



**UPSTREAM
MANAGEMENT
SOLUTIONS**

GOING UPSTREAM Newsletter

Issue #1 - April 2025

Welcome to *Going Upstream*, Upstream Management Solution's newsletter!

We'd like to introduce our consulting practice, to invite you to resources from our **first free monthly webinar on April 16th on Right Touch Regulation** and to take advantage of our time-limited offer for a **Complimentary PULSEChk™**. See below for details!



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We Want Your Feedback!

We've just launched our website at www.upstreammanagesolutions.com, where you can check out more details about us, our service, and in the near future, find free resources such as templates, briefs, newsletters, and webinars. Subscribe to our website for updates, webinars, newsletters, and free resources at <https://www.upstreammanagesolutions.com>. We will NEVER sell your email address to third parties.

Introducing Upstream Management Solutions

Upstream Management Solutions (UMS) is a boutique management consulting company, offering five PULSE pillars of excellence, experience, and expertise:

- **Policy Research, Development & Analysis**
- **User Experience/Human Centered Design**
- **Learning & Development**
- **Strategy/Strategic Planning, and**
- **Engaging Stakeholders & Partners.**

We help broader public sector organizations to achieve their mandates by solving their toughest challenges by going "upstream" to the source, instead of focusing on symptoms. UMS specializes in advising:

- Federal, provincial and municipal governments
- Profession-regulating and other regulatory bodies
- Hospitals, universities and colleges
- Agencies and special purpose bodies
- Member associations, and
- Non-profit organizations.

About Jordan Max, President



I'm a creative and seasoned policy and strategy professional with over 30 years of experience in public policy at the Ontario Government (including a Cabinet Office secondment) and Professional Engineers Ontario, where I was the Manager, Policy. I'm passionate about high-quality, evidence-based, and innovative public policy and regulation, and I want to help public sector organizations do their best work.

I understand the complex jurisdictions, governing legislation, and political dimensions in the broader public sector to deliver effective and durable solutions. I use a diverse toolbox including design thinking, agile project management, behavioural science, qualitative and quantitative research, adaptability, strategic thinking, change management, stakeholder engagement, risk management, collaboration, crowdsourcing and others to solve challenging problems.

What Does "Going Upstream" Mean?

You may know the following public health parable commonly attributed to Irving Zola, as cited in Dan Heath's book *Upstream: The Quest to Solve Problems Before They Happen*:

"You and a friend are having a picnic by the side of a river. Suddenly you hear a shout from the direction of the water—a child is drowning. Without thinking, you both dive in, grab the child, and swim to shore. Before you can recover, you hear another child cry for help. You and your friend jump back in the river to rescue her as well. Then another struggling child drifts into sight... and another... and another. The two of you can barely keep up. Suddenly, you see your friend wading out of the water, seeming to leave you alone. "Where are you going?" you demand. Your friend answers, "I'm going upstream to tackle the guy who's throwing all these kids in the water."

We apply this principle to our work at Upstream Management Solutions, trying to differentiate symptoms from problems, and problems from core problems, by probing and understanding the ecosystem in which the problem occurs, and finding durable solutions.

What's Unique about Upstream Management Solutions?

We're a boutique consulting firm, specializing in the broader public sector, and especially for smaller-resourced organizations who dream big and who need access to expertise and experience to get there and to help them grow. We practice by:

Thinking Holistically & System-oriented

We approach each project by first understanding it within its current ecosystem, users, history, and the pushes and pulls to yield insights and opportunities. We strive for holistic, system-oriented solutions that are durable because they capture all of the critical change variables.

Collaborating with clients to develop their future capacity

We believe that consulting is best performed when working collaboratively with clients who are the subject matter experts and deliver the solutions long after the contract has ended. We believe in helping clients to improve their own capacities through the consulting engagement.

Using Critical questioning and analysis

We will ask questions to challenge assumptions and test out theories or opinions, with evidence. We think strategically about everything, to know where things are going or likely to take us. We believe that frank and honest conversation produces better solutions and fewer surprises down the road.

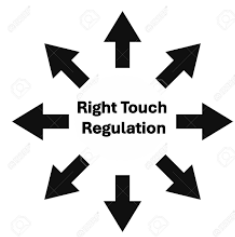
Providing Straightforward & Practical solutions

We won't inundate you with fancy jargon and complicated methodology. Our goal is to work with you to create practical solutions that are clearly communicated, implementable, and can be evaluated easily.

Going the Extra Mile

We won't upsell you for services or advice you don't need. We will strive to over-deliver and provide added value by suggesting improvements or things to ponder, now or in the future.

Right Touch Regulation Webinar Resources

**Extending Right Touch Regulation Across Your Regulatory Regime**

On April 16th, we held our first monthly free webinar, on Extending Right Touch Regulation Usage Across Your Regulatory Regime. A recording and the slides are now available to those who subscribe through the Resources page of our website (<https://www.upstreammanagesolutions.com>)

Future monthly webinars will cover topics like Upstream Problem Solving, User Experience/Human Centered Design, Employee, Practitioner and Volunteer Learning & Development, Strategic Thinking and Planning, and Stakeholder & Partner Engagement.

Subscribe through the Resources page of our website for invitations and access to recorded presentations and slides (<https://www.upstreammanagesolutions.com>)

Complimentary Upstream PULSEChek™

For a limited time, we're offering a free one-hour PULSEChek™ review of your organization's maturity levels of policy development, user experience, learning & development, strategy, and stakeholder engagement systems and tools. You'll receive a customized report with your scores and no obligation-recommendations to continue your journey. Book your PULSEChek™ today by sending an email to jordan@upstreammanagesolutions.com.

We Want Your Feedback!



Is this newsletter helpful to you? Drop us a line at jordan@upstreammanagesolutions.com to give me your feedback about what you like, hate, find "meh", or topics or questions would like to see covered in future monthly editions.

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