

Equitable Community Co-Design

2nd Edition

An approach to equitable community engagement and action

MINDSETS + STRATEGIES + TOOLS

Equitable Community Co-Design Playbook

2nd Edition • 2026

An approach to equitable community engagement and action

Acknowledgments

This guide is rooted in more than a decade of co-design practice led by Jess Roberts through ByDesign. The approach, structure, and insights reflected here have been shaped through ongoing partnerships with communities, organizations, and public systems working to shift how decisions are made and who holds power in that process.

This work has been made possible through the support and collaboration of the Destination Medical Center Economic Development Agency (DMC EDA) and the City of Rochester, Minnesota, whose early investment helped create the conditions for this work to grow and broadly take shape.

We are especially grateful to the City for Health Steering Committee (a collaboration of individuals invested in equity and health across SW Minnesota), whose leadership, guidance, and belief in the importance of co-design supported the development and launch of the first edition of this guide.

Most importantly, this guide exists because of the many co-designers, practitioners, and partners who have participated in co-design trainings and projects over the years. Their lived experiences, insights, questions, and willingness to engage deeply have shaped not only the content of this guide, but the evolution of the practice itself. This includes the many individuals and communities, often those whose voices are least heard in traditional processes, who have shared their stories, challenged assumptions, and helped reimagine what better systems can look like.

Note: Editorial development of this guide was supported with an AI-assisted review

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Jess Roberts is the founder and lead co-design facilitator at ByDesign. Trained as an architect, he approaches persistent gaps in health, education, and civic participation as design failures - the predictable result of systems built without the people most affected by them. His framework, refined over more than fifteen years of practice, treats lived experience as governance: a structural basis for how problems are defined, solutions are developed, and decisions are made. He has led co-design processes with health systems, school districts, and government agencies across the Midwest, and teaches the methodology through ByDesign's Applying Co-Design curriculum. He holds affiliations with the University of Minnesota School of Public Health and the Minnesota Design Center.



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Why We Created This Guide

Dear Reader,

The first co-design guide grew from a local effort in Rochester, Minnesota; residents, public leaders, and community partners imagining a more inclusive way of shaping places, policies, and programs. What we learned is that equitable co-design isn't just a methodology. **It's a way of shifting power, building trust, and creating spaces where those most impacted by decisions are also shaping them.**

Since then, communities have faced growing complexity such as political polarization, funding uncertainty, systemic inequities, public health crises. Yet people are still coming together, still believing that something more collaborative, more human, and more just is possible. **That's what this 2nd edition is about.** It reflects hard-earned lessons, tensions, and breakthroughs from dozens of co-design projects. It expands beyond individual efforts to look at what it takes to sustain this work within institutions, systems, and communities.

We've seen firsthand how co-design:

- Makes space for community wisdom that rarely reaches decision-making spaces
- Offers structure for working through complexity, not around it
- Rebuilds trust between communities and institutions that have historically failed them
- Creates practical solutions rooted in lived realities

This work isn't easy. It takes humility, courage, and an honest reckoning with how power has been held and withheld.

This guide isn't a prescription. It's an invitation. A compass, not a map. Use it to reflect, provoke new conversations, deepen your practice, or start something you've never tried before. Whether you are a funder, facilitator, city planner, public health director, or community organizer, this guide was written with you in mind.

In solidarity and shared possibility,
Jess Roberts
Wafa Elkhalifa
Chao Mwatela

Commitment to Accessibility

This guide has been intentionally designed to be accessible to individuals with a wide range of abilities, including those with visual, cognitive, and learning differences. Care has been taken to use clear language, thoughtful formatting, and inclusive design practices so that more people can meaningfully engage with the content. Accessibility is not an add-on; it is central to the purpose of co-design.

If co-design is about shifting power and including those who have historically been excluded from decision-making, then the tools, materials, and processes themselves must not create new barriers. Ensuring accessibility helps make participation possible, not just for some, but for all, especially those who are too often left out of traditional systems and engagement efforts.

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CHAPTER 1

Introduction & How to Use This Guide

How do we move from good intentions and mission statements to shared power and tangible impact?

A practical guide for organizations ready to center community expertise in the design of programs, policies, and systems that directly affect their lives.

Introduction

Since the first edition of the ***Community Co-Design Guide*****,** our understanding and application of co-design have evolved. This second edition reflects those learnings, particularly:

- Embedding co-design in **systems**, not just individual projects
- Deeper recognition of **power and relational trust** as infrastructure
- Integrating **systems thinking** with community-led insight
- Stronger support for **implementation, adaptation, and follow-through**

This edition is not simply an update; it is a reframing. We move beyond co-design as a methodology toward co-design as a governance infrastructure: a practice of **sharing power, cultivating belonging, and shifting how decisions are made.**

WHO THIS IS FOR

Public agency leaders, nonprofit practitioners, civic organizations, and community co-designers working toward equitable, sustainable change rooted in lived experience.

We hope this guide will serve not only as a compass for your work but as a catalyst for deeper conversations and more importantly actions.

How to Use This Guide

This guide is meant to be flexible. Use the pathways below to jump in where it makes the most sense for your goals.

"I'm exploring co-design for the first time"
Start with: **Chapter 2: What Is Equitable Co-Design?**

"I want to shift our organization's approach"
Start with: **Chapter 4: System & Organizational Readiness**

"I need help planning or launching a co-design effort"
Start with: **Chapter 5: Project Scoping & Preparation**

"I'm recruiting co-designers or building a team"
Start with: **Chapter 7: Recruitment as Power-Building**

"I'm facilitating a co-design process"
Start with: **Chapter 8: Facilitation & Holding Space**

"I'm ready to move from ideas to action"
Start with: **Chapter 9: Insights to Implementation**

TIP Use the action prompts at the end of each chapter in a team meeting or retreat. They're designed to turn reflection into action.

Resources and Publications

1. Blomkamp, E. (2018). The Promise of Co-Design for Public Policy. *Routledge Handbook of Policy Design.*

2. Roberts, J., et al. (2022). Community Co-Design Tools + Tactics: An Approach to Equitable Community Engagement and Action. *DMC.*

3. Vargas, C., Whelan, J., Brimblecombe, J., & Allender, S. (2022). Co-creation, co-design, co-production for public health. *Public Health Research & Practice, 32(2).*

4. Mintrom, M., Goddard, P., Grocott, L., & Sumartojo, S. (2024). Co-design in policymaking: From an emerging to an embedded practice. *Policy Sciences.*

5. Roberts, J., & Springer, J. (2026). Co-Design as Structural Accountability: A Framework for Lived Experience as Governance in Systems Change. ByDesign. by-design.org

6. Slingerland, G. & Wang, G. (2024). Co-design for change: Propositions and dilemmas. *DRS2024: Boston. Design Research Society.*

7. Benz, C., Scott-Jeffs, W., McKercher, K.A., et al. (2024). Community-based participatory research through co-design. *Research Involvement and Engagement, 10(47).*

8. World Economic Forum. (2023). Community co-design centres: Indigenous communities and women of colour in local developments. *weforum.org.*

9. Roberts, J. *The Leading Edge: A Design Thinking Framework for Community Engagement.*

10. McKercher, K.A. (2020). Beyond Sticky Notes: Co-design for Real: Mindsets, methods and movements. Inscope Books.

ACTION PROMPTS

Making it Real

These prompts bridge the gap between *understanding* equitable co-design and *practicing* it. At the end of each chapter, you'll find questions that:

Reflect
on your current work and context
1

Identify
gaps and opportunities for equity and inclusion
2

Act
take concrete steps toward embedding co-design principles
3

They work best when discussed in a group, practiced, and revisited over time.

Reading changes what you know. Action changes what you do.

1 CHAPTER 1

PROMPTS

1. *What brought you to this guide? What are you hoping to change in your own work?*

2. *Which sections feel most urgent or relevant for your current projects?*

3. *How will you make time and space for reflection as you work through the guide?*

4. *What is one immediate action you can take after reading this chapter?*

TIP: *Before moving on, write down what you believe the core problem is. Revisit that answer after each chapter. If it hasn't changed, you may not be listening deeply enough.*

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CHAPTER 2

Why Equitable Co-Design

Who benefits when communities lead, and who loses when they don't?

Building the case for co-design as a strategy for equity, grounded in the evidence that better outcomes emerge when the people most affected have real power in shaping solutions.

What is Equitable Co-Design

Equitable co-design is not about asking more people what they think. It's about shifting who gets to decide.

Equitable co-design is a methodology for changing how systems behave by embedding the people most affected by a problem as compensated designers of the solution. It operates from a core premise: **lived experience is expertise, not input.**



Rochester Library Co-Design Session

Community members do not advise from outside the process. They define the problem, shape the approach, test what gets built, and govern how it is implemented. The target is not community behavior but **system behavior** - how institutions define problems, develop solutions, and distribute decision-making authority.

From Engagement to Shared Power

Not all engagement is created equal. It exists along a continuum, from passive outreach to active partnership and shared power.

Not all engagement is equal. The IAP2 Spectrum of Public Participation maps five levels of community involvement, from **Inform** (one-way communication) to **Empower** (community-held decision-making authority). Equitable co-design operates at the **Collaborate** and **Empower** end of this spectrum - not because lower levels lack value, but because the problems this methodology addresses require shared authority to solve.



BIPOC Home Ownership Community Co-Design Project Report

Source: IAP2 Spectrum of Public Participation

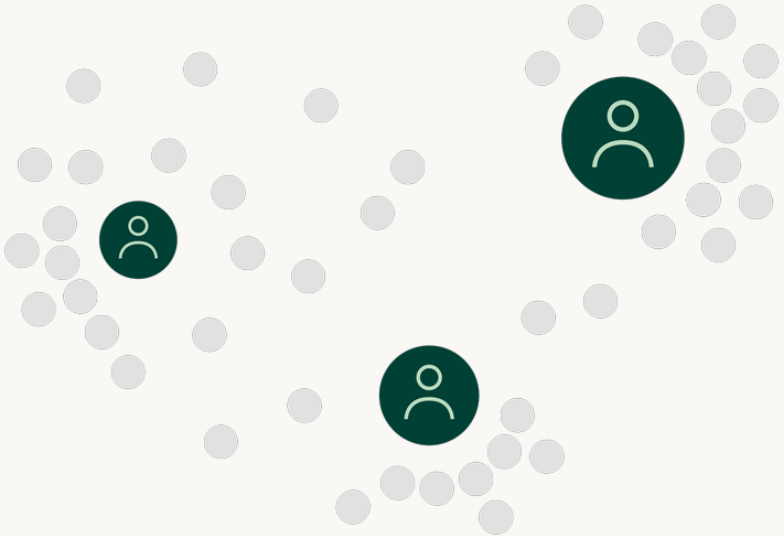
INFORM	CONSULT	INVOLVE	COLLABORATE	EMPOWER
To provide those impacted with balanced and objective information to assist them in understanding the problem, alternatives, opportunities, and/or solutions.	To obtain feedback from those impacted on analysis, alternatives, and/or decisions.	To work directly with those impacted throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with those impacted in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of those impacted.

Increasing level of public impact →

Why Equitable Co-Design

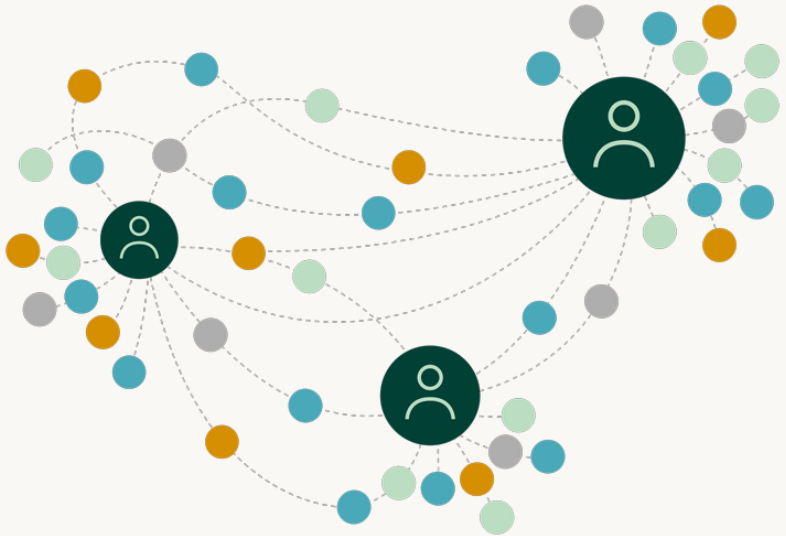
TRADITIONAL COMMUNITY ENGAGEMENT

Traditional approaches such as surveys, listening sessions, and focus groups generate valuable insight, but they often reach those already connected to institutions and relies on the same people to identify those insights. They inform decisions without meaningfully shifting who holds influence. As a result, behavioral interventions frequently reflect institutional assumptions more than the realities of everyday life.



EQUITABLE CO-DESIGN

Co-design intentionally recruits those most impacted by the issue and treats lived experience as expertise. Community members serve not only as participants, but as designers and conduits to broader networks often missed by traditional methods. Decision-making is shared across problem framing, solution development, and implementation, shifting influence alongside insight.



Source: **ByDesign LLC**

Why Equitable Co-Design

Too often, **those most impacted by public decisions have the least influence over them;** from how data is collected to who's at the table when choices are made.

As our communities become more diverse across race, language, ability, income, geography, age, and experience, traditional engagement approaches fall short. They miss the people with the clearest view of what's broken and what could work better.

Equitable co-design shifts power, making sure the people most affected are also those shaping the process and the outcome.



Rochester's Global Mayors Challenge Initiative

Minnesota's Shifting Demographics why are equitable approaches even more important today and tomorrow

POPULATION

5.8M → 6.1M

Growing to 6+ million by 2075, driven almost entirely by migration

BIPOC RESIDENTS

24% → 35%+

Communities of color projected to grow at a faster rate than the White population

AGING POPULATION

65+ Doubling

By 2035, residents 65+ will outnumber those under 18 for the first time in state history

URBAN SHIFT

63% Metro

Seven-county metro area projected to hold 63% of the state's population by 2040

REMOTE WORK

Highest in Midwest

Minnesota leads the Midwest in remote work adoption, but access remains uneven across race and education

WORKFORCE SHIFT

145,000 New Jobs

Projected by 2032, with fastest growth in tech, professional services, and healthcare

RURAL WORKERS

32,500 Fewer

Greater Minnesota's labor force expected to decline, with 80%+ of counties losing workers by 2030

BIPOC WORKFORCE

All Net Growth

Communities of color are driving all net employment growth as the White workforce contracts due to retirement

Sources: MN State Demographic Center, Metropolitan Council, MN DEED, Federal Reserve Bank of Minneapolis, U.S. Census Bureau

Co-Design Core Commitments

1. Shared Power as Structure, Not Gesture

Those most impacted hold genuine authority over how problems are defined and solutions are built, not as advisors, but as co-designers.

2. Lived Experience as Expertise

Community members who navigate broken systems carry structural knowledge no research method can recover. That knowledge is the primary design input.

3. Radical Collaboration

Difference is the mechanism through which unexpected insights emerge. New solutions require new combinations of experience and perspective.

4. Psychological Safety as a Structural Requirement

What is not safe to say cannot be surfaced. The depth of insight co-design produces depends entirely on the conditions created for it.

5. Build With, Not For

The role of co-design is to amplify what communities already know and have built, not to replace or improve on community wisdom.

6. Learn Your Way Forward

Problem definitions are discovered through engagement, not confirmed in advance. The process requires genuine openness to being changed by what emerges.

7. Organizational Accountability & Implementation

Move beyond performative DEI by embedding equity into how decisions are made, resources are allocated, and outcomes are measured.

Source: **ByDesign LLC**

Co-Design in Context

This section situates equitable co-design within a broader ecosystem of participatory approaches. It highlights where co-design aligns with, enhances, or challenges other frameworks, helping practitioners and institutions connect the dots and deepen their practice.

Rather than replacing other methods, co-design complements and strengthens them, particularly by centering power-sharing, lived expertise, and implementation.

Comparison Matrix: Equitable Co-Design & Complementary Approaches

Approach	Who Defines the Problem?	Power Dynamics	Primary Focus	Timeline	Core Strength
Equitable Co-Design	Those most impacted shape the challenge with systems	Shared power, lived expertise centered	Iterative insight-to-action	Flexible / multi-phase	Power-shifting design and implementation
Participatory Budgeting	Institutions define issue, public chooses priorities	Public votes within preset boundaries	Resource allocation	Time-bound (annual)	Democratizing local budget decisions
Liberatory / Equity-Centered Design	Communities define harm and healing goals	Centering anti-oppression, emotional truth	Healing and disruption of norms	Variable	Naming and disrupting oppression
Collective Impact	Typically institutions define shared agenda	Cross-sector alignment with central convener	Goal alignment and coordination	Long-term	Sustained institutional collaboration
CBPR	Community and researchers co-develop inquiry	Equity in knowledge production	Community-driven research	Project-based	Democratizing research design
Restorative / Transformative	Community-defined harm and repair	Accountability-based, relational	Repairing harm and building trust	Ongoing	Healing-centered relationship transformation

When Co-Design Is the Right Fit

Co-design is not always the answer, but it is the right approach when any of these conditions are present:

Affected voices are absent

The people most impacted by a decision have not been at the table in defining the problem or shaping solutions.

Existing solutions have failed

Current programs were designed without community input and have not produced equitable outcomes or have created new harm.

Multiple communities intersect

The issue sits at the intersection of communities with different lived experiences, no single “expert” perspective is sufficient.

There’s a window to shift power early

Decisions are still being shaped (not yet locked in) and there’s genuine space to share authority over design.

Demographics have shifted

The communities being served no longer match the assumptions behind current programs, services, or infrastructure.



Dedication ceremony for the Wak Pa Wazi Ozu confluence space at Silver Lake Park

Combining Co-Design with Other Approaches

Co-design can benefit when paired with complementary methods. Each combination deepens impact in a different way.

Co-Design + Participatory Budgeting

Ensures the budget reflects real community priorities from the start, not just how dollars are spent, but how spending decisions are shaped.

Co-Design + Community-Based Participatory Research

Quickly translates lived-experience insights into prototypes or service design, closing the gap between research findings and action.

Co-Design + Restorative Practices

Essential when addressing institutional harm, distrust, or generational trauma; the process itself must heal, not just produce an outcome.

Co-Design + Asset-Based Community Development

Builds on existing community strengths, relationships, and knowledge rather than framing the work as deficit-driven or needs-based.

Engagement Considerations

Traditional engagement models can tend to amplify inequalities because they rely on the same decision-makers taking the same approaches to address the same issues, resulting in the same outcomes. Engagement approaches are often well-intentioned, but there are distinct and important differences between traditional engagement strategies and more equitable, co-design approaches.

TRADITIONAL

- Community responds to pre-determined and limited options (validation).
- Engage readily accessible community members (usual suspects).
- Prioritize learned expertise.
- Decisions are made on behalf of community members.
- Uncover what people think.
- Engagement is project-based (short-term).
- Attempt to manage diversity of experiences, perspectives, & cultures (consensus-building).
- Focus on the number of engagements.

CO-DESIGN

- Community collaborates to identify, develop, and implement efforts (exploration).
- Engage less accessible community members as conduits to under-represented community experiences.
- Prioritize lived experiences.
- Decision-making with community at all phases of design process (shared power structures).
- Uncover what people feel
- Directly invest in community members, relationships, trust-building, and network building (long-term).
- Leverage diversity as an asset to creativity and innovation (productive tensions).
- Focus on the depth of engagements.

Source: **ByDesign LLC**

What Equitable Co-Design Is Not

Clarifying what this framework is not protects against the most common ways co-design gets diluted or misapplied.

Not a Research Framework

Co-design produces structural commitments accountable to lived experience, not evidence accountable to a research protocol. Academic evidence can inform scoping and iteration, but the framework is not accountable to it.

Not a Consultation Process

Consultation aggregates community input for institutional use. Co-design redistributes decision-making authority. Any process that concludes with institutional actors independently determining how to act on community input has not implemented this framework.

Not a Diversity or Inclusion Initiative

Recruiting demographically representative community members is not equivalent to embedding their authority in governance. Representation without structural power reproduces the original design problem in a politically acceptable form.

