



## Episode 59: "Leave Room for Learning"

*with Shannon McDonaugh, Program Manager in Behavioural Insights at the Nova Scotia Outpost for Public Sector Innovation*

*Shannon McDonaugh completed UBC's Advanced Professional Certificate in Behavioural Insights to have a methodology for how she uses BI to help improve the lives of Nova Scotians. Shannon shares some of these projects as well as advice for how individuals and organizations can start using BI ethically and thoughtfully. A key recommendation is to make space for learning during all phases of BI projects and all steps of our BI journeys.*

*Transcript:*

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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. Today, we're 'calling DIBS' on Shannon McDonaugh. Shannon is a Program Manager in Behavioural Insights at the Nova Scotia Outpost for Public Sector Innovation.

She's also a recent graduate of the Advanced Professional Certificate in Behavioural Insights, which means that for nine months, Shannon deftly navigated the time difference from BC to Nova Scotia. And our program was better for it because Shannon was a fantastic addition to the class of 2022. And I'm really delighted to chat with her today about what she's been up to in the last several months. So welcome to the podcast, Shannon.

SHANNON MCDONAUGH, GUEST: Thank you, Kirstin.

APPELT: Well, let's just start by having you tell us a little bit about yourself.

MCDONAUGH: Well, first, I just want to acknowledge that I'm speaking with you from Halifax, Nova Scotia, which is situated on the beautiful, traditional and unceded territory of the Mi'kmaq people. So, I guess, first and foremost, I'm a mom to a teenage boy, so he takes up a lot of my time and energy and a great joy in my life. I grew up in Montreal and I'm a little biased, but it happens to be my favourite city in the whole world. And I moved out to the East Coast, first to go to university, and then I guess in more recent years we came out here because of work opportunities.

I come to this work with a background in health. I was a Clinical Dietician in the acute care setting for many years in Ontario. But, like as you said, now I work as a Program Manager for Behavioural Insights at the Outpost for Public Sector Innovation. And so, we're situated with the Government of Nova Scotia.

APPELT: Wow. So, I'm starting to sense that there might be an interesting journey of how you went from health to something in government. So, we often use that as one of our starter questions. So, what was it like for you? What was your path to BI? What brought you to BI? How did it get on your radar?

MCDONAUGH: That's a great question. You know, I guess I'll start just as like I said, I have a background in nutrition. I have a Master's in Public Health. So actually, BI was a really natural fit. My job for many years was aimed at supporting patients and to help them make better decisions about their nutrition so they could support a healthier lifestyle.

So, for me, the step into the BI world was a fairly seamless step for me. But actually, sort of our journey starts a few years ago when we were trying to establish the Outpost for Public Sector Innovation, and we established it with a mandate to work with other government departments. So, we were looking at and trying to address many of those sort of complex, difficult challenges that are faced by governments right around the world.

And we wanted to use new, emerging methods or approaches always with that mandate of improving the lives of citizens of Nova Scotia. And so we knew that a lot of those traditional approaches that are used by governments are just-- or have not been sufficient to address a lot of those complex public policy challenges. You know, the question for us was always, well, how do we deliver better, more relevant public services if we're still using outdated processes, outdated policies, outdated practices?

We did a lot of research, and we actually, we look at BI as potentially a core program or service area along with systemic design. So, they're quite separate, but they're also really interesting, they offer a lot of impact. And so that's where we landed for our Outpost. And that journey has been really quite successful for us. And we're quite thankful for the support of the senior leadership within the department here at Service Nova Scotia, Internal Services, because they've really been a key to a lot of our success here.

APPELT: That's so interesting to hear about the idea of having an essentially an innovation department that's like we're going to look at new ways to solve these problems. And so, from having BI as part of that group, what led you to the Advanced Professional Certificate?

MCDONAUGH: Well, although it was an easy space for me to step into, you know, I was really looking at, well, how do I apply a methodology to do this work? So, I had done a ton of reading and I had exhausted all the sort of online options for courses. And I was really looking for that application of a methodology.

And I was super excited when I found the fundamentals course and noted that there is also an Advanced Certificate and that it was online. So that made it really accessible for me here on the East Coast and time zone challenges aside, it was really a great decision for me.

APPELT: That's wonderful. Well, I'm wondering if we can poke in a little bit into the job. So you said your title is Program Manager in Behavioural Insights. So, it sounds like behavioural insights is a core piece of what you do. So can you tell us a bit about how you're using BI at Service Nova Scotia, Internal Services.

