Case Study:
Adaptation Through Participatory Design

A collaboration between the Social Sector Accelerator and Oak Foundation
PURPOSE OF THIS CASE STUDY

The ability to adapt is a necessary skill of every grantmaking organization, and the events of 2020 have accelerated the urgency for grantmakers to successfully adapt and improve the support they provide their communities and grantee partners. Programs which were designed before the COVID-19 pandemic, the escalation of the crisis in the United States justice system and calls for justice for Black communities, and the world-wide financial crisis are not necessarily able to meet new and emerging needs. Participatory design provides a way for grantmakers to adapt their programs which challenges the notion of how capacity building works and who is an expert. It addresses some of the pitfalls of what has become the norm of much of the capacity building support currently on offer. Participatory design is one of many practices which can help dismantle the racism, sexism and elitism which exists in the world of philanthropy and giving, from the inside.

Participatory design, sometimes called co-operative design or co-design, is an approach to designing programs, processes, products which actively involves all stakeholders (e.g. employees, partners, customers, citizens, end users) in the design process to help ensure the result meets their needs and is usable.

This case study outlines how the participatory design process can work – in this case, in building organizational capacity for strategic communications.

Participatory design can:

- Provide a practical model for engaging key stakeholders in participatory design processes,
- Surface key questions and considerations to consider before embarking on a participatory design process, and
- Bring to light the differences between the types of supports grantmakers or capacity builders think groups need and the supports grantee partners identify and prioritize.
OVERVIEW

As a long-time provider of capacity building support, Oak Foundation (Oak) determined in late 2018 that they wanted to design a set of strategic communications supports for their grantees that would provide value across the diversity of issues on which their grantees work and a range of different country and local contexts. Oak engaged the Social Sector Accelerator (Accelerator) to lead a participatory process to design these supports, rather than prescribe a single approach or set of offerings. Working with Oak’s Programme Officers, Senior Adviser for Organisational Development and Capacity Building and Head of Communications, the project offered Oak grantee partners the opportunity to participate in both the development of, and receiving of, strategic communications capacity support. This project is not a prescription, but a different approach, which relies on both input and expertise of the participating organizations.

From the outset of our work together, the Accelerator and Oak agreed that the hypothesis that would guide our approach was:

"If we engage grantee partners in a thoughtful, meaningful and participatory design process grounded in assessment and action planning, then we will create an organizational strengthening program that is contextual to partner needs, is owned by them and thus enables them to achieve greater impact in their work and strengthens their connections to values-aligned actors in their fields."

Recognizing that “strategic communications” can have different meanings to people and organizations, we also identified a working definition to use for our shared starting point:

"Communications as a strategic approach linked to organizational mission or goals which includes designing and delivering messages to shape perceptions and/or strengthen support among those who can positively influence a cause, a campaign, or

ABOUT: OAK FOUNDATION AND SOCIAL SECTOR ACCELERATOR

Oak Foundation commits its resources to address issues of global, social and environmental concern, particularly those that have a major impact on the lives of the disadvantaged. With offices in Europe, Africa, India and North America, Oak Foundation makes grants to organisations in approximately 40 countries worldwide. To learn more visit - oakfnd.org

The Social Sector Accelerator helps grantmakers bring their mission and values into alignment with their practices, processes and programs. Using participatory design approaches, the Accelerator works with stakeholders during the program design development process to ensure the results meet their needs and are usable. To learn more visit - capacitydividend.org
PROJECT PHASES & ELEMENTS

Planning
- We engaged partners from Oak’s Issues Affecting Women, Prevent Child Sexual Abuse, Brazil and International Human Rights portfolios to identify eligible grantee partners
  - Programme Officers invited 24 grantee partners to learn more about the process via one-to-one virtual meetings with the Accelerator team
  - 22 organizations from 9 countries decided to participate and were divided into 3 regions (Brazil, South and Eastern Europe, South Asia) with 2 cohorts per region of 7-8 organizations

Diagnostic
- Overall 120 staff participated in the diagnostic process.
  - On-line, anonymous staff surveys were administered to a broad cross-section of staff
  - The Accelerator team created organizational profiles based on the survey results
  - Self-directed and facilitated reflection sessions were held with staff to align perceptions, improve understanding of staff roles and surface expectations

