, embracing what is challenging, and invoking their own concept of “innov-action”. At the start of each session, a participant observer was identified for the group and was assigned the task of monitoring the pulse of the group and reporting back at the end of the session with how closely the group kept to their shared guidelines. The figure below lists the guidelines the group was to follow. Additional guidelines developed by the lab team are detailed in Appendix B.



Figure 4: Action Lab Agreement (Action Lab Agreement, 2017)

The stewarding team began each lab session by articulating to the core team exactly where the group was in the social innovation process. By doing so, they made it known to participants when they could expect messiness and uncertainty to be dominating the atmosphere in the lab – and ensured the core team knew that was an expected and necessary part of the process. This allowed members of the core team to mentally prepare themselves for challenging and dynamic discussions that would eventually lead them to a place of clarity from which they could ideate and eventually build prototypes.

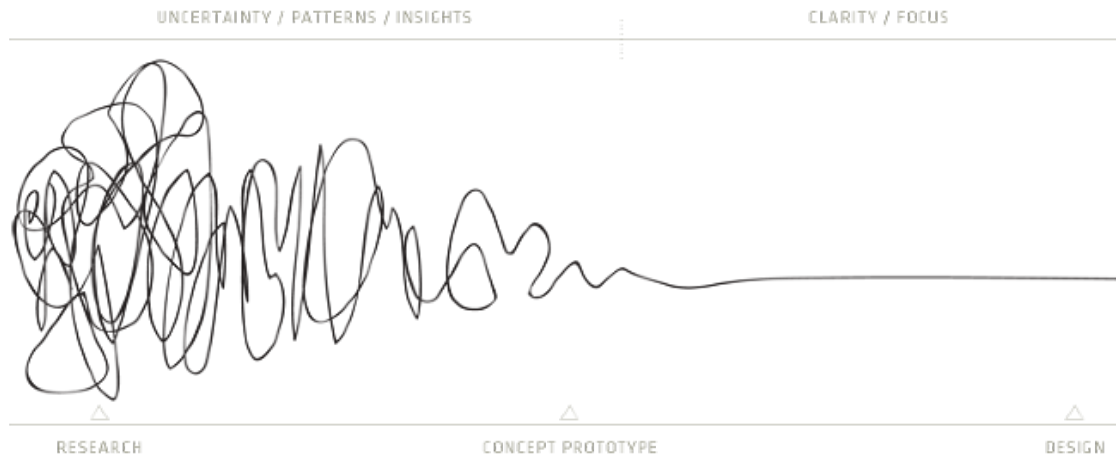


Figure 5: *The Design Squiggle (The squiggle of design, 2010)*

Lab stewards, although always seeming pressed for time to reach the outcomes for the day, started each session with ice breaker activities that overtime allowed for deeper connections between participants and enhanced relationship building, and always concluded the day with a group debrief. They also provided participants some hospitality and a break from the activity and structure of the lab midway through each session. Individuals were encouraged to eat and chat and laugh with each other and come back to the session refreshed and refocused.

Agendas for each session were built by the stewards with the understanding that as facilitators and leaders in the lab they needed to be flexible and adaptable to the needs of the group while still moving collectively towards a place where the team could prototype effectively. The lab moved at a steady and spirited pace in order to achieve its deliverables. There was very little room for slowing down the process to allow more thinking and reflection time because sessions had been pre-booked and the hours of commitment outlined before the process began. The stewarding team, however, kept in touch with the feel of the core team and adjusted agendas as best they could to incorporate the feedback that things were moving too quickly. They were able to assess which activities needed more time, which needed to be moved, and which might need to be done outside of lab time individually or in core team working groups. The stewarding team was a constant champion for esteem in the group. They acknowledged that operating in a lab can be clumsy, uncertain work and so continuously offered encouragement, insight, and reassurance to the process in order to keep the core team progressing. They were there to ensure that the collective wisdom in the room was brought out and challenged in six four-hour sessions.

5.2.2 Determining Focus

With an early understanding that the breadth of the intersection of racism and poverty was too large to tackle in the few months of the lab, the group determined they needed a focused direction that would make the outcome of developing prototypes attainable.

This led them down a process of scoping potential focal points utilizing the following criteria:

1. Are interventions realistic and sustainable in this domain?
2. Do we have the right resources (political will, buy-in, community support, relationships, etc.)?
3. Would interventions be timely?
4. Is it a systemic level intervention or would it only impact a few people?
5. Does it align with the work we are contributing to (like EndPovertyEdmonton)?
6. Does it work within an Edmonton context?
7. Are we aware of any duplications of this work?
8. Can we learn from what has been done before and what is currently taking place?
9. Consideration for outside perceptions of this work as we are a public facing entity.
10. How might we amplify work already happening?
11. Be bold!

The list whittled down from human rights, community hubs, system navigation, and broad agency level interventions to the topics of food security and housing. It was determined that system navigation would be a necessary consideration for either topic and the group voted to focus their efforts on affordable housing as it relates to the intersection of racism and poverty in Edmonton.

5.2.3 Three “How Might We” Questions

Adhering to the concept of an emergent strategy, the group understood they needed a general sense of where they wanted to go and could offer some opening moves as suggestions, but then needed to start working through actions, talking to people, and trying things in order to figure out what was going to work.

Through group discussions and a process of dotmocracy, three preliminary how might we questions were developed, selected, and then further refined. It was at this point that the core team along with the stewarding team determined the most logical way to move forward was to break into teams based on personal interest in the how might we questions and that those groups would ideate and prototype together while using the rest of the team for on-going feedback and support.

The figure below showcases the final how might we questions for the Edmonton Shift Lab.