MCDONAUGH: Yeah. So, you know, three years later, we now are up and running what I consider a full BI program. And its focus is strictly within the public service context. So we are, I guess, we're designed like a consulting service and we offer for different project teams across government the opportunity for scope to scale project. So we'll run RCTs if and when possible.

We've also partnered with academia, so we have an MOU with the CLARI Network, which stands for the Change Lab Action Research Initiative, and that is actually situated out of Saint Mary's University. And so, we're with a network of academics across universities in Nova Scotia.

And, you know, because we're really small, but we're a mighty team, and so it's been really nice to have that network available to us because they will just provide some research heft on some of our more complex

projects. And also, we offer a lens for those teams are just looking for a small tweak to something or were wondering about the behavioural context. So that aspect is also available in terms of our services.

And then lastly, we've created a BI course. So, trying to do some capacity building across the public service and the course is strictly focused on BI within the public service context. And it just gives public servants a teaser of what BI is, and what it could be for them when they're doing their projects. And s,o and we run that twice a year. So yeah, so that's the work that we've been doing.

APPELT: That's really interesting to hear. I love how you've got the different kind of pillars of the work, the more trial-based work, the lens work, and the further education work. And I think it's really great that you're partnering with academics because being in the academic practitioner world myself, I see how beneficial those relationships can be. It's really nice for the academics to get hands on access to data and to have these like really interesting questions outside of the lab. And great for you to be able, like you said, to have some research heft on the complicated design. So that sounds really fruitful.

MCDONAUGH: Yeah, it is really fruitful. And I think, you know, just having these conversations this morning, and it's, you know, how can we leverage these partnerships better, because everybody brings something to the table. And so, if we have these opportunities within our communities to partner, I think it's, you know, I think it's good for everybody. It's like you said, it's good for the academics, it's good for us. More importantly, it just brings potentially more impactful policy program or service to Nova Scotia. So we're actually really excited about that partnership.

APPELT: Yeah, it feels like a win-win-win where it's benefiting everyone involved and also those who are indirectly involved, like the end users of the policies, the people actually impacted by a policy.

MCDONAUGH: That's right. Yeah.

APPELT: You mentioned this idea of doing projects and lenses. Are there any specific projects you'd like to share and tell us a little bit about what's behind the curtain?

MCDONAUGH: Yeah, so we've had a few projects that have completed, a couple of them that are on the go. So anybody that's working in government, in BI, I think your listeners would know there's a lot of work supporting teams moving services, registration renewals, to that digital space. I think that's sort of been, there's a lot of work happening in that area, because COVID forced that conversation. You know, the digital space has really been so innovative for a lot of services. So, we have a couple of projects right now that we've done or that we have ongoing, looking at moving a service into that digital space.

So last year we completed a project with the Maintenance Enforcement Program within the Department of Justice. And so, Maintenance Enforcement Program actually deals with those individuals who have gone through the divorce process. And if you are the receiver or the payer of child support or spousal support, you're actually automatically opted into the Maintenance Enforcement Program.

And they had some outdated ways in which their clients would contact the program, and so they created an online service, this really easy to use, really intuitive, online service where their clients, whether you're a payer or a recipient, could find out about your case information, see any payments, send messages and those kinds of things that they had a large portion of the clients who had not actually registered for that for that program.

And so, we did an RCT with them last year where we designed three intervention matters against their control and sent that out. And we actually ended up with some great results on that. And then we were also able to

offer them some ways in which they can nudge their own staff, so not just the user of the program, but the staff. And it's encouraging people to register for the program.

That was just one sort of in depth. The other one that we're doing that you're aware of that we partnered with you guys at UBC. So, our Registry of Joint Stock Companies also has an online portal where they need people to renew a company. If you're a not-for-profit, if you are a corporation, if you are single, you have your own, you know, you're a service provider, you are mandated by law within the government, within Nova Scotia to register with the Registry of Joint Stock Companies.

So, every year you must renew your registration. And so, we're trying to increase the number of online renewals. And so, we partnered, like I said, with you at UBC and we are really excited about that work. We anticipate excellent quality work and so far, it's been it's been a great collaboration.

