# SOLUTIONS LAB ON COMMUNITY DECISION-MAKING TOOLS FOR HOUSING ISSUES

Community Data MicroLabs Engagement Package - A Facilitator's Guide

March, 2021

# CONTENTS

# 1   INTRODUCTION TO THE COMMUNITY DATA SOLUTIONS LAB

Solutions Labs co-develop innovative, bottom-up solutions to specific problems that have not been able to be solved using traditional approaches. Solutions Labs funding focuses on:

- resolving affordable housing problems within the NHS key priority areas and/or priority vulnerable populations;
- targeting the rapid creation of solutions such as technologies, policies, programs or standards;
- gathering a wide range of stakeholders, including those with lived experiences, to find solutions that are practical, replicable, implementable and deliverable within a realistic time frame;
- requiring inclusion of Solutions (Social Innovation) Lab expertise to advise on the design and delivery of the lab to achieve the desired results; and
- applying innovation lab tools and methods commonly used to solve persistent and complex affordable housing problems

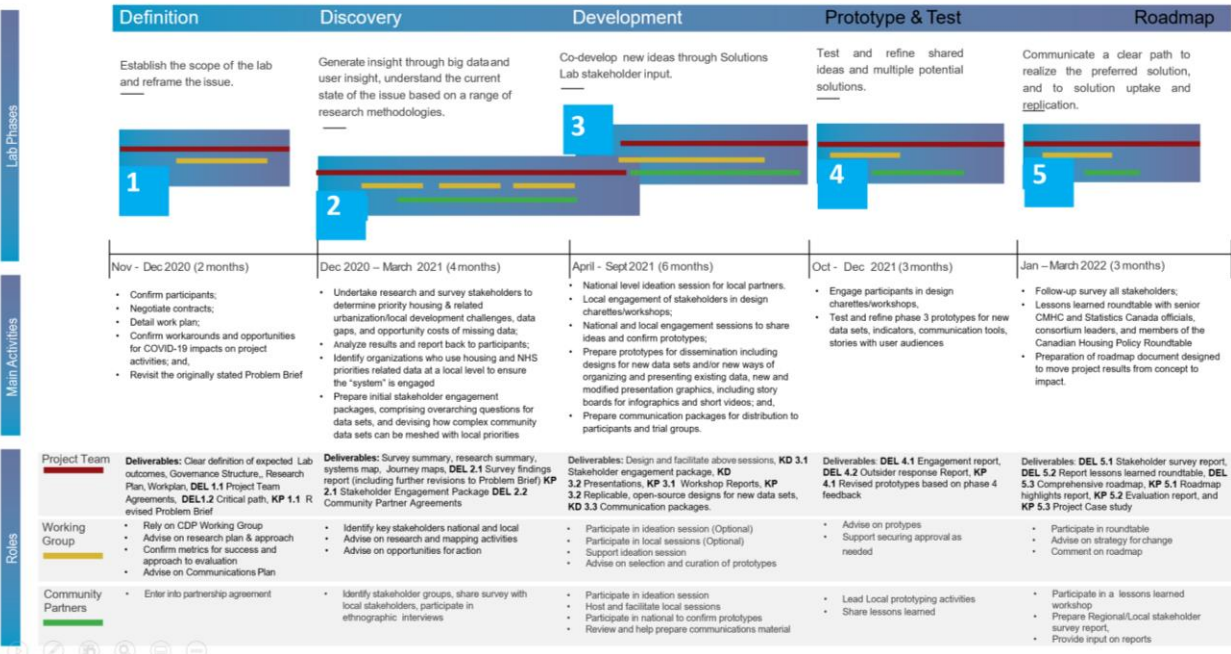## 1.1   COMMUNITY DATA SOLUTIONS LAB

With the financial support of the Canada Mortgage and Housing Corporation (CMHC), the Community Data Program of the Canadian Community Economic Development Network has launched a Solutions Lab project called "**Developing easy-to-use community decision-making tools to help achieve National Housing Strategy goals**". Working in partnership with municipal and community sector organizations active in the housing sector, the CDP Solutions Lab project will strengthen evidence-based planning and decision making using innovative methods and tools to transform municipal and neighbourhood scale data into better programs, policies and operational decisions. These methods and tools will respond to the real constraints of time and analytical staff support needed to apply data to housing-related decisions affecting neighbourhoods and communities.

