Episode 29: "Learn from Every RIDE"

with Alexis Gordon, Behavioural Insights Specialist with the BC Residential Tenancy Branch.

As the inaugural BI Specialist in the BC Public Service, Alexis Gordon is rightly excited about the future of BI in BC and beyond. Alexis shares insightful highlights from her experience in UBC's Advanced Professional Certificate in Behavioural Insights, including the crucial importance of thoroughly investigating the problem space during scoping and consulting with project partners early and often. Alexis also talks about how much you learn with every RIDE, whether your results are expected or unexpected.

Transcript:

KIRSTIN APPELT, HOST: Welcome to this edition of Calling DIBS. I'm your host, Kirstin Appelt, Research Director with UBC Decision Insights for Business and Society, or DIBS for short. Welcome to this edition of Calling DIBS.

Today, we're "Calling DIBS" on Alexis Gordon. Alexis is the inaugural Behavioural Insights Specialist within the BC Public Service. Alexis is also a graduate of the Advanced Professional Certificate in Behavioral Insights. I was fortunate to get to know Alexis through the certificate program, including getting to advise her on her capstone project with her team. I was really excited to hear that the BI Specialist role was created in the BC Public Service and that Alexis would be the first to fill it. So, I'm looking forward to hearing more today about Alexis's BI journey past, present and future. So welcome to the podcast, Alexis.

ALEXIS GORDON, GUEST: Thank you so much for having me. I'm so glad to be speaking with you and talking a little bit about my BI journey.

APPELT: Excellent. Well, let's just dive in. How did your BI journey start, Alexis?

GORDON: Well, anyone that knows me knows that I am, and always have been a very quiet observer. I've always been very curious about why people behave the way they do, why people make certain decisions. So, without really knowing what to call it or knowing it was behavioural insights, I've always been curious about people's behaviour. Even when we know the right thing to do, we don't often do it. Of course, the classic examples being going on a health journey or financial savings and that people aren't rational actors. I've always been very fascinated with that.

I floated around a little bit of my undergrad and ultimately decided on Anthropology. But the practical application in that field post university can be quite narrow. So fast forwarding again a few years I found myself working for, still do work for, the Residential Tenancy Branch and was seconded to work on a team to help transform its digital services. And this included things like new systems for staff and new processes and new services for citizens. And this surfaced all sorts of behavioural based challenges. So, this really sort of solidified my interest in how people behave and what makes people lean towards certain decisions. So, in a very, very small nutshell, that's sort of how my BI journey began.

APPELT: And for folks who may not be familiar with Residential Tenancy Branch, do you mind just taking a minute to say what that is?

GORDON: So the Residential Tenancy Branch is a branch of the provincial government that helps landlords and tenants resolve tenancy problems when they can't solve them on their own. If a landlord or tenant has a tendency problem, they can apply for dispute resolution with the branch, and a formal teleconference hearing will be held and a decision on the issues will be rendered. So that's how the Residential Tenancy Branch fits in. And, of course, we're building behavioural insights into that, into that culture.

APPELT: So it sounds like you're already alluding to it, but what led you specifically to pursue the Advanced Professional Certificate in Behavioural Insights?

GORDON: Well, going back a little bit to early 2019, I had first heard about the Behavioural Insights Group, which is a group of behavioural scientists and methods specialist with the government that collaborate with government organizations on tackling some of these behavioural challenges. So, we attended, I, along with some of my teammates, attended a session with BIG, called "Ride with US", where they talk a little bit about what they do, and they were looking for branches to collaborate with. So, we submitted an application based on some of the things we thought we could apply a behavioural insights lens to.

And this really, really piqued my interest in behavioural insights as a science and really, really got me interested in how small changes can influence behaviour and thinking "Okay, we're in this transformational continuous improvement mode at work, at the Residential Tenancy Branch. And this is really interesting. I think behavioural insights could really help".

So, through the Behavioral Insights Group, I heard about the Advanced Professional Certificate Program in Behavioural Insights and I thought this would be great to build or develop my own skill set, to be able to research, design, and launch, and evaluates behavioural insights trials, and make recommendations based on actual tangible data and ultimately help with delivering better products and services and sort of "nudge for good" as they say. And continuous improvement is sort of a core principle of our work at the tenancy branch, and behavioural insights is a great fit to help meet some of those core objectives.