Co-Design
- Each cohort of groups identified staff to participate in 6 two-hour facilitated co-design sessions which were consistently scheduled, intensive and interactive
  - Sessions included a mix of presentations on new content, small group work, brainstorming and prioritizing exercises and expert Q&A sessions linked to the assessment results

Capacity Strengthening Pilots
- 22 potential pilot projects were developed (7-8 per region)
  - Each grantee partner provided feedback, and prioritized the pilots that were the most relevant and compelling to them
  - In some cases, where there was alignment, pilots were combined to create a more comprehensive and useful pilot
  - The Accelerator team selected 3 pilots per region to implement

Shared Learning
- The facilitators participated in a design session and after-action review at the end of the diagnostic and co-design phase
  - Participants shared their feedback during the co-design sessions and via a survey at the end of the co-design sessions
  - Feedback was gathered via one-to-one conversations to reflect on the experience thus far and what comes next
ADAPTING OUR APPROACH

Designed in late 2019, the program was slated to start in early 2020. Our pre-COVID plan for the Diagnostic and Co-Design phases included the following elements:

- Virtual on-boarding meetings with each organization (inclusive of members from leadership and communications team)
- A diagnostic, which included both an online survey completed by as many staff members as partners desired and facilitated reflection sessions with small teams of staff
- Three in-person design workshops that would yield 9-12 pilot capacity strengthening pilots
- Pilots which would be a blend of virtual and in-person capacity strengthening interventions

Once the COVID-19 pandemic began to take hold across the world and it became clear that travel was unrealistic, we adapted the in-person co-design workshops into a series of 6 virtual sessions for each cohort. Given the diversity of organizations and cultural contexts, we divided the group into 3 regional cohorts (further subdivided into 2 cohorts per region with between 14-18 staff participating) and recruited 3 sets of facilitators who were matched with each cohort. This change in approach required discussion and planning amongst the Accelerator team and the facilitators, as well as Oak staff and the grantee partners themselves. While the transition to virtual required significant upfront work, an unexpected benefit of adapting to a virtual program was the flexibility that virtual space offers so that more staff from participating organizations could participate.

To build our understanding of what worked and what needed to be adapted for the different regions, we started the co-design sessions on a rolling basis with South and Eastern Europe first, followed by Asia, then Brazil. This meant we could learn from each other and share materials. It also allowed us time to translate all the materials into Portuguese. The facilitators developed a baseline set of session materials (agendas, exercises, and activities) that the regional facilitation teams then adapted, based on the unique characteristics of cohort members and regions and the facilitator’s preferences and expertise.
PARTICIPATORY DESIGN IN DETAIL

The 6 co-design sessions followed a design arc of problem identification, solution ideation, prototyping and finally, cross cohort sharing.

01 Co-Design Kickoff:
Get to know one another and take a deeper dive into our organizational diagnostics

02 Strategic Communications Trends:
Explore innovations, strategies and tactics across the sector

03 Trends and Tactics Deep Dive:
Learn more about specific strategic communication trends and begin to explore what it would take to apply to your organization

04 Collaborative Problem Solving:
Engage in participatory process to gauge what it would take to put new ideas into action

05 Designing the Pilots:
Help shape the structure of the future capacity development sessions and how they should be delivered

06 Pilot Project Ideation with Partners from Same Region:
Start broad and then narrow in on a set of pilot ideas that the cohort will try
SHARED LEARNIG

While an important outcome from the diagnostic and co-design phases was a set of strategic communications strengthening pilots, we also wanted partners to derive value from the process and not just its outcomes.

97% of workshop participants felt that their opinions were respected and included during the co-design process, ultimately, helping the development of a meaningful program.

93% of workshop participants considered the content of the sessions to be relevant and timely to their work.

