



CO-CREATION

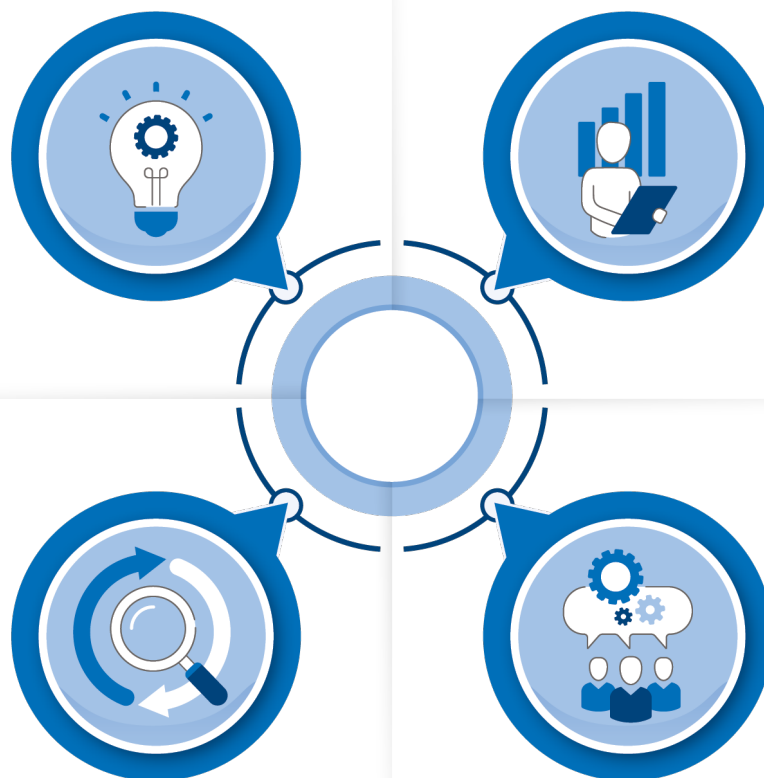
AN INTERACTIVE GUIDE

INTERACTIVE MENU

To get started, click on one of the four circles below.

1 FOUNDATIONS
I want to deepen my understanding of co-creation.

2 DESIGN AND PLANNING
I need help deciding whether and/or how to co-create.



4 REFLECTION AND FOLLOW-UP
I have completed co-creation and seek support with implementation, follow-up, and learning.

3 CO-CREATION IN ACTION
I have decided how to co-create and need help managing the process.

[Jump to Table of Contents](#)

TABLE OF CONTENTS

<u>INTRODUCTION</u>	1
<u>MODULE 1. THE IDEA</u>	3
WHAT IS CO-CREATION? WHY IS IT VALUABLE?	3
HOW DOES CO-CREATION RELATE TO USAID INITIATIVES AND PRIORITIES?	5
HOW IS CO-CREATION DIFFERENT?	6
WHO USES CO-CREATION?	6
WHEN DOES CO-CREATION WORK WELL?	6
WHAT ARE COMPETITIVE AND NON-COMPETITIVE CO-CREATION?	8
DO I NEED TO CO-CREATE?	8
<u>MODULE 2. THE DECISION</u>	9
IS CO-CREATION APPROPRIATE FOR ME AND MY TEAM?	9
HOW DO I APPLY THE 5WS TO CLARIFY CO-CREATION OBJECTIVES?	10
HOW DO I DEVELOP AN OUTLINE OF THE CO-CREATION PROCESS (INCLUDING DESIRED OUTCOMES)?	12
SETTING A TIMELINE: HOW DO I NOT RUSH INTO ORGANIZING A WORKSHOP?	14
<u>MODULE 3. THE CO-CREATION CONVERSATION</u>	15
HOW SHOULD I TALK TO PEOPLE ABOUT CO-CREATING?	15
HOW DO I GET INTERNAL BUY-IN FOR CO-CREATION?	16
DO I NEED A FACILITATOR?	16
HOW DO I RECRUIT PARTICIPANTS?	17
HOW DO I CRAFT THE INVITATION?	18
WHERE CAN I GET HELP?	18
<u>MODULE 4. COMPETITIVE CO-CREATION</u>	19
WHAT IS COMPETITIVE CO-CREATION?	19
COMMON OBJECTIVES OF COMPETITIVE CO-CREATION	20
COMMON CHARACTERISTICS OF SUCCESSFUL COMPETITIVE CO-CREATION	20
SEQUENCING COMPETITIVE CO-CREATION	21
COMMON CONCERNS AND HOW TO ADDRESS THEM (OR NOT)	22
DEVELOPING A LIST OF WHO SHOULD BE APPROACHED/INVITED/CONSULTED	22
<u>MODULE 5. NON-COMPETITIVE CO-CREATION</u>	23
WHAT IS NON-COMPETITIVE CO-CREATION?	23
COMMON OBJECTIVES OF NON-COMPETITIVE CO-CREATION	23
COMMON CONCERNS AND HOW TO ADDRESS THEM (OR NOT)	24
HOW OFTEN CAN I CO-CREATE (AND HOW OFTEN SHOULD I)?	25
DEVELOPING A LIST OF WHO SHOULD BE APPROACHED/INVITED/CONSULTED	26
<u>MODULE 6. THE CO-CREATION EVENT</u>	27
WHAT TYPE OF EVENT?	27
WHERE SHOULD I CO-CREATE?	27
HOW CAN I PULL IT OFF (AND WHO SHOULD FACILITATE)?	28
WHAT WILL HAPPEN?	30