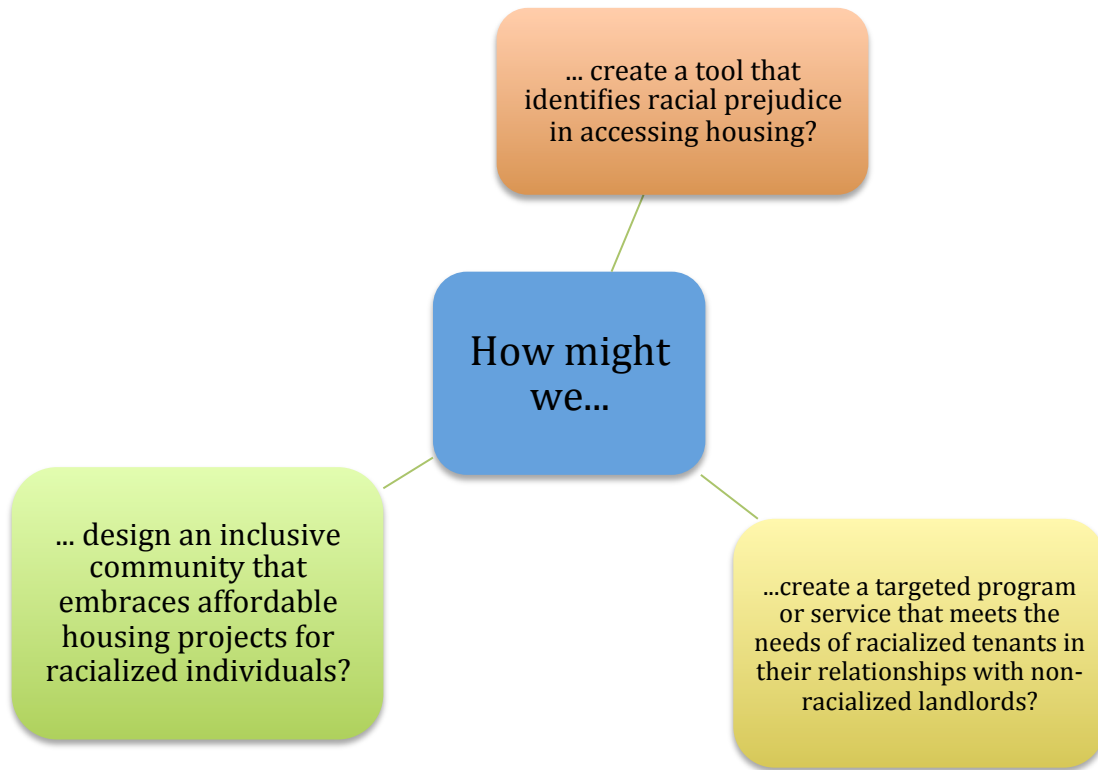


Figure 6: “How Might We” Questions

5.2.4 Ethnographic Research

A member of the core team with prior experience in practicing and leading ethnographic research led the team through an ethnographic research introduction during one of the lab sessions. The team was also provided resources and handouts from the stewarding team that would help guide them as they researched and selected interviewees, and set up and completed interviews. The resources provided came from thinkjarcollective.com, a website that “explor[es] how to problem solve better and help people, organizations and systems enhance their creative capacity” (Who the heck are we, n.d.). The resources focused on human-centred service design thinking, discovery, and research and then also on the sharing of stories and clustering insights from interviews.

An overview of Indigenous research and protocols was also included in the introduction to ethnographic research for the core team. This was led by a member of the stewarding team and reminded core team members to be aware of the legacy of trauma around research that exists within the Indigenous culture.



Figure 7: Ethnographic Research Visualization

Upon completing their ethnographic research, core team members shared the stories they learned from their interviews with persons with lived experiences, service providers, and policy makers. They were provided a guide for reflecting on ethnographic research (Appendix C) that would help test assumptions and biases, and were asked to incorporate that layer of thinking into their report back to the group. Core team members were asked to share who they

interviewed and why, what they learned, and outline the key needs or challenges that arose for them on where they might need to dig deeper or explore more. Those listening to the stories were invited to use different tools to construct a picture of what was being described. This included drawing a picture or building a scene from Lego blocks. This exercise helped participants conceptualize their learnings and use different mediums to express emotions and experiences. The stories shared were related to the how might we questions developed earlier. This helped contextualize unexpected insights and pinch points in such a way that groups could focus on how this research would influence the next phase of the lab.

5.2.6 Graphic designer

A few sessions into the lab, the stewarding team realized that with two or three week breaks in between each session they were faced with the challenge of maintaining fluidity between sessions. As such, they hired a graphic designer who would attend sessions and work with the smaller groups as they progressed through their ideation and prototyping to create a visual representation of their progress after each session. These visuals were printed and posted at the beginning of the following lab sessions in an effort to carry the momentum of the previous session forward without spending significant time collectively reviewing notes. This was also useful for those participants whose schedule conflicted with certain lab dates, as they would have something to refer to at the beginning of sessions following any they missed.

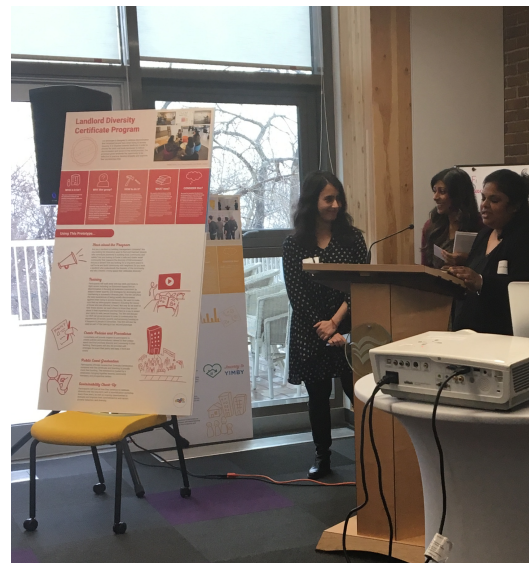


Figure 8: Core team presenting with graphic designer's outline of progress

The graphic designer was also utilized by each group to create a visual representation of the group’s progress to accompany their prototype presentation. This complemented each presentation by providing context and outlining the process teams took to building their prototypes and incorporating feedback from initial rounds of testing.

5.2.6 Prototyping

In order to be successful at building prototypes, the teams went through a series of activities that focused on identifying leverage points for their how might we questions. This included utilizing the learnings from the ethnographic research and identifying individually the top two challenges and top two needs to be addressed through this design. These challenges and needs were then discussed and voted on within the group in order to converge on the most impactful leverage points.

Groups went through a process of brainstorming their ideas and charting them on a vertical axis of “ok, wow, and wacky” and horizontally on a more individualized to a more systemic scale. Out of these many ideas, themes were developed that resulted in teams eventually voting again on how best to move forward with one idea for a prototype.

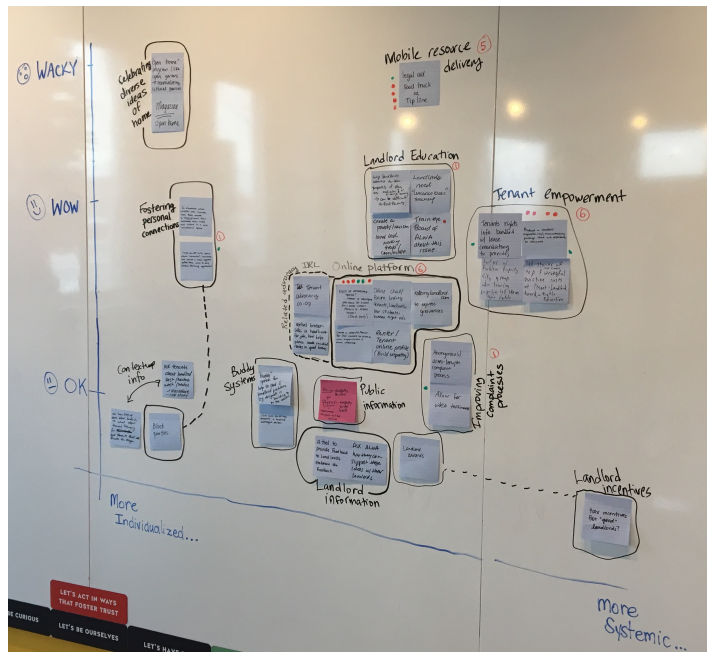


Figure 9: Ok, Wow, Wacky idea plotting

The core team groups recognized the work that was ahead of them and planned several meetings outside the core lab sessions in order to make progress on their prototypes. The figure below identifies the concepts for each prototype based on the how might we question it is built to solve.

