Co-Design How-To: Organize, Facilitate, & Analyze

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This document is intended as a non-exhaustive list of steps to prepare for, run, and analyze a co-design session. These steps come from years of co-design projects at both large (e.g., monthly co-design sessions with 20+ teachers over 2 schools, weekly sessions with 60+ parents and children) and small scale (e.g., co-design sessions with 4 teachers individually over a year). I describe and provide templates for my approach, however, encourage you to adapt these to make them work for your specific team, partners, and context. No co-design process is identical to another, just like no session is. Therefore, there are times these steps will not work. Please reach out with questions or suggestions (lu.lawrence@usu.edu). Happy designing!

Step 1. Get organized!

- **Use a high-level spreadsheet** to organize all the planned and completed co-design sessions. This will be helpful for you to:
    - Staying up to date on what's going on and upcoming
    - Organize who is attending/what needs to be done
    - Communicate with the team (e.g., agreed on a central place to find information)
    - Document the process
    - Template
        - Multiple tabs: session details, payment, and recruitment/consent

- **Make sure the co-design sessions (and co-design session plans) align with the goals of the project, the research questions you're trying to answer, and the needs of your stakeholders**
    - This document is to outline the overarching goals, vision, and research questions for co-design! *Create this document and share it* – ask for feedback, revise, iterate, ask questions, keep notes!
    - This document helps to make sure activities are purposeful and gets everyone on the same page about the overarching goals for co-design
    - What are you trying to achieve? How are you hoping to get there?
    - **Best practice:** Co-develop this with your community partners!!
    - Template

- **Recruit your partners**
    - If you are not in an established project or community, you need to do the work to build relationships and trust to ensure the project can be successful. This can take a lot of time!!

  - While I'm not going to go deep into this stage, one approach I use is making sure that expectations are flexible and explicit. You can read more about one of our approaches here.

Step 2. Plan the Session!

- **Create a folder** for all materials, planning, and data about the session
  - Template

- **Create a high level plan of session**
  - **Session methods**
    - What is the goal? What design method(s) will you use?
    - High level view of what are you doing?
    - Review your research questions and decide on the method (review your documents you created in the organization phase!)
    - **Best practice:** Co-develop this with your community partners!!
  - Session logistics
    - Who is going? What are you collecting / bringing?
    - Create a plan to document, reflect, and share the methods that will help you achieve your goals (e.g., generate ideas, get feedback, play, explore, etc.)
    - Think about your audience (e.g., activities for kids will be different than teachers or parents)
    - Get creative – find fun ways to co-design!
  - Template

- **Create a facilitation guide**
  - *Details* of what you are doing – Who is leading? What are they saying? What are the probing questions? What might a facilitator need *in the moment* to be successful?
    - Make sure to add language others can use when facilitating the session
    - Avoid research and design jargon!!
  - *This document is meant to be flexible based on what happens during the session but is helpful for grounding the team and making sure everyone is on the same page with what the main goals are and how the session will be run*
  - Also useful to those who are new to the session / co-design because it can act as a scaffold if they need additional support
  - Template

- **Additional templates within folder:**
  - Observation protocol (template)

        - Note that computers may not be welcome in the space, so paper and pencil may be best
    - Materials list needed ([template]())
    - Reflection protocol ([template]())

- **Tips:**
    - Have plans and facilitation guides prepped at least two weeks in advance to review with the team!
    - Make sure everyone's roles are clear: Who is driving? Who is packing materials? Who is the lead on the data collection?
    - Check in with community partners frequently! Do the plans for the session map to what they need? To their expectations? To their skill level?

Step 3. Co-Design!

- **Do the thing! Implement all the planning and hard work you've been doing!**
- **Have fun! :)**
- A few notes…
    - Make sure people know their roles (e.g., who sets up tech, who is leading the conversation etc.)
    - Bring extra materials!
    - Welcome people and make sure everyone knows where to go and what to do (e.g., do they sign in? Do they join a group? Get food? Something else?)
    - Introduce what everyone will be doing, present, discuss, create, etc.!
    - Be respectful of time! Make sure to wrap things up and make next steps explicit (e.g., will we be touching base in a week? 6 months? Will we get together again)
    - Ask for feedback if you're able! Can be short conversations with participants, exit surveys, etc.

Step 4. Right after the session!

- **Record (e.g., audio) an initial reflection with the team**
    - This happens immediately after the session (e.g., 5 minutes in the parking lot after)
    - Record this conversation!
    - What happened? What did people notice? What stood out to them? How did the session format run? What can we improve next time?
    - Not all sessions go well. This is especially true when covering hard topics. Creating a safe space to reflect is helpful, however, you should also allow people to excuse themselves or turn the recording off.