<u>MODULE 7. THE OUTPUT AND FOLLOW-UP</u>	31
HOW DO I COLLATE AND REPORT THE INFORMATION?	31
WHAT DO I DO WITH WHAT MY PROCESS DESIGNED?	32
HOW DO I ESTABLISH AND MAINTAIN FEEDBACK LOOPS?	32
<u>MODULE 8. THE LEARNING</u>	33
WHAT TYPES OF LEARNING SHOULD I PRIORITIZE AFTER CO-CREATING?	33
WHAT IF THE OUTPUT OF CO-CREATION DOES NOT WORK?	34
WHEN DO I NEED TO REDESIGN/RESTART THE CO-CREATION PROCESS?	34
<u>ANNEX A. ADDITIONAL CO-CREATION RESOURCES</u>	A-1
<u>ANNEX B. ACRONYMS</u>	B-1
<u>INTERACTIVE MENU 1. FOUNDATIONS OF CO-CREATION</u>	C-1
<u>INTERACTIVE MENU 2. DESIGN AND PLANNING</u>	C-2
<u>INTERACTIVE MENU 3. CO-CREATION IN ACTION</u>	C-3
<u>INTERACTIVE MENU 4. REFLECTION AND FOLLOW-UP</u>	C-4

INTRODUCTION

WHY SHOULD YOU USE THIS GUIDE? [Co-creation can be transformative](#). Used properly, co-creation can turn USAID partners and stakeholders from passive receivers of development programming to active participants who shape priorities, design activities, and share ownership of USAID investments. Co-creation is an agency-wide priority goal that reinforces many USAID initiatives. It is essential to the Localization Agenda and [Private Sector Engagement Policy](#). Co-creation processes were introduced to USAID through Broad Agency Announcements (BAAs) in 2012. Yet there remains a lot of confusion. Too often, co-creation is being misapplied or treated as a box-checking exercise, resulting in frustration within and outside USAID. When people hear *co-creation*, many think only about procurement processes and large workshops.

Co-creation is an intentional design approach. It aims to foster innovative approaches to problems through a participatory process. Co-creation's goal is to jointly produce a mutually valued outcome. Co-creation is distinct from other collaborative or participatory practices because it involves sharing power and/or decision making. Co-creation is transparent, time-limited, and organized. It can be used to address a specific problem, challenge, question, or to gain further insight on a topic of interest. Co-creation focuses on generating a specific outcome. Co-creation is NOT limited to the procurement process, CAN be used in acquisition or assistance, and CAN be deployed throughout the Program Cycle or planning activities such as the CDCS process. Co-creation associated with a procurement process may occur with clearly outlined intent and purpose leading up to and at the pre-award phase.



“Co-creation gives voice to the needs of struggling communities and allows USAID to focus on sustainable solutions that can transform communities into thriving, self-supporting success stories.”

– Deborah Broderick, Deputy Director, M/OAA

This interactive guide aims to dispel common co-creation myths and provide inputs critical to designing and managing co-creation successfully. The document leverages many existing co-creation resources while updating content to reflect USAID's experience. Specifically, this guide repurposes and updates content from the U.S. Global Development Lab's Co-Creation Toolkit, the Effective Partnering and Procurement Reform (EPPR) Co-Creation Field Guide, and the USAID Professional Development and Training (PDT) Division's Co-Creation video series. Additional outside literature on co-creation, stakeholder interviews, and research also informed the content this guide presents.

HOW SHOULD I USE THIS GUIDE? This interactive guide is designed to deconstruct co-creation into components — providing an easy-to-use reference to help staff make better decisions about when to use co-creation, improve their preparation, and elevate their management of the process.

MODULE	AUDIENCE
1. The Idea	Those seeking to deepen their understanding of co-creation or early in the process of co-creating
2. The Decision	Those determining whether co-creation is appropriate for their circumstances and how to forge a path to success
3. The Co-Creation Conversation	Those planning to co-create and seeking support, both internally and externally
4. Competitive Co-Creation	Those seeking guidance specific to co-creation in the context of competitive procurements
5. Non-Competitive Co-Creation	Those seeking guidance related to non-competitive co-creation across the program cycle

6. The Co-Creation Event

Those seeking guidance related to tactical planning for co-creation, including tips related to workshops

7. The Output and Follow-Up

Those seeking guidance on how to translate co-creation outputs into action, including follow-up engagement with participants and navigating challenges

8. The Learning

Those seeking to capture learning from the co-creation process, including when to restart co-creation

MODULE I. THE IDEA: WHAT CO-CREATION IS (AND ISN'T)

This module introduces the concept of co-creation and is aimed at individuals at USAID and beyond who seek a deeper understanding of co-creation. [Click here to watch the “What is Co-Creation?”](#)

WHAT IS CO-CREATION? WHY IS IT VALUABLE?

