Designing From the Margins:
Tools and Examples for Practitioners to Address Fragmentation and Build Equity Into Systems Design

Hailly T.N. Korman, Liz McNamee, and Bonnie O'Keefe

September 2021

What it means to “design from the margins”

How can stakeholders come together to understand and address the unmet needs of children and youth in their communities?

Typical problem-solving usually targets the “average” or “standard” user — the person who would fall within the center of a bell curve.

Designing from the margins focuses on the intended beneficiaries with the **most serious and concentrated needs**, to make inclusive solutions that can meet everyone’s needs.

For example: Making playground equipment accessible and adaptable for children with physical disabilities can also create new, fun ways to play for children of all abilities.

This design methods approach can be seen across different frameworks, such as human-centered design, targeted universalism, liberatory design, and designing for equity.

Designing from the margins supports equity in policy and in practice

Traditional approaches to problem-solving can create inequity, especially when trying to meet the needs of children and youth.

The needs of children and youth with more acute problems aren't necessarily excluded intentionally or out of malice. It may seem logical that solutions for the typical child should come first, and then children having experiences at the margins can adapt. But the consequence is that their needs often end up ignored.

Examples of those experiences include a placement in foster care, contact with the juvenile justice system, time spent unhoused, or an early, unplanned pregnancy. Most important, children and youth are likely to experience multiple disruptive events close in time, or even at the same time.

Designing from the margins pulls in people who are usually excluded from problem-solving processes, and builds in an equity lens from the start.

Because children and youth are understandably not the decision-makers in policy or practice discussions, getting their direct input is difficult. In many cases, building in strategies to meet and hear directly from people having those experiences reveals that it is both **more equitable** and **more effective** to design solutions around the toughest cases, and then adapt those solutions to address less-acute needs.

For example, when selecting a reading curriculum, selecting for the typical student may worsen outcomes for students with dyslexia. But actually, the reading curricula and accommodations that best support students with dyslexia also work well for other students.

These materials will help leaders implement collaborative, human-centered, and equitable design approaches

Tools for improving coherence using collaborative human-centered design

Bellwether Education Partners developed this toolkit to support the use of collaborative human-centered design in education. This approach aims to engage the people who are most directly affected by the problem in creating solutions. Using these tools can help create and sustain solutions that reduce fragmentation in systems serving children and families.

This toolkit is intended primarily for groups aiming to bridge stakeholders serving children and families across different organizations and agencies, such as schools, foster care systems, homeless shelters, or health care providers — but the resources can be adapted for design processes that address a range of needs and services. We envision that this will be used by nonprofits, government agencies, and other organizations taking collaborative approaches to improving outcomes in their local communities.

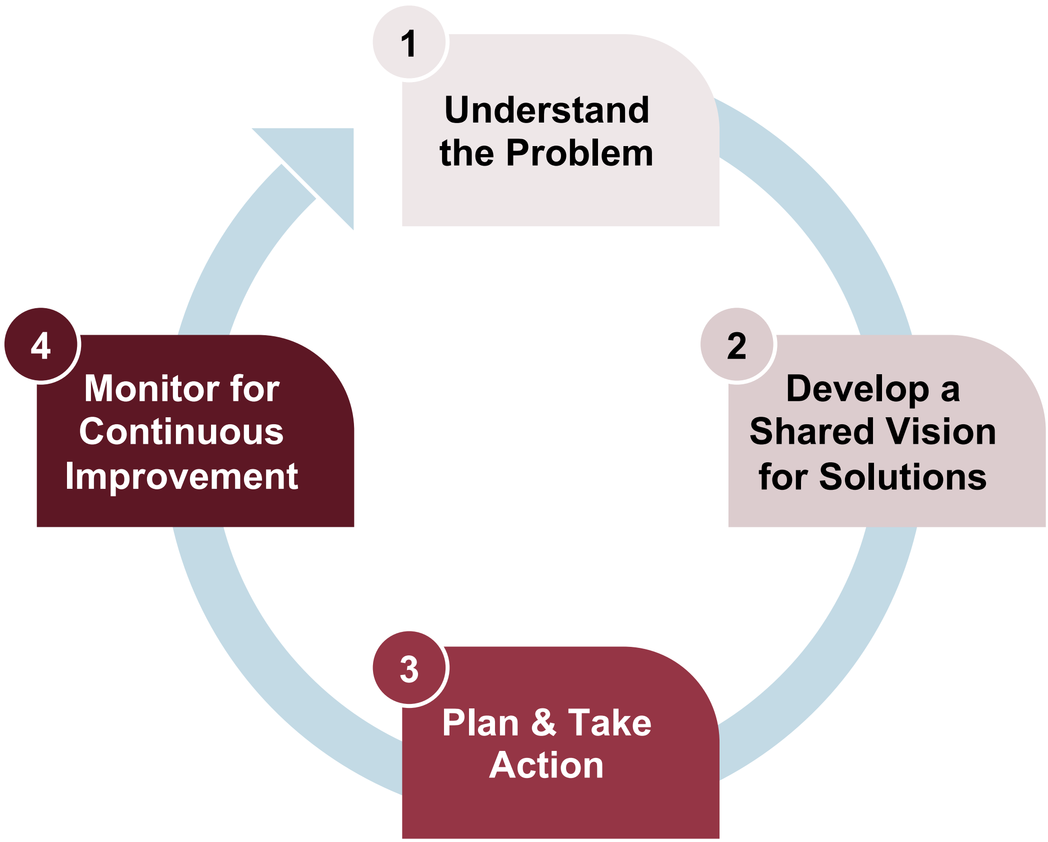
Applying design principles

There are core principles to a collaborative human-centered design process. We focus on three of them:

- *Design from the margins*: Emphasize and include perspectives of the people who are most deeply affected by the problem
- *Build understanding:* Bring stakeholders together to build relationships, empathy, and partnership
- *Shift mindsets*: Develop new mindsets that transform practice and help sustain solutions

The design process is a cycle with four phases

Design processes occur in four phases, during which the facilitators and participants are working toward discrete goals:



Adapted from Bellwether's Continuous Improvement Cycle for Schools and Lost by Design

Each phase has specific objectives, supportive mindsets, aligned activities, and resources

	1 Understand the Problem	2 Develop a Shared Vision for Solutions	3 Plan & Take Action	4 Monitoring & Continuous Improvement
Description	A working group forms and seeks to understand the specific challenges and needs of individuals directly experiencing the problem	Once the problem has been defined, the working group collaborates to identify what might be true in an ideal future — and options for how the group can bring that vision into reality	After aligning on a solution designed to address the problem, the working group develops a shared action plan to implement the solution, which should include clear lines of accountability	As the working group implements its plans, it can continue to reflect on how the problem is showing up and affecting community members — and adjust its plans and activities accordingly
Estimated Timing	1-3 months	2-4 months	5-10 months	Ongoing
Objectives	● Form an inclusive working group ● Develop a shared understanding of the problem	● Describe an ideal future ● Decide what needs to change	● Develop a shared action plan ● Define an accountability structure	● Enact the plan ● Engage in shared reflection ● Adjust course as needed
Mindsets	Value and include the perspectives of people with the most direct, acute experiences of the problem(s)	Understand that the solution often does not require new programs, but rather more streamlined processes or shared practices	Recognize that you/your agency is only part of the potential solution	Accept that the solutions/plans may need to change in light of new data, information, or changing local conditions
Activities	● Form a working group ● Gather data ● Make meaning of the data ● Define the problem	● Define the ideal end state ● Distill potential solutions ● Prioritize among potential solutions ● Decide which solutions to address	● Determine a shared approach ● Plan activities and timelines ● Create accountability structures	● Conduct regular reflection sessions ● Refer to previous resources in this guide to revise or adapt approach

Additional details on each phase and resources are provided on the following pages.

Understand the Problem

1

Description	A working group forms and seeks to understand the specific challenges and needs of individuals directly experiencing the problem
Estimated Timing	1-3 months
Objectives	• **Form an inclusive working group –** Determine who should participate in the collaborative design process, ensuring that a range of agencies and perspectives are represented, especially those of people experiencing the problem most acutely • **Develop a shared understanding of the problem –** Share and seek to understand the local landscape, outcomes data, and individual stories to inform a shared definition of the problem. Simultaneously, build relationships and trust among working group members
Mindsets	Value and include the perspectives of people with the most direct, acute experiences of the problem(s)
Activities	• **Form a working group by …** ○ Working across silos to bring together stakeholders serving children and youth from different angles • **Gather data by …** ○ Mapping agencies, nonprofits, schools, and other organizations serving children and youth ○ Conducting youth and family interviews, with a priority on acute experiences ○ Gathering data on child and youth outcomes • **Make meaning of the data by …** ○ Creating a composite persona experiencing the problem(s) ○ Drawing a journey map of an individual navigating these systems ○ Analyzing subsets of child and youth populations or exploring different facets of the data • **Define the problem by …** ○ Narrowing down the children and families most affected or differently affected ○ Identifying quality/access gaps or opportunities for improvement

Activities
click to jump for more detail

Working group formation

Relationship building

Empathy interviews

Ecosystem mapping

Persona creation

Journey mapping

Develop a Shared Vision for Solutions

2

Description	Once the problem has been defined, the working group collaborates to identify what might be true in an ideal future — and options for how the group can bring that vision into reality
Estimated Timing	2-4 months
Objectives	• **Describe an ideal future –** Develop a shared description of how the problem is showing up, and what an ideal future state could look like if that problem were addressed • **Decide what needs to change –** Collectively define and prioritize the processes, policies, and programs that need to change in order to realize the vision
Mindsets	Understand that the solution may not require new programs, but rather more streamlined processes or shared practices
Activities	• **Define the ideal end state by …** ○ Defining a "North Star" ○ Conducting structured brainstorming • **Distill potential solutions by …** ○ Identifying policy barriers ○ Identifying processes that need to change ○ Designing new/improved programs ○ Identifying which mindsets need to change • **Prioritize among potential solutions by …** ○ Researching exemplars or evidence behind each potential solution ○ Conducting a gallery walk ○ Using an impact/feasibility 2x2 • **Decide which solutions to address by …** ○ Ranking solutions according to different potential facets (e.g., cost, time, evidence)

Activities

click to jump for more detail

"How might we?"

Gallery walk

Policy canvas

Impact/Feasibility 2x2

Plan & Take Action

3

Description	After aligning on a solution designed to address the problem, the working group develops a shared action plan to implement the solution, which should include clear lines of accountability
Estimated Timing	5-10 months
Objectives	● **Develop a shared action plan –** Collectively develop a plan that aligns activities and incentivizes collaboration across agencies/ stakeholder groups to address the problem ● **Define an accountability structure** – Outline the measures of success and a plan for tracking implementation progress as well as outcomes in the short/medium/long term
Mindsets	Recognize that you and your agency are only part of the potential solution
Activities	● **Determine a shared approach by …** ○ Creating a theory of action ● **Plan activities and timelines by ...** ○ Identifying what orgs and individuals have a role to play in solutions ○ Articulating a decision-making system ● **Create accountability structures by ...** ○ Assigning roles and responsibilities ○ Outlining shared measures of success ○ Creating a data-sharing agreement