<p>How might we create a tool that identifies racial prejudice in accessing housing?</p> <p>Landlord Diversity Certificate and Education Program</p>	<p>How might we create a targeted program or service that meets the needs of racialized tenants in their relationships with non-racialized landlords?</p> <p>Moving relationships between tenants and landlords forward with a mobile support unit that comes to community.</p>	<p>How might we design an inclusive community that embraces affordable housing projects for racialized individuals?</p> <p>Comprehensive guide for nonprofits who want to develop and sustain successful affordable housing for racialized people in Edmonton.</p>
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Table 1: Prototype Descriptions

5.2.7 Testing

Three rounds of testing were completed on the prototypes developed in the Edmonton Shift Lab. The first took place during the last core team session when feedback was circulated amongst members of the core team and the stewarding team. The second was with the Lab Advisory, and the third took place at the final community campfire event where community, service providers, and policy makers were invited to provide their feedback on the prototypes developed. During each round of testing, core team groups were given the opportunity to pitch their prototype in eight to ten minutes and observers were asked to use sticky notes to capture their thoughts in one of the following categories to

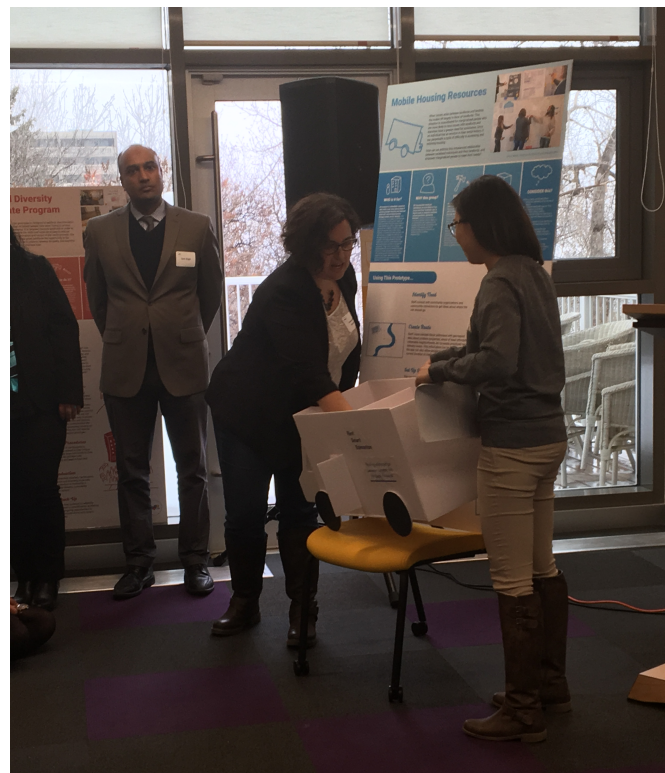
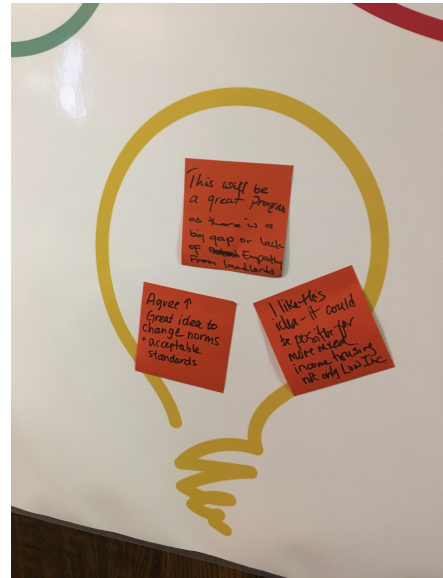


Figure 10: Presenting Prototypes

help frame constructive feedback:

1. Have you considered...?
2. Ideas that might work...



Figures 11 & 12: Feedback Collection

5.2.8 Community Campfires

The Edmonton Shift Lab hosted three community campfire events. The first was a kick-off for the lab in which community was invited to learn about what was going to take place, how to become a part of it, and the relevance and importance of the work. It was an opportunity for those who attended to share their thoughts and ideas about racism and poverty in Edmonton, and participate in activities that sparked innovation and creative thinking, setting the stage for the journey ahead.

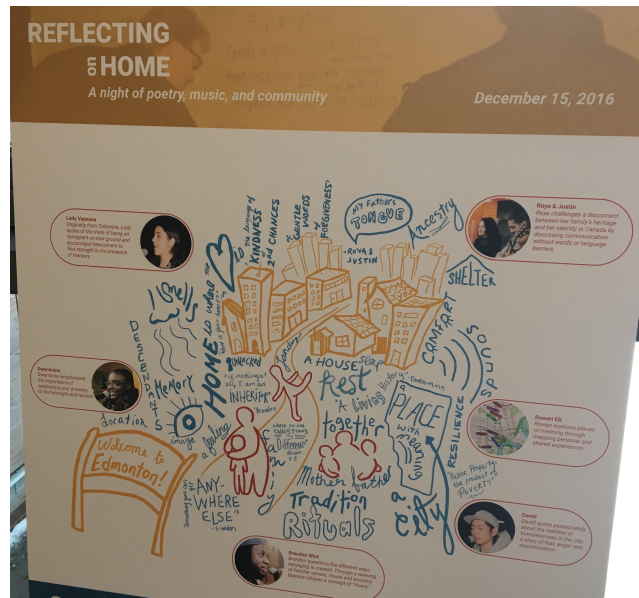


Figure 13: Reflecting on the second community campfire

The second campfire took place in downtown Edmonton at a locally owned restaurant and coffee shop, bringing together community and local artists for a poetry slam around the concept of affordable housing. The artists spoke and sang about their relationship with Edmonton, reinforcing the need for the Edmonton context to be at the forefront of the minds of the core team as they moved through the lab process. People's lived experiences were brought forward through performance art and the themes of belonging and isolation were prominent throughout the evening.



Figure 14: Celebrating with Shift Lab cupcakes

Polished prototypes were the topic of the final community campfire event that took place at the Edmonton Community Foundation and brought together community, service providers, and policy makers with the participants of the Edmonton Shift Lab. The event was not only an opportunity to test the third iteration of the group prototypes, but it was a celebration of what the collective of the Edmonton Shift Lab was able to achieve and recognition of the work happening and still needing to happen in the city in relation to racism, poverty, and affordable housing.

5.2.9 Developmental Evaluation

The Edmonton Shift Lab contracted a developmental evaluator to work with the stewarding team to maximize the effectiveness of the lab and enhance the learning journey of participants on both the stewarding and core teams. The developmental evaluator was instrumental in setting the tone for on-going personal reflection throughout the lab, encouraging the sharing feedback, and ensuring feedback whenever possible was incorporated into the lab midstream to advance outcomes.

In the context of a social innovation lab, a developmental evaluation approach is able to “assist [participants as they] develop social change initiatives in complex or uncertain environments” (Developmental evaluation, n.d.). This evaluation process contributed to significant learning for the stewarding team and resulted in an iterative lab process that reinforced the lab journey itself as significant as the final outcome.

Noteworthy learning moments in the lab were highlighted by the stewarding team during prototype testing with the Lab Advisory group. Prior to the presenting of prototypes, the stewarding team spoke about the lab process that led to them to this point and referenced their own learnings, including how to encourage healthy dialogue and disagreement amongst the group of core team participants, the fact that there is never enough time, and that after selecting housing as a focal point there was a great need to bring in subject matter experts on the topic in order for the lab to be successful.

5.2.10 The Lab Space

Lab sessions took place primarily at the Skills Society Action Lab, a unique and dynamic space that fostered creative thinking and the type of organic conversations that are not customary in a boardroom. A variety of seating spaces, whiteboard walls, toys, and pictures all contributed to creating an atmosphere where the core team was open to new concepts and encouraged to take risks with their ideas.

Adorning the walls were images such as those pictured below, with words meant to inspire, uplift, and embolden participants to “think differently and make ideas happen” (Action lab, 2017).



Figure 15: Action Lab Medallions (Action lab, 2017)

5.2.11 Participant Commitment

In preparing for the Edmonton Shift Lab, it was determined that core lab team members would be paid for their contribution to the process. This was an effort to ensure those selected to be a part of the core team would remain committed to the lab and invested in the journey. Though there were often one or two individuals absent from core team lab sessions, most made a concerted effort to connect with their individual groups or other members of the team to ensure they were prepared for the next session. As time was a precious commodity during lab sessions, this proactive approach taken by most core team members allowed for sessions to start where they left off rather than with a lengthy review.

There were originally twelve core team members, but through the process two were unable to maintain their original commitment and the lab finished with ten members of the core team that worked through various iterations of their prototypes.