Co-creation is an intentional design approach that is critical to USAID achieving many of its biggest objectives and priorities (see graphic below). USAID and its partners have used co-creation to break down silos that often impede our ability to design, implement, and oversee innovative, impactful, and locally-driven development programs. Co-creation is injecting new ideas into USAID’s work and elevating the voices of nontraditional actors and local partners across the program cycle. Co-creation may take many forms. For instance, co-creation can happen virtually or in-person, live or asynchronously, and through a large multi-stakeholder event or single-stakeholder meetings. **It should not be treated** as a box-checking exercise or used all the time. Co-creation is transparent, time-limited, and organized. It can be used to address a specific problem, challenge, question, or to gain further insight on a topic of interest to support your USAID priorities. **It is important to note that Co-creation is not a process that allows you to bypass any procurement requirements.**

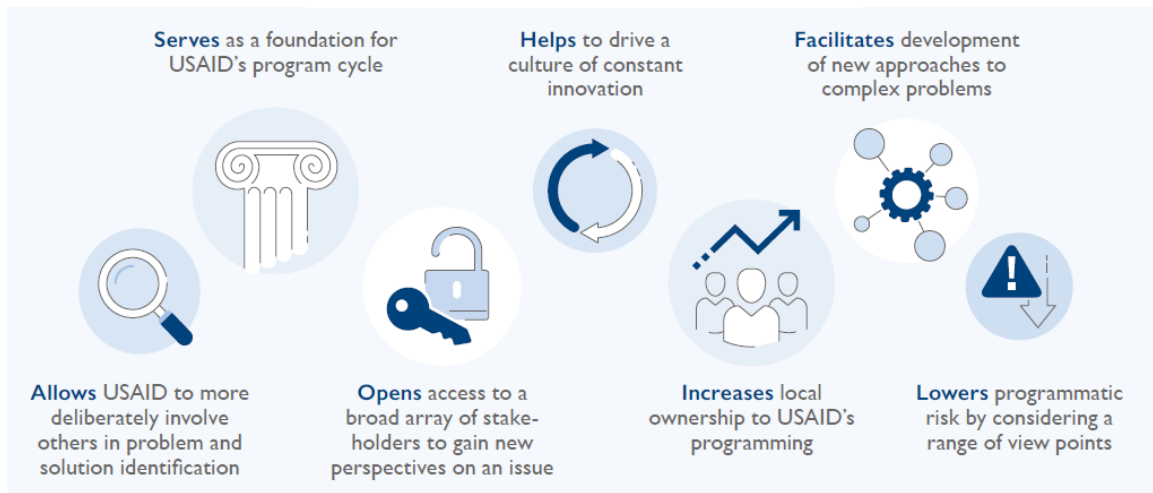


[Click to hear M/OAA Director Jami J. Rodgers talk about the importance of Co-Creation to USAID’s work.](#)

What is Co-creation?

USAID DEFINES CO-CREATION as an intentional design approach that can be used to address a specific problem, challenge, question, or to gain further insight on a topic of interest because it involves sharing power and/or decision making.

SOME OF CO-CREATION’S MANY BENEFITS





Myth

Co-creation is a procurement mechanism also known as a *Broad Agency Announcement (BAA)*, right?

Reality

No! Co-creation is a design approach, not a procurement mechanism. It can be used across the program cycle and through many procurement mechanisms! Yes, BAAs often include co-creation, but co-creation goes far beyond this one mechanism.



Myth

Co-Creation and Co-Design are the same thing, right?

Reality

No! While the two terms are often confused, [they are different](#).

- **Co-Creation** is an intentional design approach. It aims to foster innovative approaches to problems through a participatory process. Co-creation's goal is to jointly produce a mutually valued outcome. Co-creation is distinct from other collaborative or participatory practices because it involves sharing power and/or decision making. Co-creation is transparent, time-limited, and organized. It can be used to address a specific problem, challenge, question, or to gain further insight on a topic of interest. Co-creation focuses on generating a specific outcome. Co-creation is NOT limited to the procurement process, CAN be used in acquisition or assistance, and CAN be deployed throughout the Program Cycle or planning activities such as the CDCS process. Co-creation associated with a procurement process may occur with clearly outlined intent and purpose leading up to and at the pre-award phase.
- **Co-Design** is a collaborative process that utilizes collective brainstorming and problem solving techniques to develop appropriate and suitable solutions. Co-design does NOT involve the sharing of power or decision-making. If used during a procurement process, USAID usually convenes apparently successful partners to analyze, inform, and finalize a program description or statement of work. Co-design is not limited to the procurement process and may occur in settings to explore ideas for future planning, overcoming programming obstacles or challenges, or related to an existing funding mechanism.

HOW DOES CO-CREATION RELATE TO USAID INITIATIVES AND PRIORITIES?

Co-creation can be used across the program cycle — in both competitive and non-competitive situations — to help advance USAID priorities and innovations. The chart below highlights how many USAID priorities are inextricably linked to co-creation.