The project is being delivered over eighteen months, from October 1, 2020, until March 31, 2022, in the form of structured and facilitated workshops, webinars, tools development and testing, and technical guidance. The project aims to integrate several innovations into the work of local planners, policy analysts, and decision-makers, including:

- Common indicators relevant to measuring housing results at the municipal and neighbourhood scale
- New data sources and uses of data, including data modelling
- Use of new software to support data visualization and data access
- Shared learning between provincial jurisdictions
- More effective feedback loops to better understand the impact of data on local decision making

# Community Data Lab: Solutions Lab Phases

CTLabs | The Lansdowne Group | 1

This solutions lab project seeks methodological innovation in data collection, analysis and presentation. This leverages many other elements of housing solutions: increasing initial understanding of problems and how they are related; supporting evidence-based consensus on solutions; assessing end results for accountability; and identifying further innovation opportunities.

| Lab Phases | Definition | Discovery | Development | Prototype & Test | Roadmap |
|---|---|---|---|---|---|
| | Establish the scope of the lab and reframe the issue. | Generate insight through big data and user insight, understand the current state of the issue based on a range of research methodologies. | Co-develop new ideas through Solutions Lab stakeholder input. | Test and refine shared ideas and multiple potential solutions. | Communicate a clear path to realize the preferred solution, and to solution uptake and replication. |
| | **1** | **2** | **3** | **4** | **5** |

| Main Activities | Nov – Dec 2020 (2 months) | Dec 2020 – March 2021 (4 months) | April – Sept 2021 (6 months) | Oct – Dec 2021 (3 months) | Jan – March 2022 (3 months) |
|---|---|---|---|---|---|
| | • Confirm participants;<br>• Negotiate contracts;<br>• Detail work plan;<br>• Confirm workarounds and opportunities for COVID-19 impacts on project activities; and,<br>• Revisit the originally stated Problem Brief | • Undertake research and survey stakeholders to determine priority housing & related urbanization/local development challenges, data gaps, and opportunity costs of missing data;<br>• Analyze results and report back to participants;<br>• Identify organizations who use housing and NHS priorities related data at a local level to ensure the "system" is engaged<br>• Prepare initial stakeholder engagement packages, comprising overarching questions for data sets, and devising how complex community data sets can be meshed with local priorities | • National level ideation session for local partners.<br>• Local engagement of stakeholders in design charettes/workshops,<br>• National and local engagement sessions to share ideas and confirm prototypes;<br>• Prepare prototypes for dissemination including designs for new data sets and/or new ways of organizing and presenting existing data, new and modified presentation graphics, including story boards for infographics and short videos; and,<br>• Prepare communication packages for distribution to participants and trial groups. | • Engage participants in design charettes/workshops,<br>• Test and refine phase 3 prototypes for new data sets, indicators, communication tools, stories with user audiences | • Follow-up survey all stakeholders;<br>• Lessons learned roundtable with senior CMHC and Statistics Canada officials, consortium leaders, and members of the Canadian Housing Policy Roundtable<br>• Preparation of roadmap document designed to move project results from concept to impact. |

| Roles | | | | | | |
|---|---|---|---|---|---|
| Project Team | Deliverables: Clear definition of expected Lab outcomes, Governance Structure,, Research Plan, Workplan, DEL 1.1 Project Team Agreements, DEL1.2 Critical path, KP 1.1 Revised Problem Brief | Deliverables: Survey summary, research summary, systems map, Journey maps, DEL 2.1 Survey findings report (including further revisions to Problem Brief) KP 2.1 Stakeholder Engagement Package DEL 2.2 Community Partner Agreements | Deliverables: Design and facilitate above sessions, KD 3.1 Stakeholder engagement package, KD 3.2 Presentations, KP 3.1 Workshop Reports, KP 3.2 Replicable, open-source designs for new data sets, KD 3.3 Communication packages. | Deliverables: DEL 4.1 Engagement report, DEL 4.2 Outsider response Report, KP 4.1 Revised prototypes based on phase 4 feedback | Deliverables: DEL 5.1 Stakeholder survey report, DEL 5.2 Report lessons learned roundtable, DEL 5.3 Comprehensive roadmap, KP 5.1 Roadmap highlights report, KP 5.2 Evaluation report, and KP 5.3 Project Case study |
| Working Group | • Rely on CDP Working Group<br>• Advise on research plan & approach<br>• Confirm metrics for success and approach to evaluation<br>• Advise on Communications Plan | • Identify key stakeholders national and local<br>• Advise on research and mapping activities<br>• Advise on opportunities for action | • Participate in ideation session (Optional)<br>• Participate in local sessions (Optional)<br>• Support ideation session<br>• Advise on selection and curation of prototypes | • Advise on protypes<br>• Support securing approval as needed | • Participate in roundtable<br>• Advise on strategy for change<br>• Comment on roadmap |
| Community Partners | • Enter into partnership agreement | • Identify stakeholder groups, share survey with local stakeholders, participate in ethnographic interviews | • Participate in ideation session<br>• Host and facilitate local sessions<br>• Participate in national to confirm prototypes<br>• Review and help prepare communications material | • Lead Local prototyping activities<br>• Share lessons learned | • Participate in a lessons learned workshop<br>• Prepare Regional/Local stakeholder survey report,<br>• Provide input on reports |

A series of engagement activities are taking place at a National level (National Lab) and a local level (Micro Labs).