APPELT: Yeah, and I think part of what I thought was interesting about your journey is that you were in a role that was focused on continuous improvement and change management. So, you kind of already had those skills. A lot of people who applied to the program do have some change management background. Did you find that was helpful in the program to have that background?

GORDON: Oh, absolutely. It's a very interesting way to tackle these problems from different perspectives. But having, you know, having focused on change management frameworks really helps in how you see a problem, and how you scope it out, and helps with how you use different ways to research, how you can tackle those change management problems.

APPELT: So, yes, definitely. And thinking about the whole program now, not just the early stages, when you were applying for it, what were some of the highlights of the program for you?

GORDON: I would say there were three particular highlights from the program. One, I really liked how the course is divided up into modules and there were various professors who taught those different modules based on their expertise. It brought a lot of different perspectives and experience. So that was definitely a highlight for me, as well.

Number two would be working on a capstone project that related, directly related to my work. So that was really interesting. And having that applied experience be part of sort of my everyday role was pretty cool because you got to put a trial into the field and see how it works. And it's part of your everyday work. So that was pretty cool.

And of course, applying my knowledge to this brand-new Behavioural Insights Specialist role so that, the course was one of the required components for that. So, at the end, having the Behavioural Insights Specialist role as a result was definitely a highlight personally.

APPELT: Yeah, that was a pretty exciting development that we were excited to watch happen. And of course, the program has its highlights, but it also had moments that were challenging, I'm sure. What were some of the aspects that you found challenging?

GORDON: Yes. For me, I'd say the statistical analysis piece was the most challenging. It was very many years since I've flexed that muscle. It was a challenge for me to sort of remember some of the concepts. And, of course, when we were doing our capstone project, applying statistical analysis to all the data and knowing which formulas to use, and things like that was challenging. But of course, we had the support of the professors and our fellow teammates to help with that.

And I'd say the other challenge, which came with a very valuable lesson, was being flexible when the trial doesn't go exactly as you have planned and still a newbie in the RCT field. But based on my own experience, and having talked with other people that work in the field, that no trial ever goes according to plan. I would say having that flexibility and tempering your expectations was a very valuable lesson. But also, you know, made designing and deploying the trial challenging.

APPELT: Absolutely. I remember there were some scrambles leading up to launch was like, "Okay, well, we can't do that. Let's try this". And yeah, like you said, that's just typical. We just often find that a lab study you can plan it out, and, you know, you might have a few hiccups, but it is pretty much going to run. But when it's with a field partner, you realize, "Oh, wait, this data doesn't go into that database or we can't randomize this piece". So, we didn't sugarcoat it for you, you got the real experience.

GORDON: That's true. We got a little flavour of what it's like.

APPELT: Well, and speaking of the capstone project, your team gave the top-rated final presentation, which means you all will be giving a lightning talk at the Big Difference BC conference this fall. Can you give us a little preview about what specifically you were tackling?

GORDON: Yeah, yeah, I'm very excited about this. So, our capstone project was around looking at attendance to Residential Tenancy Branch dispute resolution hearings. As I mentioned earlier, a landlord or tenant could apply for dispute resolution if they have a tenancy problem that they can't solve. And what happens is there's a one-hour teleconference hearing that is scheduled. So, both landlord and tenant attend in front of an arbitrator to make a decision.

But when we started the trial, our historical data showed that in roughly 15 percent of cases, neither party showed up or there wasn't full attendance. And this is a problem because for landlord or tenant, this may mean that they're resolving their problem in a manner that doesn't align with the laws. And from a branch perspective, it means that if nobody shows up, that hearing can't be used for someone else that could use the help, and an arbitrator still needs to write a decision. It's not a great use of resources.

