

# Needs & Insights Webinar

For Aging by Design organizations  
By Overlap

Thursday, November 10, 2016

**Welcome!**

# Goals for today:

- Share how Overlap does analysis as part of a design research process
- Give you some basic tools for understanding the needs of the population you serve
- We are not asking you to do data analysis for this project

# In this session we will talk about:

- What need statements are and why they're valuable
- How to write need statements
- How to sort need statements to identify themes/insights
- How to turn what you learn into "How Might We" questions

**Please ask questions as we go!**

# What is a need statement?

A short sentence that describes what a person needs.

We use need statements to turn engagement output into single ideas that can be worked with to identify themes or insights.

# Why need statements?

- Simple, direct stories of what people need
- Breaks complexity down into pieces
- Inspires empathy
- Challenges assumptions

Example:

Understand the needs and experiences of people in the Waterloo area who have concurrent mental health and addictions challenges.



*to be honest with*

I need to not feel like I'm still  
failing

I need to not be alone

I need courage, but it's hard

I need to feel heard

I need someone  
understand me

*need someone to pick me  
up when I'm down*

I need a little hope

I need someo



# Dignity by Default: Design Principles

1. Identify the root problem (a diagnosis, trauma, etc.) and help me deal with it.
2. Take a proportionate and respectful approach to risk and safety.
3. Give me the best experience, as if I was your customer.
4. Act as one service.
5. Keep the door open for life.
6. Treat me like a person.
7. Offer hope and meaning.
8. Provide practical supports without judgment.
9. Acknowledge my courage.
10. Be kind.
11. Value connections.
12. Explain what's going on (before, during, after) without me having to ask, in a way that I can understand.
13. Help me feel safe. Assume I have trauma.
14. Strive for environments that are nice to be in.
15. Help me to find a purpose.
16. Teach me skills and how to actually apply them.
17. Bring back fun.
18. Truly customize my care.
19. Include and support my supporters.

**I need a blanket**



**“No one dies  
alone” policy**



# How to write need statements

- Work from engagement material or engagement notes
- Capture explicit and implicit needs
- Make smart leaps
- More is better than less
- Keep it simple—use stickies



# Try it yourself

- Find some sticky notes and a sharpie
- Or paper and a pen



## If you really knew me ...

you would know that  
I've taken on some form  
of caregiving for 20+ years.  
You would know the  
struggles of growing up  
with a chronically ill  
mother.

PLEASE DO NOT INCLUDE NAME, ADDRESS,  
OR OTHER IDENTIFYING INFORMATION.

Age: 34

Gender: Male

I am (check all that apply):

- An older adult
- A caregiver for an older adult
- A service provider for older adults

I consider my biggest challenge  
to be ...