Not a Toolkit

The facilitation approaches and engagement methods that support co-design are means, not ends. What cannot be modified is the underlying commitment: community members design and govern, are compensated professionally, and the relationships built are treated as primary outputs.

Source: **ByDesign LLC**

When Systems Misread the Problem

Persistent gaps in health outcomes, education, civic participation, and service engagement are not primarily failures of community behavior. They are **design failures;** the predictable result of systems built without the people most affected by them.

But the more damaging problem is what happens next.

When communities don't engage, comply, or sustain participation as expected, institutions tend to locate the explanation in the community; not enough motivation, not enough trust, not enough information. Each failed intervention confirms that diagnosis. The strategy intensifies. **The underlying design is never questioned.**

Co-design breaks this cycle, not by improving engagement strategy, but by changing who defines what the problem actually is.

THE MISATTRIBUTION CYCLE

- Structural exclusion produces **design error**
- Design error generates **misattribution**
- Misattribution deepens the **original problem**

Source: **ByDesign LLC**

2 CHAPTER 2

PROMPTS

1. *How do we currently involve those most impacted in decision-making? Where does that fall short of co-design?*

2. *Where on the IAP2 spectrum does your current engagement practice sit? What would it take to move one level further?*

3. *When was the last time a community member changed a decision, you had already made? What made that possible - or what prevented it?*

4. *Which of the seven core commitments would be hardest for your organization to honor? What does that tell you?*

TIP: *Map your current engagement practices on the IAP2 spectrum. Be honest about where you are, not where you aspire to be. The gap between the two is your starting point.*

3

CHAPTER 3

Equitable Co-Design as Systems Approach

What would it look like to design with communities, not just for them?

Understanding how policies, institutions, and power structures shape community outcomes, and how co-design can transform these systems from within.

Co-Design Meets Systems Thinking

The demographic shifts, power imbalances, and intersecting communities we've outlined demand more than isolated fixes. Many of the challenges we face (burnout in healthcare, economic exclusion, housing instability) are not technical problems. **They are systemic.** And systems resist change when we only address symptoms.

Co-design and systems thinking are powerful when practiced together. Co-design offers proximity, relational insight, and values. Systems thinking brings structure, interconnection, and the ability to see below the surface.



Rochester Co-Design Facilitator Graduation

Why Pair Them?

Co-design without systems thinking

May treat symptoms, not root causes. Solutions stay local and don't connect to the larger structures that created the problem.

Systems thinking without co-design

Risks over-focusing on technical solutions that may be detached from lived experience and community priorities.

Together, they allow us to:

- See both the system and the people within it
- Uncover patterns and power
- Hold complexity without losing urgency
- Build solutions that are not just new, but enduring

Source: **ByDesign LLC**

The Six Conditions of Systems Change

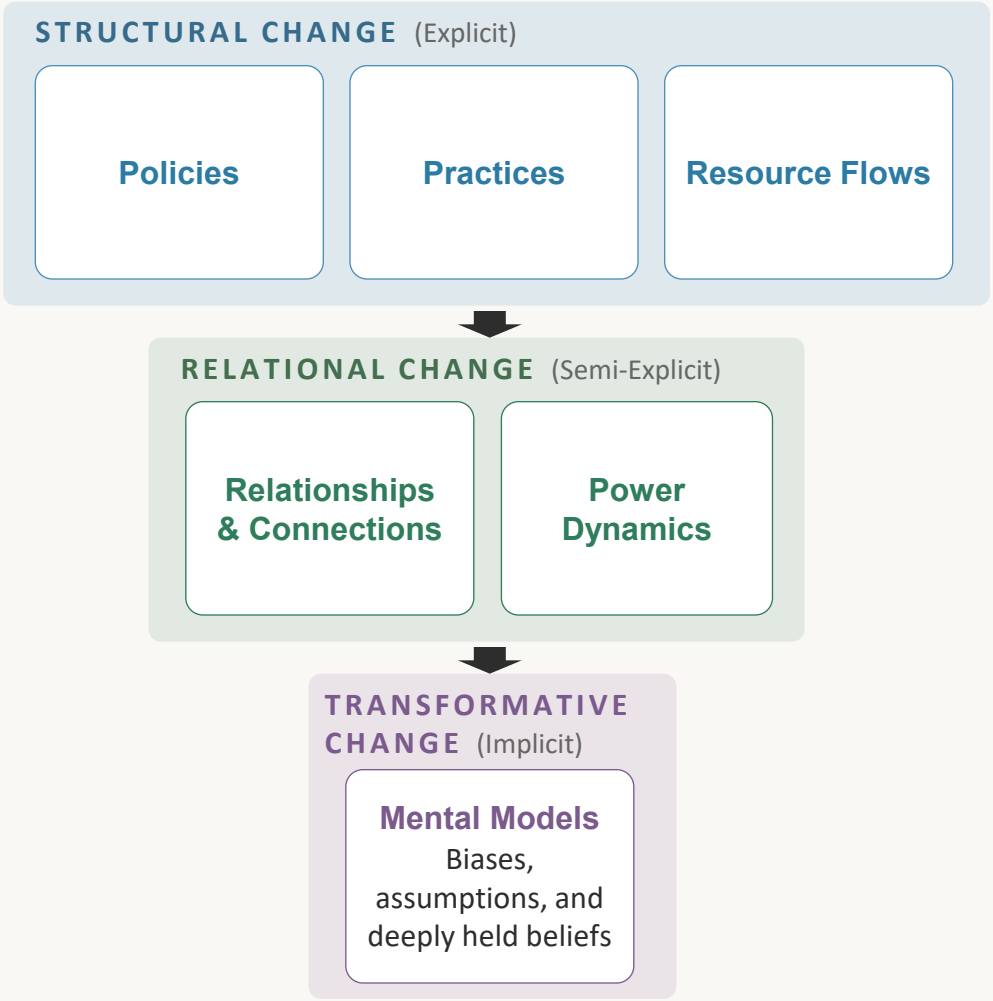
Systems don't only operate at the structural level: policy, practices, and programs. The real drivers of inequity are often found in **how people relate to each other**, **their access to power and decision-making**, and deeper still, in the **mental models** that drive decision-making. These include biases, assumptions, and deeply held beliefs about who holds knowledge, who deserves trust, and who is seen as "the problem."

Co-design invites us to work where the problems live.

To listen not just to feedback, but to the meaning behind peoples' stories. To ask not just "what's working?" but "who decided what counts as working?"

- Reveal hidden assumptions about who holds knowledge and who deserves trust
- Redistribute power by centering lived experience
- Shift the deeper conditions (relationships, power, mental models) that hold inequity in place

We cannot demand that someone change their mental model, but we can **design experiences that allow that change to happen.**



Adapted from: J. Kania, M. Kramer, P. Senge. "The Water of Systems Change" (FSG, 2018)

Seeing the Whole System, Then Changing It with People

Systems thinking helps teams understand the complex interactions between policies, practices, behaviors, and structural factors that shape outcomes.

Co-design brings those most impacted (community members, frontline workers, stakeholders, and end users) into the design process to ensure solutions reflect real needs, values, and contexts.



Discovery Walk Co-Design Session

REFLECT

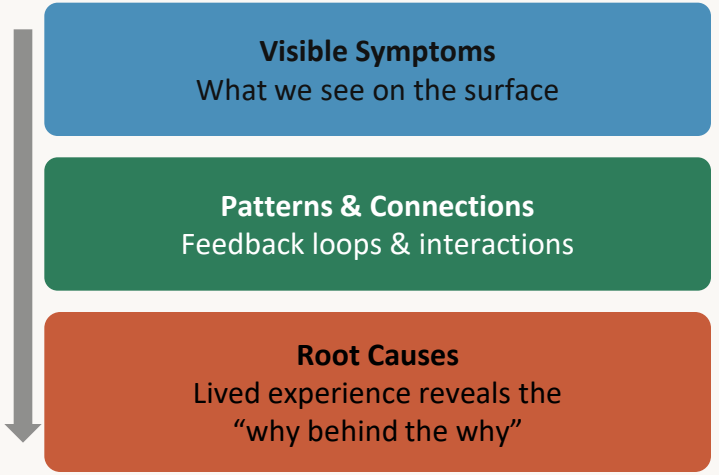
Where are we currently making decisions without the input of those most impacted? How might bringing in different perspectives change how we define the problem?

Source: **ByDesign LLC**

Surfacing Root Causes and Lived Experience

Systems thinking maps root causes, interconnections, and feedback loops, helping explain why certain challenges or inequities persist.

Co-design adds the lived experience that gives these maps depth and meaning, revealing the "why behind the why" that traditional analysis can miss.



REFLECT

What's one persistent issue we've tried to solve multiple times, without lasting success? Who might help us better understand why that problem keeps coming back, or whether we're solving for the right problem?

Source: **ByDesign LLC**

Designing for Complexity, Not Just Efficiency

Systems thinking pushes against purely linear solutions in favor of adaptive strategies that recognize interdependence and change over time.

Co-design uses testing and iteration with real users and stakeholders, making it easier to design for complexity in ways that are practical, relational, and responsive.

LINEAR APPROACH
Problem → Solution → Done

vs.

ADAPTIVE APPROACH
Test → Learn → Iterate → Adapt
with real users & stakeholders

REFLECT

Where have we prioritized efficiency over adaptability? What's one area where small, low-risk experiments could help us learn with others and design for complexity?

Source: **ByDesign LLC**

Shifting Power to Improve Outcomes

Systems thinking acknowledges the importance of distributed leadership and multiple perspectives in complex environments.

Co-design makes this real by moving decision-making power closer to those with lived experience, ensuring solutions are shaped by both technical expertise and practical knowledge.



BIPOC Homeownership Co-Design Session

REFLECT

What decisions could we move closer to the frontline, the community, or the people most affected? What support or structures would we need to make that shift successful?

Source: **ByDesign LLC**

Sustaining Innovation

Systems thinking emphasizes continuous feedback, learning, and adaptation as conditions change.

Co-design ensures these feedback loops include those most impacted, so solutions remain relevant, trusted, and effective over time.



Bloomberg Mayor's Challenge Convening

REFLECT

How do we currently gather and respond to ongoing input from those affected by our decisions? What kind of shared feedback loop could help us adapt before problems escalate?

Source: **ByDesign LLC**

Integrating Co-Design & Systems Thinking

How Co-Design + Systems Thinking Work Together

A bridge between relational insight and structural change.

Systems change work and equitable co-design are often treated as separate domains; one analytical, one relational. In practice, they are most powerful when used together.

Systems thinking helps us see the patterns and structures that keep problems in place. **Co-design** helps us understand **why** those patterns persist, **how** they are experienced, and **what would need to shift** for change to take root.

Where systems thinking provides the map, co-design provides the compass and action. Together, they support not only better solutions, but deeper **mental-model shifts** inside institutions, reshaping beliefs about who holds knowledge, whose voice is credible, and how decisions should be made.



Open global market at Peace Plaza

Source: **ByDesign LLC**

Five Ways Co-Design & Systems Thinking Integrate (1 of 2)

1 **Reframing the Problem** Defining the System

In practice: Before scoping a project, map your institutional assumptions about the problem. Then bring co-designers in to challenge those assumptions. The reframe that emerges - *Whose definition are we using?* - often redirects the entire initiative.

2 **Revealing Root Causes** Understanding Patterns & Structures

In practice: When co-designers name fear, distrust, or stigma as barriers, don't translate those into institutional language. Hold them as **design criteria**. Ask: *What would need to be true for this barrier to dissolve?*

3 **Shifting Mental Models** Changing How Institutions Think

In practice: Track how leaders describe the work *before and after* sustained co-design engagement. When language shifts from **"getting them to participate"** to **"earning the right to be trusted,"** the mental model is moving.

Source: **ByDesign LLC**

Five Ways Co-Design & Systems Thinking Integrate (2 of 2)

4 **Prototyping for Complexity** Designing for Real Conditions

In practice: Test prototypes with co-designers under **real conditions**, not controlled ones. Ask them to try a navigation tool in their neighborhood, walk through a training module with their community, or role-play a provider interaction. What breaks in practice is *exactly* what you need to redesign.

5 **Building Distributed Leadership** Embedding Change in the System

In practice: From the start, identify pathways for co-designers to grow into **sustained roles**: navigators, facilitators, evaluators, governance partners. The work is not complete when the co-design process ends. It is complete when *community authority is embedded in how the institution operates.*

REFLECT

Which of these five integration points resonates most with your current work? Where is the biggest gap between how your institution thinks about problems and how the community experiences them?

Source: **ByDesign LLC**

PROMPTS

1. *What patterns, structures, or relationships would need to shift for this work to stick?*

2. *How could co-design help address not just symptoms but root causes?*

3. *What other system-change efforts could co-design complement or strengthen?*

4. *Who in the system might be an unexpected ally in this work?*

TIP: *Ask someone outside your organization to describe the system you work in. Their description will almost certainly differ from yours. That difference is the insight.*

4

CHAPTER 4

System Readiness

Are we truly ready to share our networks, resources, and decision-making power?

Are we truly ready to share our networks, resources, and decision-making power? Systems thinking reveals why co-design is necessary. Readiness determines whether it is possible. Preparing the conditions for co-design to succeed, rooted in trust, accountability, flexibility, and an honest willingness to let go of some control.

Co-Design Readiness Is Rooted In

1 Power-Sharing Infrastructure

Are decisions truly open to being shaped by the community? Consider **structural** (budgets, timelines), **relational** (trust, reciprocity), and **transformative** (mental models, norms) conditions.

Look for: Flexible timelines, shared budgets, willingness to adapt based on input.

2 Relational Networks

Trust is not built in a grant cycle. Do we have existing, reciprocal relationships with communities most impacted?

Ask: If not, who does, and how might we partner with them?

3 Compensation & Real Authority

Co-designers must be paid at **professional rates**, and their time must connect to real decision-making power.

Test: Are we compensating expertise or extracting it?

4 Tolerance for Uncertainty

Co-design begins in **honest uncertainty**, not hypothesis. Can leadership release premature certainty about both the problem and the solution?

Ask: Are we entering to discover, or to confirm?

5 Funding & Timeline Alignment

Short-term, transactional funding structures undermine **longitudinal** relational work. Are timelines and budgets designed for the work, or the other way around?

Red flag: The grant cycle sets the pace, not the relationship.

Practice Tip:

"Start With Power Mapping"

Before launching your project, make a list of who usually gets to define the problem, set the agenda, approve the budget, or sign off on deliverables.

Then: who's most impacted? How different are those two lists?

Assessing Readiness: Narrative Discussion

Before launching a co-design effort, confirm that the project is both the right fit and at the right stage for meaningful community involvement. Use this section to discuss as a team:



Bloomberg Mayor's Challenge Convening

Why do we believe this project is right for co-design?

Are we prepared to follow community input even if it challenges our current plan?

Who in the community should be involved, and why?

What constraints (time, budget, policy) might limit the process?

What aspects of this project are not open to community influence, and are we willing to be transparent about those boundaries?

Starting too early, too late, or without team alignment can risk alienating both the community and project leadership.

Assessing Readiness: Scoring Checklist

Rate each statement on a scale of **1 (low)** to **10 (high)** and provide brief detail. This helps reveal alignment gaps and readiness strengths.

1. **Community Engagement**
   To what degree are impacted community members already engaged or invested in this project? (Describe in detail)

2. **Leadership Willingness**
   How willing is project leadership to collaborate and share decision-making power? (Describe in detail)

3. **Project Momentum**
   What is the current level of momentum or urgency for this project and from whom? (Describe in detail)

4. **Influence Potential**
   To what degree are resources and decision-making power tied to this effort open to community input? (Describe in detail)

5. **Asset Orientation**
   To what degree are we building on existing community knowledge, networks, and leadership rather than starting from scratch? (Describe in detail)

How to Use the Results:

Scores of **7–10** indicate readiness. • Scores of **4–6** suggest more preparation is needed. • Scores of **1–3** indicate the project may not be ready for co-design without significant changes.

PROMPTS

1. *What decisions are truly open to community influence right now?*
2. *What systems, policies, or habits might block equitable participation?*
3. *How might lived experience have a direct impact on decision-making?*
4. *How ready are we to shift timelines or priorities based on community input?*
5. *Where do we anticipate internal resistance, and how will we address it?*

TIP: *If your team scores below 4 on any readiness item, pause before launching. Readiness gaps don't resolve during the process. They widen.*

5

CHAPTER 5

Project Scoping & Preparation

Have we defined the right problem and have the right people helped define it?

Laying the groundwork for co-design by clarifying purpose, identifying community partners, setting shared goals, and establishing the roles, timelines, and boundaries that make collaboration real.

The Equitable Co-Design Process

Why Scoping Matters in Co-Design

Scoping is about setting the conditions for **meaningful community influence**. It is also where organizations make critical decisions about **power-sharing,** how much decision-making authority will be shared, and at which stages of the process.

Well-scoped projects are:

- **Broad enough** to allow for unexpected insights to emerge
- **Narrow enough** to be tangible and relevant to community members

Co-design is **iterative.** You don't need to have everything figured out in advance. The process is about **learning your way forward**, not validating a pre-determined solution.



Rochester Public Library Co-Design Session

Source: **ByDesign LLC**

Scoping Principles

Appropriate Scale

Start small enough for tangible input, big enough for learning.

Look for: Well-defined focus that allows for specific contributions

Watch for: Starting overly broad, leading to generic results

Iterative

Begin with humility; focus on discovery, not validation.

Look for: Multiple rounds of engagement where learning informs next steps

Watch for: Trying to finalize solutions before involving the community

Asset-Focus

Build with, not on top of, existing community strengths.

Look for: Local leadership, informal support systems, cultural practices

Watch for: Deficit-only framing that overlooks community resilience

Enhance

Build on previous work and relationships with reciprocity, honor past contributions, don’t start from scratch.

Look for: Past engagement findings and trusted networks to leverage

Watch for: Ignoring existing community-led initiatives

Source: **ByDesign LLC**

Co-Design Budgeting

Most grants and RFPs allow line-item flexibility, but few applicants proactively include **co-designer roles** beyond "community outreach" or "focus groups." Below is a sample budget for a 2.5–3 month co-design effort.

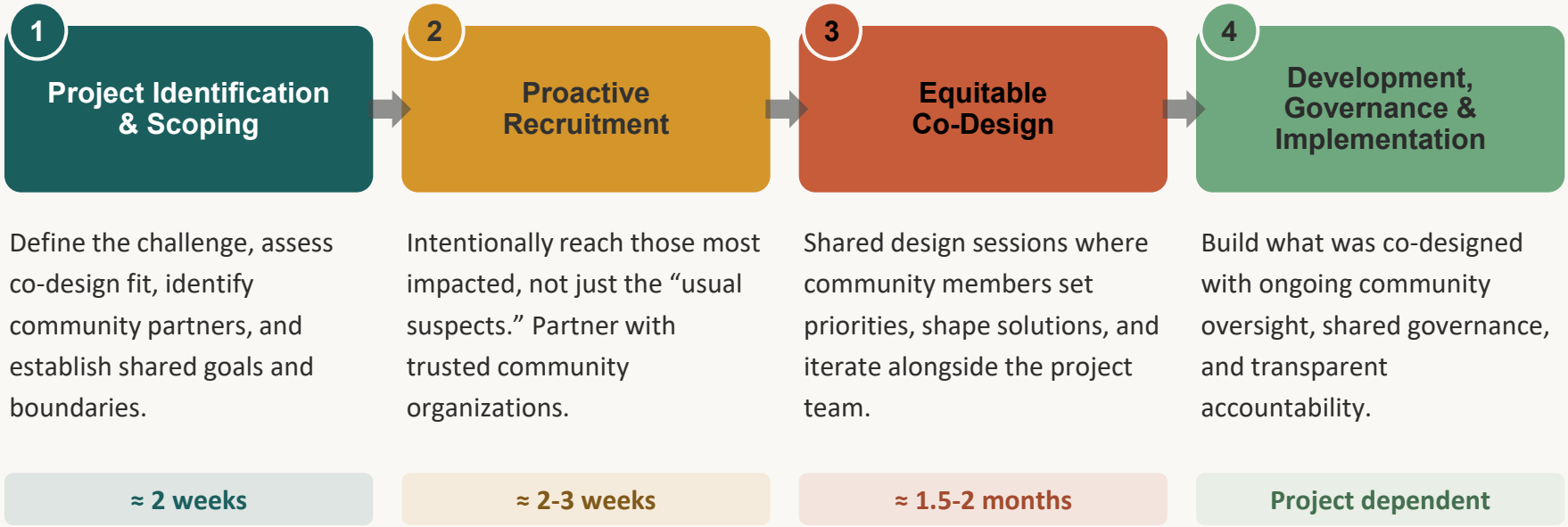
Budget Category	Estimated Cost	Notes
Project Manager / Facilitator	$7,000 – $15,000	Part-time coordination over 2.5–3 months
Co-Designer Stipends	$4,200 – $10,000	7-9 co-designers at $30-$60 per hour
Materials & Supplies	$500 – $1,000	Meeting materials, printing, prototypes
Childcare, Transportation, Food	$1,000 – $2,000	Remove barriers to participation
Venue / Technology	$500 – $1,000	Meeting space, virtual platform access

Practice Tip: *Use the budget narrative to explain how this investment builds long-term capacity and trust.*

Budget Note: This model is intentionally modular and flexible. If your organization has in-house engagement or project management capacity, you will reduce costs considerably.