Activities
click to jump for more detail

Theory of Action

RAPID decision-making

Monitoring & Continuous Improvement

4

Activities *click to jump for more detail*
Continuous improvement

Description	As the working group implements its plans, it can continue to reflect on how the problem is showing up and affecting community members — and adjust its plans and activities accordingly
Estimated Timing	Ongoing
Objectives	• **Enact the plan –** Put the plan into action, and use an ongoing process of learning and reflection to improve implementation over time • **Engage in shared reflection –** Collectively review implementation and outcomes data and continue to engage individuals who directly experience the problem to understand whether and how experiences and outcomes have changed • **Adjust course as needed –** Where necessary, adjust or redefine the understanding of the problem, the vision for success, and/or the action plan
Mindsets	Accept that the solutions or plans may need to change in light of new data, information, or changing local conditions
Activities	• **Decide on a framework for monitoring results** ○ Use continuous improvement methods and frameworks, with intentional cycles such as Plan/Do/Study/Act • **Conduct regular reflection sessions to inform and decide upon new actions** • **Refer to previous resources in this guide to revise or adapt approach**

Additional Resources

This toolkit is designed to support practitioners as they implement human-centered design processes. Many of the activities and frameworks referred to in this toolkit are explained in greater detail in other Bellwether publications.

To learn more about human-centered design and Bellwether's work on fragmentation and coherence, visit the following links:

Lost by Design (Bellwether Education Partners, 2021)

A website featuring Bellwether's approach to improving outcomes for young people by addressing fragmentation, with a full library of resources on fragmentation and coherence.

Design Methods for Education Policy (Bellwether Education Partners, 2018)

A website explaining and highlighting human-centered design methods as they apply to the context of education policy. Many of the external resources in this toolkit are featured on this site.

Creating More Effective, Efficient, and Equitable Education Policies with Human-Centered Design (Bellwether Education Partners, 2018)

A publication that makes the case for human-centered design in education policy.

Acknowledgments

These materials were created with support from Carnegie Corporation of New York. Local and state partners in several states and cities shaped these resources, and we especially appreciate the partnership and feedback from Alignment Nashville and other stakeholders in Nashville, Tennessee.

Tips for using these design methods remotely

2020 and 2021 saw a rapid switch to remote meetings via videoconferencing and other interactive meeting tools. Designing from the margins, however, is highly relational work.

We offer three tips to support successful virtual work with these materials:

1. Prioritize intentional relationship-building activities throughout the cycle and plan time for small group working sessions, one-on-one check-ins, and opportunities for spontaneous conversation.

2. Use a variety of strategies, prereads, and technical platforms and match them to each activity's objective and the needs of your users. Always think carefully about how stakeholders will engage with every experience.

3. Calibrate to the different physical and cognitive demands of remote vs. in-person meeting time by not overscheduling videoconferences or extending any one meeting longer than two hours without a break.

Tools & Examples

Table of Contents: Tools & Examples

Working Group Formation

What is this?	The working group is the collection of stakeholders who come together to build relationships and solve a problem through a collaborative and cross-agency approach. The group should represent the key stakeholders, individuals, and community organizations that both experience the challenge and have a role to play in addressing it. In the initial stages, the working group should prioritize relationship building and mutual understanding among participants.
When do you use it?	**Phase 1 - Understand the Problem:** The working group forms at the start of a collaborative design process.
Why do you use it?	A diverse and representative working group allows all group members to hear and consider many perspectives, prioritize the point of view of the people most impacted, and build broad engagement early in the process. The individuals in a working group may not have had opportunities to work together before, so building trust can sustain ongoing collaboration.
How do you adapt it?	Working groups can take many forms. They typically range in size from 10 to 20 individuals, though some working groups are larger or smaller. Depending on the size of the group, the scope of the problem being addressed, and the decisions that need to be made, working groups might meet biweekly, monthly, or quarterly.
Resources	• Building a Diverse Team (Design Kit) • How to Lead Collective Impact Working Groups (FSG) • Assembling Your Team (IDEO/Nesta)

Example: The composition of a working group

Leaders in El Dorado County (California) came together to identify opportunities to ensure all youth have access to social, emotional, educational, and health services they need.

A working group of 30+ stakeholders met several times between April 2018 and August 2019 to form relationships with one another, understand the barriers youth face, envision solutions, and create an action plan that centered on creating a county commission charged with design and launch of a countywide data-sharing tool.

The working group comprised representatives from government agencies (e.g., health and human services, education), as well as community partners (e.g., nonprofit organizations), the court system, law enforcement agencies, and community members.

Agencies and Participants in Working Group:

County Government

El Dorado County, Chief Administrative Officer

El Dorado County Board of Supervisors, Elected Supervisor

K-12 Education

El Dorado County Office of Education, Superintendent, Director of Curriculum and Instruction, Deputy Superintendent, Foster Youth Coordinator, Homeless Youth Coordinator

Local school districts

Early Childhood Education

Coordinator, First 5 El Dorado County

Judicial System

Probation Department, Chief Probation Officer

County Court, District Attorney

Juvenile Court, Presiding Judge

Local Funders

El Dorado Community Foundation, Executive Director and Program Officer

Family Services

Community-based violence prevention organization, Executive Director

County Health and Human Services Agency, Supervisor, Director, Program Manager

Public health agency, Deputy Director, Epidemiologist

Homeless shelter, Executive Director

For more, see Building a True Safety Net: A Case Study of El Dorado County's Youth and Family Commission

Empathy Interviews

What is this?	Empathy interviewing is an approach that focuses on understanding people's thoughts, emotions, and motivations so that the lived experience of a problem or challenge can be better understood, related to, and addressed. These interviews yield the most informative insights when you talk to people who are experiencing problems most acutely. Remember that these are often people who aren't yet successfully matched with programs or services that meet their needs, so plan extra time to connect with them.
When do you use it?	**Phase 1 - Understand the Problem:** Empathy interviewing is one of the first steps for gathering information.
Why do you use it?	The insights shared during empathy interviews provide some of the best evidence and expertise about the nature of a problem, how it is experienced by the people most impacted, and what ideas people with that experience have for solutions.
How do you adapt it?	Empathy interviews can also be used at later stages in the project to help to consider potential solutions. Empathy interview techniques can be used with individuals or with focus groups.
Resources	• Design Thinking Bootcamp (d.school, Stanford)

Example: A template for an empathy interview with a young person

Name		**Date of Interview**		**About**	Age, referral source, additional details, etc.