6.0 Findings based on observations, feedback, and interviews

The purpose of this section is to articulate the themes that came through from lab session observations, in written feedback forms, and based on perspectives shared by individuals during the interviews on their experience of being participants in the Edmonton Shift Lab. A total of 12 interviews were completed with participants on both the core and stewarding teams, three of which were done at the midpoint of the lab sessions.

Participants were eager to share their experiences, thoughts, suggestions, and attitude shifts as well as to comment on the learning that took place for them individually and within the group setting. Participants often related their experiences in the lab to the context of their personal and professional lives.

Theme 1: Scheduling lab sessions for success

Probably the most consistent and strongest theme that ran through the course of the lab and was evident in observations, written evaluations, and interviews was the challenge of time. Most core team members felt they did not have enough time during the four-hour sessions to think, reflect, and be confident they were making the best decision for the process. This was articulated strongly in both the mid-point interviews and the written evaluations, so stewarding team members made a concerted effort to structure lab sessions with more time for discussion and reflection with less activities that took longer rather than moving through many activities quickly.

Four hours left little time for true relationship building; icebreakers and debriefs often felt rushed in order to spend as much time on exercises that would lead the group to achieving their outcomes. Some individuals would have preferred sessions to be even less task oriented and rather have time embedded in the sessions to discuss the root causes of racism and poverty and how to create robust prototypes that would focus on interventions of root causes.

Many also referenced the concept of scheduling as it relates to the ability to attend lab sessions. With all lab sessions taking place during Friday afternoons, it was challenging for some participants to balance attending sessions with their work schedules. This ultimately led to one or more individuals missing at each of the core team lab sessions and the team being less cohesive as a result.

Theme 2: Creating a safe space for lab participants to engage and challenge each other productively

Most participants articulated during their interviews that they did not feel the group participated in the type of difficult conversations surrounding these challenging topics that would have propelled the lab forward in a more productive fashion; for the challenging nature of the topics at hand, there was not enough dialogue, questioning, and adversity within the team discussions and decision making process. At the time

when all the big decisions had to be made that set the direction for the remainder of the lab, the group was not yet comfortable enough with each other and in this new space for most to truly speak their mind and challenge each other in an industrious way.

It was also noted that when conflict was surfacing during lab activities, members of the stewarding team were quick to diffuse it and change direction rather than to facilitate a conversation and unpack the emotions, knowledge, and experiences that were on the verge of being unravelled. Most felt this left them in a place of simply maintaining the status quo. This conflict-averse atmosphere made it so only those with incredible confidence in their thoughts and ideas were open to starting dialogue and challenging perspectives as they relate to the intersection of racism, poverty, and affordable housing. This statement, however, is not to be confused with the general concept of providing feedback throughout the prototyping process; individuals shared their constructive feedback often and evocatively for the betterment of the final lab deliverables.

Theme 3: Lacking in lived experience and experience in affordable housing

A resounding theme that greatly impacted the opportunity for participant learning was the lack of on-going relationship building with community, specifically those with lived experience in racism, poverty, and lack of housing. Most core team members shared the sentiment that all places the lab went required a certain level of privilege and power to participate. This included both the campfire events and those selected as ethnographic research participants as they primarily focused on service providers and policy makers. Significantly more feedback from those with lived experience would have resulted in a more meaningful and holistic prototype development and testing process that might have significantly changed the outcome of the final designs.

Several of the core team participants had previous experience, lived or otherwise (work, education, volunteer, etc.), in the topics of racism and poverty. The selection of affordable housing as a focal point for this intersection and the lack of experience in the lab with this topic, led to the need for that gap in knowledge to be filled; however, several stewards and core team members alike professed that more could have been done to educate themselves on the system of affordable housing in Edmonton and its linkages to racism and poverty.

It was articulated by a two core team members that lateral violence racism occurring between racialized communities was not a topic of conversation in the lab even though it has significant implications for housing. Oppression by an economic system set on maintaining disadvantages towards a certain population results in challenges for community building. People who are both racialized and living in poverty struggle against systemic barriers designed to keep them in that place. In this system, oppressive forces keep people in a constant state of fear and anxiety resulting in violence between cultural groups who are suffering in similar ways.

Theme 4: The willingness of participants to be open to new ways of thinking and acting

Most participants felt the group did not address the underlying power dynamics that existed in the room and made reference to examples of white male privilege during their interviews as a reason for why certain individuals did not feel equal in the space. They aired frustrations over the fact that this lab was meant to be addressing systemic racism when, in fact, they were witness to the perpetuation of it during the sessions. The common perception was that good intentions were used as an excuse or justification for unconscious racist comments or behaviour in the lab.

Two individuals walked into the lab with a very clear path they wanted to take to solution around the intersection of racism and poverty. They pushed those ideas through every activity along the way until they ultimately were both at the forefront of one of the prototypes. It was evident that no amount of discussion or new knowledge would sway them from their original positions and that they left the lab with the same attitude and understanding of the issue they came with. Though these individuals made up only twenty percent of the core team, they occupied space and held power for much more than that. One interviewee articulated that it felt as though the knowledge and experiences of those two participants held more legitimacy than anyone else in the room.

Theme 5: Commitment, confidence, and conviction of participants

All participants interviewed felt a renewed or increased commitment to addressing racism and poverty in Edmonton. They found the process to be reinvigorating as it highlighted the work currently taking place and the number of individuals committed to finding new ways to address these community challenges. The world is slowly moving away from the status quo and lab participants were excited about that and the potential it brings for community.

Participants felt increased conviction and sense of responsibility to remain active as problem solvers after being confronted with the struggles people face related to racism, poverty, and affordable housing during every lab session. Many acknowledged they want to do right by those with lived experiences and as a result would now be more intentional about engaging with community to address these issues, taking an approach of working together rather than working for.

At the same time as commitment and conviction grew or was renewed for most participants, the idea of letting certain perceptions and ideas go based on new knowledge and information was also something most participants became more comfortable with. Their confidence to say, "I don't have the answer, but am working towards a better understanding and solution" has grown drastically. The lab process allowed participants to be comfortable in a state of uncertainty and learn to navigate ambiguity in the pursuit of knowledge and action.

Theme 6: “I learned a new way to approach complex community problems and deepened my understanding of the topics”

Participants revealed their knowledge had transformed regarding racism and poverty as a result of the opening workshop sessions as well as by exploring the intersection especially as it relates to affordable housing in Edmonton. Many had looked at housing solely from a policy lens prior to the lab. Through ethnographic research they were able to look at it through a human lens and increase their understanding of nuances within the system and the struggle for obtaining access to affordable housing. Most participants described a growth in their understanding of power dynamics and the role they play at perpetuating systemic racism and poverty. The realization led them to want to build into their prototypes mechanisms to give power to those who are often left without. This was noticeable in all three prototype designs; there were intentional elements with the expressly stated purpose of challenging existing cyclical power relationships between marginalized groups, community, landlords, and policy makers.

For many participants, this was their first opportunity to do ethnographic research. Through open-ended questioning and storytelling, the participants were able to deepen their understanding of the human experience and the experience of service providers and policy makers as related to the intersection of racism and poverty.

A highlight for most core team participants was the new set of tools they acquired to help address complex community problems. While many had previous experience in anti-racism work or poverty reduction, few had utilized the concepts of human-centred design prior to participating in the Edmonton Shift Lab. Most participants are now more confident in thinking about racism and poverty as something that can be addressed creatively, rather than through the same channels and actions as they are accustomed to. Some even are utilizing these new techniques already in their workplaces and communities of practice.