The Equitable Co-Design Sequence

A four-phase process for meaningful community partnership in public projects



Define the challenge, assess co-design fit, identify community partners, and establish shared goals and boundaries.	Intentionally reach those most impacted, not just the "usual suspects." Partner with trusted community organizations.	Shared design sessions where community members set priorities, shape solutions, and iterate alongside the project team.	Build what was co-designed with ongoing community oversight, shared governance, and transparent accountability.
≈ 2 weeks	≈ 2-3 weeks	≈ 1.5-2 months	Project dependent

Estimated total: 2.5 – 3 months (excluding implementation)

Practice Tip: "Make Room for the Unknown"

Design your timeline to include at least one **pause for reflection and course correction**. Most public projects already require dedicated budgeting and community time, find ways to incorporate co-design into existing activities. If you plan to iterate, you must also plan to stop, listen, and shift.

Source: **ByDesign LLC**

Return on Investment

Types of Returns from Co-Design

Type of Return	Examples
Community Trust & Relationships	Deeper, more authentic partnerships; co-designers become advocates; long-term accountability
Better-Designed Solutions	Programs and services that reflect lived experience and real needs
Organizational Learning	Staff gain empathy, new skills, and cross-sector understanding; bi-directional knowledge building
System-Level Impact	Policies informed by community voice; reduced service duplication; emerging/strengthening relationships; shifting power dynamics

Discussion: How does your organization currently assess value and/or Return on Investment? How do you capture value across different stakeholder groups?

Evidence for Co-Design Investment

Research consistently shows that co-design improves service quality, builds community ownership, and generates outcomes that top-down approaches miss:

- Co-design positively impacts communities through **skill-building, empowerment, and organizational learning** (Rahman et al., cited in PMC, 2024)
- Participatory approaches foster **democratic decision-making, sustainable development, and community empowerment** (Fernando et al., 2024)
- Knowledge sharing is inherently built into collaboration when diverse communities bring **varied experiences and perspectives** (ScienceDirect, 2025)
- Community participation fosters a **sense of ownership and belonging**, ensuring needs are reflected in outcomes (Fernando et al., 2024)
- Benefits span four dimensions: **improved service quality, stakeholder empowerment, knowledge generation, and organizational transformation** (Steen, Manschot & De Koning, 2011)

Key Citations

Steen, M., Manschot, M., & De Koning, N. (2011). Benefits of co-design in service design projects. *International Journal of Design, 5*(2), 53–60.

Trischler, J., Dietrich, T., & Rundle-Thiele, S. (2019). Co-design: from expert- to user-driven ideas in public service design. *Public Management Review, 21*, 1595–1619.

Bradwell, P., & Marr, S. (2017). Making the most of collaboration: an international survey of public service co-design.

PROMPTS

1. *What problem are we trying to solve and who defined it?*
2. *What outcomes are we aiming for, and how will we know if we've succeeded?*
3. *What risks are we asking co-designers to take that we're not also sharing?*
4. *How will we communicate scope and limits clearly without shutting down creativity?*
5. *What resources (time, money, relationships) do we need to secure before we start?*

TIP: *Write your problem statement on a whiteboard. Then ask: Who wrote this? If no one from the affected community was in the room, the statement is a hypothesis, not a scope.*

6

CHAPTER 6

The Co-Design Process

Have we designed a process that meets people where they are and can adapt as we learn together? Does the process allow for shifting decision-making structures?

Structuring the co-design journey; reaching under-recognized communities, choosing methods, sequencing activities, defining facilitation roles, and building in the flexibility for community voice to reshape the process itself.

The Co-Design Process

The co-design structure is an **iterative cycle** of design sessions paired with community-led exploration sprints. In each session, **professionally compensated co-designers** (valued as both researchers and designers) come together to reflect on community insights.

The process follows a deliberate **four-iteration sequence**:

- **Broad Discovery:** Capture initial insights
- **Pattern Identification:** Surface emerging themes
- **Priority Definition:** Name tensions and t**Implementation & Shared Governance:** rade-offs
- Test solutions, implement together

This progression moves from broad exploration toward shared clarity and direction.

As priorities are refined, they transition into governance and implementation sessions that translate insight into action. These sessions steward priorities, protect the integrity of what was co-designed, and adapt solutions based on ongoing community feedback, ensuring accountability to the people who shaped them.

Co-design offers a rare and authentic opportunity for **community perspectives, hopes, fears, and values to directly shape decisions,** not as feedback after the fact, but as central drivers of the design process itself.

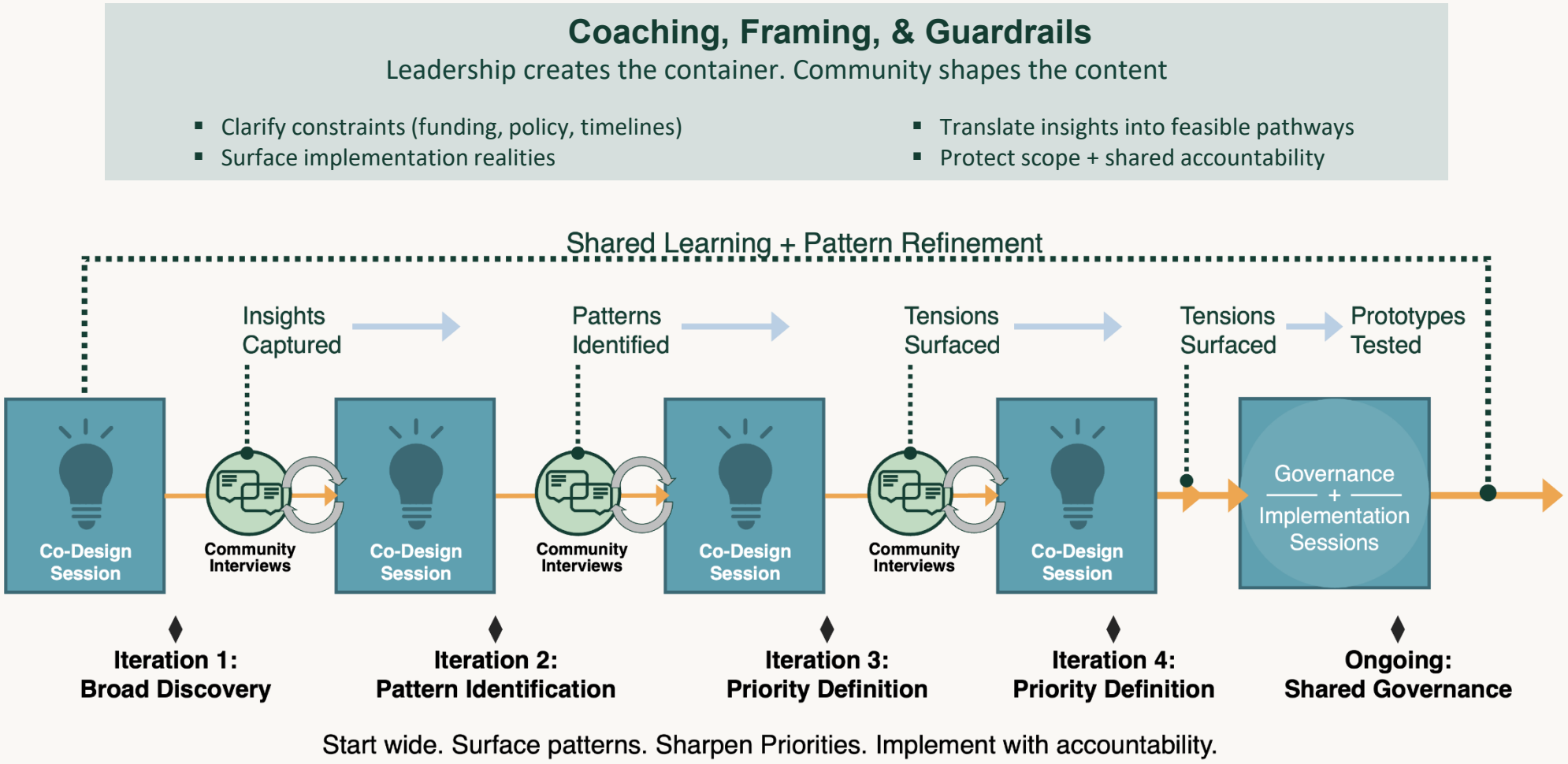


Bloomberg Global Mayor's Challenge Co-Design Session

Source: **ByDesign LLC**

The Co-Design Structure

The diagram below illustrates the full co-design cycle: iterative design sessions paired with community-led exploration sprints, supported by leadership an facilitators in setting productive guardrails. Read from left to right: each iteration deepens insight, moving from broad discovery to shared accountability.



Source: **ByDesign LLC**

The Equitable Co-Design Arc

Co-design is not a one-time activity, it's a cycle grounded in trust, reflection, and action. The arc of the work includes four interconnected components:

Co-Design Teams

The heart of the process.

- Compensated community members selected for lived experience and relational insight
- Build trust across communities and institutions
- Ground the process in real-life experience
- Synthesize insights and shape direction

Design Sessions

Where meaning is made.

- Facilitated gatherings to share findings and look for patterns
- Grounding, connection, and group synthesis
- Prioritization and idea development
- Co-creation of design principles or prototypes

Individual Support

Care is infrastructure.

- One-on-one support between sessions to reflect, ask questions, and adapt tools
- Personal check-ins with facilitators
- Emotional support or space for processing
- Navigational help with logistics, tech, or accessibility

Explorations

Staying close to the ground.

- Engaging trusted networks through conversations and observations
- Experiences, questions, and stories
- How problems show up in daily life
- Community responses to early ideas

Source: **ByDesign LLC**

Core Structural Mechanics

Three structural mechanics distinguish this approach from conventional engagement and participatory models; they are design commitments that shape every phase of the work.

1. Iterative Design Sessions + Community Explorations

Co-design alternates between facilitated design sessions and community-based explorations conducted by co-designers within their own networks. Each iteration informs the next, allowing insight to deepen rather than simply accumulate.

2. Co-Designers as Interpreters, Not Data Collectors

Co-designers do not function as research assistants. They interpret, prioritize, and contextualize what they hear through lived experience, exercising judgment about what matters, what is representative, and what institutions are missing.

3. Structured Triangulation

Structured triangulation is the deliberate navigation between three forces: what communities know from lived experience, what institutions know about their constraints, and the productive tension between them. The process intentionally works in this space, preventing both assimilation into institutional logic and disconnection from implementation realities.

The methodology is longitudinal by design. Transactional engagement extracts information for institutional use. This methodology builds shared capacity for structural change.



Source: **ByDesign LLC**

Pre-Launch: Scoping & Recruitment

Project Identification & Scoping

Scoping establishes a design space that is sufficiently constrained for institutional actionability, yet open enough that co-design can surface unexpected insights. The problem statement is a hypothesis, not a conclusion.

Proactive Recruitment

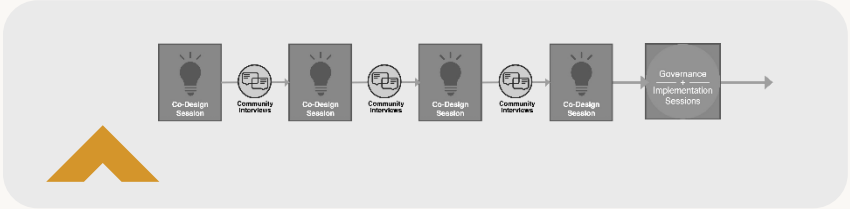
Recruitment prioritizes communities disproportionately affected and structurally excluded from prior decision-making. Co-designers are selected for their lived experience and the networks they carry access to.

Readiness & Onboarding

Relationship building, scope alignment, accessibility planning, and compensation structures are established before work begins. Co-designers must be compensated at professional rates, reflecting their role as designers.

Pre-Launch Criteria

- Willingness to share decision-making authority
- Compensation structures recognizing expertise
- Tolerance for uncertainty and discovery
- Alignment between funding, timelines, and relational work
- Leadership capable of relational accountability



Source: **ByDesign LLC**

Broad Discovery

ITERATION 1

Design Session

The kick-off session grounds co-designers in the project context, establishes relationships, and builds familiarity with the team, expectations, and the exploration approach. Co-designers begin to surface initial assumptions and frame the inquiry.

Community Exploration

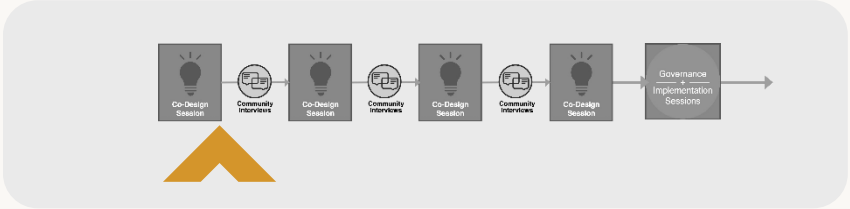
Co-designers engage their trusted networks through conversations, interviews, and observations. They do not function as data collectors, they are **interpreters**, exercising judgment about what matters and what institutions are missing.

Individual Support

One-on-one check-ins with facilitators to answer questions, adapt tools, build comfort and confidence, and address accessibility needs.

What Emerges

- Initial lived perspectives captured
- Surface-level assumptions begin to shift
- Trust-building across team
- Co-design begins in uncertainty, not hypothesis



Source: **ByDesign LLC**

Pattern Identification

ITERATION 2

Design Session

Co-designers share what they heard during explorations and begin group synthesis. The facilitation model holds the space between lived experience, institutional constraint, and the **productive tension** between them.

Community Exploration

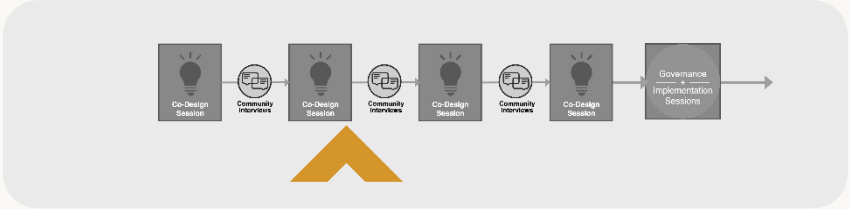
With sharpened focus from Session 1, co-designers return to their networks with more targeted inquiry. Patterns begin to surface recurring themes that reveal what institutional analysis could not have anticipated.

Steering Team Engagement

Institutional leaders review emerging patterns alongside co-designers, identifying structural tensions and opportunities. This is the triangulation in action.

What Emerges

- Structural patterns identified across perspectives
- Institutional assumptions begin to surface
- Reframing from community deficit to design error
- Tensions between lived experience and institutional logic made visible



Source: **ByDesign LLC**

Priority Definition

ITERATION 3

Design Session

Patterns are tested, contested, and refined. The co-design thesis begins to take shape, not as a recommendation list, but as a **structural commitment** developed by and accountable to the people whose lives it affects.

Community Exploration

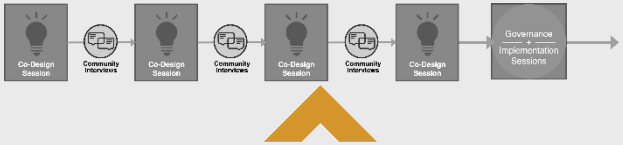
Co-designers stress-test emerging priorities against the realities of their communities. Tensions between what matters most and what institutions can implement become the productive material of the work.

Governance Session

Leadership and co-designers collaborate on translating emerging insights into feasible pathways. Institutional constraints are surfaced honestly, not used to foreclose the process.

What Emerges

- Tensions surfaced between community needs and institutional logic
- Co-design thesis taking form
- Design criteria articulated by community
- Pattern language emerging



Source: **ByDesign LLC**

Solution Testing

ITERATION 4

Design Session

The co-design thesis is finalized and presented. Prototypes, training materials, and measurement frameworks are tested against co-designers' lived experience before scaling. The thesis is not a recommendation; it is a **design commitment**.

Community Exploration

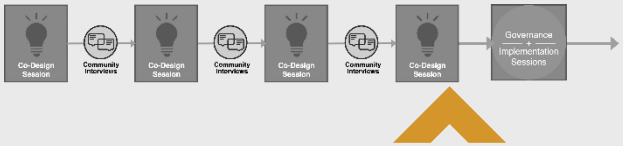
Additional co-designers may engage new perspectives, stress-testing insights and clarifying what key changes look like at the system level. Solutions are tested against community realities before finalization.

Governance Session

Implementation pathways are defined with shared accountability. Co-designers transition from design authority to governance authority.

What Emerges

- Solutions tested against lived realities
- Co-design thesis finalized as structural commitment
- Implementation pathways co-defined
- Governance transition begins



Source: **ByDesign LLC**

Shared Governance & Implementation

ONGOING

Implementation is not a handoff. It is the point at which most participatory approaches fail. Without sustained authority, community-derived insight is diluted, reinterpreted, or abandoned under institutional pressure. Three governance functions distinguish this phase:

Protecting the Thesis

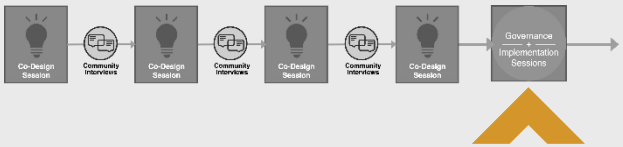
Co-designers review implementation decisions against the co-design thesis and identify departure from community-defined commitments before it becomes institutionalized.

Testing Before Finalizing

Prototypes, training materials, and measurement frameworks are tested against co-designers' lived experience before scaling. This is design governance, not advisory feedback.

Sustaining the Relationship

Co-designers maintain the institutional relationship with the community on whose behalf they have governed. Their continued presence prevents the drift that typically attenuates participatory initiatives.



Source: **ByDesign LLC**

PROMPTS

1. *How will the process allow for exploration, iteration, and testing?*
2. *Where will co-designers have the most influence along the way?*
3. *What's one way we could make this process more responsive as it unfolds?*
4. *How will we balance efficiency with enough time for trust and creativity?*

TIP: *After each design session, ask co-designers what surprised them. Their surprises reveal the edges of institutional assumption, which is exactly where the real design work happens.*

7

CHAPTER 7

Recruitment & Power-Building

Are we reaching the people most impacted by the design challenge? Does our recruitment process build trust and power, or just fill seats?

Building a co-design team through relational recruitment, trusted connectors, and professional compensation; reaching under-recognized communities not through institutional outreach, but through the networks that already hold credibility, trust, and lived expertise.

Why Recruitment Is the Work

Recruitment isn't just a step in the process. **It *is* the process.** How we invite people into co-design tells them everything about how we intend to share power. If recruitment feels extractive, performative, or rushed, trust will be hard to build later.

Trust Is a Function of Power

Trust is built when communities experience real autonomy and influence over decisions, not through better messaging. Recruitment is the first place this gets tested.

Diversity Is a Design Requirement

Homogeneous groups surface only what people with similar experiences can see. As Commitment 3 establishes, difference is the mechanism through which unexpected insights emerge; the productive friction between genuinely different perspectives is what produces solutions no single community could reach alone.

Recruitment Builds Relational Infrastructure

Done with care, recruitment becomes a powerful act of relationship-building and repair. It doesn't just diversify the room; it transforms the room. The trust cultivated here carries the work forward.

