Hello! The June 2021 Designing for Social Systems workshop is our first one with two important features:

1. Enrollment is by team, made up of co-workers from the same organization, community members, and other stakeholders.
2. Participants will learn design thinking approaches, and advance a real project of their own.

The aim of this workshop is for accepted workshop participants to each gain a fluency in a design practice that they can continue to draw on; build a stronger collaborative practice with their team; and make a significant bound forward on their project. This all requires some preparation in advance; we think the effort is well worth it, and a learning experience in itself.

This document will prepare you to apply for the workshop with a project that is well-scoped for the duration and structure of the workshop.
**Workshop Schedule**

There are 7 days with synchronous sessions (noted below with filled blue dots), plus team work and coaching sessions. Please note the dates, and only apply if all members of your team are available to join for all sessions, and commit to completing the additional work.

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<td>Week of May 10-14, meet with your design coach (90 mins) and work to finalize scoping.</td>
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<td>(Arrange interviewees and co-design session participants prior to June 1.)</td>
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<td>Core workshop sessions: June 1, 2, 7, 9, 14, and 16. 9-11:15 am, 12:15-2:30 pm PT</td>
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<td>‘Design Fieldwork’ Interviews: 3 hours within June 3-6</td>
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<td>‘Design Fieldwork’ Co-Creation Session: 3 hours within June 10-13.</td>
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<td>Continued Independent Project Work (Prototyping, etc.) 4-40 hours (as desired) over 6 weeks, June 21-July 28.</td>
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<td>Week of July 5-9, meet with your design coach (90 mins).</td>
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<td>Final session, global and team activities: July 28, 12:15-1:45 pm PT.</td>
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Application Checklist

Please complete the items in the left column to prepare your application. If accepted, you will be expected to also complete the tasks on the right.

Before applying:

- **Build your team** of 3-5 people. We encourage you to create a team that includes not only co-workers from the same organization, but also affected community members, partners, and/or other stakeholders. (If you can’t confirm all team members at this time, apply with at least three committed members.)

- **Verify availability** of all team members for live sessions and asynchronous work. (See previous page.) Hold calendar dates.

- **Gather information for each member of your team**: name, email address, role (staff, community member, partner), job title*, number of direct reports*, previous exposure to design thinking, why they are interested in joining the workshop (50-150 words), have they applied to DSS before, are they available for all workshop sessions and work, race/ethnicity*, and gender*. (*Optional)

- **Work through** the following pages of this document. Ideally do this with all team members; however, we understand you may still be assembling your team.


Before June 1 (first full-group session):

Please be aware of this additional required prework if your application is accepted:

- **Meet with your coach**, about three weeks prior to June 1. Discuss your project framing, project goals, and personal/team learning goals. We will match your team with a coach after acceptance to the workshop.

- **Finalize project framing** (an iteration of the same six responses from the application prework in this document).

- **Arrange to speak with interviewees**, to be conducted remotely or in a socially distant manner. Schedule 45-minute interviews with 4 to 6 people between June 3 and 6. DSS and your coach will provide further guidance on how to arrange interviews.

- **Invite co-designers** for a feedback and ideation session, between June 10 and 13. We will provide further guidance.

- **Complete readings and activities** that we will provide. Plan for 2 to 6 hours for this work.
Application Prework

The following pages are a guide to consider what project to focus on, and then to scope the specific design work that you would like to complete in the workshop. Step one of this Application Prework asks you to outline the (potential) program/intervention and its goals — the overall ‘project’ you are working on. Step two provides you with more information and guidance for scoping design work. Step three asks you to frame a cycle of design work that will inform and advance that larger project.

Typically, teams choose an area where they will design with/for —and hence positively impact— end-beneficiaries (program participants). Most importantly, your team should choose something you care about, have agency over, and have identified a potential path to implementation.
Select an activity/outcome area to focus on.

We recommend you select an area of work that is underway but still requires significant exploration. (In other words, a design approach of discovery, ideation, and experimentation would be beneficial.) Bound the scope of work at the level of an ‘activity’ (a program/offering; not the work of the entire organization).

The activity may be:
- a. Existing; needs to be evaluated and iterated or substantially redesigned (e.g., it is not achieving the desired outcomes), or
- b. Not existing, to be determined (TBD); it needs to be created.

If ‘a.’ then write the activity first; if ‘b.’ start with the outcome, and then write any known characteristics of the activity.

The “design project” you will scope (in Step 3) will be an exploration to inform the creation or revision of a more effective activity. In the DSS workshop, we will coach you to further scope this project, plan the methods to take it on, and advance the design work itself.