USAID PRIORITY	ROLE OF CO-CREATION	POTENTIAL CO-CREATION CHALLENGES
Private Sector Engagement (PSE)	Creates a platform to help development practitioners and the private sector identify areas of mutual interest and speak the same language.	<ul style="list-style-type: none"> ● USAID processes do not always operate at the “speed of business,” which can result in missed opportunities. ● Navigating potential conflicts of interest or competitiveness concerns (e.g., not “picking winners”).
Localization	Elevates diverse local voices across the program cycle, enhances their power in the process, and facilitates joint ownership of USAID investments.	<ul style="list-style-type: none"> ● USAID staff not always comfortable sharing knowledge or ceding power in decision-making processes. ● Finding the right balance of participants when engaging local partners.
New Partnership Initiative	Reduces barriers to entry for new and underutilized partners to engage and work with USAID while attracting those with new, needed voices to USAID to design and test innovative ideas.	<ul style="list-style-type: none"> ● More time and patience are required on the front end to effectively engage partners unfamiliar with USAID. ● Involving USAID contracting and agreement officers early to ensure co-creation does not cause procurement issues.
Collective Action	Can be used to facilitate new partnerships and generate mutually beneficial outcomes not only between USAID and partners but also among groups of stakeholders.	<ul style="list-style-type: none"> ● Increased workload after co-creation takes place given the larger number of actors involved in the effort.
Collaborating, Learning, and Adapting (CLA)	Aligns closely with CLA and can be directly integrated into CLA tools and approaches (e.g., using pause-and-reflect sessions to also co-create activities).	<ul style="list-style-type: none"> ● Too much collaboration? CLA and co-creation must balance time for CLA with the time focused on implementation.

HOW IS CO-CREATION DIFFERENT?

Co-creation is an intentional, collaborative design approach that brings people together to collectively produce a **mutually valued outcome**, using a **participatory process** that assumes some degree of **shared power and/or decision-making**. At USAID, there is a distinction between consultation, collaboration, and co-creation. Let's compare these distinctions.

Consultation versus Collaboration versus Co-Creation



WHO USES CO-CREATION?

Co-creation is used widely by public and private institutions. USAID introduced it through BAAs in 2012. Various acquisition and assistance (A&A) mechanisms — such as the Annual Program Statement (APS), BAA, Request for Applications (RFA), and Request for Proposals (RFP) — can now integrate co-creation into the procurement cycle. USAID uses different co-creation methods (e.g., multi-stakeholder workshops and single-stakeholder meetings) and sequencing approaches (e.g., pre- and post-award). Beyond USAID, technology companies often engage users in the design process through co-creation. USAID implementing partners use co-creation by facilitating innovation through grants under contract or innovation competitions. The Department of Defense and NASA use co-creation to acquire specialized research support outside their core expertise. Bilateral donors such as the U.K. Foreign, Commonwealth & Development Office (FCDO) use inception phases at the beginning of new programs to create space for FCDO, implementing partners, and counterparts to co-create. See more examples on the following page.



Example

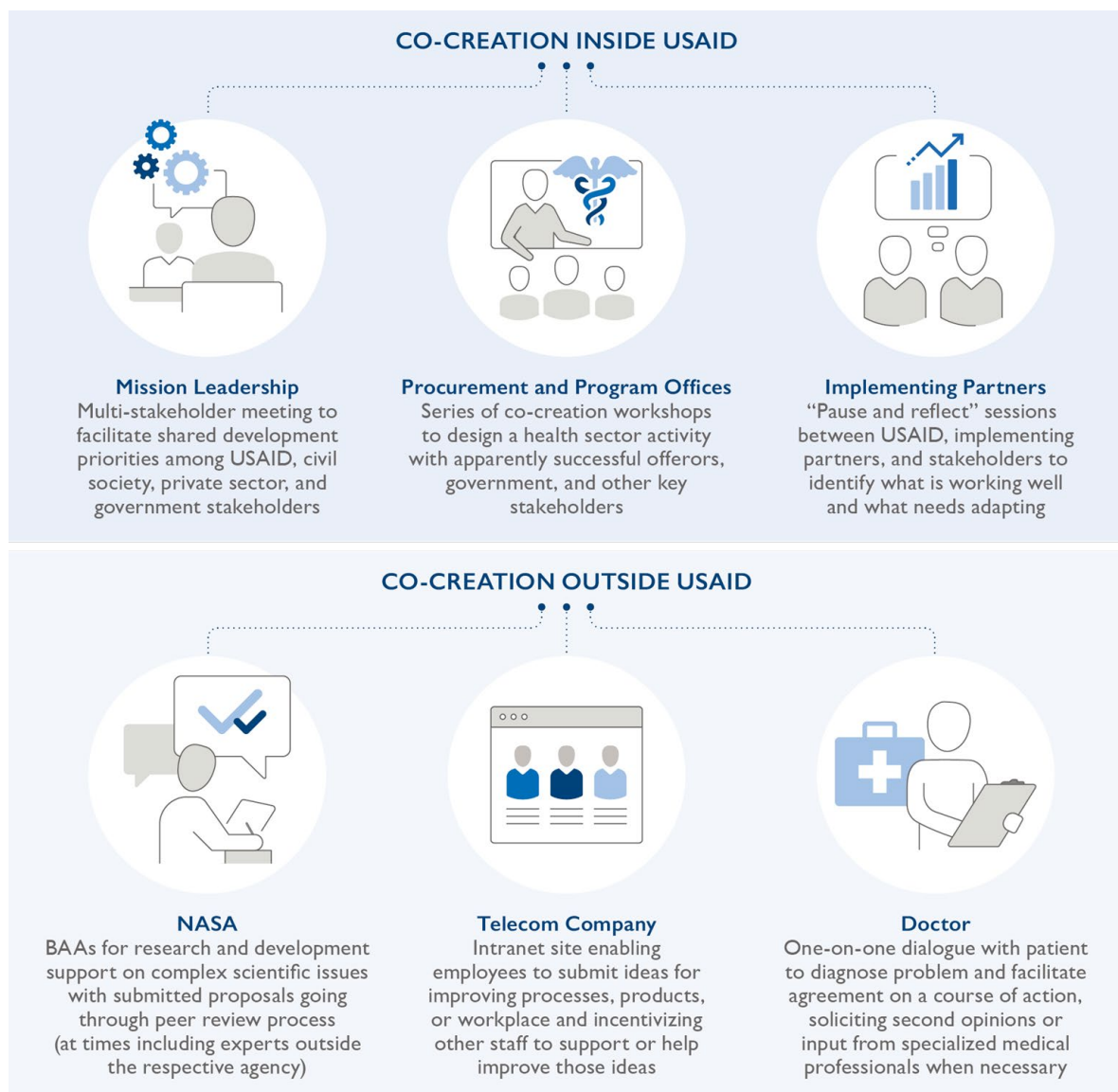
In early 2021, USAID/Senegal facilitated a two-week co-creation event under the Improving Health Status and Human Capital APS. The mission co-created with three implementing partners deemed “apparently successful offerors” based on their concept notes. USAID/Senegal had tentatively selected each partner to implement pieces of the program (one focused on the national level, another on the local level, etc.). Sequencing co-creation this way meant the implementing partners could engage in an open, productive co-creation process without head-to-head competition. The mission brought in key government counterparts to ensure the three implementing partners used co-creation to develop sound strategies for working with the Senegalese government. The three apparently successful offerors then developed full proposals that led to new awards.