The Recruitment Sequence

1 Collaborator Mapping

- Identify communities disproportionately affected by the design challenge
- Map existing relational channels: community orgs, faith communities, informal networks
- Identify trusted connectors already embedded in those communities
- Assess whose voices have been structurally excluded from prior decision-making

2 Prioritizing Collaborators

- Select co-designers based on lived experience AND relational reach
- A co-designer's value includes who they can access, who trusts them
- Prioritize diversity as a design requirement—not a values commitment
- Map prospective co-designers' networks alongside their own experience

3 Outreach

- Leverage existing relational channels rather than institutional outreach
- Use the snowball model: trusted connectors invite from their own networks
- Approach through relationships, not flyers or public calls
- Be transparent about the role, commitment, compensation, and decision-making power

4 Expectation Setting

- Define the co-designer role clearly: interpreters and governance partners, not data collectors
- Establish professional compensation at the outset
- Name what the institution is prepared to share—and what it isn't
- Build in trauma-informed pacing from the very first conversation

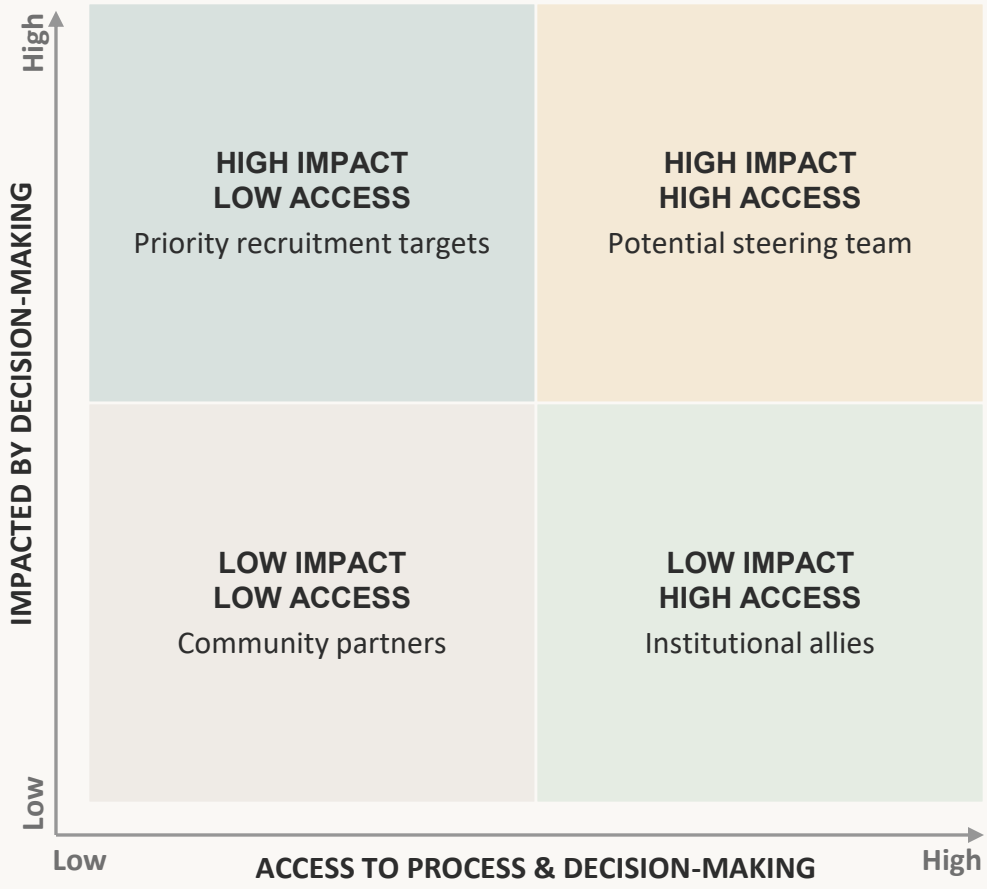
Source: **ByDesign LLC**

Stakeholder Analysis

Institutional outreach channels reliably surface the same individuals already connected and articulate in institutional language. Mapping stakeholders by **impact** and **access** reveals who has been structurally excluded from prior decision-making.

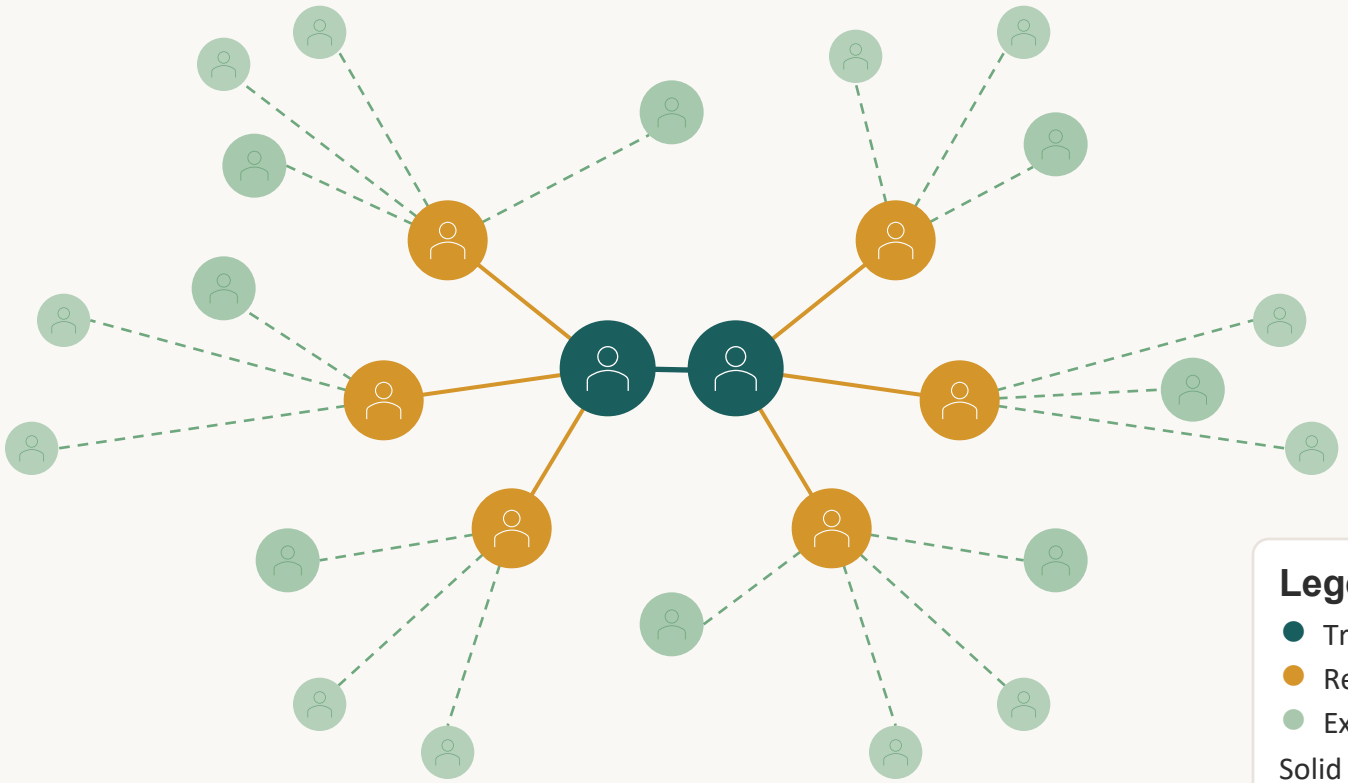
Key Questions

- Who is most affected by this design challenge?
- Who has access to institutional decision-making?
- Where is the gap between impact and access widest?
- Whose voices are missing from prior engagement?



Recruitment Through Relational Networks

The snowball model begins with a small number of **trusted connectors;** individuals deeply embedded in the communities we seek to engage. Each connector brings their own networks of credibility and trust, expanding reach organically through existing relational channels rather than institutional outreach.



Source: **ByDesign LLC**

Barriers & How We Address Them

Co-designers should be set up for success. Communities disproportionately burdened by structural inequity have also been disproportionately subjected to broken promises and extractive engagement. Recognizing this history, and responding where possible and appropriate, is a structural requirement.

Barriers to Participation

- Lack of childcare or family support
- Transportation access
- Work schedule conflicts
- Language and literacy differences
- Distrust of institutions (earned)
- History of extractive engagement
- Technology and digital access gaps
- Housing instability and economic precarity
- Trauma and emotional safety concerns
- Immigration status and documentation fears

Reducing Barriers

- Provide childcare and family-friendly scheduling
- Cover transportation or meet where people are
- Professional compensation from day one
- Offer interpreters and translated materials
- Build trust before asking for participation
- Trauma-informed pacing and facilitation
- Provide technology access and digital support
- Ensure confidentiality and data protection
- Flexible meeting times, locations, and formats

Compensation as Power-Sharing

Compensation is critical to ensuring co-designers can fully participate in the process and address challenges such as childcare, transportation, and time. **Professional-level compensation shifts power dynamics** and demonstrates an equitable valuation of lived experience.

Tax & Benefits Considerations

Depending on state and federal tax regulations, co-designers may need to fill out tax forms and report earnings. This can impact individual's state or federal benefits. Be sure to fully explore these impacts and adjust, as necessary.

Living Wage Standard

A living wage is the minimum income necessary for a worker to meet basic needs. We recommend compensation at or above the regional living wage.

Compensation Should Include:

- Design session time (preparation + attendance)
- Community exploration work between sessions
- Governance and implementation sessions
- Travel time and incidental expenses

Find regional living wage rates: livingwage.mit.edu

Other Forms of Recognition

Financial compensation is essential but not sufficient. Recognition takes many forms; each reinforcing that co-designers are valued partners, not participants being managed.

Professional References

Provide references for future employment that name their design and governance contributions

Certificates & Credentials

Formal recognition of skills developed: facilitation, research, community organizing

Co-Authorship

Name co-designers as co-authors on reports, publications, and presentations

Employment Pathways

Co-designers should be first-line candidates for positions created by the projects they helped design: peer navigators, community liaisons, implementation leads

Public Acknowledgment

Recognize contributions in organizational communications, events, and media

Skill Development

Invest in co-designers' growth: training, mentorship, professional development opportunities

Network & Leadership Access

Connect co-designers to professional networks, advisory boards, and leadership roles beyond the project

Meals & Gathering

Share food at every session. Gathering and community-building are part of the work

Ongoing Relationship

The most meaningful recognition: sustained partnership that outlasts any single project

Source: **ByDesign LLC**

The Position Description

A position description communicates that this is professional, compensated work, not volunteerism. The way we describe the role signals whether we see co-designers as advisors being consulted, or **partners with governance authority**.

A Position Description Should Include

- Clear title (e.g., “Community Co-Designer”)
- Overview of the co-design process and goals
- Specific roles and responsibilities
- Time commitment and schedule
- Compensation rate and payment process
- Decision-making authority and scope
- Contact person and support resources

A Description Should Reflect

- Lived experience as a core qualification
- Language that signals partnership, not volunteerism
- Co-designers as interpreters and governance partners
- Transparency about what the institution is prepared to share, and what it isn’t
- No requirement for formal education or institutional experience
- Commitment to trauma-informed, culturally responsive engagement
- The institutional commitment to follow through on what is decided

PROMPTS

1. *Who is most impacted and least likely to be invited to the table?*
2. *Whose recommendations could help us find trusted facilitators and co-designers?*
3. *How could recruitment itself be a relationship-building process?*
4. *What supports (childcare, stipends, transportation) will make participation possible?*
5. *How will we ensure recruitment reflects the diversity of experiences we need to hear?*

TIP: *Ask your co-designers who else should be in the room. The best recruitment strategy is relational, not institutional. The people you can't reach through your channels are often the ones who matter most.*

8

CHAPTER 8

Facilitation & Holding Space for Equitable Co-Design

Are we creating the conditions for people to bring their full knowledge, or just the parts that fit our timeline?

Facilitation in co-design is not about running a meeting. It is about constructing the conditions under which lived experience can surface what institutional analysis cannot, navigating the space between what communities know, what institutions can realistically implement, and the productive tensions between the two - with trauma-informed pacing, invitational participation, and the understanding that relational depth is what produces insights that exceed institutional expectations.

What Co-Design Facilitation Is, and Isn't

Co-Design Facilitation IS

- Constructing the conditions for honesty, safety, discomfort, emergence, and shared power
- Navigating **generative tension** between lived experience and institutional constraint
- Practicing **problem admiration.** Sitting with complexity long enough for real insight to surface
- Shaping the emotional, cultural, and relational space where power can shift
- Building toward **co-created clarity,** where understanding emerges from shared process
- Treating the process itself as a site of discovery, not execution

Co-Design Facilitation IS NOT

- Running a workshop or driving consensus toward a predetermined outcome
- Performing neutrality while guiding the group toward institutional preferences
- Trying to "be right" before community voice is involved
- Consultation that aggregates input for institutional actors to accept, modify, or discard
- A diversity initiative where representation substitutes for structural power
- A toolkit; facilitation methods are means, not ends

Source: **ByDesign LLC**

Co-Design Project Partners & Roles

Co-Designers

Proactively recruited from communities most impacted by the design challenge and traditionally excluded from addressing them. Co-designers serve as conduits to difficult to reach community perspectives and experiences and interpreters of community insight - not data collectors. They exercise governance authority over problem framing, design, and implementation fidelity. They are compensated at professional rates.

Project Team

Works hand in glove with co-designers throughout the process. Includes members from the steering team and community collaborators. Responsible for facilitation, logistics, and navigating the space between lived experience and institutional constraint. Supports the triangulation that produces co-created clarity.

Steering Team

Responsible for oversight, guidance, and institutional support. Includes key decision-makers and project leadership. Ensures the institution is prepared to share authority, resource the work adequately, and follow through on what is decided. Accountable for structural readiness.

Non-Negotiables & Responsibilities

1

Presence Over Performance

You are not there to prove expertise, you are there to bring grounded, calm, relational presence. Your nervous system is the first facilitation tool.

2

Power With, Not Power Over

Your role is to distribute voice, not control it. Shift authority to those whose lived experience defines the design problem.

3

Accountability to the Room

The process belongs to co-designers. Your job is to protect the conditions under which their knowledge can surface and be further explored - not to own the outcome.

Key Responsibilities

- Build and uphold shared agreements - lived, not just posted
- Make space for all voices, especially the quietest
- Navigate conflict as design information, not disruption
- Pace to the co-designers, not the schedule
- Protect psychological safety before inviting depth
- Hold the triangulation between community knowledge, institutional constraint, and productive tension
- Model vulnerability and be willing to be changed by what you hear (pivot)
- Frame participation as invitational, never extractive

Creating Safety, Belonging & Accessibility

Safety is more than physical, it's emotional, cultural, and relational. Communities disproportionately burdened by structural inequity have been disproportionately subjected to broken promises and extractive engagement. Recognizing this history is a structural requirement, not a facilitation preference.

Safety & Belonging

- Construct psychological safety before inviting depth
- Name power dynamics openly and don't pretend they aren't there
- Treat apparent resistance as design information
- Recognize disengagement as a rational, protective response
- Offer food, gathering, and community-building as part of the work
- Use reflection tools to notice and adjust for power dynamics in real time

Accessibility & Inclusion

- Design for varying digital access, literacy, and capacity
- Offer multiple ways to share: verbal, written, visual, one-on-one, etc.
- Provide interpreters, translated materials, and culturally responsive facilitation
- Meet where people are including flexible locations, times, formats
- Provide tech support and low-tech alternatives
- Assume nothing about what people "should" know
- Embrace differences in participation as a strength that reveals insights others may overlook

Facilitation as Nervous System Care

Design sessions that invite vulnerability can surface stress, grief, numbness, or activation, even in well-facilitated spaces. The relational depth of co-design is not a product of facilitation technique; it is a product of conditions in which it is **safe to be known and valued**.

Recognize the Signs

- Notice when the energy shifts to silence, withdrawal, tension, hypervigilance
- Watch for shutdown, flooding, or dissociation in participants
- Your own nervous system is a barometer, check in with yourself regularly

Respond with Care

- Normalize emotional responses: “This is hard. This is frustrating. That makes sense.”
- Offer grounding: breathing, movement, a pause, stepping outside and be flexible to differences in grounding needs
- Plan for silence; count to 10 before jumping in after hard questions
- Never force participation; frame everything as invitational

Sustain the Container

- Debrief with co-facilitators after every session
- Be sure to regularly check-in (one-on-one) with co-designers between sessions
- Build in rest between emotionally intensive sessions
- Honor the rhythm, some sessions are for processing, not producing
- Remember: pacing to the co-designers, not the schedule, is the standard

Relationship Building as Accountability

"Leaders are rarely held accountable by dashboards. They are held accountable by people whose stories they know and to whom they feel genuine obligation."

The Relationship Is the Mechanism

Trust is a power problem, not a communication problem. It is built when communities experience real autonomy and influence over decisions that affect them. The relationships constructed through co-design are a primary output, not a byproduct.

How Facilitators Build It

Be curious, not judgmental. Focus on the "why" behind experiences, not just the "what." Lean into tension with curiosity. Share food, gather, and invest in the human dimension, especially when it shows up in unexpected ways. Model vulnerability and **be willing to be persuaded.**

Why It Sustains the Work

Leaders who have worked alongside co-designers are held accountable in a way no metric can replicate. These relationships are what prevent the implementation drift described in Chapter 6 - not policy, not process, but the presence of people whose lives depend on what gets built.

Facilitating the Iterative Structure

The iterative co-design structure follows a **minimum viable structure:** enough to move the work forward while remaining open for unexpected learning. Each cycle is a qualitative progression, not repetition. Later understanding can reopen and revise earlier conclusions.

1
Discovery & Pattern ID

Broad exploration. Surface lived experience. Identify patterns the institution could not have anticipated.

- **Design Studio**
- **Community Explorations**

2
Deepening & Sense-Making

Test emerging patterns against broader community experience. Begin structured triangulation.

- **Design Studio**
- **Community Explorations**

3
Productive Tension

Hold the space between community knowledge and institutional constraint. Surface the co-design thesis.

- **Design Studio**
- **Community Explorations**

4
Concept Testing

Test design commitments against reality. Refine implementation pillars with co-designer governance.

- **Design Studio**
- **Community Explorations**

⟵ SHARED LEARNING connects all cycles: later understanding can reopen earlier conclusions ⟶

Source: **ByDesign LLC**

Facilitation Tools: Synthesis & Reflection

Synthesis Questions

Use these to guide debriefs, develop materials, and shape future agendas:

- What did we hear?
- What stood out or surprised us?
- What assumptions were challenged?
- Where do we need to go deeper?
- Whose perspective(s) seem to be missing?
- What should the next iteration focus on?
- Does anything from earlier need to be reopened?

Power & Dynamics Reflection

Use these to notice and adjust for power dynamics in real time:

- Whose voice dominated? Whose was absent?
- Did institutional framing override community framing?
- Were decisions shaped by who spoke loudest?
- Did we spend enough time on the tension(s) that needed to be held?
- Where did we default to “being right” rather than staying curious?
- What would a co-designer say about how this session felt?

Source: **ByDesign LLC**

Recruiting Co-Design Facilitators

The best facilitators are often already trusted by the community. Recruitment is less about finding someone entirely new and more about **recognizing and supporting the people already doing this work**.