- **Document more in-depth reflections** from each person
    - This is more in-depth than initial thoughts, including ideas that came up, themes they saw, or insights
    - Ask everyone to document their reflections as soon as possible (or 48 hours within session)
    - These data are helpful for preliminary analysis
    - Template

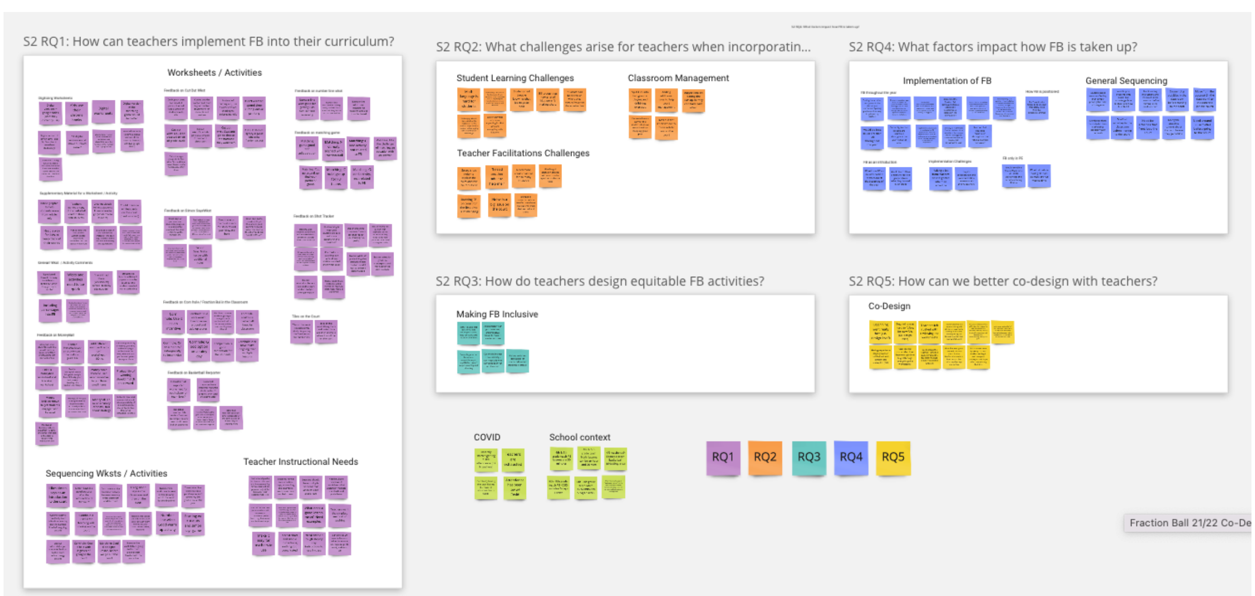
- **Upload data**
    - Assign a person to this task and use the folder set up that you already created during the organization stage
    - Begin transcription (e.g., otter.ai)
    - Remind note takers to edit their observations (see template)

Step 5. Initial analysis of the session!

- **Within a week or two of the session, you can do a preliminary analysis of the co-design session**
    - Helpful for communicating high level findings, grounded in the data you collected
    - Preliminary analysis can inform more robust future analyses of the data :)
    - I do this because often (always) our co-design sessions are frequent and do not allow for robust qualitative analysis, which can take years to refine

- Affinity Diagramming
    - *This is just one method for initial analysis! You can also explore other methods for synthesizing your data!*
    - (1) First, pull ideas, comments, etc. from available data sources (e.g., observation notes, reflections, transcripts, artifacts, whatever you have ready to look at)
        - One idea per sticky note
        - Document what data you are analyzing and not for future reference (*always document more than you think you need; your future self will thank you!! What did you do? Why did you do it?*)
        - You may not be able to get through all data but try to be thorough and look at several data sources
        - Have multiple people adding data to the Miro board
        - Can use other tools like Jamboard

- (2) After the data has been pulled into one place, set aside a few hours to go through the data together
    - At least 2 people need to participate to ensure reliability/consensus while clustering (include your community partners in this stage)
    - Go note by note, read it off and discuss what it's telling and begin to form themes (you can separate notes into multiple ideas if necessary)
    - Go through all notes, clustering, and re-clustering notes into themes
    - Themes can be expanded, collapsed, or removed based on new notes and discussion
- (3) Synthesize your findings!
    - Go back to your goals or research questions – Are you answering them? What did you learn? Are there gaps that may need to be further investigated?



- Present findings to the team and community partners
    - Since so much happens during co-design sessions, doing this preliminary analysis helps to synthesize ideas rather than just sharing what an individual or two thought was important
        - Everyone has their own view or ideas they remember/found interesting, this gives some cross reference to what happened from multiple perspectives!
    - As a team, identify what the main insights you need to communicate to the team are and what your next steps are
        - Review your main planning documentation and iterate / brainstorm future co-design sessions or studies!
    - Template

Step 6. More robust qualitative analysis!

- Because the preliminary analysis is intended to be just that, preliminary analysis. I go back through and do a more fine-tuned analysis to inform and answer our larger research questions.
- You can use this preliminary analysis to inform your further analysis, but dig deeper in a more fine grained manner to validate (and invalidate) your findings and assumptions about a session