WHEN DOES CO-CREATION WORK WELL?

Co-creation can be used across the program cycle to inject new ideas and voices into USAID's work. Each situation is different, but it is important to consider the following questions before deciding to co-create.

1. **Does my problem lend itself to co-creation?** Co-creation makes sense for adaptive problems — i.e., when there is no readily understood solution to a problem, no shared understanding of the problem’s root causes, or no outside expertise required. Co-creation can shed light on the problem’s true nature and generate solutions. Co-creation is not always appropriate when the problem and solution are clear.
2. **Are my team and I committed to co-creation?** Those leading co-creation must approach it with the right reasons and mindset, including a willingness to share information and power in decision-making and an openness to new views and approaches. At USAID, the technical team leads the process with support from the Office of Acquisition and Assistance (OAA), program officers, and General Counsel/Resident Legal Officers (RLOs) when appropriate.
3. **Are my counterparts willing to co-create?** Co-creation requires more than one party (all parties can be internal to USAID). Sometimes, people lack the trust or incentives to share information/ideas openly. Other times, one party might be unwilling to dedicate the time to participate. USAID’s experience reveals that a good communication strategy may address many concerns. In this context, the term *counterparts* refers to those with whom/which you seek to co-create. They could range from implementing partners as part of a competitive RFP to public sector stakeholders as part of country development cooperation strategy (CDCS) development.

Examples of Co-Creation in Action



WHAT ARE COMPETITIVE AND NON-COMPETITIVE CO-CREATION?

COMPETITIVE CO-CREATION

As interpreted from Federal Acquisition Regulation (FAR) Part 6, competition begins immediately after a solicitation is issued. If co-creation is anticipated, the solicitation should state where in the procurement process it will occur so that offerors understand the procurement expectations, competition is fair and transparent, and offerors are evaluated in accordance with solicitation requirements.

NON-COMPETITIVE CO-CREATION

Non-competitive co-creation pertains to all co-creation outside competitive situations, including in the development of a new CDCS, during a program's inception phase or to support government-to-government collaboration. Sole source solicitations are also considered non-competitive for the purposes of this guide. For more information, see Modules 2, 4, and 5.

DO I NEED TO CO-CREATE?



Myth

Since co-creation is a priority for USAID, I must use it, right?

Reality

Of course not! Co-creation is not always the best approach and **does not need to be used**. If you know exactly what you want, do not force co-creation. See Module 2 for more guidance on when co-creation may not be appropriate.

PDT has tools to help you decide whether co-creation is appropriate for your circumstances. Ask yourself the questions posed in the “When is Co-Creation Appropriate?” graphic (page 8) as a first step. If you think co-creation is a good fit, apply the 5Ws (why, what, who, when, and where) tool in Module 2 for a deeper analysis.



“The convening power of the Agency is worth more than the money we put on the table!”

– Charles Kiamie III, Deputy Director, Center for Education/IDI

MODULE 2. THE DECISION: SHOULD I CO-CREATE?

This module provides guidance on deciding when co-creation is the right approach to use. The tools included aim to assist in a yes/no decision about co-creation while providing the information needed to plan for and execute successful co-creation regardless of the co-creation approach, stage of the program cycle (see graphic below), or context in which you operate.