Goals/Framing	Share key framing at the outset, including goals of the project, preview of questions that will be asked, how the information will be used (including confidentiality), and (if relevant) how their time will be compensated
About You	• What's the most important thing I should know about you? • Where are you on your educational journey? • What do you want for your future?
Challenges/Barriers	• Could you tell me about an experience with XYZ problem? • What made that difficult for you? How did you react? What solutions did you seek out? Did they help? • What was the impact on your life?
Supports	• Were there any resources or people that helped you along the way? • Are there other supports that you wish you had?
Closing	Thank the interviewee and provide a gift card in compensation for their time (if applicable)

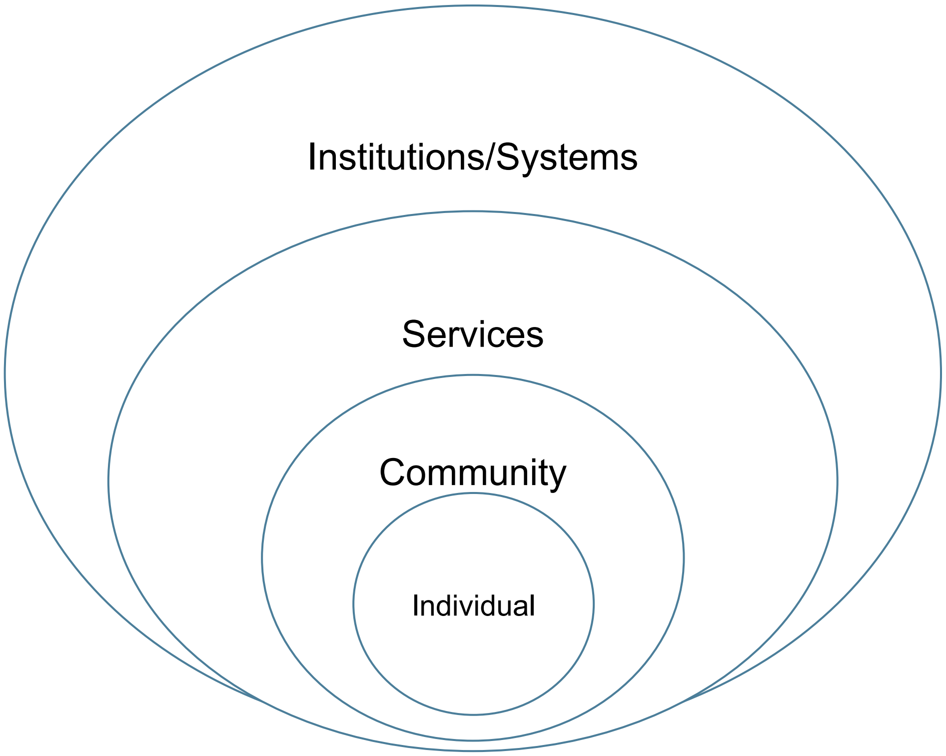
Ecosystem Mapping

What is this?	Ecosystem mapping is a tool to understand the context that shapes individuals' actions, beliefs, and life experiences. The goal is to use the exploration of surrounding context (e.g., community, policies, etc.) to identify which shifts or changes in the context might lead to different and improved experiences for those individuals.
When do you use it?	**Phase 1 - Understand the Problem:** An ecosystem map helps generate insights about the problem and how it is shaped by a broader context.
Why do you use it?	An ecosystem map that illuminates the sometimes-ignored overlapping challenges faced by a person navigating across multiple systems or policies helps to accurately understand, define, and articulate a problem. Ecosystem mapping can also help working group members to understand one another's work, deepen their relationships, and build trust.
How do you adapt it?	The rings of surrounding context can be adapted to reflect the specific nature of the individual's lived experience or the nature of the problem the working group is seeking to address.
Resources	• Ecosystem map (Service Design Tools)

Example: An ecosystem mapping exercise

How to Map an Ecosystem
You will need plenty of wall space and stickies (virtual or physical) for this exercise.

- Starting with the user (an individual experiencing the problem), explore the experience you ideally want your user to have. From there, examine the context of their community, services, and institutions, paying particular attention to places where systems intersect or overlap.
- As you map, note shifts or changes that might be needed in the system to enable an ideal experience. Capture these in an organized way.
- Map the ecosystem collaboratively alongside multiple stakeholders, who know the systems from different angles.



Note: Adapted from the full exercise by DesignKit, which can be found online here.

BELLWETHER EDUCATION PARTNERS

Persona Creation

What is this?	Using the data and stories from the initial research and interviews, create a composite persona that represents a person experiencing the problem(s) firsthand. Draw from real stories to name and envision a specific, but fictionalized, child who would benefit from improvements to the system. This composite persona maintains the privacy of actual children in the system.
When do you use it?	**Phase 1 - Understand the Problem:** After collecting data, conducting interviews, and mapping the system, in order to imagine an individual's experience in that system.
Why do you use it?	A persona helps the working group center and humanize children and youth experiencing an issue most acutely, and use specific data and stories as they shift toward solutions. Personas are an effective way to connect with working group members and to keep your work focused on the people you're designing for after the research phase is over. You can also use personas to communicate the challenge to funders or policymakers.
How do you adapt it?	The specific elements of the persona (e.g., age, race or ethnicity, life experiences) should be as localized and true to the data and empathy interviews as possible.
Resources	• How to Create Personas (Innovation Training) • Creating Personas (UX Booth)

Example: Creating a persona based on empathy interviews and an ecosystem map

How to Create a Youth Persona

Synthesize key findings from empathy interviews, the ecosystem map, and data analysis on the community landscape to create a composite persona of a young person who experiences the problem(s) facing the group firsthand.

