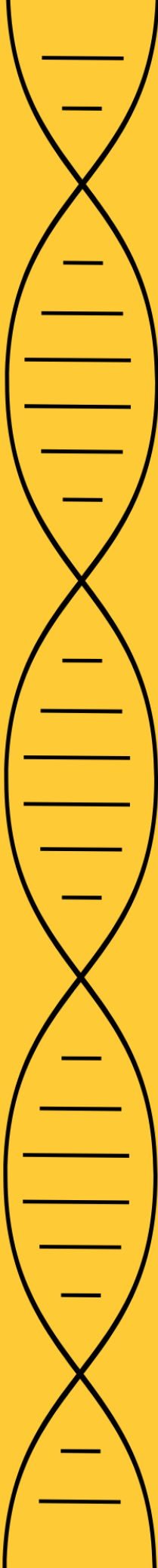
btrust

A TOOLBOX for CO-DESIGN



CONTEXT

While a co-creation session focusses on identifying hurdles, cues and potential associated with a certain implementation, the co-design phase focusses on the development of possible responses to those validated hurdles. More specifically, the co-design workshops are intended to translate earlier findings into solutions, improvements and mitigation strategies that could support the responsible uptake of an implementation.

Co-Create VS Co-Design

	CO-CREATE	CO-DESIGN
Input	Stakeholder specific consequences	Hurdles, cues and potential
Output	Hurdles, cues and potential	Solutions, improvements and mitigation strategies
Purpose of engagement	Listen	Collaborate
Target audience	Actors impacted by the implementation, regulation,…	Actors who influence the implementation, regulation,…

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A TOOLBOX FOR CO-DESIGN

Co-design goes beyond asking direct questions, which often lead to surface-level answers. Instead, it engages participants as active contributors. In a co-design context, participants are often linked to organisations and have a stake in implementation. While this brings valuable practical insight, it can also make it more challenging to encourage truly out-of-the-box thinking.

Main outcomes of a co-design session

- ✖ Discuss and further interpret the chosen hurdles that need addressing.
- ✖ Co-develop possible solutions, improvements and mitigation strategies that could help address these barriers in practice
- ✖ Solutions created by those who are directly 'at the steering wheel' of implementation

A good co-design session…

- ✖ … makes solutions that go beyond 'how it is done today', and results in ideas beyond 'what first comes to mind'
- ✖ … makes people inspire each other
- ✖ … engages all participants

Basics for a good co-design session

- ✖ Provide an environment where people can relax and be themselves
  - Inspiring and easy to reach location
  - Food and drinks
  - Ensure there is something in it for them
- ✖ Set a clear context: why did you invite them and what is going to happen with their input?
- ✖ Frame your expectations: what do you expect from them?
- ✖ Explain the practicalities, including GDPR-related rules and plans for publication of photos and results.

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Timing, context & set-up

Adapt timing and set-up to your target group

Co-design involves influential actors who are often directly responsible for implementation as part of their professional role. As a result, co-design sessions need to be structured, formal, and to the point, with attention to practical constraints such as working hours, accessible locations, and clear value for participants. Keep it relevant en time efficiënt for busy professionals!

✖ Sessions should be organised on moments when your target group is available, and the duration should be adapted to their availability.

	Self-employed and C-level representatives	**Employees, participating in a work context**
Timing	Depends, often more available in the evenings unless topic is core business	During working hours
Duration	Restrict time investment to ~3 hours, unless combined with dinner	Restrict to ~2 hours in an online setting, physical meetings can be 2-4 hours, depending on how close topic is to core activities

✖ Also take into account low-availability periods like holidays, harvest time for farmers, important conferences on the same day for industry etc…

✖ Choose between online or physical meetings. Both have their advantages (pros) and disadvantages (cons), so it depends on the case which format fits best.

	Pros	**Cons**
Online	• International participation	• Open discussions may be difficult • Interactions are less spontaneous
Offline	• More in-depth interactions	• Requires significant time engagement from participants • Restricted geological spread of participants

✖ Make the value for participants explicit. Ensure a clear incentive to attend, for example by linking the session to another event, providing good networking opportunities or interesting (new) information, or offering reimbursement of transport costs.

Practical tip

Schedules can fill up quickly. Take into account that a ‘save the date’ should be sent out at least 6 weeks in advance, so set out your venue, date and time, and your goal and incentives in time.

Timing, context & set-up

Participants

Mixing stakeholders versus single-stakeholder sessions

For co-design sessions, it is both possible to mix several stakeholder groups or invite them separately. Both choices have their advantages (pros) and disadvantages (cons).