At a Glance: Tips for the “Co-Creation Conversation”

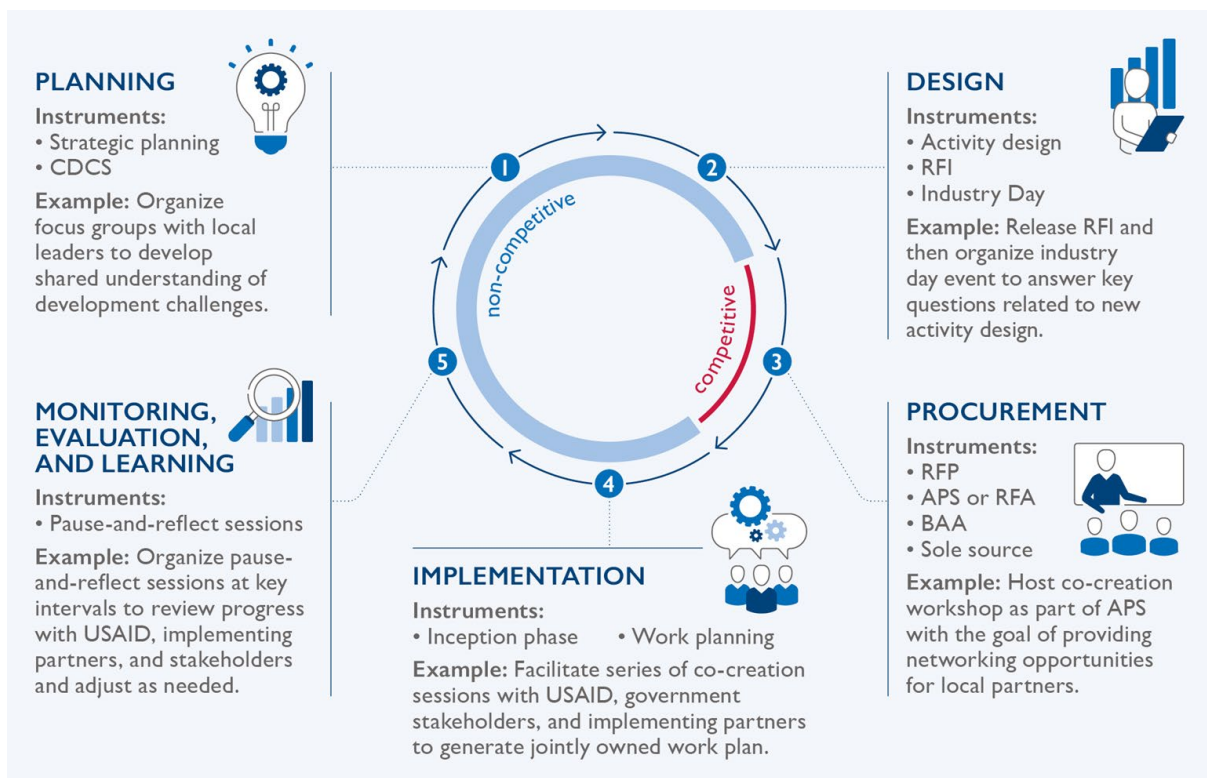
Start by confirming that co-creation is appropriate. Before applying the 5Ws, work with your core team to confirm that the problem you are trying to address is appropriate for co-creation. If so, confirm that your team is committed and that stakeholders could be open to the process (see next page). If you have persistent or difficult questions, reach out to OAA/PDT for assistance ([click here](#)).

Use the 5Ws to form your co-creation plan. There is no cookie-cutter approach to co-creation. Co-creation must be adapted to the circumstances. The 5Ws provide an analytical framework for thinking through co-creation. It is important to think through each element to form a successful plan. Working through the 5Ws is also a great time to involve “internal partners” crucial to making co-creation successful, e.g., your contracting office, RLO.

Don’t forget: there are lots of ways to co-create! You may determine that time constraints will not permit the multi-day workshop you envisioned, but you do not need to dismiss co-creation altogether. Consider alternative approaches to co-creation or engaging in co-creation later in the program cycle.




IS CO-CREATION APPROPRIATE FOR ME AND MY TEAM?

Co-Creation Across the Program Cycle



Use the tool below to quickly assess whether co-creation is appropriate for your circumstances.

When is Co-Creation Appropriate?

 <p>THE PROBLEM</p>	<p>Are you unsure what the problem is, or is the problem complex with many possible causes and/or solutions?</p>	<p>If you know exactly what the problem and/or approach required is, then co-creation might not be the best approach.</p>
	<p>Can you afford to dedicate time for co-creation, or does the problem require immediate response?</p>	<p>If the problem requires an urgent response (e.g., a humanitarian disaster), then co-creation might not be the best approach.</p>
 <p>YOUR TEAM</p>	<p>Are you open to a collaborative, inclusive approach that generates multiple viewpoints?</p>	<p>If your team is unable or unwilling to share power and information, then co-creation might not be the best approach.</p>
	<p>Do you and your team anticipate making concrete changes as a result of co-creation?</p>	<p>If you and your team do not anticipate changes as a result of co-creation (e.g., strategies, procurements, work plans), co-creation might not be the best approach.</p>
 <p>THE PARTICIPANTS</p>	<p>Will co-creation generate value for your target participants? In other words, are they motivated to participate?</p>	<p>If the people with whom you want to co-create are not motivated to participate, share information, and collaborate, co-creation might not be the best approach.</p>



Myth

I already collaborate with partners and counterparts, so co-creation isn't necessary, right?

Reality

Co-creation is more impactful when done consciously and systematically. You have likely engaged in co-creation before but can also likely still benefit from lessons and tools for co-creating more effectively. If you are wondering whether a collaborative process you participated in counted as co-creation, ask yourself: *Was there shared power in decision-making?*

HOW DO I APPLY THE 5WS TO CLARIFY CO-CREATION OBJECTIVES?