APPELT: Yeah, that's been really exciting for us and I think that's like another example, this great way to have win-wins. And maybe this one has a fourth win because we're also there's an education component as part of the project where people are learning about the doing of BI like you said before, it's not just learning the concepts but learning how to apply the toolkit.

MCDONAUGH: That's right. Yeah, exactly. It's been great, too, you know, so it's applying the toolkit, It's, you know, now we have another, another program within government that has been, you know, exposed to the process of BI. So yeah, so there's a lot of wins for this and yeah, we're just really excited about that partnership.

APPELT: And I think the shift to digital space too is really interesting because, you know, in private sector they might say, what do you mean shift to digital? We've been digital for a very long time, but a lot of public sector things are still bridging that space. And I think it's something where as we do more projects in the space, there's more lessons.

Your capstone last year was actually also shift to digital. And so, some of the lessons from that I find are informing these projects. I think a lot of the shift to digital nudges, there's a lot of cross-talk between projects in that space.

MCDONAUGH: Yeah, absolutely. And the other component of that too, is just because the digital space is there, not everyone can access the digital space. And so that's the balance, right, in government. So private sector and government we're just so different. And so, we have a responsibility if there's a service that people need to access or if there's something that you are literally mandated by law to renew on, you need to have access to a way in which you can communicate with government.

So, we can't necessarily remove all paper renew options and those kinds of things. Not everybody is comfortable in the digital space. Not everybody has, if you're living in rural parts of Canada, there isn't always reliable, accessible internet. And so, it's just trying to find that right balance. And so later we'll talk a little bit about ethics. But, you know, it's just always working and trying to find that balance of what's appropriate in this context, how can we innovate and do what's right, both for the citizen and for government?

APPELT: Absolutely. And I think that's why the shift to digital is such a good fit for a nudge as opposed to something like a mandate. It's not that we want to force people, but for folks who it is a fit to be online, it's a great way to figure out how to make that easy because a lot of times some of the issues are that it's a bit of a sludgy process to get online. And the more we can make that easy for folks to do for those whom its a fit, then they can do it.

MCDONAUGH: Yeah, exactly.

APPELT: Yeah. Well, something else I wanted to chat about is just a idea that I think we all have experienced the field of BI is really cooperative and there's a lot of sharing of lessons learned. And I know that Nova Scotia, when they were starting out, was talking to the folks in BC and I imagine other folks. So, I'm curious, now that you have some experience under your belt, what advice do you have for others who are trying to start BI practices within their organizations or in collaboration with organizations?

MCDONAUGH: Yeah, I think that's a great question. So, you know, if you're standing up a new program or even if you're just new to the field, I just recommend you make space in your business plan to learn and to be okay with learning from your mistakes. You know, doing this work in a complex system like the public service is really challenging. Like we have long standing programs, we have data issues.

You know, just because people provide information to government for use in one context doesn't mean it's available for use in other contexts. So, privacy, confidentiality requirements are always at play when we're looking at projects and sometimes, you know, the systems that have been designed for large mail outs so that there's no mistake. I work with teams where they send out 65,000-70,000 letters a year. They're not always designed to do an RCT. You can't always use them for those kinds of things. The flexibility isn't always there. I think it's just -- be ready for some of these challenges.

And the other thing is, spend a lot of time in the problem space, don't rush it. Just like pivot on project, accept that things aren't always going to be perfect. And that for me anyway, compromise has become my ally. And so if I do spend a good amount of time in the problem stage, if I don't rush it, I find that we mitigate a lot of areas where maybe we don't have to learn. Our learns aren't so hard.

APPELT: Yeah, I love that and I wanted to pick on a couple of threads there, but I really appreciated. So the first thing you said, the space for learning I think is so vital. I remember one group I worked with when they were first starting out, the folks they were reporting to were like, "Okay, so you're starting in September, we'd love to hear the results of three projects by December", and we're like, "Oh, no, that's not how this works. No, we'll be maybe done with scoping in December. We're not going to have the results.". So, it is something that takes time and you have to have that time.

And I think tied to that is also the space, like you said, for failure too because BI is a mix of like art and science. Like we have the intuitions of which solutions we think will work, but then they don't always work. So, you have to be able to try things and innovate.

And then I also really liked what you said about compromising, which is just so true that, you know, whether it's because of confidentiality or the system architecture or just the bandwidth of staff, you do have to figure out what compromises do you make where you're still able to do BI in a way where you're not kind of ruining the BI solution by making too many compromises, but you're making the right compromises so that you're actually able to implement something that is actually going to be able to go forward.