	Pros	Cons
Mixed stakeholder session	• Multiple viewpoints can inspire, complement and enhance each other, creating more powerful ideas • Time-efficient: several stakeholders' views captured in one session	• Stakeholders can have conflicting interests, making it hard to cooperate • Misunderstandings may occur due to differences in knowledge and language (use of terminologies)
Single stakeholder session	• There is better mutual understanding between participants • Participants have similar levels of background knowledge, making it easier to adapt the level and style of communication	• Participants can be in direct competition with each other, therefore holding back on ideas • Participants may tend to think in the same direction which may restrict creative thinking

Take group dynamics into account

In order to get honest and relevant input from the participants, it is important to create a welcoming environment and to take into account several aspects of human behaviour to create a desirable group dynamic.

✖ **A good group dynamic for these sessions is reached in groups of 8-25 people.** However, the bigger the group, the more relevant and necessary it becomes to make smaller groups for the exercises.

✖ To make sure all participants' opinions are heard, **make sure there is a balance between individual assignments, exercises in small groups and plenary discussions.** If necessary, dominating individuals should now and then be asked to let the others speak.

Can you include consumers in a (mixed) co-design session

Certainly, and their input can be very valuable. However, there are some practical hurdles:

✖ They are available at different times than professionals (outside / during working hours)

✖ They tend to value the ideas of experts and professionals over theid own

This is why it is important to have stakeholder groups like consumer already think of solutions during the co-creation phase, and take these ideas into the co-design phase. Another way of tackling this, is validation by re-engagement with the initial stakeholders. And there is also the option of having a co-design session with consumers only.

Timing, context and set-up

Set your objectives

The co-design phase aims to co-develop solutions, improvements and mitigation strategies that could help address the identified and prioritised hurdles in practice.

The main questions you want answered in general is “how are we going to solve and mitigate these hurdles?”. It is however important to finetune the central questions, and if necessary, break it up in smaller parts.

Note

The validation and prioritisation steps in the *Assess* phase are important to keep focus in your co-design session. When you try to tackle too many hurdles at once, participants may become overwhelmed or try to work on hurdles that are easy to address, but not the most crucial, or not within your sphere of influence.

This objective needs to be clear by the time you invite the participants, as is contains the reason why you want them to participate.

Set up the the general flow

The general outline for a co-design session that was set up and refined in the B-Trust project can be summarized below:

- ✖ Framing of the context: Why are we doing this session? What is expected from them?
- ✖ What will we do with the results of this session?
- ✖ What happened before this session (in the previous phases)?
- ✖ What were the results of the previous phases? (including feedback from participants).
- ✖ Input rounds (discussed under the section ‘input rounds’)
  - Round 1: Idea generation
  - Round 2: Clustering and prioritization
  - Round 3: Refinement of solutions
- ✖ An after-session questionnaire about their individual reflections and key takeaways.

Preparation

Preparatory material

To ensure a co-design session runs efficiently, it is best for participants to receive sufficient context and information in advance.
Send out preparatory information, such as the results from the *Involve* and *Assess* phase and/or an outline of the project, to help them prepare and reduce the amount of introductory information during the sessions.

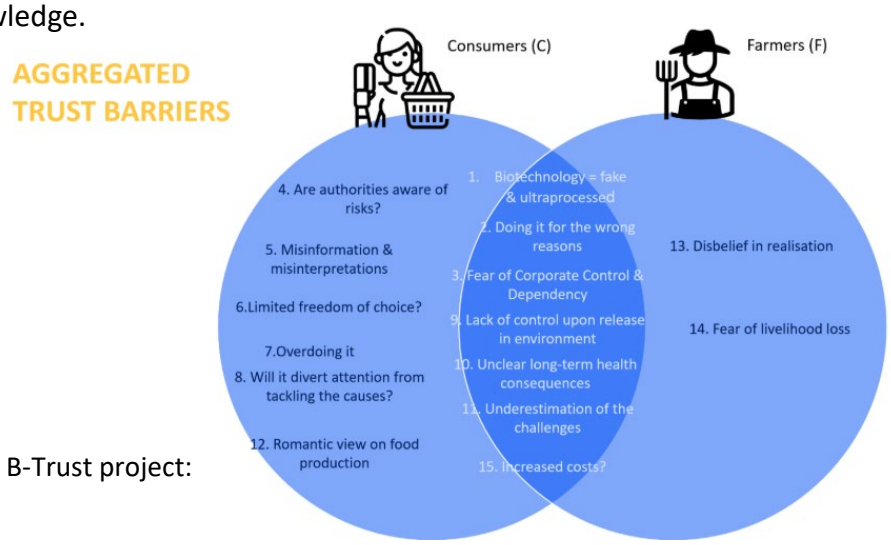
Tips and tricks

- ✖ Sent out the preparatory materials at least a week in advance. This makes sure that the participants have sufficient time to revise them.
- ✖ Provide information on
  - the outline of the project
  - the context
  - the rationale behind the co-creation sessions
  - Information on the key hurdles identified during the co-creation sessions
  - other relevant information

Format and communication style

- ✖ Work visual to create oversight and make it easy to understand. It also makes the process more engaging and interactive than relying solely on text.
- ✖ Adapt your terminology and explanations to the stakeholders and their level of background knowledge.