We wanted to look at ways where we could nudge or encourage participants to attend their hearing or if they didn't need it anymore, for whatever reason, to withdraw their application in a timely manner instead of just not showing up. We looked at different ways that we could tackle this, and we ultimately landed on redesigning some of the email reminders that the tenancy branch sends out and we redesign them with a behavioural lens in mind. So can we use things like consequence language or checklists or call to action buttons or different ways that we could nudge people to the optimal outcome, which is attending their dispute resolution hearing.

So, lots of interesting findings from that study. And it did surface a lot of other potential trials that we could look at as well in the future. But you'll have to attend Big Difference BC to see the ultimate outcome. But, Kirstin, maybe you could have me back in a year or so and we could talk about ways we've looked at some of the outcomes from that trial.

APPELT: Yeah, absolutely. I love that. A teaser trailer. So now everyone has to tune in on November 5th, 2021 to see this very exciting conclusion or middle point of the story, and then we'll come back next year. And so, you mentioned a little bit about some of the hiccups and surprises when you're doing a capstone project. In general, what did you think about the capstone project experience? How did it fit into the journey for you?

GORDON: Yeah, it was a really great experience. Some of the lessons that I've taken away from the capstone project is don't discount the scoping phase. So really think about the problem space and really pinpoint the behaviour that you want to tackle or influence. And I would say specific to the next cohort, of course, consider the time frame of the capstone project, and pick a problem where you can run and RCT or a trial either within those timelines or have a solid sample size by the end of the timeline. But yeah, I would say really, really dive into the problem space when you're scoping out a problem.

And again, just another lesson around that, based on our capstone project experiences, again, that no trial goes exactly as planned, and to temper your expectations because something will go right or wrong, and you have to pivot and be flexible. You can plan until the cows come home, but there will always be hiccups, so consult early and often.

So that's one of the takeaways from our capstone project experience. And one other thing is a colleague and friend recently reminded me that the value in a BI project or any project really is all the discoveries you make along the way and not necessarily the outcome. So don't always focus on that big sort of looking for that big significant result. Null outcomes can be just as valuable as those big flashy results, and that a lot of the value is in the process.

APPELT: Yeah, I think those are fantastic. I liked what you said about the scoping phase because I think we often get so excited about the project that we're like, "Oh. Emails. Change this, let's go.". And then you've closed off this entire part of the problem space, which may not be as obvious or as big, but actually might have bigger effects. There might be something more feasible to be able to make larger changes. I think that's something where it goes a little bit against human nature because we get so excited, but like to take that time and really explore the full problem space.

I think that's hugely important and kind of related to that, I liked your comment, you said consult early and often. And I think, when you're working with partners because you've got your capstone teammates, and then you've also got the client, and for you, which is your own employer. But then also it's not just your direct reporting structure, but the data teams. And so, making sure everyone is consulted because a lot of times in the different projects they'll be like, "Oh, wait, this person needed to be pulled in and we didn't pull them in".

So as part of that, exploring the problem space, also thinking about all the different teams that will need to be involved and getting them on board early.

GORDON: That's right. And sort of, I think one lesson, a valuable lesson our project team took away is sort of don't, like you mentioned, don't get hung up on certain nudges or super, you know, you get super excited about doing all these crazy RCTs. But really, you really have to hone in and sort of temper your expectations on what's feasible, what's realistic. And you can still have a great trial based on that.

APPELT: Yeah, absolutely. And then, I also just, I thought, I liked all of what you said. So one other thing I wanted to pick up on, I liked what you said about the discoveries along the way because I think, you know, we often say that null results are as informative, but people don't really until you've done a project yourself, you don't realize just how informative those null results can be and how much you learn. With your project in particular, I think as you went through, we found all these other cool places where there was data that the RTB maybe haven't looked at in a certain way and didn't realize what was going, that there might be an opportunity or that, hey, it turns out there's this other thing that might make a bigger tweak. So, you learn so much about the problem and, of course, the process. So now all of you and the RTB have so much experience with this; you can just really grow and take it further. I think that's really neat as well.

Well, now that you're a few months out of the program, are there any, besides the capstone, are there any other particular lessons or experiences that have really stayed with you?