Recruitment Strategies



- Look beyond the usual suspects to include community organizers, peer educators, cultural liaisons
- Ask for recommendations from community partners and co-designers that already hold trust
- Prioritize relational credibility over formal credentials
- Consider co-facilitator pairs: institutional + community perspective
- Compensate facilitators professionally - this is skilled, demanding work

Onboarding & Support



- Provide orientation to co-design principles, trauma-informed facilitation, and project goals and guardrails
- Clarify role and boundaries; facilitators guide process, not content
- Pair with experienced co-facilitators during initial sessions
- Build in regular debriefs, peer learning, and emotional support
- Create pathways for facilitators to grow into ongoing leadership roles

Tips & Expectations for Facilitation

Before the Session

- Review session goals with co-facilitator
- Prepare materials in multiple formats
- Check the space: food, seating, accessibility, technology (especially virtual or hybrid)
- Ground yourself, you can't hold space if you're scattered

Setting the Room

- Open with a moment of grounding and recognition of the value of those attending (beyond their co-design role)
- Review agreements together, don't just post them
- Name who is here, why, and how decisions will be made
- Welcome people as people first, participants second

During Sessions

- Track energy and make time for movement and breaks – make it feel informal.
- Redirect dominant voices with curiosity, not confrontation
- Follow the thread the room is offering
- Use silence strategically, don't rush to fill it
- Allow people to show up in the diversity of ways they are comfortable in sharing

Navigating Tension

- Name the tension rather than avoiding it
- Leverage disagreement and divergent experiences as opportunities for exploration
- Separate the person from the position
- Ask: "What else is true here?"
- Be transparent about the experiences and insights that are most likely to influence this specific project
- Offer a pause if the room needs to regulate

Closing Well

- Summarize what was heard, not just decided
- Name next steps and who is responsible
- Acknowledge the emotional labor of participation
- End with connection, not logistics

Between Sessions

- Debrief with co-facilitator and steering team within 24 hours
- Connect with each co-designer (one-on-one) to answer questions, capture insights, and address concerns
- Send synthesis and next round of discussion/exploration guides back to co-designers for validation
- Adjust agendas based on feedback and progress
- Take care of your own nervous system

8 CHAPTER 8

PROMPTS

1. *How will we make space for multiple ways of contributing (verbal, visual, written)?*
2. *When tensions arise, how will we handle them in a way that builds trust?*
3. *What's one practice we can commit to that will ensure balanced participation?*
4. *How will we check in with co-designers about their experience in the process?*
5. *What's our plan if facilitation needs to be shared or rotated during the project?*

TIP: *Debrief within 24 hours of every session. What you notice on the first day fades fast, and it's often the most important signal about what's working and what isn't.*

9

CHAPTER 9

Moving from Insights to Implementation

What does it take to move from what we heard to what we build, without losing the trust, nuance, and community voice that made the insights possible?

This chapter covers how co-design produces a pattern language of shared commitments, how insights become design guidance through iterative synthesis, and what shared governance means in practice; from dissemination and prototyping through piloting and scaling, ensuring that implementation honors the people who shaped it.

The Co-Design Thesis

The thesis that emerges from co-design is not a recommendation. It is a **design commitment**, developed by and accountable to the people whose lives it affects.

Communities cannot be expected to operate fluently in institutional design language. What they can do, when given adequate time, structure, and conditions, is articulate the **design criteria** that any effective solution must address.

This produces a **pattern language;** not prescribing specific solutions but articulating the structural conditions any good solution must address. Community members contribute what must be true for a solution to work in the real conditions of their lives.

A co-design thesis does not say:
"Here (specifically) is what we recommend."

It says:

"This is the structural reality. Solutions must address the guiding principles or design criteria developed from it. We will hold you accountable."

Source: **ByDesign LLC**

Lived Experience as Governance

The most common failure mode of community engagement is **implementation drift** where community-derived insight gradually diluted as institutional pressures reshape what gets built.

Keeping co-designers embedded in governance prevents this. Their continued authority means implementation is tested against lived reality at every stage, not merely informed by it at the beginning.

Leaders who have worked alongside co-designers, who know their names and stories, who have been **persuaded rather than having persuaded,** are held accountable in a way no metric can replicate.

Ownership produces durability where compliance cannot.

What Governance Looks Like

- Co-designers remain compensated participants in implementation
- Working groups accountable to community-developed pillars
- Decisions tested against lived realities before finalization
- Relational infrastructure maintained for recruitment & feedback
- Relationships become the accountability infrastructure

Source: **ByDesign LLC**

Sustaining What Was Built

The design process has a finish line. The commitment to those who shaped it does not. As implementation begins, the relationships, authority, and accountability structures built through co-design must travel with it as the living infrastructure through which what was built continues to be tested, protected, and adapted **by the people whose lives depend on it.**

Honor the Process

The transition from design to action is a critical moment to sustain trust and embed commitments into lasting change.

- **Share the story together:** visual summaries and briefs in language accessible to all
- **Present with co-designers as co-presenters:** reinforcing their leadership role
- **Celebrate and reflect honestly:** name what was hard and what the organization still needs to learn
- **Extend the table:** invite co-designers into implementation, advocacy, and advisory roles

Adapt to Context

Not all projects follow the same path. The process should fit the people, not the other way around.

- **Short timeline?** Run a sprint-studio cycle in 6–8 weeks while preserving the core triangulation structure
- **Remote setting?** Virtual options including phone, ensure co-designers have access and literacy
- **Language diversity?** Interpreters, translated prompts, and space to lead in their own languages
- **Trauma-aware space?** More care, flexibility, and processing time; the structure bends to protect the people in it

The design cycle ends. The governance commitment does not. What was built together must be sustained together.

The Pattern Language of Co-Design

A **pattern language** does not prescribe specific solutions — it articulates the structural conditions any effective solution must address. Community members define the design criteria, and these become commitments that guide everything built from this point forward.

Protecting the Thesis

As implementation progresses, institutional logic will naturally pull toward efficiency and scale. Co-designers apply the governance role from Chapter 6: reviewing each decision against the thesis and flagging departures early.

Ask: Does this decision honor what we built together?

Testing Before Finalizing

Nothing is final until co-designers have tested it against their lived reality. Prototypes, training curricula, and measurement tools all pass through this filter. The question is not whether it looks right on paper, but whether it would work in their lives.

Design with people, not for them - especially at the finish line.

Sustaining the Relationship

The community trusted co-designers to carry their voice into institutional spaces. That trust does not expire when the project ends. Co-designers bridge the institution and the community - and that bridge must remain open for the work to endure.

Relationships are the accountability infrastructure.

Source: **ByDesign LLC**

From Insights to Design Guidance

How Synthesis Works

- Community members surface barriers, values, and priorities institutional analysis could not anticipate
- Institutional partners name constraints, resources, and operational realities
- Negotiation produces implementation pillars - shared commitments neither party would have reached alone
- Pillars are tested back against lived experience before adoption as design criteria

What This Produces

Reframed problem definitions From non-adherence to trust erosion; from program gaps to access design failures

Implementation pillars Community-developed design criteria for program, policy, and training decisions

Navigation infrastructure Built on relational trust, not informational access

Measurement frameworks Tracking trust, engagement quality, and relational continuity

For example: Insight: *"I don't feel welcome here, and I'm afraid of the unknown."*
Design Guidance: *Create low-barrier entry points that signal belonging before asking for engagement.*

Source: **ByDesign LLC**

Implementation as Shared Governance

1 Recognizing Drift Warning Signs

Watch for decisions being made without co-designer review, scope narrowing for operational convenience, or language shifting from community priorities to institutional metrics. These are early signals.

2 Redistribute Power Not Simulate It

Institutions must share decision-making authority, not just invite participation. Co-designers move into governance roles with real influence over implementation decisions.

3 Compensate as Partners Not Volunteers

Co-designers must be paid at professional rates, reflecting their role as designers and governance partners. Decision tracking makes every choice visible and accountable.

4 Relational Accountability Not Metrics Alone

Leaders who have worked alongside co-designers are held accountable in ways no metric can replicate. New institutional relationships constitute a shift in power, not an exchange of information.

Key Principle:

"Implementation is where participation usually ends. Governance is how it persists."

Without sustained co-designer authority, community-derived insight is diluted as institutional pressures reshape what gets built.

Source: **ByDesign LLC**

The Continuum of Implementation

Outcomes vary in scope. Outputs exist along a spectrum of depth and scale.

Dissemination	Prototyping	Piloting	Scaling	Continuous Improvement
Share outcomes with decision-makers, partners, and communities. Co-designers participate directly, grounding the work in lived experience, not institutional summaries. Co-designers offer important context to the outcomes.	Create small, intentional opportunities to test and learn from early versions. Prototypes are low-risk and cost-effective interventions designed to explore (not validate) solutions. Prototyping can happen with very little investment or time.	Test a fuller version with stakeholders in real-world conditions. Surface what works, what needs adjustment, and where gaps remain, alongside those most affected.	Expand by adapting principles, not replicating solutions. Collaborate with co-designers to ensure flexibility and relevance in expanded and new contexts.	Sustainable solutions grow through learning, not just implementation. Keep co-designers engaged to surface what's working and uncover new needs. Look to create regular structures for co-designer involvement, especially as problems, demographics, and technology changes.

Source: **ByDesign LLC**

9 CHAPTER 9

PROMPTS

1. *How will we ensure co-designers' priorities are reflected in decisions?*
2. *What's our plan to resource and support the ideas we move forward?*
3. *Who will stay involved from the community as implementation happens?*
4. *How will we track what changes between idea and implementation—and why?*
5. *What barriers might emerge in implementation, and how will we address them together?*

TIP: *Create a simple tracking document: what did we agree to, and what did we actually build? Review it with co-designers quarterly. The gap between those two columns is where drift lives.*

10

CHAPTER 10

Evaluation as Relationship

Are we only measuring what changed, or are we measuring whether the conditions for lasting change are being built?

This chapter reframes evaluation as a relational practice rather than an extraction exercise. It explores how to track engagement quality, trust indicators, and relational continuity alongside conventional metrics, replacing compliance-based measurement with approaches that honor lived experience and sustain accountability to the communities who shaped the work.

Evaluation as Relationship

Most evaluation asks whether an intervention worked. There are foundational questions we should be asking to determine whether essential relationships, including those to power and knowledge, have changed and developed, and to what degree.

1. **Did we do what we said we would?**
2. **Did we learn, shift, and grow together?**
3. **Did the work feel true to those most affected?**

Relational evaluation includes:

Co-Defined Success

Co-designers define what success means, not funders, not institutions, not metrics alone.

Story Alongside Data

Storytelling and narrative sit alongside quantitative metrics as equally valid evidence.

Shared Results

Findings are shared openly with communities, not extracted for institutional reporting.

Relational Evaluation

Evaluation in co-design is a relational practice. The question is not only "did it work?" but "did we honor what we set out to do together?"

Why Traditional Evaluation Falls Short

- **Prioritizes** funder-defined metrics over community-defined value
- **Focuses on** short-term outputs rather than sustained relational change
- **Privileges** quantitative data over lived experience and narrative
- **Excludes** co-designers from defining what counts as evidence

What Relational Evaluation Looks Like

- What does success feel like for the people most affected?
- How will we know if we honored community contributions?
- What ripple effects emerged beyond the original scope?
- What would we change in the next iteration?

Success may sound like: "I felt listened to," "The policy changed," "I'm not alone anymore," "They followed through."

Evaluation is a tool for connection and growth, not just a report. It should reflect the relationships that made the work possible.

Capturing Project Outcomes

Use these questions to guide project-level evaluation conversations with co-designers, institutional partners, and community stakeholders.

1. Where did you start, and how was the problem reframed through co-design?

2. What did co-designers surface that institutional analysis alone could not have revealed?

3. What did co-designer input directly lead to — in design, policy, practice, or governance?

4. How are you measuring trust, persistence, and relational continuity — not just program outputs?

5. Across the four domains, partnerships, knowledge, policies, and thriving communities, where did the work land?

Practice Tip

Ask co-designers to help frame evaluation questions. They know what was meaningful, and what institutional metrics miss.

"What matters most may not be what's easiest to count."

Evaluation is not judgment; it is a check-in and a check-back. A way of honoring the process as much as the product.

Source: **ByDesign LLC**

The Evaluation Loop

Evaluation is not an endpoint; it is a continuous practice woven into the co-design rhythm.

Reflect & Adapt

Stay in the loop

Evaluation is not a one-time survey. It is a continuous loop: reflect on findings, adapt the approach, and share back what you're learning.

Honor the Story

Not just the stats

Narrative and storytelling are legitimate forms of evidence. Capture what changed for individuals and communities in their own words.

Invite Revision

Co-designers shape criteria

Invite co-designers to revise evaluation criteria as the work evolves. Let learning shape the next iteration of the process.

Track What Matters

Relational indicators

Track trust, belonging, and institutional follow-through. Pair quantitative metrics with qualitative depth to show the full picture.

Practice Tip: Build evaluation into the co-design rhythm from the start, not as an afterthought. Co-designers should help shape what gets measured and how.

Source: **ByDesign LLC**

Four Evaluation Domains

Co-design evaluation operates across four mutually reinforcing domains. Together they capture expanded knowledge, strengthened relationships, improved systems, and thriving communities.

1. Strengthened Partnerships & Alliances

New or deepened relationships between institutions, community organizations, and the people they serve. Measured through the quality, durability, and equity of collaborations.

2. Expanded Knowledge

New understanding, from both lived experience and institutional learning, about what the actual barriers are, what works, and why. Knowledge that could not have emerged without co-design.

3. Improved Policies, Programs & Resources

Tangible changes to how institutions design, deliver, and govern services. Policies rewritten, programs restructured, resources redirected based on community-defined priorities.

4. Thriving Communities

Outcomes experienced by community members: improved health, increased trust, greater civic participation, economic opportunity, and a sense of belonging and agency.

Adapted from: National Academy of Medicine. (n.d.). Achieving health equity and systems transformation through community engagement: A conceptual model.

Evaluation Domain Indicators

1. Strengthened Partnerships & Alliances

Key Indicators

- New institutional relationships with communities where none existed
- Cross-sector collaborations sustained beyond the project period
- Community organizations involved in institutional decision-making
- Trust indicators: willingness to partner again, shared ownership of outcomes
- Power-sharing structures formalized in governance agreements

2. Expanded Knowledge

Key Indicators

- Reframed problem definitions that institutions had been misdiagnosing
- Community-identified barriers surfaced that institutional analysis missed
- Institutional leaders report changed understanding of root causes
- Co-designers articulate structural insights that inform future work
- New measurement frameworks that track engagement quality alongside outcomes

Adapted from: National Academy of Medicine. (n.d.). Achieving health equity and systems transformation through community engagement: A conceptual model.

Evaluation Domain Indicators

3. Improved Policies, Programs & Resources

Key Indicators

- Community-developed implementation pillars adopted as institutional commitments
- Provider training curricula co-developed and facilitated by community members
- Navigation infrastructure designed around relational trust, not just information access
- Governance structures that maintain community authority through implementation
- Resources redirected based on community-defined priorities

4. Thriving Communities

Key Indicators

- Improved health outcomes and access for populations most affected
- Increased civic participation and community agency in decision-making
- Economic participation through compensated design roles and institutional partnerships
- Greater sense of belonging, trust, and connection to institutions
- Community members report feeling heard and seeing follow-through

Adapted from: National Academy of Medicine. (n.d.). Achieving health equity and systems transformation through community engagement: A conceptual model.

Prompts for Reflection

Evaluation in co-design is not a detached judgment; it's a check-in and a check-back. Use these prompts to ground your evaluation in relationship, not just results.

1 Defining Success

How will you know if the co-design process was successful (in the community's terms, not just the institution's)?

Reflect: What does success feel like for the people most affected?

2 Measuring What Matters

What stories emerged during this work that captured something metrics alone could not?

Ask: Are we honoring the story, not just the stats?

3 Reframing the Problem

What problem definitions were reframed through co-design that the institution had been misdiagnosing?

Test: Did lived experience reveal what institutional analysis missed?

4 Evaluation Authority

How are co-designers involved in defining what gets evaluated and how results are shared back with communities?

Look for: Co-designers shaping the measures, not just being measured.

Practice Tip:

"Start with Co-Designer Defined Value"

Traditional measures may not be relevant. Begin with what the co-design process identified as valuable, then build evaluation outward from there.

Prompts for Reflection

Continue reflecting on how evaluation serves the relationship between institutions and communities. These prompts focus on leadership, rhythm, and sustaining the work.

5

Leadership Transformation

Did the institutional leaders involved come away changed (not just informed)?

Ask: Are leaders willing to be changed, not just to change others?

6

Evaluation as Rhythm

What would it look like to build evaluation into the co-design rhythm from the start — not as an afterthought or a reporting requirement?

Reflect: Evaluation is a check-in and a check-back, not a final exam.

7

The Four Domains

Which of the four evaluation domains — **partnerships**, **knowledge**, **policies**, or **thriving communities** — feels most urgent for your next iteration?

Test: Are all four domains being tracked, or just the easiest to count?

8

Sharing Results Back

How will findings be returned to the community — not as a report, but as an invitation to shape the next cycle of work together?

Look for: A feedback loop, not a final deliverable.

Practice Tip:

"Close the Loop"

Share findings openly, invite co-designers to revise interpretation, and let learning shape the next iteration. Evaluation is relational, not extractive.

Thriving Communities

In their own words: reflections from community members and partners.

"Community Co-Design has changed how we do our work! We are using co-design to center voices of those with lived experience in all phases of our work — from investigating to planning to implementation. This change is exactly what we needed to move our work forward in an authentic and timely way!"

Julie Ruzek
Executive Director, Cradle to Career

"As both a co-design facilitator and co-designer, I have seen people become more confident speaking up about what they need and what works for their community. When they are included from the beginning, they feel respected, trusted, and connected, and the programs created are stronger because they reflect the culture and real experiences of the people they serve."

Khadija Ali
Co-Design Facilitator and Co-Designer, Pamoja Women

"The true impact of co-design lies in seeing students engaged in a genuinely authentic way, knowing that their diverse feedback is valued and that they are a vital part of the community. When students feel seen and heard, it builds a stronger, more connected environment for everyone."

Sara-Louise Henry
Coordinator of Youth Empowerment, Rochester Public Schools

"This work became more than a project — it grew into a community-wide movement powered by our co-design team. Together, we delivered meaningful solutions, strengthened partnerships, and sparked system-level changes that made our community more inclusive and better positioned to advance health equity."

Holly Jones
Program Manager, Olmsted County Public Health Services

10 CHAPTER 10

PROMPTS

1. *How will we track not just outputs, but changes in relationships and systems?*
2. *How can evaluation be built into the process, so it feels participatory?*
3. *What stories, not just data, will show the impact of this work?*
4. *How will we share evaluation findings back with those who contributed?*
5. *How will evaluation and other community recognition help strengthen trust and ongoing collaboration?*

TIP: *Before defining metrics, ask co-designers: "What would tell you this work mattered?" Their answer is the starting point for evaluation, not your funder's reporting template.*

11

CHAPTER 11

Sustaining Co-Design

The most common failure mode of community engagement is not a bad process. It is a good process that ends.

This chapter addresses what happens after the design phase: how to sustain co-designer roles, embed shared governance in institutional practice, build pathways from participation to leadership, and ensure that the relationships constructed through co-design become permanent infrastructure rather than project artifacts.

Why Sustainability Matters

Co-design does not end when the project does. The relationships, knowledge, and governance structures that emerge require sustained investment to produce structural change.

Sustaining Authority

The governance structures from Chapter 6 must persist beyond the project. When co-designer authority lapses, institutional pressures quietly reshape what was built. Sustainability means keeping the people who shaped the work present in decisions about its future.

Relationships as Infrastructure

Leaders who have worked alongside co-designers, who know their names and stories, who have been persuaded rather than having persuaded, are held accountable in a way no metric can replicate.

Ownership Over Compliance

Systems designed without the people they serve require ongoing external pressure to function. Systems designed with them embed the conditions for sustained engagement. Community investment in solutions significantly exceeds what compliance can produce.

Key Question

What would it mean if the most important outcome of co-design was not the product, but the relationship?

Embedding in Institutional Practice

Sustainability requires institutional structures that outlast individual projects. These five strategies move co-design from initiative to infrastructure.

1 Embed in Governance

Formalize co-designer roles in decision-making bodies. Include community governance positions in organizational charts, not just advisory structures.

2 Build Internal Capacity

Train staff in co-design facilitation, trauma-informed practice, and power-sharing. Create internal positions dedicated to sustaining community partnerships.

3 Grow Internal Champions

Include co-design values in job descriptions, performance reviews, and onboarding. Leaders who have experienced the work become its most credible advocates.

4 Establish Learning Systems

Build organizational routines for reflection: what worked, what drifted, what the community would say. Make learning visible, not just outcomes.

5 Resource the Relationship

Dedicate budget lines for ongoing community engagement, co-designer compensation, and relationship maintenance, not just project-based funding.

Practice Tip

Ask: "If the project lead left tomorrow, would co-design continue?" If not, the work is person-dependent, not structurally embedded.