Example from in the B-Trust project:



Preparation

Preparation for a physical co-design

In a physical meeting, you can have up to 25 participants, given you have enough moderators and note-takers:

- ✖ 1 moderator can take on 5-10 participants at a time
- ✖ more if there are several note-takers present

Make sure you prepare a presentation

- ✖ To share the information they need to have an effective brainstorming session
- ✖ To guide the participants through the process

Materials

- ✖ Flipcharts or whiteboards and large sheets of paper (A2 or bigger)
- ✖ Markers and pens, post-its and voting stickers or dots for prioritisation.
- ✖ Name tags (if participants do not know each other).

Equipment

- ✖ Projector or screen (if needed).
- ✖ Camera or smartphone to photograph outputs.
- ✖ Notebook or laptop for recording key findings

Preparation for an online co-design session

The amount of moderators for an online meeting is similar to those for an physical meeting. However, it is advised to have someone extra present for technical assistance, following up timings and chats, and making sure everyone gets into the correct break-out session.

For a digital co-design session, you will need to use an online whiteboard tool, such as Miro, Mural or Microsoft Whiteboard.

- ✖ You will need to prepare a different whiteboard or section within the whiteboard for each round, prepared with all the tools (digital post-its and voring buttons) necessary to make the process easy to understand and straightforward for the participants
- ✖ Test the digital whiteboard in advance with a colleague acting as a participant
- ✖ Make sure all participants are briefed in advance about the log-in process for the whiteboard tool, and that everyone can access the tool

Experienced and neutral moderators

- ✖ A good moderator knows how to make sure everyone's opinion is heard and valued, not just from the loudest talkers. For example by including one-to-one conversations and silencing dominant personalities if necessary.
- ✖ Take into account that moderators have opinions too, especially when they are involved in the research or have a commercial stake in the development of the technology. It takes training and experience to moderate a session while staying objective and put aside your own opinions that.

Input rounds

Round 1: Idea Generation

This round focuses on exploring a broad range of potential solutions within groups, and is based on the brainstorming tool known as 'purging': giving participants a quest(ion), and have them generate as many ideas as possible, using port-it notes or having them write on a large paper.

- The exercise can be done with the entire group or in smaller groups, depending on the number of 'quests' (in this case, hurdles you need solutions for) and the group size.
- In case multiple groups are formed in a mixed stakeholder setting, it might be useful to create the groups in advance to achieve maximum diversity per group.
- For multiple 'quests', it might be useful to create multiple 'rounds', to make sure that each quest is tackled, and that each group has tackled more than one quest.
- To enhance inspiration and ensure different types of solutions, it might be useful to predefine several 'categories' (for example: Marketing and communication solutions, Behavioural science and nudging solutions, Financing and legislative solutions, Innovative governance and collaboration solutions, Research and technology development solutions, …)

Tip for the moderator

Make your participants think outside the box of their profession! Go beyond what is possible today (for example in terms of legislation, capacity,…)

Attention point

Making clear that addressing 'the big challenges' will always be a combined effort and there is no single solution.

Materials needed

- Physical session: Large sheets of paper (A2 or bigger), post-its, pens and markers.
- Online whiteboard: Large board(s) marked with the hurdle(s), digital post-its

Timing: 10 minutes per quest

Input rounds

Round 2: Clustering and prioritisation

This round is about clustering the solutions across different groups of solutions. Which solutions are overlapping?

- ✖ Each group is invited to present their proposed solutions, one post-it at a time.
- ✖ Each post it is gathered on either
  - One large 'wall' or paper
  - Several papers with predefined superclusters (for example the given solution types)
- ✖ Within each paper, similar solutions are taken together and given an overarching title that defines the cluster.
- ✖ Using the voting dots, participants can indicate which solutions have the most potential

Example from the online co-design session in the B-Trust project:

Materials needed

- ✖ Output of round 1
- ✖ Physical session:
  - Large sheets of paper (A1 or bigger) OR smaller sheets marked with the title of the supercluster
  - Post-its, voting dots, pens and markers
- ✖ Online whiteboard:
  - Large board OR smaller boards marked with the title of the supercluster
  - Digital post-its and voting dots