MCDONAUGH: Exactly. Because I think that at the end of the day, what can we, at the end of the day, certainly, the work that I'm focused on is program improvement. I spent a lot of time in that space. And so, you know, if I'm going to create something that can't be scaled up, it's just not practical, it's not something that we do, then there's no value add for the department.

It's really just to understand where you're at. The work can be done and it can be quality work. You just don't rush it, ask good questions, spend the time really scoping out the problem and working with the teams and the systems that you have in place and I have no doubt you'll find the path forward and you'll have value add for the team that you're working with. It's just a matter of understanding some of the bigger challenges that really just don't, maybe they exist in the public sector, or the private sector -- sorry, I don't work in the private sector, but you know, they don't have data issues. They mine data all the time. They sell people's data like you know, these kinds of things, they just don't work with the same challenges that we do. And our challenges are there for reasons and usually good reason.

APPELT: Yeah. And I think every real-world organization has challenges with RCTs, they might be different types of challenges. But I wanted to go back to that thing you said about scaling, because to me that's also an ethical issue, right?

If we're using government resources to run an RCT on something that can never be scaled, then that's a misuse of resources. Like if we're coming up with a solution, it has to be scalable, otherwise it's not good stewardship. So I think that's really important.

MCDONAUGH: That's very important. Yep. I completely agree with that.

APPELT: And it's actually interesting because some of our upcoming podcast episodes are going to talk a little bit more about this question of compromises, because I think that's something that comes a lot with expertise.

Your very first BI project, it's a little hard to say like, which things are okay to compromise on and which aren't because you don't necessarily have that feel for, "Okay, if we change this research design this way, is that going to take it too far?". I think that's something that for me myself, I found I've gotten a lot better over time is understanding which compromises to make and where to see if we can hold the line, if there's ways to. If you can only change a few things, which ones do you change, basically.

MCDONAUGH: Right, exactly. Yeah.

APPELT: And then the last thing I wanted to pull on from what you said is just the idea that whether or not you do a trial, there's so much learning that comes out of these BI projects. Sometimes it's just as basic as, "Hey, we have these two data sets and they don't talk to each other. Would be great if down the road you could get the data sets talking to each other".

Or is there a way that you could create a touchpoint with this audience who you really want to work with? Or maybe you just find something really interesting from the exploratory research like, "Hey, are you even aware that this specific barrier exists for this audience?" So, I find that if we do an RCT, the RCT results are crucial, but they're like one piece of a whole like compendium of insights that are coming out of the project.

MCDONAUGH: Yeah. And I would say like that was one of the successes of our MEP trial was there was the RCT and, and the results were great, but then there was a whole host of other insights that we were able to offer the team and that could be implemented that would further move their goals of getting people to register within their online system. And so, I mean, that was sort of the 'aha moment' I think, not just for me, but also for them, you know, based on some of these results and some of our scoping. And then you have like a full pendulum of opportunities to maximize people registering online.

APPELT: Yeah. There's just so many insights that come out of that. Just like you said, taking the time with scoping, with exploratory research, with each step of the process.

Well, shifting gears a little bit and thinking about the Certificate Program. I know you were doing your role before the program, but are there ways the program has skills or insights for the work you're doing?

MCDONAUGH: Yeah. It's like I said, I did the program, you know, to learn a methodology, the application of the theory and to have a real-world project to work on. And so, I actually have incorporated quite a bit of the course into my day-to-day job.

So, I had sort of alluded to a conversation around ethics like that ethics framework that has been provided. Like for me that's not just a checklist. So that's something that I keep sort of like on the corner of the project, and that I refer back to all the time just to make sure that, you know, depending on who we're working with because we work with project teams right across government, you know, just to make sure that we're always on the right side of the ethics conversation is really important.

So that's just one nugget of the program that I have really appreciated and that I use quite frequently. Yeah. And then just the other parts of it too, you know, sometimes like within government, there's, you know, there's competing priorities, there's changeovers in mandates. You know, there's budgets that happen every year. And so, we had a conversation about sort of "go, no go".