The benefits of the process, in our words and in the words of the participating organizations, included:

- An assessment of individual organizational strengths/growth areas that they “own”. “The diagnostic process, alone, is valuable to us.”
- Organizational consensus about priority areas for improvement. “We have greater clarity about where we are aligned and where we are not.”
- Thought partnership from values-aligned peer organizations. “It was great to meet all of you and have the opportunity to hear more about your experiences and the work you are doing, but also about the problems and challenges you are facing!”
- Clarity about the ways in which strategic communications can support their missions and the resources necessary to be successful. “Thanks for the care you are taking to meet our organizations unique needs.”
- Exposure to different strategic communications tools, tactics and capabilities in support of campaigns, policy change, behavior change using both formal and informal techniques. “Grateful that this was the most engaging, interesting zoom event that I attended. I was feeling all zoomed out but you restored my faith!”
- Modeling a process of collaborative problem identification and idea generation that partners can apply in their work. There was a healthy appetite to engage with and master new tools that allow for enhanced participation including voting/polls for example. “We appreciate this approach because of the flexibility and adaptability”

WHERE WE ARE NOW: CAPACITY STRENGTHENING PILOTS

We drew on the following “ingredients” from the diagnostic and co-design phases to develop the capacity strengthening pilots:

- Desired areas of focus from a collaboratively built list of trends, strategies and tactics within strategic communications; accompanied by a sorting of these priorities based on their importance and difficulty to achieve (see sample in Appendix A)
- Prioritization from grantee partners about the types of capacity strengthening approaches
with the greatest resonance (see sample in Appendix B)
• “Need to Have” vs. “Nice to Have” elements of capacity strengthening projects that
grantee partners identified (see sample in Appendix C)

The preliminary list of pilots include a range of projects, some that are for specific regions and some
that are for all three regions, such as:
  • Provide a roster of experts offering technical expertise in key areas (i.e. social media
  analytics) and a bank of “office hours” for partners to use to access expert support
  • Support strategic communications planning via small group webinars combined with
    coaching for individual organizations and staff
  • Strategies to move target audiences from awareness to action via learning from guest
    campaigners, piloting discrete experiments and getting feedback and problem-solving
    support from peer advisors.

“One of the (rarely found) qualities of the potential pilots is that they combine a
more collaborative, cohort-type of peer engagement, learning and sharing,
together with high-end tailored individualized expert support.
Usually it is one or the other.” Biljana Dakić Đorđević, Trag Foundation

WHAT WE’RE LEARNING ABOUT PARTICIPATORY DESIGN

Our experience from this project confirms our previous experience designing, implementing, and
evaluating organizational strengthening programs. We have seen our own and other’s programs fail
to achieve their goals for some of the following reasons:

1. Grantee partners do not have a clear picture of their capacity growth needs and which to
prioritize. Organizational capacity is seen as an add-on, rather than an integral part of an
organization’s life.

2. There is lack of buy-in from across the organization; capacity development is initiated
and/or led by funders in a way which disempowers grantees and sidelines them.

3. It takes more time and resources to strengthen organizational capacity than expected or
it is seen as a one-off intervention rather than a continuous and dynamic process. Some
funders overfocus on results and deliverables rather than the process and transformation.
They prioritize project-based support rather than organization-oriented.
Participatory design is a direct response to these common pitfalls because it:

- Builds buy-in, consensus on priorities, and engagement of staff across the organization through the diagnostic process
- Develops a range of strengthening supports that accounts for organization’s priorities, interests and absorptive capacity
- Improves grantee partner’s understanding of what it will take to successfully change

While the pilots the groups created may be the same as what we would have created ourselves, the participatory process has paved the way for improved implementation and greater adoption. The process also aligns with a values-centered approach to capacity strengthening, which prioritizes the experience and desires of the organization receiving the support. In response to our feedback survey, 97% of grantee partners who responded felt that their opinions were respected and included during the co-design process.

**REFLECTION**

Participatory design is one of several approaches which grantmakers and their partners can use to design values-aligned, relevant and useful programs. Skills in leading participatory design processes are particularly useful during times of uncertainty and when there is an opportunity to make change in our practices to bring them more in line with our mission, vision and values.