GORDON: Yeah, well, I would have to say that the biggest one is the lesson around the value in the discovery, and so don't discount that at all and don't just focus on the outcome. But I have to say, that was my biggest takeaway because it's so easy to sort of become a little bit discouraged or bummed out if something doesn't go according to plan. But that's absolutely how it goes. And it's just as valuable as sort of null results or something not going according to plan because all of these other things may surface, and you might find an even better approach to take.

APPELT: Yeah, I think it's interesting because a lot of times when you first hear about BI, whether it's in a podcast or reading nudge or doing a webinar, you hear all these success stories. So, you think, "Oh, this just works every time. This is going to be great.". But then learning that, no, it's the result of lots of experimentation and that the failures don't get as much air time, but the failures are critical for the successes. I think that's a huge piece.

Well, we alluded to your new role that was created in late spring. Can you tell us a bit about the new role? It's a pretty exciting one for the BC Public Service.

GORDON: Yes, I'm very excited and honoured to be the first BI Specialist in the provincial government. I take it very seriously, and I want to do very well in this role. It's the first Behavioural Insights position that is embedded within an organization as opposed to acting in that sort of consultancy role like the Behavioural Insights Group.

It's really building that internal expertise where addressing behavioural based challenges can be folded directly into the organization's culture. And so even if we're not running full-blown RCTs on every problem, we have the expertise or skill set to apply BI concepts and frameworks or that BI lens to optimize services and products, of course, in an ethical and cost-effective manner and using data to back it up wherever possible.

So, the big sort of, the big difference here is that the role is actually part of a branch or organization to start folding it into the culture. I'm hoping, I'm still learning and shaping it and learning how to sort of maximize the

success of this role. But I'd really like to start building a backlog of behavioural insights challenges that the organization is facing. So just like all of the other priorities that the branch is working on, we look at it with a critical lens, we see how it fits in with all of the other work that's happening, but really building in that continuous improvement resiliency into the organization. And I think this role is key to that.

Continuous improvement is built into our mission statement. The team that I am part of is called the Innovation and Continuous Improvement Team. It's really at the core of what we're doing. And sort of to meet that principle, behavioural insights is such a great way to build that in and to meet that objective. Because, you know, what better way to continually improve products and services than to look at it with a critical eye and apply that sort of scope RIDE scale model to it?

APPELT: Absolutely. Yeah. And so, you just mentioned that it's part of the Innovation and Continuous Improvement team. So how does the team use the different innovation approaches together? Are they separate people gluing different approaches? Does each person do multiple approaches? How does that work for the team?

GORDON: So, we're a small team that's part of the Branch itself. We use a few tools that are core to our success. We have an innovation roadmap, a digital service roadmap, a product roadmap. And I may have just lost half your listenership, saying all that, but it's really key to our success. We reset our mission and vision every year. We have very clear accountabilities on our team, and I think that's key to our success.

Again, that continuous improvement piece that is so critical, having the Behavioural Insights Specialist role really helps with that. And we have very sort of clear and defined priorities and our very, very mission-driven. So, building products and services, again, making them the best for the people that use them, and applying those behavioural insights lenses really helps with that. And I would be remiss if I didn't mention our partner vendor Hive One as well, who really shares our vision and helping us build our digital services and who has really sort of helped adopt that continuous improvement mindset as well. We did, a little plug here, we did launch Canada's first enterprise open-source dispute resolution service.

What all that jargon means is that we built from the ground up, a very cool online application that landlords and tenants can use to apply for dispute resolution and of course, when you're applying for dispute resolution as a tenant or landlord, you're under duress because your tenancy is at risk. Your housing may be at risk. So, you can imagine all of the behavioural based challenges that come along with that.

That's sort of where we're kicking off some of our work around optimizing how the behaviour, how landlords and tenants interact with our system, and how we can make that the most efficient as possible without impeding any freedom of choice there.

APPELT: Yeah. And I think part of what's really neat there is that it is these different approaches coming together and also, like you said, Hive One and the RTB and just all these different approaches coming together, different perspectives and partners. And I always say that I don't think I've ever worked on a behavioural insights project alone. It's always been with a variety of people with different backgrounds. And I think that just makes the projects and the end results, whether it's a product or service or something else, so much stronger.