Sustaining Co-Designer Roles

Co-designers must be compensated at professional rates, reflecting their role as designers and governance partners, not volunteers.

Multiyear Contracts

- Extend co-designer contracts beyond single project cycles
- Include governance phases in scope of work, not just design sessions
- Budget for sustained participation, not one-time consulting

Shared Funding Strategies

- Pool resources across departments or agencies to sustain roles
- Write community governance into grant applications from the start
- Align funding timelines with relational work, not fiscal cycles

Post-Project Roles for Co-Designers

Implementation Advisors

Review decisions against the co-design thesis. Identify drift before it becomes institutionalized.

Evaluation Partners

Help define what gets measured and how. Ensure evaluation reflects community-defined value, not just funder metrics.

Peer Navigators & Trainers

Co-develop and deliver training curricula. Build navigation infrastructure around relational trust.

Community Ambassadors

Sustain the institutional relationship with community. Maintain trust and accountability beyond the project.

Readiness Check

Use these prompts to assess whether sustainability is being built into the work.



BIPOC Homeownership Co-Design Session

1 Governance Beyond the Grant

What structures will keep co-designer authority intact after the current funding cycle ends?

2 Building Internal Capacity

Who inside the institution is developing the skills to facilitate co-design, and are they being supported to do so?

3 Co-Designer Growth

What pathways exist for co-designers to move into leadership, facilitation, or governance roles, with compensation that reflects it?

4 From Initiative to Identity

If someone asked how your organization makes decisions, would co-design be part of the answer, or just something that happened once?

Co-Designer Pathways to Leadership

Co-design develops transferable expertise. Economic participation pathways convert community expertise into durable professional opportunity.

Skills Developed Through Co-Design

- Facilitation and group process management
- Qualitative interpretation and pattern recognition
- Navigating institutional systems and language
- Advocacy, public speaking, and storytelling
- Community organizing and relational network building
- Program design and evaluation methodology
- Governance participation and policy influence

These skills form the foundation for sustained professional opportunity beyond any single project.

Co-Designer

Participate in design sessions. Conduct community explorations. Interpret and contextualize findings.

Governance Partner

Protect the co-design thesis through implementation. Test prototypes and training materials.

Peer Facilitator

Co-facilitate future design sessions. Train providers and practitioners from lived experience.

Community Leader

Shape next phases of work. Advocate for structural change. Build institutional relationships independently.

From Initiative to Identity

Sustainability is not about maintaining a program. It is about transforming how an institution operates so that co-design becomes part of who the organization is, not just something it did.

FROM: Project-Based Engagement

- One-time projects with defined start and end dates
- External consultants leading community engagement
- Advisory input that institutions can accept or discard
- Community relationships that end when funding does
- Success measured by deliverables produced

TO: Institutional Identity

- Co-design embedded in ongoing governance and decision-making
- Internal staff trained and empowered to facilitate
- Community authority structurally protected, not optional
- Relationships sustained beyond any single project cycle
- Success measured by trust, durability, and shared ownership

The question is not whether this work is possible. It has been done. The question is whether institutions are ready to be persuaded, not be persuasive.

11 CHAPTER 11

PROMPTS

1. *What will it take to make co-design the default way of working here?*
2. *Who will be responsible for carrying this forward when the project ends?*
3. *What ongoing supports will keep relationships strong?*
4. *How will we continue to bring in new voices and perspectives over time?*
5. *What policies, practices, or funding structures can embed co-design into the system?*

TIP: *Ask: If the grant ended tomorrow, would the community relationships survive? If the answer is no, you haven't built sustainability. You've built dependency on funding.*

The Design That Was Always Missing

A closing reflection on what co-design makes possible — and what it asks of us.

The Design That Was Always Missing

Health disparities, access gaps, disengagement from institutions, and the persistent failure of well-resourced interventions to produce durable change are predictable outputs of systems built without the people they were intended to serve.

Co-design corrects that original error by recognizing that the knowledge, the realities, and the design judgment needed to build effective systems already exist within communities. They do not need to be created. They need to be structurally included.

This framework asks institutions to make five structural commitments:

Share Authority
Redistribute decision-making power. Do not simulate it

Compensate Expertise
Pay co-designers at professional rates for design and governance work

Embrace Uncertainty
Release premature certainty about problems and solutions

Align Resources
Match funding and timelines to the longitudinal nature of relational work

Lead Relationally
Be willing to be changed through sustained engagement, not simply informed

Where these conditions are absent, co-design may still produce insight. But it will not produce structural change.

Source: **ByDesign LLC**

The question is not whether this work is possible.

It has been done.

The question is whether institutions

are ready to be persuaded, not to persuade.

Source: Roberts, J. (2026). Co-Design as Structural Accountability: A Framework for Lived Experience as Governance in Systems Change. ByDesign. by-design.org

Appendix

Supplementary resources, templates, and reference materials for the Co-Design Playbook.

Case Studies

Six projects. Six problem reframes.
Each case shows what co-design revealed that no conventional process could.

01 PUBLIC SPACE
Discovery Walk Design
A landmark park redesigned from the lived realities of communities' traditional outreach never reached.

02 ECONOMIC DEVELOPMENT
Main Street Grant Application
A $3M COVID recovery grant redesigned so the communities it was meant to reach could access it.

03 WORKFORCE EQUITY
Rochester Built Environment
Industry and BIPOC women at the same table, revealing trust deficits no training program had addressed.

04 CIVIC INSTITUTION
Rochester Public Library
Surfacing why communities the library most wanted to serve had never walked through its doors.

05 HOUSING EQUITY
BIPOC Home Ownership
BIPOC communities leading the analysis of a homeownership gap that research alone had failed to close.

06 HEALTHCARE EQUITY
LGBTQIA+ Healthcare Access
Co-designers now compensated as the ongoing training facilitators they helped design.

CASE STUDY 01

Discovery Walk Design

DMC EDA & City of Rochester, MN • Public Space Design • 2020–2021

BY THE NUMBERS

7
co-designers recruited

4
design studios + 3 sprints

45+
Co-designer interviews

3
outcome domains: Spatial, Programmatic, Policy

The Challenge

Downtown Rochester was planning a landmark 4-block linear park, Discovery Walk, adjacent to Mayo Clinic. The DMC EDA and the city of Rochester had strong design intent, but the community engagement process revealed a critical gap: communities most likely to use and benefit from the space had not been consulted on the design principles.

Traditional outreach had reached those already connected to institutional channels. The result was a design process moving forward on assumptions rather than the lived realities of Rochester's diverse communities, including communities of color, elderly residents, immigrant populations, people with disabilities, and young people.

What was at stake was more than aesthetics. A public space designed without these communities risked becoming a space that didn't feel safe, welcoming, or accessible to those who could benefit from it.

WHAT TRADITIONAL ENGAGEMENT MISSED

Open houses and institutional outreach reliably surface those already connected to decision-making structures.

They do not reach:

- Immigrant communities unfamiliar with public process, cultural context, and/or language
- Residents who don't feel safe in current park spaces
- People whose cultural practices don't match park programming
- Those without transportation or fixed schedules

"A public space designed without these communities risked becoming a space that didn't work for them."

Who Was at the Table

Seven co-designers were recruited through a deliberate process by the DMC EDA, City of Rochester, Diversity Council, and Olmsted County Public Health. Rather than institutional outreach, the team identified trusted connectors already embedded in the communities most likely to be impacted by the park.

Co-designers were selected for two qualities: their own lived experience and the networks they could access.

Compensation: Each co-designer received $450 for 14-15 hours of work, a professional-rate recognition of their expertise. Co-designers that continued to work with the developer were paid additionally for their oversight work.
Structure: 4 design studios + 3 community exploration sprints within trusted networks.

PERSPECTIVES REPRESENTED

Communities of Color
East African, Latinx, Asian-American members with trusted networks in underrepresented communities

Elderly Residents
Older adults navigating mobility challenges, isolation, and year-round accessibility needs

Young People
Youth representing generational perspectives on safety, programming, and social connection

Disability Community
Individuals evaluating spaces for real-world mobility and cognitive accessibility

Healthcare Community
Clinic staff and patients navigating the intersection of healthcare and public space near Mayo Clinic

Faith Communities
Leaders with connections to communities whose cultural practices shape how public spaces feel

How It Worked

The Discovery Walk co-design ran from winter 2020 through the end of construction documentation, a year-long process integrated across the Schematic Design and Design Development phases. It followed four structured iterations, each pairing a design studio with a community exploration sprint.

ITERATION 1 • Broad Discovery Co-designers grounded in project context. Initial community conversations begin through trusted networks.

ITERATION 2 • Pattern Identification Co-designers share what they heard. Themes surface across communities. Design team identifies shared patterns.

ITERATION 3 • Priority Definition Themes tested against broader community. Tensions between priorities and institutional constraints made visible.

ITERATION 4 • Solution Testing Design principles finalized with co-designers. Design team tests against lived realities before adoption.

GOVERNANCE • Post-Project Co-designers continued as design team members to select local artists. Presented insights to City Council and boards.

Winter 2020 – End of Construction Documentation • Year-long process • Integrated into active design phases

What the Process Revealed

The most important outputs were not design features, they were problem reframes. Co-designers surfaced structural truths the design team could not have found through any conventional method.

WHAT WAS ASSUMED
The park needs standard amenities: seating, paths, greenery.

WHAT CO-DESIGN REVEALED
Immigrant communities needed spaces of warmth, especially in the winter. The long dark winter drives isolation.

WHAT WAS ASSUMED
Safety means lighting and physical sight lines.

WHAT CO-DESIGN REVEALED
Safety is cultural. For some communities, pet access and alcohol presence were primary deterrents, not the built environment.

WHAT WAS ASSUMED
Design for daytime medical visitors adjacent to Mayo Clinic.

WHAT CO-DESIGN REVEALED
East African and Asian families gather in the evening. A strategic lighting network and shelters for after-dark use became a design priority.

WHAT WAS ASSUMED
The park's role is public greenspace and recreation.

WHAT CO-DESIGN REVEALED
Clinician burnout and patient healing are both public health challenges. The park could bridge healthcare and community well-being in ways no clinic space can.

What Was Built & What Carried Forward

DESIGN OUTCOMES BY DOMAIN

SPATIAL

- Snow melt system for year-round accessible navigation
- Healing space designated near clinic entry points
- Raised plant beds creating immersive landscape without barriers for those in wheelchairs
- Strategic lighting network for evening gatherings

PROGRAMMATIC

- Cultural symbols and flags signaling belonging
- Multi-generational and interactive programming
- Clinician-community connection opportunities built in
- Custom benches and gathering shelters for after-dark use

POLICY

- Non-smoking/vaping policy adopted
- Affordable access for fixed-income residents
- Pet access limited to designated times/areas
- Strategic alcohol restrictions to ensure safety

WHAT CARRIED FORWARD

Governance: Co-designers continued as design team members after the formal process ended, interviewing and selecting local artists for the park.

Advocacy: Co-designers presented to City Council and relevant boards, translating community insight into decision-making spaces. Their collective voice helped decision-makers understand why design elements like snow melt and shelters mattered, even with an increased cost.

Sustained Relationships: The DMC EDA continued inviting co-designers to business and community networking events, treating the relationships as ongoing infrastructure rather than project artifacts.

> *"The co-design process allowed for in-depth conversations about how public spaces are perceived and used by different cultures, leading to discussions about sense of belonging that brought new thoughts for the design team."*
>
> **- Britton Jones, Senior Associate PLA, Coen + Partners**

CASE STUDY 02

Main Street Grant Application

DMC EDA • Economic Development • 2021

BY THE NUMBERS

6
co-designers recruited

4
design studios + 3 sprints

30+
Co-designer interviews

4
outcome themes: Access, Finance, Trust, Support

The Challenge

The DMC EDA was awarded $3 million from Minnesota DEED to disperse to Rochester businesses for downtown recovery from COVID-19. A primary goal was reaching targeted businesses and underrepresented populations; communities of color, entrepreneurs, and others typically excluded from institutional grant processes.

The challenge was structural: traditional grant application processes are designed by and for those already fluent in institutional language and systems. Complex requirements, reimbursement-based funding, and lack of translated materials meant the communities most intended to benefit were the least likely to apply.

Without co-design, the grant would have reproduced the same exclusion it was meant to address.

WHAT TRADITIONAL GRANT DESIGN MISSED

Institutional grant processes are designed for those already connected to formal business networks and comfortable with bureaucratic language.

They do not reach:

- Business owners who don’t know the opportunity exists
- Communities of color unfamiliar with grant reimbursement structures
- Entrepreneurs without relationships with institutional lenders
- Diverse business owners who distrust or have been excluded from city programs

“To reach these populations, you have to start by asking them what would make this process actually accessible.”

Who Was at the Table

Six co-designers were recruited through the Diversity Council and Southern Minnesota Initiative Foundation (SMIF), representing the full range of perspectives needed to make the grant genuinely accessible.

Co-designers were selected for their own business experience and the networks they could access, especially those most likely to be left out of traditional channels.

Compensation: Each co-designer received $500 for 14 hours of work, reflecting professional-rate recognition of their expertise.

Structure: 4 design studios + 3 community exploration sprints across Rochester's business and cultural networks.

PERSPECTIVES REPRESENTED

Downtown Business Owner
Existing businesses in the downtown corridor with direct experience of the recovery challenges

Prospective Business Owner
Entrepreneurs considering opening downtown, facing barriers to entry and application complexity

Philanthropist
Individuals connected to funding networks and familiar with grant structures from a funder perspective

Commercial Bank Lender
Institutional knowledge about the lending process and the required 70% match requirement

Community Navigator
Trusted connectors with ties to diverse business owners, especially communities of color

Developer
Real estate and development perspective on how grant terms affect project feasibility

How It Worked

The Main Street Grant co-design ran across four design studios and three community exploration sprints. Co-designers worked within their own networks to test draft application requirements against the realities of diverse business owners, surfacing barriers invisible to institutional designers.

ITERATION 1 • Broad Discovery Co-designers grounded in grant context. Initial conversations explore what barriers exist to application and awareness.

ITERATION 2 • Pattern Identification Co-designers share what they heard in their networks. Themes around language, trust, and financial structure surface.

ITERATION 3 • Priority Definition Key barriers refined into actionable design criteria. Tensions between institutional requirements and community access made visible.

ITERATION 4 • Solution Testing Draft application changes and support structures tested with co-designers. DMC EDA adjusts based on feedback.

GOVERNANCE • Post-Project Co-designers invited to record the promotional video (filmed in four languages) and attend Rochester business networking events.

2021 • 2.5–3 months • Integrated into active grant design and application development

What the Process Revealed

The most important outputs were not application edits; they were problem reframes. Co-designers surfaced structural barriers the DMC EDA could not have identified through institutional analysis alone.

WHAT WAS ASSUMED
The application just needs to be simplified.

WHAT CO-DESIGN REVEALED
Trust, not complexity, was the real barrier. Communities of color had no relationship with the program and trust had to be built before access could be designed.

WHAT WAS ASSUMED
Reimbursement-based grants are standard practice.

WHAT CO-DESIGN REVEALED
For small businesses with limited cash, reimbursement is exclusionary by design. Co-designers named this the single largest barrier to participation.

WHAT WAS ASSUMED
Lenders will connect applicants to the required match.

WHAT CO-DESIGN REVEALED
Diverse business owners lacked relationships with lenders who knew the program. The grant needed to actively identify culturally competent lending partners.

WHAT WAS ASSUMED
A translated application is sufficient for language access.

WHAT CO-DESIGN REVEALED
Translation alone wasn't enough. Co-designers named the need for oral, human support from trusted navigators walking applicants through the process in their language.

What Was Built & What Carried Forward

DESIGN OUTCOMES BY THEME

ACCESS / KNOWLEDGE

- Application translated and summarized in multiple languages
- Oral support provided through community liaisons
- Rolling submission window replacing fixed deadlines
- Promotional video filmed in four languages with co-designers

FINANCES / TRUST

- Direct disbursement model replacing reimbursement structure
- Grant funds held as applicants identify lending match
- Metered release of funds aligned with project readiness
- Transparent communication about timeline and approvals

SUPPORT / CONNECTIONS

- Business support services identified and linked within application
- Culturally competent lenders identified and listed by name
- Navigation support for diverse business owners built into process
- Co-designers invited to Economic Development and Chamber events

WHAT CARRIED FORWARD

New Partnerships: The DMC EDA, after hearing from co-designers about the importance of lending partners, researched and built new relationships with new financial institutions (with diverse lending portfolios) that didn't exist before the process began.

Co-Designer Leadership: Co-designers were invited to participate in creating the grant's promotional video, filmed in four languages, translating their governance role into public communication and community representation.

Sustained Networks: Co-designers were invited to the Rochester Area Economic Development Annual Luncheon and Chamber events, extending their professional networks as part of the institution's ongoing commitment.

> *"This engagement approach provides for a deeper level of engagement with communities that can't be replicated through a government employee alone."*
>
> **- DMC EDA, Main Street Grant Reflection**

CASE STUDY 03

Equity in Built Environment

City of Rochester • Workforce & Industry • 2021

BY THE NUMBERS

6
co-designers recruited

5
design studios + 4 explorations

55+
Co-designer interviews

3
pilot phases: Adult, Post-Secondary, K–12

The Challenge

Less than 1% of construction industry positions in Rochester are held by women of color. Attempts to address this through isolated interventions, job fairs, training programs, and outreach campaigns, had not produced lasting change. The design and construction industry continued to reflect assumptions built without the women it was hoping to recruit.

The challenge was not a lack of talent or interest. It was a design failure: every solution had been built by industry without the people it aimed to include. Programs assumed culture, flexibility, and support structures that simply didn't exist for women of color navigating both structural inequity and a white male-dominated worksite culture. Any sustainable solution required the voices of both women of color and industry partners at the same table.

WHAT TRADITIONAL APPROACHES MISSED

Job fairs and training programs are designed by those already inside the industry. They reflect assumptions that don't match the realities of women of color entering it.

They do not address:

- The cultural gap between industry expectations and the lived experiences of women of color
- Early exclusion from STEM pathways; girls 'opted out' by age 11–12
- Lack of knowledge that so many careers exist in the built environment
- Absence of mentorship, flexibility, and psychologically safe worksites

"Attempting to create a solution in isolation without women of color and industry leaders at the table will be ineffective and has the potential to do more harm than good."

Who Was at the Table

Six co-designers were recruited representing both women of color navigating the industry and industry professionals with hiring and worksite authority. The combination was intentional: sustainable solutions required both communities in the room.

Co-designers were selected for their lived experience of the problem and their relational access to networks of women, employers, and educators across Rochester.

Compensation: Co-designers were professionally compensated, reflecting the expertise and time required for five workshops and four community exploration sprints.

Structure: 5 design workshops + 4 community exploration sprints with individual support between each session.

PERSPECTIVES REPRESENTED

BIPOC Women - Experienced
Women of color with direct experience navigating the built environment industry, including barriers to entry and retention

BIPOC Women - Seeking Entry
Women of color considering or actively pursuing a career in construction, architecture, or design

Industry Partner - Hiring
Employers and project managers with authority over hiring decisions and worksite culture

Industry Partner - Training
Professionals in training and apprenticeship programs, aware of pipeline gaps and education barriers

Community Navigator
Trusted connectors with networks among BIPOC women, youth, and workforce development organizations

Educator / Counselor
School counselors and educators who influence whether girls are introduced to STEM and construction pathways

How It Worked

The Built Environment co-design ran across five workshops and four community exploration sprints. Each iteration deepened the understanding of why previous solutions had failed, moving from surface-level knowledge gaps to the root challenge: revealing systems and structures that do not support (or recognize) success for women of color.

WORKSHOP 1 • Broad Discovery Co-designers develop relationships, gain project familiarity, and practice first-round interviews with BIPOC community members and industry contacts.

WORKSHOP 2 • Pattern Identification Co-designers share insights. Group develops themes expanding on the three original areas: Culture Clash, Education Gap, Knowledge Gap.

WORKSHOP 3 • Opportunity Mapping Co-designers identify promising spaces, partners, and industry sectors most ready to move toward inclusive work environments.

WORKSHOP 4 • Prototype Feedback Co-designers offer input on industry prototype storyboard, mentorship structure, and the overall co-design approach.