The lab opened participants' views to working beyond the confines of the nonprofit sector and engaging more actively and intentionally with community members, government, and the private sector. The lab process reinforced their understanding that all have a responsibility and role to play when it comes to transforming systems for social benefit.

Theme 7: The Edmonton context

Through interviews and interactions in the lab, participants expressed their new understanding of the intersection of racism and poverty as context sensitive. They discovered that the lived experiences of individuals in Edmonton depend on many nuances in the system including their distinct cultural background, who they are interacting with, and the uniqueness of their situation in life (i.e. single parent, youth, elderly, etc.). With that, however, comes more questions surrounding the manifestation of these issues in Edmonton specifically and their roots in systemic oppressive processes

unique to the history of the city. This was something not explored during the lab, but something several core team members spoke to as needing to be addressed if there were future iterations of the Shift Lab.

A number of core team members only began living in Edmonton within the past five years, so participating in the Shift Lab led to their increased understanding of what is happening in Edmonton and the key players in the social sector for racism, poverty, and affordable housing. The Shift Lab experience was also noted to be an excellent networking opportunity, especially because external community members, policy makers, and service providers were interested in what the Shift Lab was doing and wanted to learn more about the process and the people involved.

Theme 8: Breaking down the system

Perhaps one of the most inspiring themes that came through the research was the acknowledgment and acceptance that one does not have to transform the entire system of racism, poverty, and housing in order to make a difference in the community. Breaking down the system into manageable pieces and leveraging small intentional changes that focus on maximizing impact is admirable work that should be celebrated. The complexity of these topics at times can be overwhelming, but maintaining focus on actions is what separated this work from that of most typical work in this field where discussions very rarely lead to any sort of action. Realizing how to work within a system and tackle complexities on a small scale can result in significant benefits to those affected by complex, systemic community problems.

Summary

The eight themes described above were developed based on lab session observations, written feedback forms, and perspectives shared by individuals during interviews about their experience of being participants in the Edmonton Shift Lab. In their entirety, they present an overview of the challenges and successes of the Edmonton Shift Lab as they relate to the participant learning experience. In the next section, these themes are further analyzed in comparison and contrast to the literature review.

7.0 Discussion and Analysis

In this section, the findings described above are correlated to the learnings from the literature review as they relate to the primary and secondary research questions listed in the chart below.

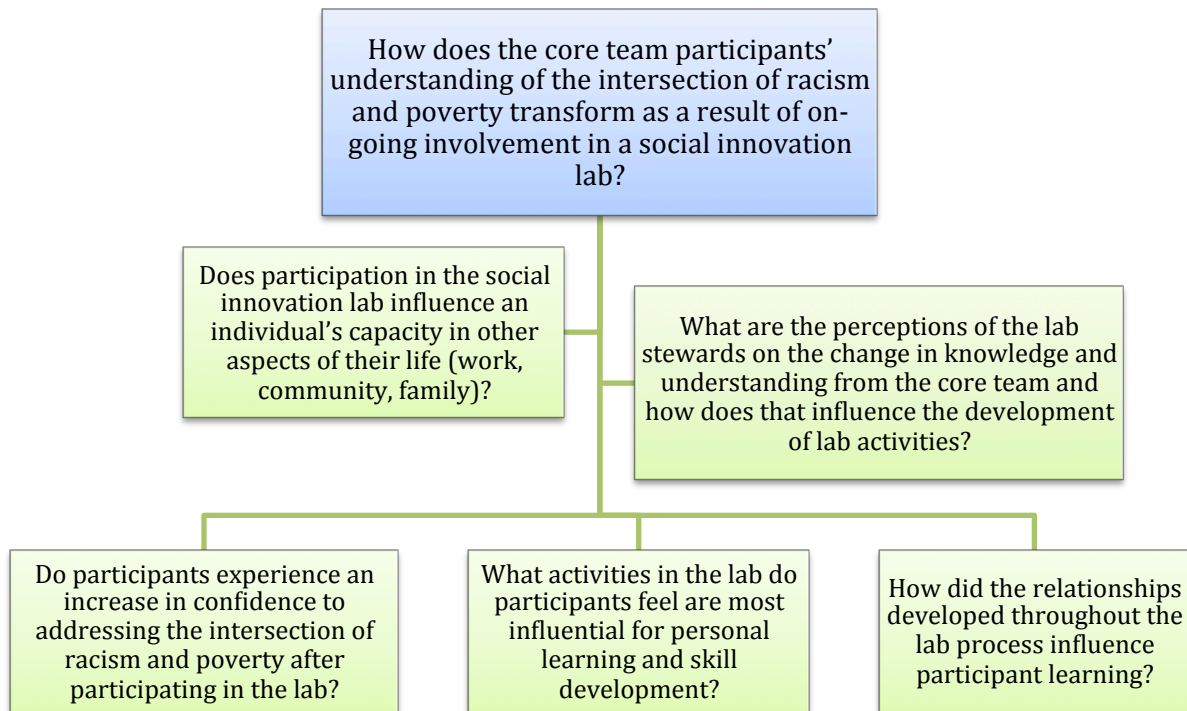


Figure 16: Research Questions

The section is organized into three parts with the purpose of articulating how the Edmonton Shift Lab and the experience of participants compared to social innovation processes described in the literature. The first part articulates how core team learning and capacity building in the Edmonton Shift Lab relates to the experiential learning process described in the literature. The second describes the demographic make-up of the core team participants and the importance of the context of the local community in relation to the literature. The third part focuses attention on navigating complexity in the Edmonton Shift Lab and what insights the literature provides for managing such uncertainty. The figure below aligns the themes from the findings as they relate to the learnings from the literature review.