All meetings take place on Tuesdays starting at 1:30 pm ET

1. January 12, 2021: Virtual Orientation
   a. CMHC CDP Solutions Lab Working Group Terms of Reference - January 12, 2021 (.docx)
   b. Notes - Solutions Lab Working Group Meeting January 12, 2021 (.docx)
2. January 19, 2021: Living Room Conversation on Housing Data
3. **March 2, 2021**: National Insight Generation Workshop
4. **April 8th, 2021**: Presentation of survey results and research findings
5. **April 22, 2021**: National level ideation session followed by microlab engagement of local stakeholder ideation sessions
6. **June 15, 2021**: National session to share ideas from local microlabs & confirm prototyping approach
7. **September 14, 2021**: Prototyping activities workshop
8. **November 9, 2021**: To Be Confirmed
9. **December 7, 2021**: To Be Confirmed
10. **February 8, 2022**: Lessons Learned Roundtable / Road map engagement session
11. **March 8, 2022**: Sharing project results and transition to post-project implementation

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## 1.2 PURPOSE OF THE FACILITATORS GUIDE

The purpose of this facilitators guide is to provide an overview of the engagement activities that will take place are part of the micro lab. This guide is a resources for micro lab facilitators who are leading engagement activities in their Province or community.

## 1.3 PROJECT CONTACT INFORMATION

**Community Data Program Team**

| Name | Contact info | Role |
|------|-------------|------|
| Michel Frojmovic | michel@communitydata.ca | **Project lead, welcome participants** <br> **Small group facilitator** |
| Mary Clarke | mary@communitydata.ca | **Driving Adobe Connect, small group facilitator** |
| David Crenna | principal@prioritydecisiondata.com | **Housing expert, present research and participate in breakout group** |
| Mike Ditor | mike@communitydata.ca | **Small group facilitator** |
| Saeideh Hejazi | saideh.hejazi@gmail.com | **Support, survey findings** |
|  |  |  |

**Facilitation Team National Labs:**

| John Purkis | jpurkis24@gmail.com | Lead Facilitator |
|------|-------------|------|
| Fiona Wright | **f.wright@lansdowne.com** | Co-Lead Facilitator |
| Phil Culhane | **p.culhane@lansdowne.com** | Back up Co-Lead Facilitator |

Local Facilitation Resources

| (You) |  |  |
|------|-------------|------|
|  |  |  |

## 1.4 MICROLABS

The MicroLabs are the segment of the overall Solutions Lab that connects to end users and decision makers in communities.  The MicroLabs are designed to gather local level experiences, needs and insights from individuals, organizations, and regions.

**Microlabs are designed to:**

- Review and discuss issues and assumptions from the draft challenge brief and related research
- Gather input on how housing related data is currently generated and used locally
- Identify local needs and barriers to meeting those needs
- Discuss how housing related data could be used to help inform decision making in the future
- Propose ideas for how to better get good data into a form decision makers will use

## 1.5 WHO SHOULD BE PART OF A MICROLAB?

A key principle in solutions labs is to include representation from all parts of the system the lab is aiming to identify solutions for. It's important to be able to unpack problems and explore insights and ideas across sectors, silos, and people, and look at issues from multiple perspectives.

All microlabs should include representation from the following groups:

- Community Data holders
- Community data gatherers
- Local level decision makers – from both the public and private sectors
- Provincial data holders

## 2  PHASE 2: INSIGHT GENERATION: LOCAL MICROLABS

### 2.1  ENGAGEMENT PURPOSE

The purpose of this event is to:
- Provide a brief overview of the CDP Solutions Lab
- Review and discuss issues and assumptions from the draft challenge brief and related research
- Gather input on how housing related data is currently generated and used at a local level
- Discuss how housing related data could be used to help inform decision making in the future

### 2.2  YOUR MEETING INFO:

**Meeting:** Community Data MicroLab: Generating Insights into data and decision making

Date and Time:

Location:

Teleconference number:

Event Set up:

Materials:
- PPT Deck (outline provided)
- Mural Whiteboard Platform
- Challenge Brief

**Audience:**  Who will be attending your MicroLab?
Try to get people from across your local system:
- Local Municipality
- Local private sector
- Local academia
- Who else?