In advance of our time together we invite you to:

- Identify any additional questions this case study has surfaced for you about participatory design and/or feedback you have for us
- Think of an upcoming opportunity to build in elements of participatory design in your own grantmaking or program development or adaptation
- Reflect on a recent experience with a program or project that would have benefited from greater participation from key stakeholders and why

The Social Sector Accelerator provides a range of intermediary and advisory series, serves as a trusted peer coach and mobilizes our partners in the philanthropic sector through a range of field building activities. Participatory design is one of the tools in our toolbox to help grantmakers design and implement useful and relevant support for their grantee partners. **To access a free hour of peer coaching and to learn more about our services visit - capacitydividend.org.**

We would like to express our immense gratitude to our peers who reviewed and provided feedback on this case study: Vânia Alves, Lois Bruu, Gianluca Cesaro, Elizabeth Coleman, Biljana Dakić Đorđević, Maria Fernandez, Karen Fitzgerald, Matthew Henkes, Aaron Kotler, Amanuel Melles, Sarah Rice, Brianne Sanchez, Wanjiku Shelmerdine, Chloe Silva, Diana Walker and Lisa Weinstein.
Appendix A
During the participatory design sessions participants began by brainstorming a list of their individual organizations desired areas of focus.

<table>
<thead>
<tr>
<th>Statement Starters</th>
<th>FINISHERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>How might we...</td>
<td>develop and implement ways to measure the impact of our communications strategies</td>
</tr>
<tr>
<td>How might we...</td>
<td>create a powerful identity for our organization</td>
</tr>
<tr>
<td>How might we...</td>
<td>craft messages to reach the moveable middle</td>
</tr>
<tr>
<td>How might we...</td>
<td>engage affected communities to use their voice and inform our strategic communications activities</td>
</tr>
<tr>
<td>How might we...</td>
<td>involve network/coalition members in generating and disseminating meaningful messages</td>
</tr>
</tbody>
</table>
Then the participants categorized these priorities based on their importance to their organization and difficulty to achieve. From these two exercises, the facilitators built a list of strategies and skills that were cross-cutting across the participating organizations.
Appendix B

After creating their list of priority skills, tactics and strategies the participants discussed the ways in which their organizational capacities can be strengthened. They prioritized the types of capacity strengthening approaches that have the most resonance with them

**Emoji Voting on Approaches to Building Organizational Capacity**

**Process:**
1. VOTE: Pick 1 emoji you like, and copy it.
2. Paste as your vote for Approaches you value most in the table below.
3. You get 3 votes total to vote for your favorite approaches -- you can vote for the same approach multiple times

<table>
<thead>
<tr>
<th>Approaches</th>
<th>Vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bootcamp - Campaign or Brand Development: Condensed, facilitated, virtual experience with a small team of experts to go through a full human centered design cycle</td>
<td>🌈 🌈</td>
</tr>
<tr>
<td>Expert Office Hours: Each organization has a bank of hours to spend on a roster of experts in a variety of areas.</td>
<td>🐻 🐻 🐻 🐻 🌈</td>
</tr>
<tr>
<td>Peer Learning Cohort: Small group of peers work to answer a shared question with an expert to facilitate.</td>
<td>🌅 🍃 🌈</td>
</tr>
<tr>
<td>Coach - Individual or Small Team: Hire a coach to work directly with one person, several people or a team (i.e. working with a new Communications Director or to aid in adoption of a new strategy)</td>
<td>🌟 🎉 🎉 🎉 🌈</td>
</tr>
<tr>
<td>Technical Consultant re: Specific Skill/Tactic/Strategy: Hire an expert to work one-on-one with an organization to strengthen a specific capacity.</td>
<td>🐔 🐔 🐔 🌈</td>
</tr>
<tr>
<td>“Off the Shelf” Training: Individual or small group training or workshops delivered through a pre-existing program (i.e. social media analytics)</td>
<td>🌟 🍃 🍃</td>
</tr>
<tr>
<td>Peer-to-Peer Skillshare/ Coaching/Joint Problem-Solving: Facilitated virtual convenings for skillsharing, peer coaching or problem solving</td>
<td>🐶 🌅</td>
</tr>
<tr>
<td>Immersion - study visit, twinning, secondment, exchange</td>
<td>🌅 🌈 🌈 🐻</td>
</tr>
</tbody>
</table>
Appendix C

We ended our discussions with a collective brainstorming of the “Need to Have” vs. “Nice to Have” elements of capacity strengthening projects.