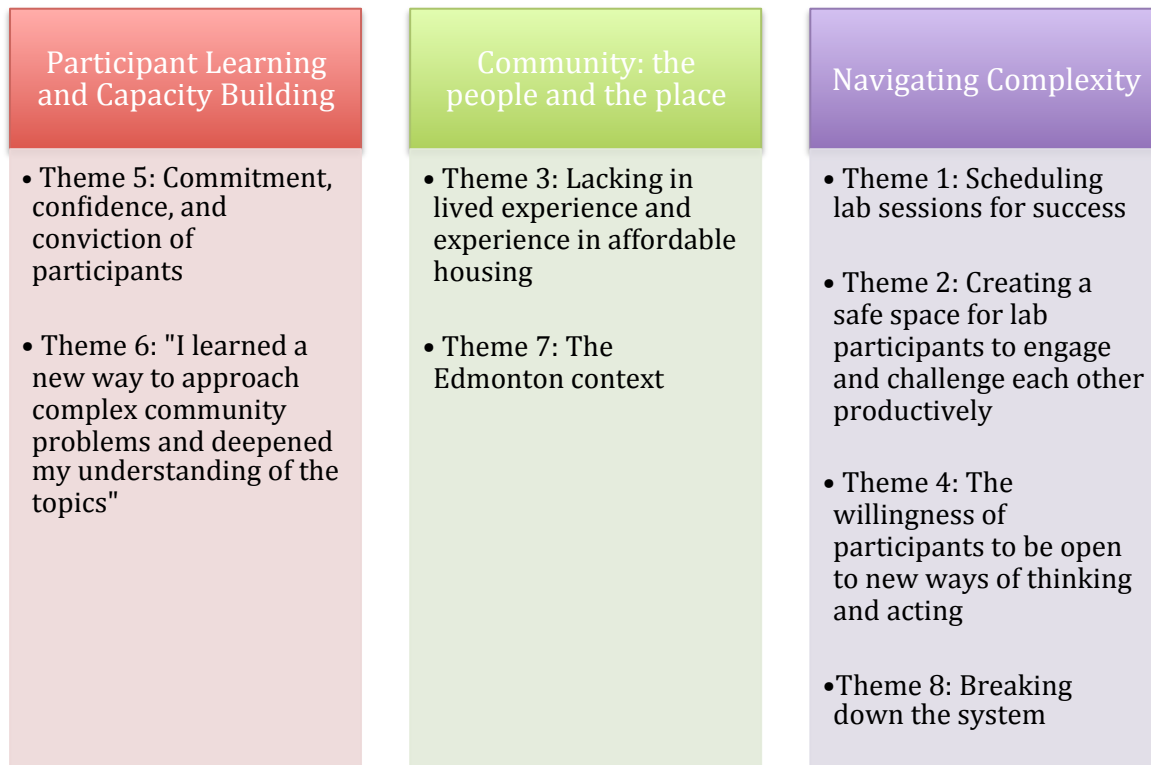


Figure 17: Alignment of Findings with Literature Review

Participant learning and capacity building

The practice of social intervention through innovation, as described in the literature, “requires a process that allows individuals, groups and systems to transform and shift the level [and quality] of awareness” from where they started, both individually and collectively (Scharmer & Yukelson, 2015, p. 37). The findings through observations, feedback, and interviews suggest that participants on the core team of the Edmonton Shift Lab transformed their awareness and understanding of the intersection of racism and poverty, especially as it relates to the problem of affordable housing in communities. The utilization of participatory action research throughout the lab process, reinforced the commitment of participants to reflect on their experiences, knowledge, and learnings, and to maintain focus on the resulting action through the development and testing of prototypes (Baum et al., 2006, p. 854). Participants expressed increased confidence in their ability to speak publicly about these challenges facing communities and significant growth in their knowledge of the Edmonton context. Group learnings were evident in the often small but meaningful changes implemented in their prototype designs between each testing phase. The core team was impassioned by the feedback they were receiving through testing as it strengthened both their understanding of the local context and made their designs that much closer to being actionable in communities.

As described in the literature, traditional summative forms of evaluation are likely to suppress innovation whereas an evaluation approach that supports individual and team development is better suited for a setting in which innovation is attempting systems change (Fagen et al., 2011, p. 646; Patton, 1994 as cited in Fagen et al., 2011, p. 646). This approach was embodied by the Edmonton Shift Lab and resulted in individual capacity building for members of the core lab team. The findings show that most core team members acquired a new set of tools in human-centred design they can access when tackling complex community problems. As such, they are not afraid to utilize creative methods of problem solving in their professional lives or within other communities of practice.

The ethnographic research component of the lab was new to many of the core team members and as a result significantly impacted their learning journey and the development of their prototypes. The literature reinforces this practice of including individuals with lived experience in social innovation practices to build legitimacy in both the process and the outcome (Franz, 2015, p. 56). Though participants shared the belief that more could have been done throughout the lab to involve more community members in the process, it was recognized that without the ethnographic research and community campfire events the process would have been done in isolation of the larger context of the problem despite all members of the core team bringing some element of personal or professional experience to the topics.

Community: the people and the place

The literature revealed it is challenging to engage individuals and groups that are representative of the topic being addressed in social innovation practices, especially when those individuals are members of vulnerable populations or marginalized communities (Bergvall-Karenborn & Stahlbrost, 2009, p. 368 as cited in Franz, 2015, p. 57; Franz, 2015, p. 63). This was apparent in the findings of the research. Most core team members shared the sentiment that all places the lab went required a certain level of privilege and power to participate, despite on-going efforts to engage diverse community members through the campfire events. Core team members expressed the desire to continue to conduct ethnographic research for a longer period of time and to focus on building social capital with interviewees. This would allow for a reengagement with those individuals during the prototyping and testing phases to add perspective and value to the final outcome as well as validity to the process in its entirety.

As the literature describes, participants in social innovation labs must focus their attention on building and bridging social capital at the local level to ensure multi-sector networks are activated and the process is grounded in trust and authenticity (Cheuy, 2016). Innovation efforts must embrace “the unique context of [the local] community” and the distinctive skills, experiences, knowledge, and ideas of individuals (Cheuy, 2016). Throughout the lab process, the stewarding team made the conscious effort to continue to reinforce the need for core team members to think locally and find leverage points based on the Edmonton context. Through observations of lab discussions and in

interviews, it was apparent the core team members were deepening their understanding of the intersection of racism and poverty as it relates to the specific community of Edmonton. They remained locally focused when developing and testing prototypes in order to maximize their effectiveness and impact for members within this community. Certain groups, during prototype development, spoke of the research they conducted into similar work happening in other jurisdictions. They incorporated those ideas with acknowledgement that though much can be learned from other places it is not wise to simply implement the exact tools and expect the same outcomes as sustainable community change requires a place-based approach to problem solving (Enabling city, n.d.).

Navigating complexity

The literature described uncertainty as a driver for social innovation and a requirement for achieving sustainable social change (Cederquist & Golüke, 2016, p.3). The stewarding team worked to prepare the members of the core lab team for the uncertainty they were to experience during the social innovation process; however, as core team members shared during their interviews, this preparation in most cases did not make the process any easier.

Core team members lamented the lack of time they were given to complete tasks and work through the complexity of the topics of racism, poverty, and housing. While navigating the unknown is not something new to social innovation, it was challenging for participants to make decisions when they felt more time for ethnographic research and building relationships with community was required in order for them to be doing justice to both the people and the cause.

Social innovation processes require participants to operate within an unfamiliar and often uncomfortable place, sometimes with much uncertainty and ambiguity (Scharmer, 2009, p. 289). The findings from core team participants revealed that, from their perspective, the difficult conversations that could have advanced the lab even further did not take place. For many core team members, there was not enough dialogue, questioning, and adversity within the team to add value to the decision-making process. While the lab stewarding team worked consciously and intentionally to develop a safe space for participants to share their thoughts, feelings, and ideas, that level of trust and comfortability within a new team takes time to develop. The observations and interviews also suggest that the diffusion of emerging conflict led certain core team members to feel the stewarding team was conflict-averse. This diffusion of conflict led to other challenges within the lab, including, from the perspective of several participants, the perpetuation of systemic racism and historical power imbalances.

It was evident through the process that certain individuals brought elements of solutions into the lab at the very beginning and were set on seeing them utilized in prototypes. The literature suggests that social innovation practices are designed to change power dynamics such as these and foster a process akin to belonging and shared

decision-making rather than ownership of ideas, plans, and actions (Scharmer, 2009, p. 285). However, in this case, certain individuals were not open to working in such a way and instead held significant power over those in the room who remained open-minded and committed to fully embracing the social innovation process.

The notion of complexity, although anticipated, presented many challenges to the core team. In order to work through the extremely complex nature of the intersection of two multifaceted, deep-rooted community issues, the lab stewards led the core team members through a series of activities that sought to find and refine leverage points and uncover opportunities for small interventions that would maximize impact. As the literature suggests, this developmental evaluation approach is one way to attempt to “manage uncertainty in complex... environments, giving [entities] greater confidence to experiment with solution[ing]” in the unknown (Preskill & Beer, 2012, p. 21).

Summary

Based on this analysis, there are three core issues that affected the overall learning experience of core team participants. First, the timing of the lab presented significant challenges to the ability of the core team to reflect, discuss, and learn at the pace that the lab was needing to progress. The second issue was the limited opportunity for the core team to engage in on-going communication and relationship building with community members, especially those with lived experience in racism, poverty, and lack of affordable housing. Third was the conflict-averse atmosphere that was maintained during the lab process and the resulting lack of conversations where participants were able to challenge one another’s thinking and strive to break free from the status quo. The analysis also demonstrated the importance of the developmental evaluation approach taken by the stewarding team in the overall success of the lab process and the enhancement of the learning experience of participants.