### 2.3  PRE-EVENT

1. Please ask participants to read through the **Challenge Brief** (provided in advance of the session)
   a. The Challenge Brief includes:
      i. A description of the problem we are seeking to address
      ii. Some of the current challenges within that problem space
      iii. Some draft insights
2. Share Agenda, Adobe meeting link and Mural Link in advance with your participants

### 2.4  EVENT

Agenda:

1. Introductions

2. Overview of the CDP Solutions Lab

3. Challenge brief and research

4. Group discussion

5. Next Steps

| Time | Agenda Item | Lead | Supporting Materials | Notes |
|------|-------------|------|---------------------|-------|
| **1:15** | Open Meeting for team and Tech Checks | | PPT slides Mural Link | |
| **1:30** | Welcome & Housekeeping | | | Brief Welcome and Technology orientation Mural intro |
| **1:35** | Welcome/Opening | | | Welcome everyone, Thank participants for attending, introduce yourselves. |
| **1:40** | Introduction to the workshop (10 mins) | | Slide: agenda, objectives<br><br>Slide: Please introduce yourself name, organization, and your response to the following question: | Purpose of Today's Meeting<br><br>Introduce Mural. Ask people to write their name on a post it and put it on the map as a way to get comfortable with Mural. Then do a go around and invite people to introduce themselves, their role, and how they work with data. |
| **2:00** | Project Overview | | Slides: Project Overview and status update<br>- Context<br>- Problem<br>- Phase | Brief overview of the CDP Solutions lab. Questions? |
| **2:10** | Information leveling – Challenge Brief Overview | | Challenge Brief<br><br>*do not assume people will have reviewed it. Ask, but plan to go through key findings. | Introduce the challenge brief and go through the highlights:<br><br>What has the national research phase found to date? |

| | | | | |
|---|---|---|---|---|
| | | | | What are the issues, challenges, and opportunities?<br> How does housing data flow in the system?<br>Where are the gaps currently?<br>What is preventing organizations from using housing data to make better decisions?<br><br>What are the best practice examples?<br>Etc. |
| | Check in Question:<br>What do you see as the biggest issues involved with connected good data with local decision makers? | | | |
| | Discussion Questions<br><br>i.  Based on the overview and information covered in the challenge brief what is missing?<br><br>Please write your responses on a post it on Mural, or in the chat box, and/or share verbally.<br><br>Facilitator note: As participants are writing their comments group common ideas. For those participants who are not comfortable writing ideas in Mural let them share their comments and write them down, or ask them to use the Adobe Chat<br><br>More specific framing questions<br>     1.  Are the issues identified in the National Lab also present/relevant in your local context?  If not what's different? What is missing that you can add?<br><br>     2.  What types of decisions do you make that require housing related data? Consider the scale at which the decision is being made.<br><br>     3.  What data and/or data format do local decision makers find most useful?  What kinds of data formats do local decision makers find most useful?<br><br>     4.  What challenges and barriers exist for local decision makers to access and be informed by good data? Consider systemic challenges, data formats, data ownership, accessibility, timeliness, etc.<br><br>Optional: | | | |

| | Who else do you think we can invite to the table to help us better understand these issues and to help identify and prototype potential solutions. Who is not here that needs to be engaged? | | | |
|---|---|---|---|---|
| | | | | |
| **3:05 – 3:20** | Brief summary from each group | | Ask each group facilitator to highlight 2-3 insights from their breakout group | |
| **3:20** | Next steps for Engagement & Closing Remarks | | Slide with overview of national and local (micro lab) sessions. Updated Challenge Brief | |

## 2.5   DETAILED FACILITATOR INSTRUCTIONS

Please have the Mural open on your own screen, and once people join the session room, SHARE link in the chatbox and invite them to open it.

Welcome people to the session. Invite people to click the link in the chat box and open a mural if they are on a computer. If they are on a phone, they can continue to just participate via Zoom and use either the chat box to input, or speak.

Paste the following text into the Zoom chat box:

1. Your Mural link
2. The discussion questions:

**Overarching Challenge Q:** What are the current challenges, barriers and opportunities to connecting decision makers with powerful, relevant, timely and understandable data in order to further empower evidence-based decision-making?"