WORKSHOP 5 • Validation & Governance Co-designers validate the proposed pilot and phasing. All co-designers confirmed the process was beneficial and recommended citywide adoption.

2021 • Multi-month process • Integrated with ongoing workforce development planning

What the Process Revealed

The most important shift was not a new program; it was a reframe of the root problem. What initially appeared as a knowledge gap deepened into a system and trust deficit that no amount of outreach could fix without structural change.

WHAT WAS ASSUMED
Women of color just don't know about careers in construction.

WHAT CO-DESIGN REVEALED
They know. The industry hasn't created conditions for women to see it as safe or welcoming. Awareness campaigns miss the root problem entirely.

WHAT WAS ASSUMED
Training programs are the solution.

WHAT CO-DESIGN REVEALED
Training fails when worksites aren't ready. Industry DEI competency building must precede any cohort-based training intervention.

WHAT WAS ASSUMED
The same solution works across ages and contexts.

WHAT CO-DESIGN REVEALED
There is no single intervention. The pilot requires three phases: adult women, post-secondary, and K–12, each needing different partners and approaches.

WHAT WAS ASSUMED
The primary barrier is lack of awareness.

WHAT CO-DESIGN REVEALED
Psychologically unsafe worksites, not lack of awareness, are why women leave or never join. Trust and structural safety are the primary barriers.

What Was Built & What Carried Forward

DESIGN OUTCOMES BY THEME

CULTURE & INCLUSION

- Industry DEI assessment and competency building for worksite crews
- Worksite readiness modifications (facilities, uniforms, accommodations)
- Crew training completed before women begin collaborative work

MENTORSHIP & SUPPORT

- On-site mentors assigned to both women and worksite crews
- Daily check-ins and weekly group evaluations to address issues
- Wrap-around services and technical skills assessment for participants

EXPOSURE & ACCESS

- Early and consistent career exposure for girls starting before age 12
- Network access and opportunity sharing between industry and BIPOC women
- Phased pilot across adult women, post-secondary, and K–12 settings

WHAT CARRIED FORWARD

Bloomberg Mayors Challenge: The co-design process earned a $1 million Bloomberg Mayors Challenge award to build and develop the pilot's community-informed workforce model.

Scalable Model: The four-phase approach; assessment, worksite experience, group evaluation, and outcomes, was designed to scale across communities and industries beyond construction.

Generational Impact: Women participants are expected to become mentors for future cohorts and role models for younger girls, creating a self-sustaining pipeline into the built environment.

A Systems-Level Change Model: This project didn't address one barrier — it addressed the system that produces them. Industry culture, early exposure, mentorship infrastructure, and worksite readiness are four interdependent leverage points that reinforce each other. The pilot intervenes at all four simultaneously — which is why it scales as a model, not just a program.

> *"The most valuable part of this process has been to collaborate and listen to different perspectives of both employers and BIPOC women."*
>
> **- Co-Designer**

CASE STUDY 04

Rochester Public Library

Rochester Public Library • Strategic Planning • 2025

BY THE NUMBERS

7
Co-Designers recruited

30+
Co-designer interviews

5
community groups: young adults, elderly, Somali, Hispanic, LGBTQIA+

4
priority themes: Safety, Space, Programming, Access

The Challenge

Rochester Public Library recognized that the communities who could benefit most from its services were the ones least likely to use them. Despite offering extensive resources and programs, the library's traditional outreach had consistently reached the same connected residents, leaving young adults, elderly residents, Somali and Hispanic community members, LGBTQIA+ individuals, and people with disabilities largely outside its reach.

The challenge was not simply awareness. For many, the library felt unwelcoming, inaccessible, or simply unknown. Some community members didn't know it existed beyond schools. Others had experienced or anticipated feeling unsafe, unwelcome, or confused. A single negative experience was enough to ensure they wouldn't return.

The library needed to understand what would make it genuinely useful, not from assumptions, but from the people it was failing to reach.

WHAT TRADITIONAL OUTREACH MISSED

Surveys and listening sessions reliably surface those already connected to the library and comfortable navigating institutional spaces.

They do not reach:

- Somali residents who didn't know a public library existed outside schools
- Parents who assumed their children would be too loud or disruptive
- LGBTQIA+ individuals weighing whether the space signals their belonging
- Elderly and disabled residents uncertain of physical access

"I thought that only schools had libraries."
- Co-Designer

Who Was at the Table

Co-designers were recruited to represent communities structurally excluded from library participation. Partners including Pamoja Women, Cradle2Career, DMC EDA, and the City's DEI office supported outreach to trusted community networks.

Co-designers were selected for their lived experience of the library's gaps and their relational access to broader community networks across Rochester.

Compensation: Co-designers were professionally compensated, recognizing their expertise and the community engagement work conducted between sessions.

Structure: 3 design sessions with community explorations between each, engaging 20–30 additional community members.

PERSPECTIVES REPRESENTED

Young Adults
Community members in their 20s–30s seeking spaces for connection, career development, and peer community post-COVID

Elderly Residents
Older adults navigating isolation, mobility challenges, and limited awareness of available library services

Somali Community
Members of Rochester's Somali community, many of whom were entirely unaware of the public library or its services

Hispanic Community
Spanish-speaking residents navigating language barriers, limited cultural representation, and unfamiliar institutional spaces

LGBTQIA+ Individuals
Community members evaluating whether the library signals genuine belonging through its spaces, collections, and staff

People with Disabilities
Individuals navigating physical access, sensory needs, and whether the library's design goes beyond minimum ADA compliance

How It Worked

The RPL co-design ran across four design sessions, each followed by community explorations in which co-designers engaged friends, family, neighbors, and others in their personal networks. The process surfaced insights that no survey or public meeting had previously captured.

SESSION 1 • Broad Discovery Co-designers grounded in project context. Initial community conversations explore experiences with and barriers to library use.

EXPLORATION 1 • Network Outreach Co-designers interview trusted community members about library awareness, barriers, health resources, cultural values, and what makes spaces feel safe.

SESSION 2 • Pattern Identification Co-designers share insights. Four priority themes emerge: Safety, Physical Space, Programming & Offerings, Connection & Access.

EXPLORATION 2 • Deeper Inquiry Co-designers test emerging themes with broader networks. Questions probe Physical Space, Safety, Programming, and Connection & Access in depth.

SESSION 3 • Priority Definition & Solution Design Co-designers validate themes and generate 45+ specific program ideas across six priority categories.

EXPLORATION 3 • Solution Feedback Co-designers share proposed priorities with community members, gathering feedback on how solutions could be implemented.

SESSION 4 • Report-Out & Recommendations Co-designers present final priorities and recommendations to RPL leadership, grounded in three rounds of community input.

2024–2025 • 4 design sessions • 3 community explorations • 20–30 community members engaged across trusted networks

What the Process Revealed

The most important outputs were not program lists; they were structural reframes. Co-designers surfaced why the library had been failing to reach these communities, not just what it was missing.

WHAT WAS ASSUMED
The library just needs better marketing to underserved communities.

WHAT CO-DESIGN REVEALED
No marketing will convince people to show up. Trust must be built through relational outreach, community peers and liaisons, not institutional channels.

WHAT WAS ASSUMED
Safety means physical security and clean spaces.

WHAT CO-DESIGN REVEALED
Safety is cultural. For some communities, the idea of bringing their child with a disability to be loud at a place that is supposed to be quiet was unthinkable.

WHAT WAS ASSUMED
The library is accessible because it meets ADA requirements.

WHAT CO-DESIGN REVEALED
Minimum compliance is not accessibility. Wheelchair users couldn't see shelves, routes were indirect, parking was disconnected. Accessibility must be explicitly designed.

WHAT WAS ASSUMED
Programming for families means children's programming.

WHAT CO-DESIGN REVEALED
Families need simultaneous spaces: children safe, parents recharging, elders gathering, young adults with their own place. The whole family unit matters.

What Was Built & What Carried Forward

PRIORITY THEMES & KEY DIRECTIONS

SAFETY & BELONGING

- Proactive community outreach through trusted cultural liaisons
- Clear signals of welcome: flags, greetings, diverse collections
- Peer-based "what to expect" guidance before first visits
- Culturally specific wayfinding and navigation support

PHYSICAL SPACE

- Semi-private spaces for families, study, and cultural gathering
- Accessibility beyond ADA: tall tables, visible shelving, open aisles
- Third-place environments for young adults and elders
- Sensory-aware design: warm lighting, comfortable seating, nature

PROGRAMMING & ACCESS

- 45+ community-prioritized programs across six categories
- Educational support: resume help, FAFSA, health navigation
- Multicultural programming: story time with elders, cultural events
- Intergenerational connection as a strategic programming priority

WHAT CARRIED FORWARD

Sustained Relationships: The co-design team, including Pamoja Women, Cradle2Career, DMC EDA, and the City's DEI office, committed to continued connection with co-designers and willingness to connect future project leaders with participating community members.

Strategic Direction: The library was advised to prioritize depth over breadth; sustained, meaningful engagement with one or more underserved communities rather than attempting to meet all needs simultaneously.

Governance Commitment: RPL committed to co-designer involvement in the next phases of development and implementation, including prototyping, piloting, and ongoing program evaluation aligned with community-defined values.

> *"Spiritual spaces feel safe and welcoming because people have similar experiences and backgrounds and speak the same language I do."*
>
> **- Co-Designer, RPL Co-Design Process**

CASE STUDY 05

BIPOC Home Ownership

Coalition for Rochester Area Housing • Housing Equity • 2022

BY THE NUMBERS

10
co-designers predominantly from BIPOC communities

4
design sessions + community sprints

60+
Co-designer interviews

5
stakeholder groups targeted for change

The Challenge

Minnesota has one of the largest racial homeownership gaps in the country. In Olmsted County, 77% of White households own their homes compared to just 22% of Black/African American households, a disparity the Coalition for Rochester Area Housing identified as among the largest in the nation.

The Coalition recognized that this gap was not a failure of individual BIPOC community members. It was the predictable result of racist practices such as redlining, single-family zoning policies, and the intimidation and destruction of BIPOC neighborhoods, compounded by structural systems that continued to produce inequitable outcomes long after those practices were formally ended.

To address it meaningfully, the Coalition needed the BIPOC communities most directly impacted to lead the analysis. No institutional study could surface what lived experience already knew.

WHAT TRADITIONAL APPROACHES MISSED

Housing gap analyses and policy reports are written by researchers and institutions. They describe the problem but rarely ask those living it to define the solution.

They do not surface:

- The navigation barriers inside financial and lending institutions
- Cultural and religious factors shaping how BIPOC families approach homeownership
- The role of mentorship and trusted peer networks in the purchase process
- What structural changes lenders, realtors, and builders actually need to make

“The co-design process is one where the BIPOC communities lead.” - Coalition Report

Who Was at the Table

Ten co-designers, including those working in the trades, and those from local BIPOC communities with diverse racial, cultural, and religious backgrounds, participated. Personas covered the full spectrum of homebuying experience; from long-term renters to successful buyers, mortgage professionals to immigrant families.

Co-designers were selected for their lived experience of the housing system and relational access to broader BIPOC networks. The project team was led by the Coalition with support from the City of Rochester, DMC EDA, and Elocina, Inc.

Compensation: Co-designers were professionally compensated across four design sessions and multiple community sprint conversations.

Structure: 4 sessions: Introduction, Exploration (x2), and Themes & Recommendations, with community sprints between each.

PERSPECTIVES REPRESENTED

Experienced Realtor
Realtor with significant BIPOC community relationships and experience helping first-time buyers navigate the purchasing process

Mortgage Professional
Experienced banker familiar with the underwriting process and mortgage qualification for first-time BIPOC home purchasers

Successful Homeowner
BIPOC community member who purchased a first home through traditional avenues and could reflect on that experience

Long-Term Renter
BIPOC community member who had always rented and had not previously considered purchasing a home

Immigrant Family Buyer
Immigrant family with household income of $80,000 or less who faced barriers but successfully purchased a home

Single Parent / First-Time Buyer
Educated single parent with household income $80,000 or less navigating the purchase process for the first time

How It Worked

The co-design ran across four sessions with community sprints between each. Co-designers were trained to conduct their own interviews within their trusted networks, surfacing barriers and opportunities the project team could not have anticipated. Each session built on the prior, moving from relationship-building to exploration to co-developed stakeholder recommendations.

SESSION 1 • Introduction Co-designers build familiarity with the project, team, and timeline. Learn interview approaches and identify community members in their networks to engage.

SESSION 2 • Exploration Co-designers share insights from their community conversations. Seven themes surface: Education, Navigation, Belonging, Safety & Security, Structural Racial Barriers, Mentorship, Representation.

SESSION 3 • Exploration (Continued) Continued probing of identified themes with broader community networks. Cultural and institutional barriers deepen, especially around navigation and cultural competency.

SESSION 4 • Themes & Stakeholder Recommendations Co-designers synthesize findings and develop targeted recommendations for five stakeholder groups: Financial/Lending Institutions, Realtors, Community Housing Support, Developers/Builders, and the BIPOC Community.

ONGOING • Governance & Dissemination Project team recommends annual DEI-focused homeownership conference and sharing findings with Housing Alliance, Regional Realtor groups, and State Housing conferences.

2022 • 4 design sessions + community sprints • 10 co-designers across diverse BIPOC communities

What the Process Revealed

The most important outcomes were not a list of programs, but a set of structural reframes of why BIPOC homeownership had been failing to improve despite years of effort.

WHAT WAS ASSUMED
BIPOC homeownership gaps are primarily a financial literacy problem.

WHAT CO-DESIGN REVEALED
Navigation is the primary barrier. The mortgage process itself, complex and opaque, is what co-designers named as the single largest obstacle to BIPOC homeownership.

WHAT WAS ASSUMED
Cultural competency means diversity training for staff.

WHAT CO-DESIGN REVEALED
Cultural competency requires structural change: diversifying the workforce, exploring Islamic lending, accepting rental history as credit, and building ongoing community relationships.

WHAT WAS ASSUMED
The solution lies in making existing programs more accessible.

WHAT CO-DESIGN REVEALED
Mentorship is a distinct structural need, a separate entity guiding home seekers throughout the entire process, that no existing program was providing.

WHAT WAS ASSUMED
BIPOC community members need to be better informed about homeownership.

WHAT CO-DESIGN REVEALED
Communities already hold the knowledge. What's missing is a framework for sharing it: peer networks and culturally specific education from youth through adulthood.

What Was Built & What Carried Forward

RECOMMENDATIONS BY STAKEHOLDER

FINANCIAL / LENDING

- Complete DEI assessments and implement recommendations
- Diversify workforce and establish community relationships
- Explore Islamic lending and rental history as credit
- Translation and language services for entire mortgage process

REALTORS & BUILDERS

- DEI assessment and workforce diversification
- Cultural business competency training and community outreach
- Multi-generational and culturally aligned home designs
- Proximity to worship, welcoming schools, minimal maintenance

COMMUNITY & MENTORSHIP

- Develop BIPOC homeownership mentorship pipeline
- Framework for information sharing within BIPOC communities
- Annual DEI-focused homeownership conference across stakeholders
- Education from youth through post-purchase completion

WHAT CARRIED FORWARD

Multi-Stakeholder Accountability: Recommendations were deliberately separated by stakeholder; Financial/Lending, Realtors, Community Housing Support, Developers/Builders, and the BIPOC Community, so each could be held accountable for its own structural changes.

Coalition Investment Strategy: Co-designer insights directly informed the Coalition's funding priorities, translating community-led analysis into cross-sector financial commitments from Olmsted County, Mayo Clinic, the City of Rochester, Rochester Area Foundation, and DMC.

Sustained Dissemination: Findings introduced at the Housing Alliance, State Housing conferences, and Regional Realtor groups, extending co-designer impact into institutional spaces where structural change is decided.

> *"Their time and talents are invaluable to advancing change in our community."*
>
> **- Coalition for Rochester Area Housing, Project Report**

CASE STUDY 06

LGBTQIA+ Healthcare Access

Olmsted County Public Health Services • Healthcare Equity • UCare-funded

BY THE NUMBERS

4

co-design sessions + community interviews

30+

Co-designer interviews

3

community-designed initiatives co-developed

2

Co-designers now compensated as ongoing training facilitators of the training developed through the process

The Challenge

LGBTQ+ residents in Olmsted County Public Health Services (OCPHS) face significant health disparities in mental health, substance use, and access to care compared to heterosexual residents. Olmsted County Public Health Services identified these gaps and sought to understand what it would actually take to improve access, not from an institutional perspective, but from the perspective of those navigating care every day.

The challenge wasn't lack of programs. It was that the programs were built on assumptions. Clinics displayed rainbow flags but produced isolating experiences. DEI training existed but didn't address intersectional LGBTQ+ needs. Insurance was complex, coverage was inconsistent, and the only reliable navigation tool was a personal network most people didn't have.

OCPHS recognized that the people who had been forced to develop workarounds for a system that didn't serve them were the people who needed to design the solutions.

WHAT INSTITUTIONAL APPROACHES MISSED

Healthcare systems had been asking the wrong questions. Rainbow flags and DEI trainings are visibility signals, not safety signals.

What the system couldn't see:

- Finding "welcoming" care requires exhausting trial-and-error
- Personal networks are the only trusted navigation tool
- Young adults face acute insurance and privacy vulnerabilities
- Providers lack intersectional LGBTQ+ training, not just awareness

"While it is easy for a clinic to have a rainbow on their website, finding a welcoming environment can be a difficult and exhausting process of trial and error."
– Co-designer

Who Was at the Table

Co-designers were recruited through trusted community networks after significant challenges identifying willing participants through institutional channels, itself a signal of the distrust this project was designed to address.

More than 30 additional community members were engaged through co-designer networks. Co-designers were professionally compensated throughout and continue to receive compensation as ongoing training facilitators after the project concluded.

Compensation: Co-designers were professionally compensated across four design sessions and multiple community sprint conversations.

Structure: 4 design sessions + community interviews between each. Facilitated by Jess Roberts & Jes Springer, ByDesign.

PERSPECTIVES REPRESENTED

Young Adults
LGBTQ+ individuals navigating the insurance system without family support, often uninsured or on parents' plans without the privacy needed to access care

Queer People of Color
Community members whose distrust of the healthcare system intersected with both racial and LGBTQ+ identity, naming distinct barriers not captured by either lens alone

Trans & Nonbinary People
Individuals managing complex care needs, including hormone therapy and gender-affirming care, with providers unprepared for their bodies or identities

Rural & Geographically Isolated
LGBTQ+ residents in outlying areas where welcoming providers were severely lacking.

Healthcare System Insiders
LGBTQ+ people working within medical institutions who named the gaps in DEI training from the inside what staff were never taught

Community Network Navigators
People who are informal healthcare navigators within their own networks, helping friends and neighbors find and prepare for care.

How It Worked

The co-design ran across four sessions with community interviews between each. Co-designers engaged their own trusted networks, friends, family, and neighbors, to surface barriers, fears, and hopes the project team could not have accessed through institutional outreach. Each session deepened understanding from exploration to priorities to three co-designed community initiatives.

SESSION 1 • Introduction Co-designers grounded in the project, team, and process. Begin identifying interview approaches and community members in their networks to engage.

SESSION 2 • Exploration Co-designers share what they heard from their networks. Core themes emerge navigation barriers, insurance complexity, provider training gaps, safety vs. signaling, trust through personal networks.

SESSION 3 • Exploration (Continued) Continued probing of identified themes. The role of peer networks as the primary navigation infrastructure crystallizes. Providers who need training are not the ones who will seek it out.

SESSION 4 • Initiative Development Co-designers synthesize insights into three concrete, community-designed proposals: Community Care Navigator, Story-Based Provider Training, and Peer-Informed Resource Mapping.

ONGOING • Governance & Implementation Co-designers transition from design authority to implementation authority. They are currently compensated as facilitators of the story-based training they developed; the governance commitment that didn't end when the project did.

Olmsted County • UCare-funded • OCPHS + ByDesign

What the Process Revealed

The most consequential reframes were not about programs or services. They were about where the real navigation infrastructure already existed and what institutions had been misdiagnosing as individual failure.

WHAT WAS ASSUMED
A rainbow flag signals a safe space.

WHAT CO-DESIGN REVEALED
Flags without follow-through are more disorienting than no signal. Staff must use pronouns, honor privacy, and avoid irrelevant assumptions - a flag alone means nothing.