8.0 Recommendations

This section provides a series of recommendations based on the literature reviewed, observations from the lab sessions, and feedback from participants. The recommendations are presented as opportunities to be considered in potential future iterations of the Edmonton Shift Lab or other labs focusing on the intersection of two very challenging social topics. Potential future iterations of the Edmonton Shift Lab would require a commitment again from the Edmonton Community Foundation and the Skills Society Action Lab, the involvement of additional community members to support the process and provide feedback, the recruitment of stewarding members and a core team, as well as adequate funding to be secured.

The following recommendations are options to be considered by future stewarding teams as they prepare to lead a new lab or a second iteration of the one studied. The recommendations can be implemented together or individually depending on resources available and the capacity of the stewarding team and lab advisory; however, in their entirety they address the overarching challenges the Edmonton Shift Lab participants and stewards faced through the life of the lab and in an ideal situation would be implemented simultaneously.

1. Adapt the scheduling of the lab sessions to allow more time for participant relationship building

With a topic as complex as the intersection of racism and poverty and the added layer of affordable housing, lab participants require more time throughout the lab to establish and test their shared understanding of those issues. It is also imperative for participants to be given the time to achieve a state of comfortability with one another in order to encourage productive conflict that will lead to an improved collective decision-making process.

This change can take place several ways, either in lengthening lab sessions or by adding more. It would also be beneficial to extend the overall length of the life of the lab to ensure adequate time for building relationships in community both in and out of scheduled lab sessions. Extending the length of sessions or the number of sessions would result in an increase in resources needed to compensate participants. Lengthening the life of the lab itself would require additional effort to maintain engagement with all participants in the lab, including core team members, advisors, community members, funders, and other supporters. The overall responsibility for this on-going engagement would likely be that of the stewarding team with support and work from the core team to build and maintain relationships with the advisory team, community members, funders, and other supporters.

2. Integrate more opportunities for diverse community participation

As mentioned several times throughout this report in both the findings and the literature, greater involvement of community and those with lived experiences in

racism, poverty, and lack of housing is needed in order to build relationships at the local level and further legitimize the process and outcomes (Cheuy, 2016).

This change could be managed by reserving spaces on the core team for individuals with lived experience or by building relationships with those individuals and inviting them to attend, participate, and share their stories in lab sessions and prototype testing. Both options would involve additional funding, to either accommodate more participants on the core team or to compensate those community members engaged at several points throughout the process. It would also involve a stronger commitment by all members of the core and stewarding teams to build and maintain relationships with community members through the duration of the lab.

3. Embrace challenging conversations amongst lab participants to enhance opportunities for learning and transformations in attitudes and perceptions

The lab would benefit from an extremely strong, yet neutral facilitator who could take the role of the participant observer for the duration of the lab and be responsible for both ensuring participants adhere to the established guidelines and for unpacking the difficult conversations that arise between members of the core and stewarding teams. This would provide an alternative to the quick diffusion of conflict within the lab and demonstrate to participants that tensions and emotions are expected as part of the discussion of complex, systemic community problems. A professional facilitator would bring the experience needed to ensure conflict is managed in a respectful and productive way that ultimately could alter the direction of the core team for the better.

This change would require additional funding to contract a professional facilitator to attend each lab session and debrief with participants on the core team and the stewarding team as required. Alternatively, this role could be given formally to a member of the established stewarding team with the acknowledgement that the primary function of that individual would be to facilitate difficult conversations as they arise. With this option, the remainder of the stewarding team would need to support that individual by taking a bigger role in managing the on-going planning and coordination of the lab.

4. Maintain the use of a developmental evaluator

The use of a developmental evaluator not only enhanced the learning experience of participants in the lab, but the approach ensured timely adaptations were made to the process as a result of the on-going collection of feedback from participants and the observations as the lab progressed. Taking a developmental evaluation approach ensures the learning journey maintains the same level of importance as the final outcome. This helps “manage [the] uncertainty” and ambiguity of innovating for complex social challenges and encourages the progression of an active and adaptive process (Preskill & Beer, 2012, pp. 18 & 21).

This recommendation reinforces the impact the developmental evaluation had during the on-going lab process. It would require similar funding to implement as in the first iteration of the lab; however, increased slightly if the life of the lab is extended.

5. Implement a process to monitor and assess participant learning and the ability to transfer knowledge into skills beyond the life of the lab

In order to adequately assess the impact of the learning and skill development of participants in the core team, it is recommended that a process be implemented to document and analyze the on-going work of these individuals post-lab. This could take place anywhere from three months to a year beyond the life of the lab. The results of this additional research could assist with future funding applications as well as further document and communicate the impact social innovation labs can have on affecting change in communities.

This additional research would require the lab stewards, with input from the lab advisory group as well as project funders, to develop a set of criteria for expected learning, attitude transformations, and skill development from participants. This could include openness or willingness to embrace new perspectives, ability to problem solve creatively, leadership development, increased community networks, and changes to positions in the community or the workplace. This continued evaluation of the lab learning experience could be used to determine which core team participants may be invited to participate in future iterations of the lab.

Continued evaluation would require an additional commitment from the stewarding team and developmental evaluator or the engagement of an additional researcher. Core team participants will need to be made aware of this research approach and their expectation to remain engaged with the lab beyond the final sessions.

Summary

The options articulated above will require additional preparatory work to be undertaken by lab stewards as well as additional funding and resources. It is recommended that if the capacity and resources are available, all options detailed above be implemented together in future iterations of the Edmonton Shift Lab or in other labs that focus on the intersection of two very challenging social topics. Together the options present a holistic response to the challenges the core and stewarding teams experienced and would be most effective if implemented simultaneously. However, if resources will not allow, it is suggested that the stewarding team focus on recommendations one and two to ensure adequate time and capacity to work collectively with community on addressing the chosen issues.

9.0 Conclusion

The purpose of this research project was to understand the learning experiences of core team members of the Edmonton Shift Lab and identify the challenges and opportunities that exist for participant learning when addressing the intersection of two complex, systemic community problems.

The scope of this project was the internal changes within the core team's participants' knowledge and understanding as they relate to the intersection of racism and poverty. Research was not conducted on the impacts this change in participants' knowledge may have had on the community or the general public or whether or not public perceptions have been altered.

The literature review demonstrated how the practice of social innovation labs is inherently linked to the learning experience of participants and can be strengthened by utilizing developmental evaluation. This evaluation approach not only works to progress the learning experiences of lab participants, it also leads to the advancement of the final outcome by revealing opportunities for thoughtful interventions.

Eight themes were organized from the observations made during lab sessions and the feedback collected from the lab core team and stewarding team members. The themes encompassed 1) scheduling, 2) creating a safe space for participants, 3) participant demographics, 4) openness to learning, 5) personal commitment, 6) new approaches to problem solving and deepening understandings, 7) the local context, and 8) breaking down the complex system.

Based on the research findings and literature on social innovation practices, the following recommendations were developed as options for implementation by future stewarding teams based on capacity and resources:

1. Adjust the timing of the lab to allow more time for individual and collective learning and self-reflection,
2. Integrate more opportunities for diverse community participation to ensure the voices of those with lived experience are well represented,
3. Embrace challenging conversations in order to enhance the participant learning experience and the overall advancement of the design process and prototype testing, and
4. Maintain the use of a developmental evaluator to enhance the learning experience of participants in the lab and to bring timely adaptations to the overall process.
5. Implement a process to monitor and assess participant learning and the ability to transfer knowledge into skills beyond the life of the lab.