Then say:

***Opening check in:*** What do you see as the biggest issues involved with connected good data with local decision makers?

Q1: Are the issues identified in the National Lab also present/relevant in your local context?  If not what's different? What is missing that you can add?

Q2: what are the housing-related issues and decisions that your region is grappling with?

Q3: What data and/or data format do you wish you had?  What do you have that is useful?

Q4: What challenges and barriers exist for local decision makers to access and be informed by good data? Consider systemic challenges, data formats, data ownership, accessibility, timeliness, etc.

Hit "Record" in the Zoom menu:

Script for your inspiration:

"Welcome everyone, we have the next hour or so to talk about the current challenges, barriers and opportunities to connecting decision makers with powerful, relevant, timely and understandable data in order to further empower evidence-based decision-making?

There are 3 main ways to participate: 1) speak, 2) share your comments in the Zoom chat box, and 3) type directly onto the Mural.

Navigate to Box 1 in the outline: How to add a sticky note
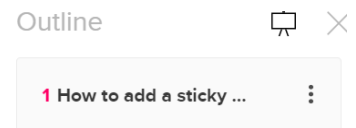
Click your personal profile icon on the bottom of the screen and click 'Summon' to bring everyone along with you.

Outline  🖵  ✕

1 How to add a sticky ...  ⋮

If you are interested in joining the collaborative whiteboard online, please click the link in the zoom chatbox. You'll need to sign in.

**Talk through Adding a Sticky Note:**  On the left of your screen there should be a set of tools that look just like this.  There are 3 ways to add a sticky note in Mural. The first is to double click on an empty sticky note already on the canvas, and type into it.  The second is to double click the screen where you want to add a note and one should appear. The third is to click on the sticky note icon, click the sticky note that is the size and shape of your choice, and it should appear in the middle of your screen, along with a set of controls right above it. You can click the magnifying glass to zoom in and see what you are writing.  When you are done writing, click outside the sticky note and drag it to wherever you want it to be on the canvas.
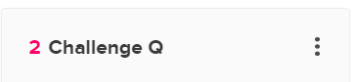
2 Challenge Q  ⋮

Navigate to Box 2: the overarching 'Challenge Q', and read the question.

Overarching 'Challenge Q':

"We have the next hour or so to talk about the current challenges, barriers and opportunities to connecting decision makers with powerful, relevant, timely and understandable data in order to further empower evidence-based decision-making".

Then say:
To answer this, we are going to explore some sub questions, all of which you will find posted on the mural. How this is going to work is that I will ask a question, and you can either 1) put your hand up to speak, 2) add a sticky note to the mural with your thoughts, or 3) add your thoughts to the zoom chat box**.**
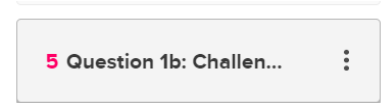
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Let's start with a check in: [click to Box 3:]

→ **Opening check in:** What do you see as the biggest issues involved with connected good data with local decision makers?
→ Debrief with the group (10 mins)
→ Navigate to Q1: Issues Validation
- Read Prompt on Canvas

5 Question 1b: Challen... ⋮

Q1. Are the issues identified in the National Lab also present/relevant in your local context?  If not what's different? What is missing that you can add?
→ Debrief with the group (10 mins)
Navigate to Q2: local decisions
Q2: What are the housing-related issues and decisions that your region is grappling with?
→ Debrief with the group (10 mins)

Navigate to Q3: Data and Formats
Q3: What data and/or data format do you wish you had?  What do you have that is useful?
→ Debrief with the group (10 mins)

Navigate to Q4: Challenges and Barriers
Q4: What challenges and barriers exist for local decision makers to access and be informed by good data? Consider systemic challenges, data formats, data ownership, accessibility, timeliness, etc.
→ Debrief with the group (10 mins)

Optional Qs for moderators if time / the conversation goes there
Optional Q1:
Optional Q2:
Optional Q3: Who is not here that needs to be here?
        Optional Q4: How do we ensure data meets the needs of decision makers at all scales?

FACILITATOR: PLEASE SAVE THE CHAT TO YOUR COMPUTER BEFORE THE BREAKOUT ROOM CLOSES
(click on the 3 dots beside the Chat title, and select Save Chat)

# 3   PHASE 3: DEVELOPMENT – IDEATION SESSION MICROLABS

Note: Design Content will be added as the session is prepared.

## 3.1   ENGAGEMENT PURPOSE

## 4   PHASE 4: PROTOTYPE AND TEST - LOCAL MICROLABS

Note: Design Content will be added as the session is prepared.