WHAT WAS ASSUMED
DEI training improves care for LGBTQ+ patients.

WHAT CO-DESIGN REVEALED
Most DEI training co-designers experienced was abstract and out of touch. Story-based training facilitated by LGBTQ+ community members is what produces genuine change.

WHAT WAS ASSUMED
The care access problem is primarily a resource gap.

WHAT CO-DESIGN REVEALED
Personal networks are the primary navigation infrastructure. The solution isn't more information; it's supporting the trusted people already doing this work.

WHAT WAS ASSUMED
Providers who need training will seek it out.

WHAT CO-DESIGN REVEALED
Clinics that opt into training aren't the problem. But a certification system lets patients identify genuinely welcoming providers before exhausting trial-and-error.

What Was Built & What Carried Forward

THREE COMMUNITY-DESIGNED INITIATIVES

COMMUNITY CARE NAVIGATOR

- A trusted community member with lived LGBTQ+ experience providing on-demand navigation support
- Helps individuals find, afford, and prepare for care, including in-clinic advocacy
- Specialized insurance knowledge and awareness of local welcoming providers
- Trust hierarchy: independent > nonprofit > healthcare > insurer

STORY-BASED PROVIDER TRAINING

- Training for entire care teams (receptionists through providers) grounded in real LGBTQ+ experiences
- Designed and facilitated by LGBTQ+ community members, not abstract DEI curriculum
- Certification/badging system to help patients identify genuinely welcoming clinics
- Co-designers now compensated as ongoing facilitators, governance that didn't end

PEER-INFORMED RESOURCE MAPPING

- Community-generated directory of LGBTQ+-welcoming providers, clinics, and resources
- Peer reviews and lived experience emphasized over institutional listings
- Inspired by platforms like 'Everywhere is Queer' and 'Queering the Map'
- Could be tied into the Care Navigator role for consolidated community feedback

WHAT CARRIED FORWARD

Governance That Didn't End: Co-designers are currently compensated as facilitators of the story-based training program they designed. This is the truest form of co-design governance: community members moved from design authority into sustained, paid implementation roles.

Lived Experience as Institutional Change: The training is delivered by the people who lived the experiences it's built on, not external DEI consultants. Their continued compensation maintains accountability between the institution and the community whose safety the training is meant to create.

A Model for the Field: This project demonstrates that the governance commitment described in the Playbook, co-designers remain compensated participants in implementation, is achievable. It requires institutional willingness to share authority beyond the project period. OCPHS did that.

> *"We cannot do our work without the voice of those most impacted by these challenges."*
>
> **- Olmsted County Public Health**

EQUITABLE COMMUNITY CO-DESIGN

Facilitator Resources

Worksheets + Reference Materials
In Process Order

How to Use These Resources

These worksheets are designed to be used alongside the Co-Design Guide. Each tool corresponds to a phase in the process and a chapter in the Guide, so you can move between the conceptual framing and the practical work at any point.

You do not need to use every worksheet. Instead, follow the lead of your community members to draw on the practices and approaches that are most supportive, when they are most supportive.

For practitioners running a project
Work through the worksheets in sequence, starting with WS 1A (Scoping) and moving through recruitment, session design, and governance.

For organizational leaders
Start with WS 1A and 1B to test whether a project is genuinely ready for co-design before committing resources.

For facilitators mid-process
Jump to the worksheet that matches your current phase. Each tool stands alone and can be pulled individually for any active project.

FACILITATOR RESOURCE GUIDE · PROCESS MAP + PLAYBOOK CHAPTER REFERENCE

PROCESS PHASES	**1 Project Identification & Scoping**		**2 Proactive Recruitment**	**THROUGHOUT ALL PHASES:**
PLAYBOOK CHAPTERS	**Ch. 4** · System & Org. Readiness **Ch. 5** · Project Scoping & Preparation		**Ch. 7** · Recruitment as Power-Building	Community Participant Agreement, one-on-one check-ins, & Co-Designer Tracking Sheet (compensation, check-ins, exit interview, final payment, etc.)
WORKSHEETS & TOOLS	**WS 1A** Framing Design Challenges	**WS 1B** Project Scoping Canvas	**WS 2** Persona Development **WS 3** Position Description **WS 4** Recruitment + Snowball **WS 5** Compensation Planning	

PROCESS PHASES	**3 Equitable Co-Design**		**4 Development, Implementation & Governance**	
PLAYBOOK CHAPTERS	**Ch. 6** · The Co-Design Process **Ch. 8** · Facilitation & Holding Space		**Ch. 9** · Insights to Implementation **Ch. 11** · Sustaining Co-Design	
WORKSHEETS & TOOLS	**WS 6** Session Sequencing + Facilitation Guide	**WS 7A & 7B** Co-Design Discussion Guide	**WS 8** Implementation + Continued Authority	

HOW TO READ THIS MAP:

- Worksheet cards are organized under their phase - find your phase, find your tools
- Chapter tags reference the Playbook section that goes deepest on that phase
- Use worksheets in sequence or pull individually for any active project

Source: **ByDesign LLC**

Framing Design Challenges

Use these questions as discussion starters before settling on your co-design project scope. Work through all four categories.

Appropriate Scale

- How might you scale your project to allow co-designers to offer meaningful input that is broad enough for exploration, but narrow enough for engagement?
- How does your project focus on a specific audience of co-designers? How did you identify this population?
- How do you know your project is at a stage where collaborator input can still influence its direction?

Iterative

- How might you frame your project for exploration rather than validation of an embedded solution?
- How might your project offer transparency about why you're seeking input and what will be done with it?
- How might co-designer involvement influence project development and implementation beyond the engagement phase (into implementation and evaluation for example)?

Asset-Focused

- How might your project benefit from including community lived experiences?
- How have you framed your project to focus on systems and structures, not training people to adapt to existing ones?
- How might you create structures to avoid assuming collaborator needs, values, or fears?

Enhance

- How has your project been informed through previous engagement efforts?
- How does your project seek to access and grow relational networks?
- How do you know your project is focused on challenges that can be practically addressed, or at least show real progress?

Project Scoping Canvas

Clarify your design challenge, build the project brief, and test readiness before moving to recruitment.

STEP 1 **Initial Design Challenge: Write the challenge you hope to explore. Frame as a question, not a solution.**

STEP 2 **Root causes: Describe at least 3 reasons this challenge persists. For whom is this a structural problem? How do you know?**

Root cause 1	Root cause 2	Root cause 3

STEP 3 **Refined Design Challenge**

Actionable · People-focused · Practical · Leadership investment confirmed

STEP 4 **Project Considerations: timeline, staffing, constraints, assets**

READINESS CHECK · All six criteria must be confirmed before moving to recruitment · Problem open for discovery · Co-designer authority is real · Compensation budgeted · Timeline allows longitudinal work · Lived experience is central

Persona Development

Prioritize the perspectives you need to recruit. Diversity is a design requirement; homogeneous groups limit insights, creativity, and action.

	Access to process & influence →	
Impacted by outcome →	**HIGHLY IMPACTED LOW ACCESS** *Priority recruitment targets*	**HIGHLY IMPACTED HIGH ACCESS** *Steering team candidates*
	LESS IMPACTED LOW ACCESS *Community partners*	**LESS IMPACTED HIGH ACCESS** *Institutional allies*

PERSONA PROFILES

#	Lived experience, culture, and assets	Age range	Race / culture	Networks this person can reach
1				
2				
3				
4				
5				
6				

DIVERSITY LENS: Age · Race & ethnicity · Gender identity · Geography · Disability · Immigration status · Veteran status · Multiple personas may exist in one person

Co-Designer Position Description

A position description signals professional, compensated work, not volunteerism. The language you use signals whether co-designers are advisors or governance partners.

PROJECT BACKGROUND

What is this project, what will co-designers influence, and why does it matter?

ROLE & RESPONSIBILITIES

Frame contributions as active and expert, not passive participation.

SESSION TIMELINE

Session 1:	Introduction & broad discovery
Session 2:	Pattern identification
Session 3:	Priority definition
Session 4:	Solution testing & co-design thesis
Ongoing:	Governance & implementation authority

COMPENSATION

$/hr · max hrs · $ total

QUALIFICATIONS

Lived experience is the qualification

MUST INCLUDE · Clear title · Decision-making authority scope · Time commitment · Compensation rate · No formal education required

LANGUAGE GUIDANCE · Partner, not participant · Governance partner, not advisor · Lived experience IS the qualification · Commitment to follow through on decisions

Recruitment + Snowball Outreach

Recruitment begins with trusted connectors already embedded in the communities you seek to engage. The snowball model expands reach through relational channels, not open calls.

1	2	3	4
Collaborator Mapping	Prioritizing Collaborators	Outreach via Relational Networks	Expectation Setting

OUTREACH CONVERSATION GUIDE

OPENING

"I'm reaching out because [organization] is working on [challenge]. We're looking for people with real experience, not experts, not volunteers. This is paid work."

THE ASK

"We're looking for co-designers who'll help us understand what's broken and design what better looks like. You'd be paid $[rate]/hr for [X] hours across [Y] sessions."

WHAT IT'S NOT

"This isn't a focus group or survey. Co-designers shape the problem framing and solutions and stay involved through implementation."

IF YES

"Tell me about your experience with this. Who else in your network has a strong perspective we should hear from?"

COMMON BARRIERS + HOW TO ADDRESS

- Childcare / family obligations: provide stipend or schedule around care
- Transportation: cover costs or meet where people are
- Language & literacy: offer interpreters and translated materials
- Institutional distrust: build relationship before asking; trust is earned
- Documentation fears: ensure confidentiality; use trusted community orgs
- Schedule conflicts: flexible timing and multiple session options
- Safety: create a diversity of ways for co-designers to show up how and when it is most comfortable

TRACKING TOOL: For each co-designer, record: name · background · contact · connector · confirmed · W-9 submitted · check-in 1 · check-in 2 · check-in 3 · exit interview · final payment

Compensation Planning Guide

Compensation is a structural requirement, not optional recognition. Professional-rate pay demonstrates that lived experience is valued as expertise and ensures co-designers can fully participate.

SCOPE OF COMPENSATION - WHAT TO INCLUDE

Activity	Hours each	# sessions	Subtotal
Design sessions (prep + attendance)			
Community exploration work between sessions			
Governance + implementation sessions			
Travel time / incidental expenses	flat rate or mileage	—	
TOTAL			

Living wage reference: www.livingwage.mit.edu: $30–$60/hr is a reasonable starting point in most regions.

PARTICIPANT AGREEMENT - KEY TERMS

Scope:	Co-designer agrees to share lived experience related to the project
Rate + ceiling:	$[rate]/hr · max [X] hrs · $[total] maximum compensation
Contractor status:	Independent contractor, not an employee or partner of the compensating organization

Timeline:	State start/end dates. Extensions require amended contracts.
Invoice schedule:	Two invoices: project midpoint + project conclusion (can be adapted if pay affects ability to qualify for resources)
Tax paperwork:	W-9 may be required before payment and 1099 issued at tax season (see IRS requirements)

RECOGNITION BEYOND PAY

- Co-authorship on reports and publications
- Professional references naming governance contributions
- Certificates & credentials
- Employment pathways: first-line candidates for roles they helped create
- Network access: professional events, advisory boards, leadership
- Ongoing relationship: sustained partnership beyond the project
- Meals & gathering at every session

TAX + BENEFITS · Compensation may affect co-designers' state/federal benefits (housing, SNAP, Medicaid). Explore implications before finalizing rates. Consult legal counsel as needed.

Session Sequencing + Facilitation Guide

Co-design alternates between facilitated design sessions and community explorations. Co-designers are interpreters, not data collectors, they contextualize what they hear through lived experience.

1 Broad Discovery

- Ground co-designers in project context
- Establish relationships and psychological safety
- Begin community exploration through trusted networks
- Exploration: What frustrates you most? Tell me about a time when...

No solution yet. Design team listens only.

2 Pattern Identification

- Co-designers share what they heard from their networks
- Themes surface across communities
- Design team identifies shared structural patterns
- Exploration: What matters most? What does success look like?

From stories to structural patterns.

3 Priority Definition

- Themes tested against broader community networks
- Tensions between community priorities and institutional constraints made visible
- Exploration: If you could change one thing about this system, what would it be?

Productive tension is the mechanism.

4 Solution Testing

- Co-design thesis finalized
- Prototypes/training/measurement tested against lived reality
- Thesis is a structural commitment, not a recommendation
- Governance transition: from design to implementation authority

Nothing is final until tested alongside real lives.

FACILITATION PRIORITIES

1 Safety & Belonging

Emotional, cultural, relational. Critical when inviting people harmed or excluded by systems.

2 Power in the Room

Power dynamics don't disappear when community members and (and if) institutional staff share a room.

3 Inclusive Tools

Accommodate multiple ways of learning, sharing, and processing. Everyone participates fully.

4 Holding Tension

Conflict is information, not failure. Tension reveals depth and complexity of the issue.

5 Co-Facilitation & Resonance

Pair facilitators across lines of difference. Different strengths and community ties build trust.

Community Exploration Discussion Guide

Between design sessions, co-designers engage their trusted networks through open conversations where they are an interpreter, not a data collector.

SETTING UP CONVERSATIONS

Choose people you already know
Reach out to people in your networks affected by this issue.

Explain what you're doing
"I'm helping with a project about [issue]. I'd love to hear your experience."

Find a comfortable setting
Private, familiar, free from distractions. Meet them where they are.

Be clear about confidentiality
Responses stay anonymous. Their voice shapes the work; we do not collect identifiable information.

Schedule 3+ conversations
Each runs 30–45 min. Aim for three before the next group session.

EXAMPLE STARTER QUESTIONS (each phase)

1 Broad Discovery

- What do you value most when it comes to your health or your family's health? Why?
- What makes it hard to focus on your health or keep track of things? Why?
- Who do you trust when it comes to health decisions, and why?

2 Pattern Identification

- What or who have you relied on most to address/navigate this [issue]? Why?
- Describe how this [issue] gets in the way of doing the things that matter most to you.
- What do programs or institutions consistently get wrong about your community or your experience?

3 Priority Definition

- If you could change one thing about how this is handled, what would it be and why?
- What feels most urgent to the people you know? Why?
- How do you balance this [issue] with the other challenges facing you and/or your family?

4 Solution Testing

- We've been working on [approach], in what ways does this reflect (or not) what you have heard in previous interviews?
- What part of this [approach] do you feel would be most impactful? Why?
- If you were delivering this [approach] what would you need to be successful? Why?

Continued on next page →

Community Exploration Discussion Guide

Tips for conducting and documenting your community conversations

WHILE FACILITATING

1. **Connect first**
   Begin by connecting as people. Share a bit of your own story first
2. **Listen actively**
   Use gentle follow-up: “Tell me more” or “Why does that feel that way?”
3. **Allow silence**
   People need time to reflect. Don’t rush to fill the gap.
4. **Follow the ‘why’**
   That’s where the most important things live
5. **Handle emotion with care**
   If someone gets emotional, thank them and let them know they can stop
6. **Stay flexible**
   You don’t need to ask every question; follow the lead of the person you are interviewing - see where the conversation goes

CAPTURING WHAT YOU HEAR

- Jot down what stood out. What was powerful, unexpected, or common
- Record feelings, values, and themes, not just facts
- Note exact phrases when they capture something important
- What are the top 3 things you heard, and why do they matter?

SHARING BACK

You are lifting up what your community shared, not speaking for them, but with them in mind.

When you bring insights back to the group, focus on themes, feelings, and patterns, not individual identities. Your role is to be a bridge between the community and the design process.

Implementation + Continued Authority

Implementation is not a handoff. Without sustained authority, community-derived insight is diluted or abandoned. Without governance, co-design becomes insight without consequence.

1 Protect the thesis

Co-designers review every implementation decision against community-defined commitments. Identify and flag departure before it becomes institutionalized.

2 Trust before finalizing

Prototypes, training materials, and measurement frameworks are tested against co-designers' lived experience before scaling. This is design governance, not user feedback.

3 Sustain the relationship

Co-designers maintain the institutional relationship with the community on whose behalf they have governed. That bridge must remain open for the work to endure.

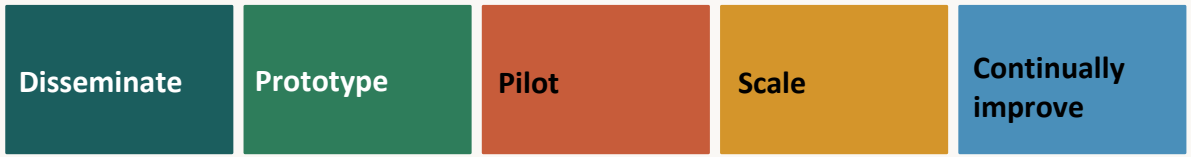
CO-DESIGN THESIS DOCUMENTATION

PROBLEM REFRAME: What the institution assumed vs. what co-design revealed:

IMPLEMENTATION PILLARS: The structural conditions any solution MUST address; community-defined, not negotiable:

ACCOUNTABILITY + GOVERNANCE: How will we honor these commitments? What roles do co-designers hold through implementation?

IMPLEMENTATION CONTINUUM



DRIFT WARNING SIGNS

- Decisions made without co-designer review
- Scope narrowing for operational convenience
- Language shifting to institutional metrics
- Co-designers being thanked but not consulted
- Timelines moved without co-designer input

POST-PROJECT ROLES

- Implementation advisor
- Evaluation partner
- Peer facilitator
- Community ambassador
- Frist-line candidates for the roles they helped to create

Source: **ByDesign LLC**

How Ongoing Governance Works

Authority only holds if it is structured. Define who decides what, how often the work is reviewed, and how governance survives turnover.

1 Decision rights

Name the decisions co-designers sign off on, not just advise on. Fidelity, scope, and measurement changes require their approval, not only notification.

2 Review cadence

Set a fixed rhythm for governance review. Implementation is checked against community commitments on a schedule, not only when problems surface.

3 Terms & succession

Define how long co-designers serve, how they rotate, and how new members join so governance outlives any one individual.

GOVERNANCE CHARTER - DRAFT HERE

DECISION RIGHTS: Which decisions require co-designer sign-off (or at least collaborative decision making), not just input?

REVIEW CADENCE: How often does the governance body meet, and what does it review each time?

SUCCESSION: How do co-designers rotate on and off, and who recruits replacements?

IMPLEMENTATION CONTINUUM

Disseminate	Prototype	Pilot	Scale	Continually improve

CO-DESIGNER SIGN-OFF GATES

- Implementation fidelity changes
- Scope or eligibility changes
- Measurement & evaluation design
- Budget shifts affecting the work
- Public communication & framing

REVIEW RHYTHM

- Standing governance meeting each cycle
- Decision log reviewed regularly
- Fidelity check against the thesis
- Open action items tracked to close
- Annual charter & terms review

Source: **ByDesign LLC**

Sustaining Governance: Compensation & Durability

Governance you do not resource is governance you will lose. Compensation, budget, and ownership turn continued authority into durable change.

1 Pay for the role

Co-designers in governance are compensated as designers and researchers, not thanked as volunteers. The rate reflects the authority they hold.

2 Budget the continuity

Ongoing governance is a line item, not a favor. Fund meeting time, facilitation, and co-designer roles across the full implementation horizon.

3 Ownership = durability

Systems designed with community embed the conditions for sustained engagement. Compliance cannot. Durability comes from who holds the work.

SUSTAINABILITY PLAN - DRAFT HERE

COMPENSATION: What will co-designers be paid, and against what role or rate benchmark?

BUDGET SOURCE: Which line funds governance beyond the project period, and who protects it?

THE CONVERSATION: What are the biggest institutional barriers to doing this work and how can you find work-arounds (or even better, solutions)?

IMPLEMENTATION CONTINUUM

Disseminate	Prototype	Pilot	Scale	Continually improve

WHAT GOVERNANCE COSTS

- Co-designer compensation (per role)
- Facilitation & meeting coordination
- Materials, travel & access needs
- Evaluation & reporting support
- Onboarding for new members

SIGNS GOVERNANCE WILL LAST

- Co-designers hold paid, named roles
- Funding secured beyond the pilot
- Decision rights written down
- The community relationship stays open
- Ownership sits closest to the issue
- Contributions are recognized and credited

Source: **ByDesign LLC**