Example: Stakeholders in Nashville used a narrative persona, “Tyler,” based on interviews and youth surveys, as well as data on the local landscape, to inform and deepen their work around coordinating services for youth. Below are the key events that Tyler experiences. The full persona is often presented in the format of a longer, narrative story.

- Until third grade, Tyler is an outgoing student who enjoys going to school.
- In third grade, his mother’s boyfriend moves into their house and begins to abuse him emotionally and physically. The abuse continues for years.
- In seventh grade, Tyler is taken into state custody and he moves to a new school in South Nashville.
- In his new school, he continues to struggle and misses several days of school and is suspended frequently.
- In eighth grade, Tyler is assigned a new caseworker through the Department of Children’s Services. Unfortunately, the caseworkers assigned to him change frequently; in a three-month period, he has eight caseworkers.
- Before his junior year, Tyler is arrested, spends time incarcerated, and works on his high school education at a juvenile detention center.
- The quality of education provided at the center is inadequate. Youth also do not have access to quality mental health services at the center.
- He is released from the center in his senior year but does not have the credits needed to graduate on time.
- Tyler attempts to start at a new school to finish the credits he needs, but in-person school closes due to COVID-19. Tyler does not have reliable internet at home, and does not find remote school interesting or rewarding. He stops going to class.

Journey Mapping

What is this?	A journey map is a systematic way to understand a single person's experience through the lens of the specific steps and stages they must navigate to accomplish their goal (or get from start to finish in a process, like applying to college).
When do you use it?	**Phase 1 - Understand the Problem:** A journey map can pinpoint the specific places in a person's experience where problems occur. **Phase 2 - Develop a Shared Vision for Solutions:** After identifying the specific problem areas or points in time, targeted solutions can be proposed. **Phase 3 - Plan & Take Action:** Engaging with a journey map can also communicate the experience of the problem to stakeholders who have an important role to play in implementing the solution.
Why do you use it?	A journey map can help individual support providers understand the ways in which other agencies or providers may also be present in the lives of the people they serve, where effort might be duplicated, or where services may not exist.
How do you adapt it?	The Journey Map can be used to generate insights as well as to communicate the need for change to broader audiences beyond the working group.
Resources	• Design Thinking Bootcamp (d.school, Stanford)

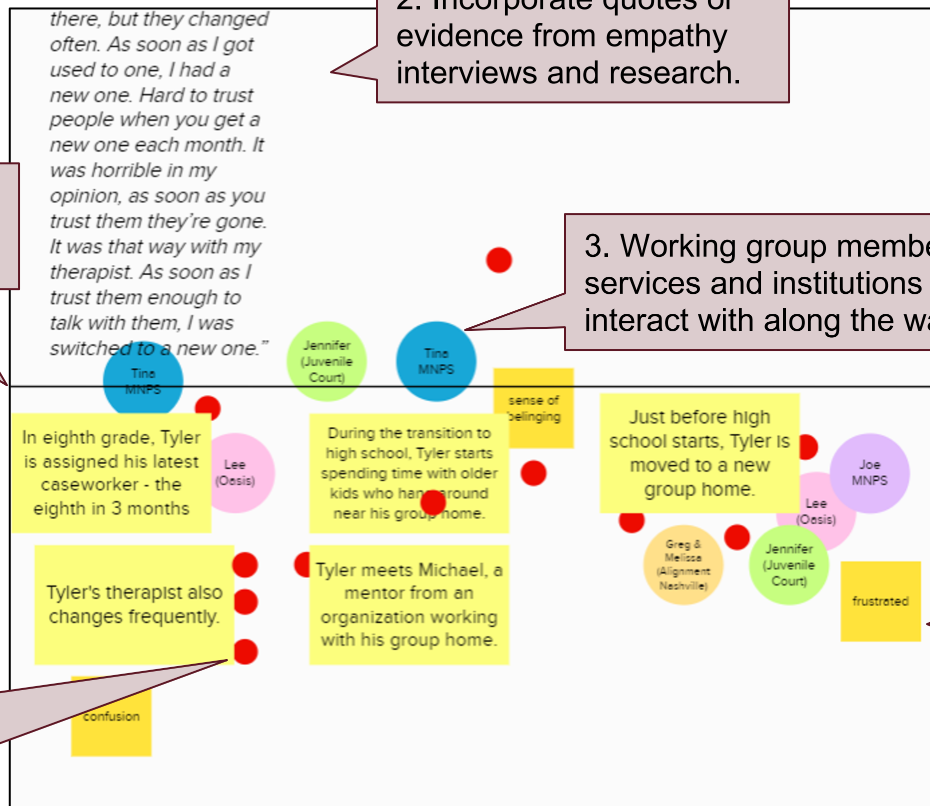
Example: A journey map exercise that uses a persona

Combine a **persona** and the **ecosystem map** to visualize the journey of a single young person over time. Use the **journey map** to identify places for potential change, improvement, or intervention, and highlight the systems or services (or gaps in services) a young person encounters in each key event.

2. Incorporate quotes or evidence from empathy interviews and research.

1. Map out the timeline of key events in Tyler's life. [Yellow squares]

3. Working group members note the services and institutions Tyler might interact with along the way. [Circles]



5. Discuss how Tyler might feel at different points in his journey. [Orange squares]

4. Participants flag places where Tyler might experience difficulties or gaps in needed services. [Red dots]

BELLWETHER EDUCATION PARTNERS

“How Might We?”