GORDON: Absolutely, yeah. On our team, we have people that specialize in data, and product management, and looking at processes and our Solution Architect who does all of the digital service piece. So yeah, we all come to the table. Nothing's done in isolation, and we all bring our expertise to the table and our different

perspectives. I think that's part of why we're such a cohesive team. And yeah, it works really well. And I don't think any BI trial would be successful without sort of those different teams coming together.

APPELT: Yeah. And then I think at the same time, it does make it, it keeps it interesting, but it also raises challenges because it makes you really analyze your own jargon and everything. So, you have people speaking their own different languages and you realize like you're talking about the same exact thing, but using different terms or you're using the same term to talk about different things.

GORDON: Yeah, absolutely. Yes. Clarity is key. Yeah, yeah.

APPELT: Yeah. And I think that's like thinking about the EAST framework. I think that helps us a lot of times; you know, we say make things easy, attractive, social, timely, but then in our own communications, we don't. So, it's a good push to always keep things easy and so you can collaborate and communicate across the boundaries.

GORDON: Yeah.

APPELT: Well, thinking more about the role, are there ways that you think the program helped you transition into the role?

GORDON: Yes, absolutely. So, prior to taking the course, I knew a little bit about the different terminologies, System 1, System 2 thinking or choice architecture. But I didn't really know what that meant in a practical sense. So, one of the things I really liked about the course is the first half being concepts and frameworks and sort of learning about behavioural insights as an area of study and the last half being that practical application. And I think, well, it was absolutely integral in this Behavioural Insights Specialist role, having that sort of on-the-ground experience running, sort of scoping, designing a trial and putting it in the field, and then analyzing it and making recommendations. Having that experience absolutely sort of open the door to all of the other possibilities for running a trial particularly in the Residential Tenancy Branch.

But perhaps even going beyond that, I should mention, right now we're working with the Behavioral Insights Group on a project that is related to digital evidence. So I can't say too much, it's preregistered and embargoed. But I can talk a little bit about the problem spaces around courts and tribunals or are going online now, and which means a lot of people submitting things, evidence online, and that can cause issues around quality, quantity, and organization. One of the problems we're tackling right now is, is there a way we can improve or influence people to provide the right sort of quantity, quality of evidence? And I think this is a problem space that is happening globally and it's growing. And I think that's where behavioural insights can really help steer, design in the right direction. So, again, maybe if I come on a little later on, we can talk about the results of that that trial as well.

But, even just circling back to your question, having gone through an RCT or a trial design from beginning to end, really gave me that groundwork sort of, again, that roadmap, of how a trial works and some of the highlights and hiccups to look out for, speed bumps to look out for. So having that sort of on the ground experience, and now applying that to another even larger or more complex problem, really helped me, really help me in this role. And that skill set really allowed me to be a little bit more valuable on the team, I think.

APPELT: It's really exciting to see you go from being, I think in previous years, BIG was involved in some projects, and you were probably a bit of a more helper role. In the capstone, you're in the driver's seat for sure. And then now post certificate, you're getting to continue to do that. And that's really exciting to see that you have kind of a pipeline of projects now, which is kind of our dream for grads. So living the dream!

GORDON: Yeah.

APPELT: Yeah, and reuniting two thirds of the capstone project team.

GORDON: That's right. Yes.

APPELT: Anything else about your role? Like, are there any other ideas or skills you mentioned kind of a richness of ideas and skills from the program that you're using, but was there anything else you wanted to mention there?

GORDON: Yeah, well, just one of the other objectives that I'd like to meet with this role is around advocacy for behavioural insights just as a discipline and particularly within government. Looking at ways to sort of help spread the word about the importance and value of behavioural insights, perhaps looking at if there are ways we can have more Behavioural Insights Specialists within government, and sort of grow that role a little bit. I'm pretty, pretty excited about that. And just making behavioural insights more accessible to people, which I think is another benefit of the Advanced Behavioural Certificate course, is that, you know, without becoming a full-blown behavioural scientist, it's a way for people to increase their knowledge and their skill set around behavioural insights and making it accessible to people who are sort of enthusiasts, but taking them to that next level and slowly embedding that into various organizations.