Write the three elements (activity, intermediate outcome, ultimate outcome) below. See examples on the next page.
**Examples**

**Activity** (Program/Service/Offering)
- What do/will you produce and implement?
- Who's affected?
- (If activity is TBD)

**Activity Outcome** (Intermediate Outcome) (Near Star)
- What changes do you (aim to) create?
- The qualitative and quantitative impact you have seen or desire within 3-5 years, due to your program.

**Ultimate Outcome** (Guiding Star)
- Articulate and visualize a desired new future state. (Imagine a city/community where...)
- Provide specific changes and the desired ultimate impact.

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Some intervention for advisors of high-net worth individuals (over $10M) to help them advise strategic philanthropy. Needs to have in-person/physical component, not just online.

Increase quality of philanthropic advice from wealth advisors to high-wealth individuals. In turn, increase high-wealth donors gifts to outcome-oriented non-profit organizations.

Thriving and well-funded outcome-oriented non-profit organizations making change in the world.

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TBD interventions for our students in middle schools of X Unified School District. We have flexible funding; could be program/campaign, change in the meal experience/process/space, and/or change in food itself.

Drastically increase the percent of students fed and eating healthy food each school day. Specifically, increase the participation rate for those entitled to free school meals (currently as low as 50% in some demographics).

No children going hungry in our schools. Students that are healthy and engaged in learning in our school district. No achievement/learning gap for free-and-reduced-fare-lunch-eligible students.
Read the *Design Project Scoping Guide*

In the previous step you outlined the activity/outcome area to focus on. Next, read the Design Project Scoping Guide to understand some considerations of scoping and preparing for design work.

**DESIGN PROJECT SCOPING GUIDE**

This is a guide for selecting, framing, and communicating the intentions of a design project.

A design approach can be inserted into many junctures of almost any project. For example, iteration and making low-resolution prototypes is useful in nearly any work you do. Speaking to people for whom you are designing is never a bad idea. Start your practice by using design techniques in your current projects when they are useful.

When you are ready to take on a complete exploratory project using design, this guide is for you. It discusses what challenges are best suited for human-centered design, and how to scope and frame design projects. We hope you find it to be useful.

Written by Thomas Both, building on the work of many at the d.school. Particular thanks to Perry Klebahn, Nadia Roumani, and Gigi Gormley Wampler for input on this guide.

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Frame the challenge, and what design could help you figure out

Now frame the design work that will help you gain understanding and insight, inform more effective activities/programs, and ultimately contribute to reaching the desired outcomes you noted in Step 1. Use the structure below to write a first draft. Consider the recommendations from the Scoping Guide, and see examples on the next page.

You may be able to simply rewrite your intermediate outcome as an actionable WHAT (Create ways to ...). If you have a broad intermediate outcome, then the WHAT should narrow the scope.

Be sure your challenge has a human focus (understanding people is key) and geared toward discovery (you need to explore possibilities, not simply execute).

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**THE CHALLENGE/GOAL OF THE WORK**

**WHAT**

What are you aiming to do?

What’s the challenge space? What human experience are you trying to affect? (Not the solution to design.)

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**FOR WHOM**

For what group of people are you designing?

Our tendency is to broaden this as much as possible (“All Teachers”); instead narrow your focus with a specific user group. Even if you want to affect a broad group, choose a place to start (“New teachers at Lincoln Elementary”).

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**THE CRUX**

When it comes down to it, what are you trying to figure out?

Why are you employing an exploratory process? What’s not already known? This ‘crux’ could be an assumption you need to test [“X must be true (about our users) for this to work. Is it?”] or an unknown to explore [“How do people experience Y? What do people believe about Z?”].

---

**Create ways to**

human action .

**For** user group __________ ;

(while considering __________).

We really need to figure out question/assumption __________ .

(Up to three.)

The second phrase (“while considering”) is optional but is a place to acknowledge other important players.
### EXAMPLES

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<td>Create a way to encourage students to eat healthy (lunches) at school.</td>
<td>For 9th-grade female students at T.M. high school in X Unified School District (to start); while considering the constraints of the school meal program.</td>
<td>We really need to test the assumption that students do not eat at school due to not liking the food options that are provided. (Or if/what other issues are at play.)</td>
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| Create ways to increase wealth advisor's comfort in talking to, and working with, their clients about philanthropy. | For wealth-advisors, at large financial institutions (start with Schwab Charitable), who want to proactively talk to their clients about philanthropy but do not have the confidence or knowledge; while considering the philanthropic support units within each institution (if any). | We really need to figure out: 
- Do they want to become experts in philanthropy, or just learn enough to have the conversation and hand off to an expert? 
- What's the best way/format to engage and educate advisors? 
- Will wealth advisors use a 'Stanford' resource, or must it be branded/customized by their firm? |