What is this?	The “how might we” exercise is a frame to begin generating ideas and solutions. The goal is to take insights generated and frame them as statements that point the way to potential solutions.
When do you use it?	**Phase 2 - Develop a Shared Vision for Solutions:** “How might we” questions are most useful to transition from Phase 1 - Understand the Problem to Phase 2.
Why do you use it?	A “how might we” question allows for open-ended brainstorming of many possible solutions with a shared objective that directly addresses the problem as described by the people experiencing it.
How do you adapt it?	“How might we” questions are open-ended by design, and can be adapted to various scenarios to narrow in on possible solutions.
Resources	• How Might We (Design Kit) • How Might We Guide (Odel Keller)

BELLWETHER EDUCATION PARTNERS

Example: Brainstorming "how might we?" ideas

Build off of the insights and key themes from Phase 1 research to propose questions that could generate solutions. Then, invite members of the group to brainstorm answers.

Note that the "we" in "how might we" should be the people and organizations represented in the working group.

Use theme from data, interviews, and journey map:
For example, students face substantial barriers trying to reenroll in high school or get a high school credential after juvenile incarceration.

Use that theme to generate a "how might we" question:

How might we make the reenrollment process for young people moving from juvenile detention to city high schools seamless and supportive?

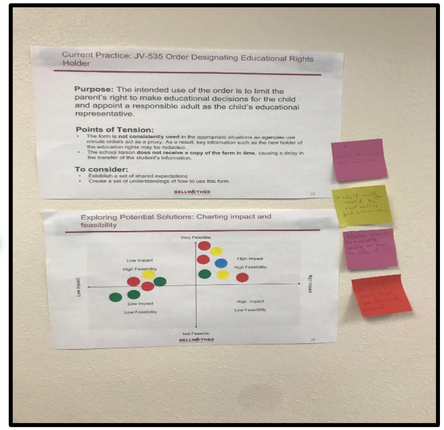
Then working group members brainstorm solutions using the "how might we" question(s) as their prompt.

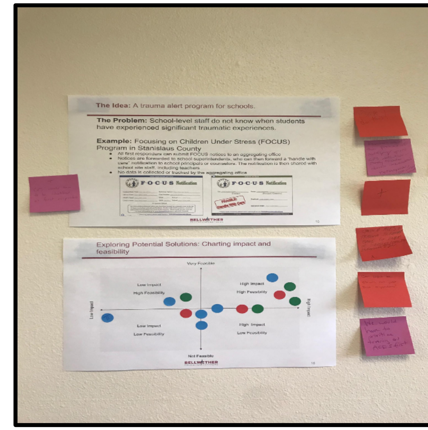
Gallery Walk

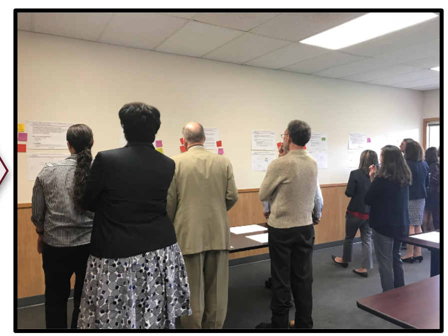
What is this?	A gallery walk creates an opportunity to review examples, options, or brainstormed ideas and reflect on them. Participants move around the room independently (or a virtual workspace) and examine short summaries of each idea. They can discuss in small groups as they go, and leave notes or questions at each station.
When do you use it?	**Phase 2 - Develop a Shared Vision for Solutions:** A gallery walk can help participants to narrow down the set of possible solutions, generate questions for deeper investigation, and identify those ideas that are the most compelling.
Why do you use it?	Using a gallery walk allows all participants an equal chance to consider the ideas and reflect on them independently so that they can build enthusiasm, raise concerns, or generate questions.
How do you adapt it?	A gallery walk can be done in person, with stations around a room and sticky notes, or virtually, using a tool for collaborative editing and reading like Google Slides or MURAL.

Example: Conducting a gallery walk

1. **Select and summarize ideas:** Select a subset of ideas or solutions for the group to consider in the gallery walk. Write up brief summaries and any key considerations for each idea.
2. **Display ideas around the room (or virtual workspace):** Create stations that allow participants to disperse around the room and read/consider/discuss each idea at their own pace.
3. **Capture questions, reactions, ideas:** Leave sticky notes or another way to capture participants' thoughts and notes as they go.
4. **Debrief:** Come back together to share and discuss. If the goal of the gallery walk is to winnow down potential solutions, you might ask participants to rank their favorites or vote, and then explain their choices.







BELLWETHER EDUCATION PARTNERS

Policy Canvas

What is this?	A policy canvas is a framework to think through and identify the major elements of a policy solution. If a working group believes that a policy change is necessary to address the problem, the policy canvas can be a useful tool to clarify the goals, beneficiaries, revenue sources, and implementers of a policy solution.
When do you use it?	**Phase 2 - Develop a Shared Vision for Solutions:** A policy canvas can be used to test the viability of a potential policy solution and weigh trade-offs. The policy canvas could also be used as a reference point in Phase 3 if the working group decides policy change is part of its implementation plan and used as a communication tool to advance the policy agenda.
Why do you use it?	A policy canvas can help to anticipate resistance and challenges to a proposed idea and develop a plan to mitigate risks.
How do you adapt it?	Change the elements of the policy canvas as needed to fit the context, and focus on the elements/guiding questions in the policy canvas that are most critical to success.
Resources	• Policy Canvas (Design Methods for Education Policy)