Once you have determined that co-creation is important, apply the 5Ws as soon as possible to plan for successful co-creation: Why? What? Who? When? Where? The decision tree below is a guide to applying the 5W framework. Do not simply scan through the 5Ws. Assemble a multidisciplinary co-creation team composed of a technical team, Program Officers, OAA, and, if appropriate, General Counsel/RLOs. Take the time to discuss each question as a group and write out your responses. This process will encourage more critical thinking and ensure the core group of people involved share an understanding of the issues at stake. *To learn more, watch [“The 5Ws” from PDT’s Co-Creation Video series](#).*

5Ws SELF QUESTIONNAIRE

5Ws	GUIDING QUESTIONS	OUTPUT	POTENTIAL NEXT STEPS
Why? Why are you co-creating?	<ol style="list-style-type: none"> 1. What are the intended and anticipated outcomes? 2. What are the reasons you are motivated to use this approach? 3. Are any constraints at odds with this approach? 	<ul style="list-style-type: none"> • Motivations for co-creation identified (e.g., question answered, ideas generated, new partners engaged) • Potential co-creation constraints identified 	<ul style="list-style-type: none"> • Write out co-creation objectives • Validate constraints and determine how to navigate • Confirm co-creation is appropriate
What? What is this for?	<ol style="list-style-type: none"> 1. Design, industry day, procurement, or internal? 2. What will the co-creation accomplish? 3. Partnerships? New solutions? Collective approach? 	<ul style="list-style-type: none"> • Understanding of where co-creation fits within program cycle identified • Anticipated changes as a result of co-creation developed (e.g., new strategic priorities, solicitation statement of work) 	<ul style="list-style-type: none"> • Determine the optimal sequencing of co-creation in program cycle • Confirm internal alignment on co-creation purpose and objective
Who? Who are the key stakeholders, and what are their responsibilities?	<ol style="list-style-type: none"> 1. External or internal? 2. Whose actions are you trying to incentivize? 3. Who will facilitate? 	<ul style="list-style-type: none"> • Additional individuals needed to assist in co-creation identified • Stakeholders for co-creation identified • Outreach and tactical issues identified (e.g., challenges engaging local partners) 	<ul style="list-style-type: none"> • Engage others (e.g., outside facilitator) to guide process • Analyze power dynamics, cultural factors, and other political considerations • Launch outreach and invitations
When? Is the timing doable?	<ol style="list-style-type: none"> 1. Will the timeline allow for proper preparation? 2. Is there an ideal time to convene stakeholders? 3. Do you need multiple engagements or just one event? 	<ul style="list-style-type: none"> • Time constraints related to problem identified (e.g., procurement timeline) • Time constraints related to potential co-creation methods identified (e.g., multi-stakeholder workshop) 	<ul style="list-style-type: none"> • Confirm resources to properly prepare for and manage co-creation • Adjust co-creation approach to fit time and resource constraints
Where? Where will co-creation happen?	<ol style="list-style-type: none"> 1. Virtual engagement? 2. Travel required? 	<ul style="list-style-type: none"> • Co-creation approach and format identified • Location that accommodates inclusive audience identified 	<ul style="list-style-type: none"> • Adjust co-creation plan to reflect format/location and ensure “right participants” can attend



Successful co-creation depends on two levels of alignment: (1) internal USAID alignment and (2) alignment between USAID and the external entities with which USAID wishes to co-create. After applying the 5Ws, consider whether USAID has achieved alignment internally regarding the objective and purpose of co-creation before engaging external partners. If not, consider alternative approaches.

HOW DO I DEVELOP AN OUTLINE OF THE CO-CREATION PROCESS (INCLUDING DESIRED OUTCOMES)?

Applying the 5Ws using the questionnaire above will provide the information needed to develop a well-outline for the co-creation process.



“Co-creation allows USAID and its partners to align their goals and achieve stronger partnerships resulting in more effective programs.”

– Shannon White-Benson, Senior Contracting/Agreement Officer, M/OAA

I. DOCUMENT THE DESIRED OUTCOMES OF CO-CREATION

Clearly define the parameters of co-creation and ensure that those involved understand them from the beginning. Establishing this shared understanding is a core goal of your communications plan, which every co-creation should have. Validate the parameters with other internal stakeholders who could not participate in dialogue about the 5Ws. These outcomes will guide co-creation planning and management. See the table below for examples.

Common Outcomes of Co-Creation

BETTER UNDERSTAND A PROBLEM	DEVELOP NEW IDEAS	FORM PARTNERSHIPS FOR ACTION	ADAPT AND LEARN
<p>Develop a stronger problem definition based on multiple, intersecting perspectives. Better capture the context, needs, and constraints on the ground. Develop a common understanding across stakeholders.</p> <p><i>Example:</i> Request for information (RFI) followed by co-creation workshop to better understand the root causes of deforestation in Peruvian rainforest.</p>	<p>Generate innovative solutions by bringing new or nontraditional voices into the design process and transforming traditionally siloed stakeholders into members of a collaborative community.</p> <p><i>Example:</i> Single stakeholder co-creation meetings with The LEGO Foundation to design a mutually beneficial public-private partnership.</p>	<p>Build coalitions with complementary skills and resources, attract new resource partners, catalyze collective action and commitments to an issue or sector, and build the mission’s network and reputation.</p> <p><i>Example:</i> Workshop as part of an APS designed to facilitate networking among traditional and new local partners.</p>	<p>Build feedback loops into your design process and validate ideas with partners. Increase the efficiency of project implementation by building in early learning.</p> <p><i>Example:</i> Co-creation built into a 6-month inception phase of a new activity, followed by co-creation at key intervals to promote learning and adaptation.</p>

2. CLARIFY HOW MUCH CHANGE IS POSSIBLE

What are the anticipated changes from co-creation? For example, in the context of competitive co-creation, is USAID (1) looking to refine the program description or (2) open to rethinking objectives or sub-objectives in a draft activity design? Participants are more motivated when they know how their contributions could lead to substantive changes to USAID’s priorities or design. Clarifying what these changes might be helps makes co-creation more meaningful. Regardless, it is important for USAID to align on anticipated changes and communicate these parameters as appropriate.