These recommendations are options to be considered by stewarding teams of future labs and would be most effective if implemented together; however, if the resources required are unavailable the team may decide to focus on ensuring adequate time and capacity for working more collaboratively with community throughout the process.

The opportunities and challenges that exist within a social innovation lab are deeply connected to the ability of a core team of individuals to work collectively from a place of uncertainty and ambiguity. The process challenges participants in many ways they have likely not experienced before in their typical roles as service providers or policy makers and in their typical approach to problem solving in communities. The personal learning experience is foundational to the effectiveness of social innovation labs and plays an important role in helping participants navigate and manage uncertainty in pursuit of the new solutions to complex community problems.

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Appendices

Appendix A: Core Team Session #4 Agenda

Session # 4 Shift Lab
 Total Time: 4 Hours
 Date: February 3rd 2017
Facilitation Guide

Priority	Item	Facilitator	Time
1.	<p>Welcome: Show Molly's graphic on what we did last week.</p> <p>Icebreaker through an Indigenous methodology</p>	Jodi	1:00 - 1:15pm
2.	<p>What does housing currently look like in Edmonton.</p> <p>what people in poverty really need so racism doesn't interfere with access to housing.</p> <p>Share experience what does he think the housing support system really needs to keep racism in check.</p>	Giri	1:15 - 1:40 pm
3.	<p>Ethnographic Research: Story Share</p> <p>Refining what we have learned from our ethnographic research.</p> <ul style="list-style-type: none"> • Small groups each look at the how might we • Each facilitator to give team the option of timing themselves or just going free flow 	All to support	1:40 - 3:15pm
4.	<p>Mission Drift Check</p> <ul style="list-style-type: none"> • Print out question template 	Sam	3:15- 3:30pm
5.	<p>Finding the gems: From <u>the gems</u> and your learning overall, what do you see as the main needs and challenges you need to design solutions for to address your core HMW? Ask yourselves if you are remembering to focus on addressing racism-poverty intersection as well.</p> <p>From the Post-its on the walls, each person should choose the five that they find most interesting or most insightful AND especially most relate to the core problem (HMW) you are designing for. Remove these Post-its from the group and put them in a new blank area with lots of empty space around them. Let's call these Post-its your "gems".</p> <p>2. Group and cluster the Gems Review the "gems" that your team has</p>	Ben	3:30- 3:55pm

	<p>selected and try to organize them into similar groups or categories. "Clusters". Did many people mention the same thing? Are there behaviors you saw repeatedly? Which issues, needs, challenges were obvious?</p> <p>3. Refine your clusters of Gems Create a minimum of three and a maximum of five clusters. Is there a new cluster that you might need to create? Could two existing clusters be combined?</p> <p>4. Write headlines for each cluster Make a headline that sums up what each cluster seems to be about</p>		
6.	<p>The detailed HMWs - HCD leverage points - Transform needs and challenges into detailed HMW</p> <ul style="list-style-type: none"> • Individual exercise done on template • Print Template 	Sam	3:55 - 4:15 pm
7.	<p>Converge on core needs and challenges to design for How might we's and voting</p> <ol style="list-style-type: none"> 1. Write out and post all new how might we on stickies 2. 10 dots (sharpie dots on stickies) of what your team should focus on for design and prototyping. <p>All the HMWs are important and should be kept handy for the next session, but especially highlight the top 3- 4 HMWs that will emerge from the dotmocracy. The HMWs simply help inform the next round of ideation to set stage for ideation and also can help inform criteria for choosing ideas to prototype next session.</p>	Ben	4:15 - 4:40 pm
8.	<p>Check out</p> <ul style="list-style-type: none"> • Participant observer 	Aleeya	4:45- 5:00pm
9.	<p>Stewards Debrief</p> <ul style="list-style-type: none"> • What worked • What did not work • Plan Winnipeg <ul style="list-style-type: none"> ◦ Craig wants us to book early on the same flight ASAP 	All	5:00- 5:30pm

Appendix B: Participant Guidelines



Conflict Guidelines and Trust Building

Do:

- Recognize and name it directly as conflict
- Create space to talk about it
- Recognize how to react in a positive way while maintaining trust and comfort
- Lovely debate, infused with mindfulness, is ok
- Creating alternative space to talk about ideas

Say:

- Ask questions: "Hey I noticed this, is it right?"
- It is ok to say "I need time, let's talk later."
- Forgive and keep moving (contextual)
- In conflict, do more listening than talking. Seek to understand rather than be understood
- "I felt that what you said was...because..."

- Acknowledge that "bad" conflict has begun
- Have a "vibe monitor" or "safe word" (pumpernickel!)
- Have the "is it just me" conversation with the whole group. Be brave.
- Call in (rather than call out)
- Law of two feet -- people always have the right to decide to quit
- No tone policing
- Check in/check out
- Social time and content time should be equally prioritized
- Confidential space

- Be willing to "agree to disagree"
- Be aware/check in with the different ways people respond to conflict
- Establish common ground around what "safe space" is, and what "safety" means
- Question: what are our approaches to decision making
- Differences between trusting in people versus trusting the process
- Let's not assume we are entering neutral space



Shared guidelines from racism day:

- Empathetic
- Respectful
- Active
- Share "air time"
- Create knowledge
- Challenge ideas, not persons
- Ask questions, be curious
- Agree to disagree
- Ask questions honestly
- Confidential
- Speak in "I" statements
- Plan for action

Further guidelines from HDC day:

Our environment:

- Sense of humour
- Playing with ideas
- Balance of quiet and talking
- Make space for those who are quieter
- Make space for trauma/recognize trigger points

Personal Commitments:

- Embrace what we don't like
- Asking sincere questions
- Sincerity
- Accept resistance
- Be present
- Willing to adapt and compromise
- Own your shit
- Love your ideas like an ugly child
- Check your bias
- We create responsibility and accountability to others

Our perspective

- Recognition of other ways of knowing and doing
- Understanding of different thought processes -- make space for these

Team Interaction

- Relational resistance
- Commitment to loving struggle
- Mutual respect
- Boost and bring out the best in each other

- "Yes, and..."

Commitment to Outcomes

- Innovation + Action = Innovaction™
- Collective action

Recognizing what is beyond the walls of the lab

- Challenging structures
- Intersectionality
- "Nothing for us without us"
- Contribute to spiral/ be willing to engage with spiral

Appendix C: Shift Lab Devil's Advocate Reflection Questions

Shift Lab Devil's Advocate Reflection Questions

When conducting ethnographic research we often use the research to help us test our assumptions when asking people about challenges with racism and poverty can get tricky. We have also learned that there are personal experiences that draw into the way we tell and share our experiences around this topic. ... so when dealing with a person of another race, and a negative experience results, it could be due to racism. Or it could be because that person had a bad day. Or it could be that you were having a bad day and 'came off' the wrong way. Or it could be a miscommunication. Or even just a perception (i.e. that person treats everyone the same s***y way).

How do we know? You are, after all, relying on what others have told you, not necessarily from first-hand experience. We can't read minds so what ways are there that can inform conclusions?

With regards to our exploration, how do we know we are really focussing on the challenge area of racism + poverty? Do we have mission drift, how do we know that we are we really focusing on the challenge area of Racism and Poverty?

The following questions can help us think critically about this subject and help refine our conclusions to have better impact.

1. What assumptions (list 3) must be made for your hypothesis that race + poverty had this impact?
2. How could you test each of these assumptions to know they apply?
3. What seems to be the "moment of truth" in the stories you heard?
4. In the examples in your research, swap the racial identities of the protagonist & antagonist (i.e. tenant and landlord). Would the same story take place? The same end result? Why or why not?
5. What role does gender play in this analysis? Would the same scenario unfold if gender roles were reversed?