Example: Question prompts for constructing a policy canvas

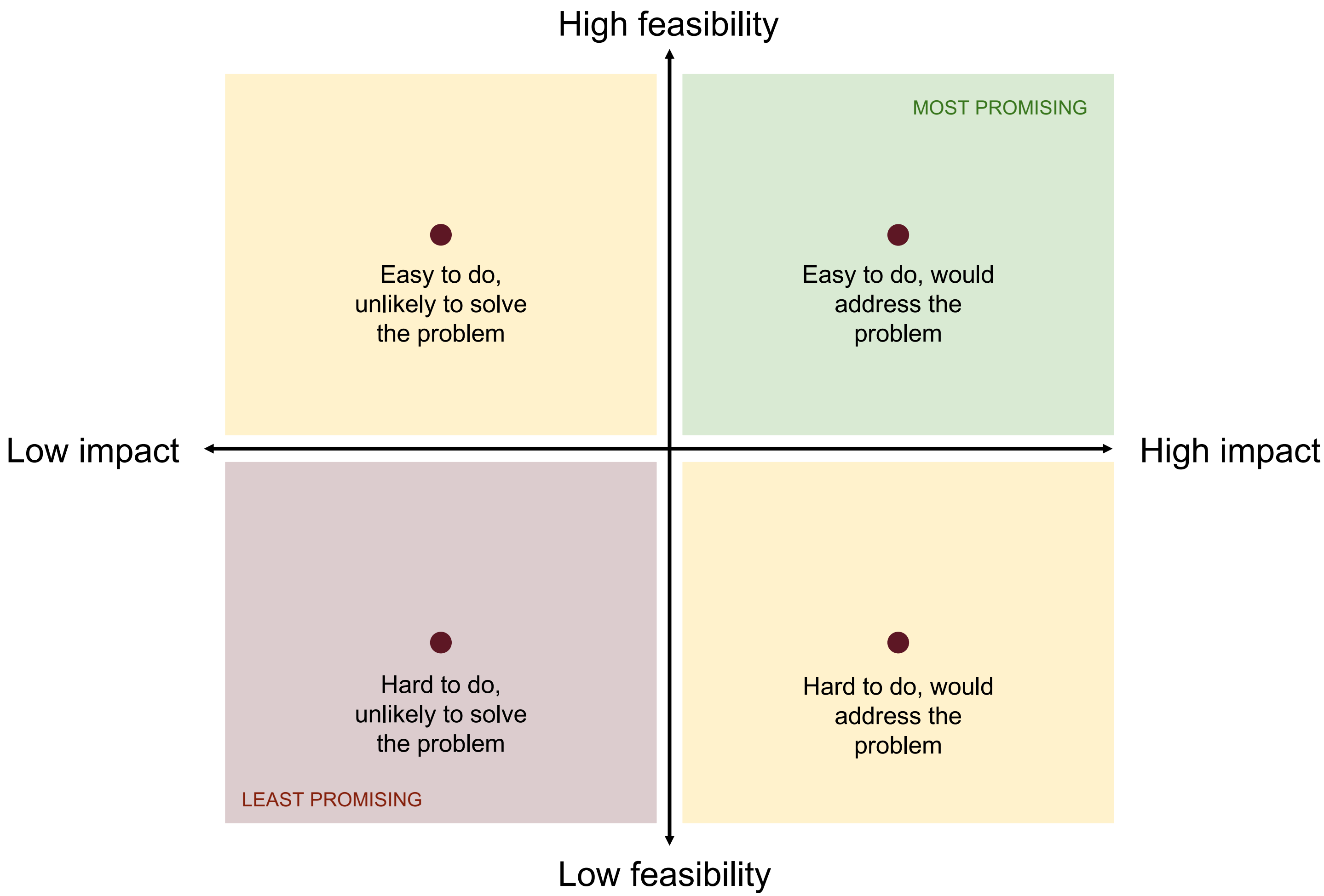
Policy Beneficiaries Who is the policy intended to help? Are there distinct beneficiary segments or groups (e.g., age, location, experience)?	**Value Proposition** What value do we deliver to the beneficiary? Which one of our beneficiary's problems are we helping to solve? What bundles of products or services are we offering to each beneficiary group? Which beneficiary needs are we satisfying? What is the intended outcome on an individual and societal level?	**Beneficiary Relationships** What type of relationship does each of our beneficiary groups expect us to establish and maintain with them? Which ones have we established? How are they integrated with the rest of our policy model?	**Touch Points** Through which touch points do our beneficiaries want to be reached? (e.g., mail, email, text, visit, etc.) How are they reached now? How are our touch points integrated? Which ones work best? Which ones are most cost-efficient? How are/might touch points be integrated with beneficiary routines?
Detractors Who might oppose the policy or service? How might our detractors try to derail the passage or implementation of this policy? How might their efforts be mitigated? How might they be turned into supporters?	**Policy Canvas** [Description of your idea] Designed for: Designed by: Iteration #:		**Key Activities** What key activities do our value proposition, beneficiary relationships, channels, oversight and regulation, and revenue sources require?
Key Partners Which key partners will help get this policy passed? Which key partners can help implement this policy? What key activities do partners perform? *Motivations for partnerships: Optimization and economy; reduction of risk and uncertainty; acquisition of particular resources and activities*	**Oversight and Regulation** Which agency, department, team, etc., should oversee and regulate the service?	**Ownership** Which agency, department, team, etc., should own and deliver the service?	**Revenue Source** Where might funding for this service come from? (e.g., general budget, categorical funds, discretionary funds, competitive grants, etc.) How are resources allocated and distributed?