Timing: depends on group size

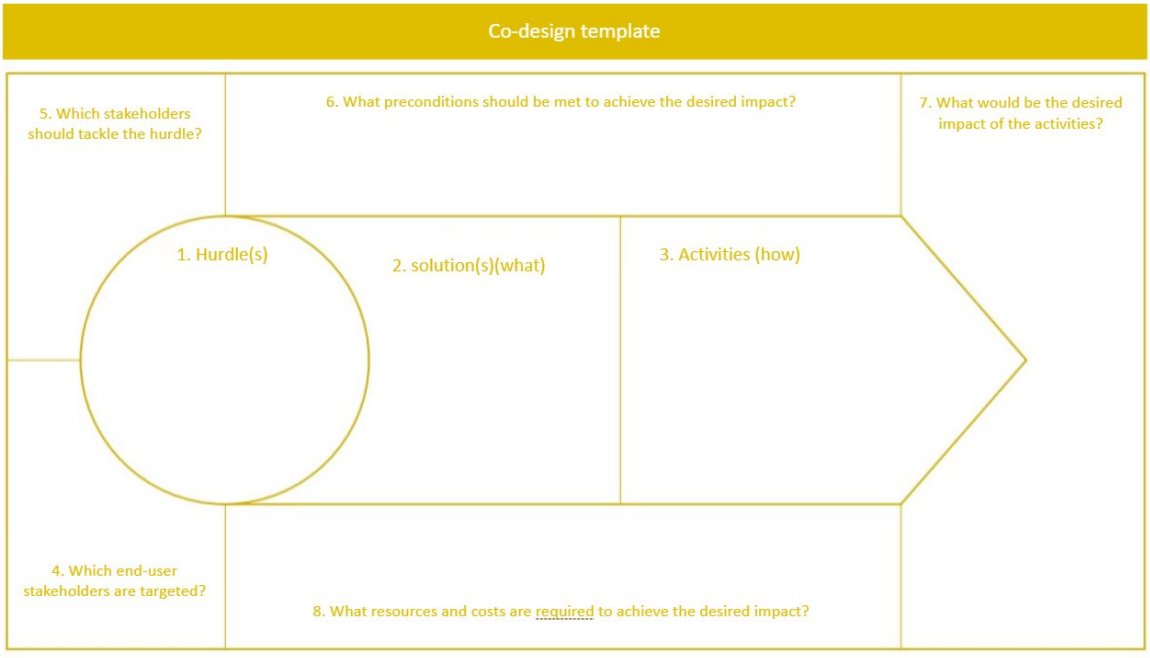
For an average group: 10 min for presentation and 10 min for clustering

Input rounds

Round 3: Refinement of solutions

This round focuses on refining solutions that participants could realistically implement and integrate into their professional practice. The emphasis is on translating ideas into concrete and actionable solutions by considering how they can be applied in real-world contexts. Here, group composition is reshuffled per stakeholder type.

- ✖ This exercise works best in smaller groups (3-5 people per group). A reshuffling of the groups can be done to freshen up the ideas.
- ✖ Groups are asked to select a few clustered measures that they could potentially work on and adopt in the context of their professional activities geared towards the implementation of the technology.
- ✖ They can further design the solutions with the help of the co-design template below.
- ✖ After the exercise, each group is to present their solutions plenary



Materials needed

- ✖ Printed templates
- ✖ Markers and pens
- ✖ Output of Round 2

Timing: 10 min per template

Analysing the data

Analysing data from a co-design session is not straightforward. But there are some rules and guidelines to make sure your analysis is thorough, objective and complete.

Preparation

A good analysis starts with good data. Note-taking alone is often not sufficient. Analysing the data often requires a reconstruction of the interaction in your head, so all types of information help to make this reconstruction as complete and accurate as possible.

- ✖ Make sure to get people to write down things themselves.
- ✖ Take pictures or even videos and audio recordings.

Tip

Make sure you have enough background knowledge on the topic to make the correct interpretations. There is no need to be an expert, but a basic comprehension of the concept and subject is imperative.

Transcription

The analysis should be done shortly after the interaction, but not immediately. Let the information sink in for at least a few hours, but make sure you are still able to recall the event(s) when doing the analysis.

The first step is to type out as much data and information as possible. A written out (typed out) reconstruction of the session/interaction, with the data gathered from each exercise grouped together, makes it easier to obtain a complete picture.

Reporting

Summarise the results and report back to the participants:

- ✖ Focus on recurring elements
- ✖ Show findings from the templates from round 3
- ✖ Inform about next steps and what happens with their input

Tips & tricks

- ✖ Let at least two people analyse the data, and use AI as external validation
- ✖ AI can also support summarisation and identification of recurring themes, but should never be the sole analysis tool

Attention points

- ✖ When prioritisations are made, be aware that this group is small and chooses from their own viewpoint, and not based on objective data.
- ✖ Analysis of qualitative data is prone to bias. Be vigilant of your own opinions and biases, and do not to let them interfere with the analysis.
- ✖ Factors such as peer pressusre, confidentiality issues, or difficulties thinking beyond the current situation could limit openness and prevent participants from express ideas.

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