I remember at one point in terms of project and I really appreciated that too, it just allowed me to like I pick a time within our project and I look at and go, "Okay, where are we at? Are we meeting our target? Have we met the timeline?". I look at our project charter and then it's like, "Are we all still on board in terms of moving this project forward? Do we need to take a break? Is this still the priority that it was when you approached us and then we started the project scoping?". So, that's just another part of that that comes to mind that was really helpful for me.

APPELT: Yeah, I think that has been really helpful for my own project work as well. It's kind of this idea of applying BI to how we do BI, like if we're just in a project with sunk-cost fallacy, we're often like, "Oh, we've already invested so much staff hours in the project. We've already been working on it for so long. We've sunk resources into it. We got to keep going".

But forcing yourself to have "go, no go" points, I think you really evaluate the project with more clear eyes in terms of is this working, is it meeting everyone's needs? Are there ways we need to pivot it or even pause it or just stop it? So, I'm glad to hear that resonated for you as well.

MCDONAUGH It certainly did. Yep.

APPELT: And beyond those kinds of insights, are there any experiences that really stayed with you? Anything else you'd like to add?

MCDONAUGH: Well, I think really the other thing is like we talked a lot about statistically significant versus not significant data. And I think this is really important because I think not every result is going to be statistically significant. So, you know, for me, like my focus is not to publish in an A journal or B journal or anything like that, but it's sometimes managerially significant can be just as important, if not more important depending on the project team or the project. So, that that's also been a really helpful conversation for us.

And the other thing that's really stuck with me is just the importance of working with a team. I had a really, really good team to work with, with the Capstone Project. I was really fortunate to have met those two women and they were great. They're great to work with so that having good people to work with also translates into outside of the program into my job here with the Government of Nova Scotia, not everybody is fortunate to choose who they work with. I just also happen to have a great team at the Government of Nova Scotia, too. So that was also another key takeaway.

And then I think lastly, grow your network. So that's one thing that I've noticed with the BI community here is just people are really open to chatting and sharing information and there's so much you can learn from other people. So, take that opportunity to connect, whether it's me here in Nova Scotia or whether it's the crew down at BC BIG, they're so great. Or the BI team in Ontario. Everybody is really open and we've had some great conversation.

APPELT: Yeah, I love that because I think it is. Everyone's so excited about BI and the opportunity, so everyone's really excited to talk about what they're working on. And I think it's a great way to build those connections because there isn't I mean, we have various networks like the BIG Difference Network, there's no current like association with an annual meeting or anything. So, it is a bit on individuals to plug themselves into the network. But the network exists if folks plug them in.

MCDONAUGH: Yeah, the network does exist and people are willing to meet with you. So that's the other component of it, which is great. You don't always get that. So, I've really appreciated it, that's for sure.

APPELT: Yeah. Well. Do you have a message for our new BI practitioners in training beyond growing your network?

MCDONAUGH: You know, I read a lot of case studies, I think. And I want to say I heard Heather Devine in maybe with another podcast or another session that was involved with you guys, but she talked about doing as much reading as you possibly can, and that resonated with me. So, I'm going to reiterate that. Read as much as you can, books, case studies, whatever you can get your hands on.

Like I said, the community here is really willing to share and it's easy to learn from others and talk to as many people as you can. The space is really dynamic. There's so much going on and there's always something new to learn.

APPELT: Absolutely. I think that's a great one because like you said, case studies aren't static. It's not like, "Oh, the last case study was done, we're done, there are no more", like there's always new case studies coming out and then the newer, the more recent, often the more relevant it is.

So, it is a place where you really need to stay current to find out what the newest tools that are being applied and how they're being applied and what weird things are people finding or are they finding that something that was previously considered kind of a known finding is now, "Oh, it doesn't work with this group" or "there's some questions about it", so it's good to stay current. I totally agree. Well, any last thoughts, questions I should have asked?

MCDONAUGH: No, I don't think so. I just want to thank you so much for your interest and the opportunity to discuss the work that we are undertaking with the Government of Nova Scotia. Pleasure chatting with you.



APPELT: Well, thank you. It's been so interesting to hear, we've gotten to chat a lot before, but not really about the work that you're doing. So, it's really interesting to hear about what's going on in BI in Nova Scotia and it's exciting to see how you're continuing to use BI for good and also really ethically and thoughtfully. I think that's something that matters a lot to me. So, it's always really nice to see that that's being done. Thank you so much for joining us today, Shannon.

MCDONAUGH: Thank you.

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

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