Impact and Feasibility 2x2 Matrix

What is this?	A 2x2 matrix is a tool for narrowing and rating the range of potential solutions to implement; the frame requires two dimensions (e.g., impact and feasibility) and solutions are placed in quadrants to identify which solutions might be the highest impact and also the most feasible.
When do you use it?	**Phase 2 - Develop a Shared Vision for Solutions:** This tool is used to narrow the solution set in advance of the implementation phase.
Why do you use it?	A 2x2 matrix creates the opportunity to balance multiple priorities and identify which ideas are most promising.
How do you adapt it?	The dimensions of the 2x2 matrix can be adapted for the specific context and criteria that are most important to the working group; for example, other dimensions could be cost (low/high), time horizon for impact (short/long), etc.
Resources	• Design Thinking Bootcamp (d.school, Stanford)

Example: Layout of an impact and feasibility 2x2 matrix

Participants map the leading candidate solutions by placing them in the quadrant that best describes whether they are low or high impact and low or high feasibility, then narrow the possibilities.



Theory of Action

What is this?	A theory of action is a coherent statement of a hypothesis that IF we implement these actions, THEN we will see progress from our current state to a desired vision for the future.
When do you use it?	**Phase 2 - Develop a Shared Vision for Solutions:** A theory of action can be used to support brainstorming about the desired vision and potential activities (solutions) that will bring about that future; it can also help surface and clarify underlying assumptions about barriers to success held by members of the working group. **Phase 3 - Plan & Take Action:** A theory of action can be used to maintain focus on the actions/activities agreed to by the working group.
Why do you use it?	A theory of action is what connects the actions to the shared vision for the future, and it can operate as a unifying commitment to alignment when working group members disagree on specifics of implementation.
How do you adapt it?	A theory of action can be very broad or very specific, depending on the objectives of the working group.
Resources	Note that a theory of action is similar to a logic model and the terms can be used interchangeably; however, a logic model is typically more detailed.

Example: A Theory of Action template

When working together to build a theory of action, proceed in the following order:

Step 1: Describe the **current state** of the problem, based on Phase 1 findings [Left-most box]
Step 2: Set a **vision for the future** as a group [Right-most box]
Step 3: List the **activities** the members of the group will do to change the current state and bring about the future vision [Center box]

Step 1: Current State	Step 3: Activities	Step 2: Future Vision
Describe the current conditions and data that reflect the impact of those conditions on the people affected by the problem	1. List the actions and activities the group will undertake together to bring about the future vision 2. Etc. 3. Etc.	Describe the vision for a changed future

RAPID Decision-Making

What is this?	RAPID is a decision-making framework that can be used to assign roles and clarify how decisions will be made.
When do you use it?	**Phase 3 - Plan & Take Action:** RAPID can be used throughout the collaborative human-centered design process, and can be particularly useful in the pre-implementation stage of assigning roles and accountability to each member/organization involved in the working group.
Why do you use it?	To clarify each person's role in deciding on or implementing a solution.
How do you adapt it?	There can be distinct RAPID roles assigned for different decisions. For example, the working group facilitator might Decide the agenda for each meeting, while a participating agency might be the one to Decide which measures of success to monitor over time.
Resources	• RAPID overview (Bain & Company) • Who Has the D? (HBR) • RAPID Decision-Making (Bridgespan)

BELLWETHER EDUCATION PARTNERS

Example: RAPID assignment of roles

RAPID is an acronym for decision-making roles:

Recommend	**Approve**	**Perform**	**Input**	**Decide**

In practice, though, the steps toward a decision come in a different order:

RAPID	Role Description	For Example
Input	The people most closely affected by a decision, or those whose knowledge, experience, or access to resources are so important that it would be irresponsible not to have their input early on.	Youth council
Recommend	The person or people responsible for bringing together input and weighing options to come to a recommendation or set of recommendations.	Working group subcommittee
Decide	The person with the power to make a decision based on recommendations.	Agency head
Approve	The person with "veto" power over a decision. This role should be assigned sparingly.	Mayor
Perform	The person or people who enact the decision after it is made.	Service providers

Continuous Improvement

What is this?	Continuous improvement is a cycle of reflection, learning, and action that takes place after plans are in place and action has begun. There are many potential resources and frameworks to draw from. Any continuous improvement plan should include defined steps and cycles for collecting, reflecting upon, and acting on lessons from implementation.
When do you use it?	**Phase 4 - Monitoring & Continuous Improvement:** This tool is primarily intended for use once the key initiatives of an action plan are in place and the working group's primary goal shifts toward monitoring and adapting to new information and adjusting implementation plans accordingly.
Why do you use it?	To refine and improve outcomes over time, fix any issues that the initial design process did not anticipate, and identify new potential problems to solve.
How do you adapt it?	Continuous improvement is a general concept that can be adapted to other topics and contexts by adjusting the time frame for review cycles, adjusting steps in the process to fit the context, or altering key questions along the way.
Resources	• Continuous Improvement in Schools Workbook (Bellwether) • Plan-Do-Study-Act Toolkit (Vermont Agency of Education)

Example: Guiding questions for each phase in a continuous improvement cycle

Phase	Guiding Questions
Setup	● Who will participate in ongoing monitoring and continuous improvement? ● What is our timeline for each cycle of reflection? ● What guiding principles, context, and norms should be agreed upon before starting this process?
Envision	● What will success look like? ● What metrics will we use to measure progress? ● What are ambitious, feasible goals? ● What actions will we take, who will be responsible, on what timeline?
Execute	● Are we executing on our original plans? ● What adjustments are needed to address realities on the ground? ● How will we stay focused on our goals and true to the intent of our plan?
Examine	● What do the data show? ● What are the key takeaways? ● What should we do differently as a result?
Enact	● What will we change based on what we know now? ● How will we communicate changes and incorporate them into the ongoing plan? ● Is there a new or pressing problem to solve?

Adapted from Bellwether's Continuous Improvement in Schools Workbook

BELLWETHER EDUCATION PARTNERS