Knowing when I  
can help and when  
I need respite

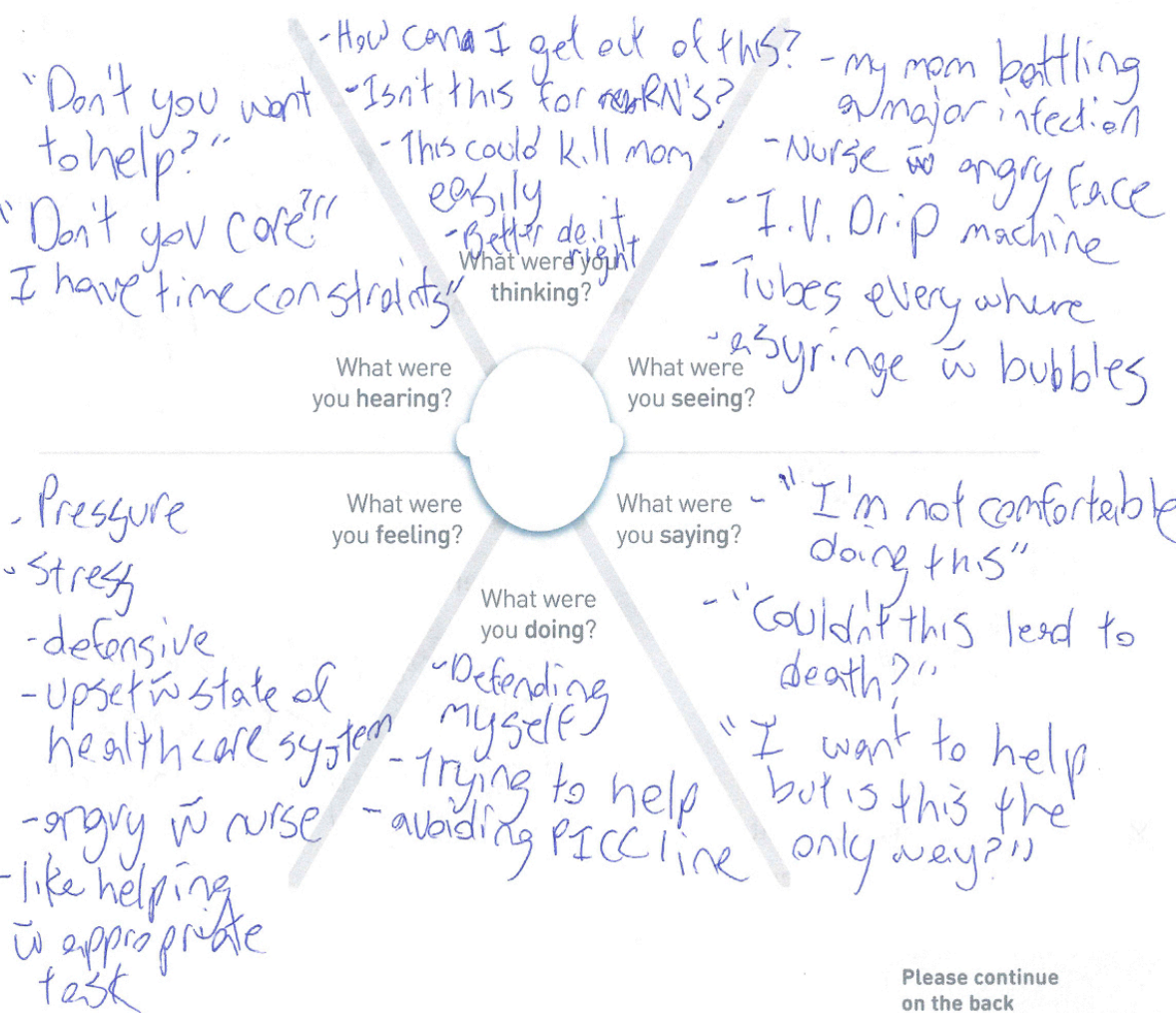


1. Tell us about your day yesterday, or a day last week.

What happened that day?

I was home when the <sup>home care</sup> nurse arrived and she wanted my help flush the PICC line

Help us understand your experience that day. Write in the spaces below to tell us what you were thinking, seeing, saying, doing, feeling, and hearing.



Please continue on the back

2. For the day that you described, or more generally...

What were you trying to achieve?

1. Help Home Care Nurse
2. Help mom get better
3. Flush PICC line

What do/did you need to achieve this?

1. Tasks that can't easily led to death
2. ↓ ↓
3. Proper medical training

What made it difficult to achieve this?

1. what nurse wanted my help with
2. Danger involved with requested help
3. How the nurse reacted when I said I wasn't comfortable

What single change would make the biggest impact for you?

A home care system which budgets time for a drip so that I can care give elsewhere

Please tell us a bit about yourself.

Age 34

Gender male

Zip Code NAP 116

I am (check all that apply):

- An older adult
- A caregiver for an older adult
- A service provider for older adults

I consider my biggest challenge to be...

How the healthcare system unload's tasks onto "free" caregivers no matter the risk,



I need to know that the Home Care nurse values my mom's safety over her own time

I need to help my mom to feel better

I need my mom's Home Care nurse not to be angry with me

I need the Home Care nurse to flush my mom's PICC line

I need ways that I can help that are suited to what I can do

I need proper medical training if I'm going to help with medical tasks

I need the healthcare system to stop unloading tasks onto "free" caregivers without regard to risks

I need to not have to defend myself to my mom's Home Care nurse

I need to not feel scared that I'm going to do something that hurts my mom

I need to feel comfortable with any caregiving tasks I take on, especially medical ones

I need the nurse to respect that I'm not comfortable helping with this procedure

I need to know that I'm not going to make things worse

I need to be aware of when I can help and when I can't

I need to balance self-care with caregiving

**Comments? Questions?**



# Identifying themes and insights



# Clustering need statements

- Don't predefine your themes
- Avoid creating groups that are generic and jargon-y
- Let the themes emerge on their own
- When you're done, name the clusters
- Use names that are clear, not cute

**Try it—cluster some of your need statements**



I need ways that I can help that are suited to what I can do

I need to help my mom to feel better

Help me support my loved one

I need to not feel scared that I'm going to do something that hurts my mom

I need to know that I'm not going to make things worse

I need to know that the Home Care nurse values my mom's Safety over her own time

I need to feel comfortable with any caregiving tasks I take on, especially medical ones

I need my mom's Home Care nurse not to be angry with me

Respect me and what I'm comfortable with

I need the nurse to respect that I'm not comfortable helping with this procedure

I need to not have to defend myself to my mom's Home Care nurse

Keep my loved one safe above all

I need the Home Care nurse to flush my mom's PICC line

I need the healthcare system to stop unloading tasks onto "free" caregivers without regard to risks

Appropriate tasks for formal and informal caregivers

I need proper medical training if I'm going to help with medical tasks

I need to balance self-care with caregiving

I need to be aware of when I can help and when I can't

Balance caregiving with self-care



**Comments? Questions?**

# Create “How Might We” (HMW) questions

- HMW questions are simple tools for highlighting focus areas to drive action
- Use themes and need statements to develop HMW questions

# How to write a HMW question

1. Choose a theme or need statement that you want to act on
2. Decide what you want to do about it (improve, increase, etc.)
3. For whom
4. Write it into a question that starts with “How Might We” (HMW)

- HMW help caregivers balance self-care with their caregiving role?
- HMW ensure that appropriate tasks are given to formal and informal caregivers?
- HMW support formal caregivers so that they can respect the boundaries and wishes of informal caregivers?
- HMW prioritize the safety of VOAs within the constraints of the health care system?

**Comments? Questions?**

**Thanks!**