APPELT: I love kind of your plan for how you'll use BI in projects and like you said, and advocacy. Are there things that you're seeing in behavioural insights right now that you're excited about, developments or things that are happening?

GORDON: Again, I am a sort of new to the area, but I feel like BI is in good hands. I, I see the podcasts and the books and the government roles and more nudge units and it sort of makes me excited to see that BI seems to be in good hands and is growing. And that's pretty exciting.

APPELT: It's really been thrilling for me to see it. It's been expanding globally, but seeing it expand locally is just as exciting. It's nice to see that BC is really starting to have a flourishing community. And are there things you'd like to see as our local community grows and develops? Are there things you hope the community does?

GORDON: Well in terms of just spreading the word, I mean, it would be you know, I'm looking forward to some in-person eventually, in-person events, but, of course, virtually makes it more accessible to people. Yeah, just communities of practice. All the great work you and your team are doing, you know, maybe starting, not a book club, maybe a BI journal club where some like minded people get together every month and talk about maybe some trials that are going on, and what's working and what's not, or coming to the table with a problem and how can we apply BI lens to that and just sort of building that BI awareness in the community, even locally, it would be pretty exciting.

APPELT: I love the idea of journal clubs, and other regular get togethers that might be part of your BI Specialist role as you plant the seeds for more by specialists.

GORDON: Yeah.

APPELT: Well, I think we're just about out of time, but do you have a message for our new cohort of practitioners in training?

GORDON: I do, I have a few messages. I would say, one is talk to your fellow classmates. You all have a common interest. Get to know one another. Everyone has such diverse experiences and where they are on the spectrum of knowledge and BI and that's pretty cool. I would say commiserate often, especially when you're in the capstone project phase. You can be, you know, become quite heads down in your own project. And sometimes you may feel like you're the only project team going through these certain challenges. But talk to your other teams, and you'll soon learn that everyone's sort of in the same boat in terms of their challenges. Ask a lot of questions. One of the benefits of this course, as I mentioned earlier, is that there's a whole breadth of professors and people that are there to help you learn. And I know that they're there to share their experience. So, take advantage of that.

And lastly, I would say make your team meetings fun. My team, we always joke that we spent more time with each other than we did our own friends and family for a little chunk of time there. So do whatever you can to make it fun. We had some data parties over a few weekends just to make looking at spreadsheets a little more fun and yeah, get to know each other and support each other. And it's a pretty cool experience. So, enjoy, enjoy the RIDE, so to speak.

APPELT: Yeah, I love that. And I want to single out your team because I really like, and as you know, I've appropriated your use of the Question of the Day. Your team always opened every meeting with a question of the day, and it was often something quite random, like what was the first tape, cassette tape you ever bought, or first CD you ever bought? Or like what is the hobby you would you would get? And I just thought that was such a fun way to build rapport. And so, I have been using it in my own meetings. I definitely would advocate for more teams doing that.

GORDON: Admittedly, I did, pooh-pooh the idea at the beginning, with the classic eyeroll icebreaker, but it quickly became one of the parts of the meeting I look forward to. And I learned so much about my teammates and I'm happy to call them friends now. So, yeah, make them fun and enjoy it.

APPELT: Yeah, absolutely. Awesome. Are there any last thoughts you have, questions I should have asked and didn't?

GORDON: Well, I thought I would cap off the conversation with an ice breaker, even though it's a little bit backwards. But I thought the ice breaker for the listeners is, and of course this has nothing to do with BI, but that's the joy of an ice breaker. If you could only have three apps on your phone, which three would they be? So, I will leave you to that to ponder.

APPELT: Now I'm going to be thinking about that for the next hour. That's a good one.

GORDON: You're welcome.

APPELT: Well, thank you, Alexis. It's been lovely to get a deeper dive into your BI journey and just to get to chat, as always. And I can't wait to see what you continue to do with the BI specialist role. I think you're really going to make something of it, and from the outside, quite excited to have you in the role, and see how you how you take advantage of it. So, thank you for joining us today.

GORDON: Thank you so much. I had so much fun chatting with you.

APPELT: And thanks to our listeners for joining another episode of Calling DIBS.