3. DETERMINE HOW TO MANAGE POWER DYNAMICS

Shared power and decision-making are fundamental to co-creation. Will your process be driven by consensus, majority decisions, or a lead decision-maker? Will USAID staff participate in or observe the process? How will you ensure that participants from diverse organizations, sectors, and regions interact productively?



Warning

What is shared power, and how can we confirm shared power in co-creation?

1. First, **identify the sources of power** and how that power differs — e.g., in terms of access to information, understanding how USAID works, or decision-making authority.
2. Second, **acknowledge those power dynamics** with your co-creation participants and use an independent facilitator whenever possible.
3. Third, take **deliberate actions to level power** in the process. If the event is in person, consider how seating arrangements could alter power dynamics.
4. Finally, determine **how decisions will be made**. Consider how that will affect power dynamics throughout co-creation when selecting an approach.

4. DETERMINE HOW TO SEQUENCE CO-CREATION

Think carefully about when to co-create relative to the procurement process or program cycle. Holding co-creation later in the process, when fewer stakeholders are involved, may mean participants are more motivated. Holding co-creation earlier may bring more voices to the table. Consider the tradeoffs. Could you achieve your objective more easily by using co-creation later in a procurement?

5. ESTABLISH FORMAT AND APPROACH

At this point, decide the approach you will use to co-create.

SINGLE OR MULTI-STAKEHOLDER	LIVE, ASYNCHRONOUS, OR HYBRID	WORKSHOP, SMALL GROUP, OR ONE-ON-ONE	DURATION
Multi-stakeholder is most common, but single-stakeholder co-creation can be a better approach — e.g., for politically sensitive topics.	Live co-creation takes place either in person or virtually. Asynchronous co-creation enables participants to share ideas on their own schedule (e.g., RFIs).	Multi-stakeholder workshops are the most common co-creation event, but other options exist. See Module 6 for additional guidance.	Generally, it is best practice for co-creation to span multiple days to give people space to reflect on ideas. See Module 6 for additional guidance.



Myth

Co-creation requires a large, multi-day, multi-stakeholder event, right?

Reality

No! There are lots of different approaches to co-creation, including one-on-one single-stakeholder co-creation meetings and asynchronous information exchange (e.g., RFIs), among others.

SETTING A TIMELINE: HOW DO I NOT RUSH INTO ORGANIZING A WORKSHOP?

Successful multi-stakeholder competitive co-creation workshops generally require **a minimum of six weeks** for preparation and planning — ideally, with an external facilitator. If the co-creation event is targeting new local partners who require additional engagement, USAID should plan on **a minimum of eight weeks** for preparation and planning with an external facilitator. The table below outlines additional considerations for setting a successful timeline. The model timeline after the table is what PDT considers the “gold standard” for in-person or virtual multi-stakeholder workshops.



Warning

When thinking about your timeline, consider (1) the timeline to **plan** a co-creation event and (2) the timeline for **taking action** on the outcomes of co-creation. For example, a very well-planned, well-executed co-creation process may be less impactful if, after co-creation, it takes a year for a procurement to be executed. Momentum is lost, and circumstances may change.

Key Considerations for Setting a Co-Creation Timeline

EXTERNAL FACILITATORS	INVITATIONS	PRE-CO-CREATION WORKSHOPS	ASYNCHRONOUS ASSIGNMENTS
Engage facilitators 8 weeks before event. For example, do not wait until BAA is released to engage facilitators.	Send invitations 30+ days before the event to ensure the “right” people can attend it.	It is a best practice to organize a 1-2 hour meeting at least 5 days before co-creation to set expectations and enable participants to ask questions.	If you want participants to prepare presentations or handouts, request these materials 10+ days before event.

The “Gold Standard” Timeline: Multi-Stakeholder Co-Creation Workshop



MODULE 3. THE CO-CREATION CONVERSATION: HOW DO I MOBILIZE SUPPORT FOR CO-CREATION?

This module provides guidance for those who believe co-creation is right for them (based on guidance in Module 2) and need to [begin engaging internal and external stakeholders to secure their buy-in and support for the co-creation process.](#)

At a Glance: Tips for the “Co-Creation Conversation”

Secure internal buy-in first. The last thing you want is to get external stakeholders excited to participate in co-creation and then have other USAID stakeholders significantly change the approach. This lack of internal alignment regarding co-creation expectations will negatively impact the process.

Allow sufficient time to facilitate alignment. Co-creation is not effective if overly compressed or rushed. Ensure you have sufficient time to engage internal and external stakeholders to get their buy-in and align expectations before co-creation.

Set and manage expectations. Clearly communicate, as early as possible, what USAID hopes to get out of the co-creation process. Make sure those expectations are realistic. Tell participants how important they are to achieving USAID’s desired outcomes.

Focus on the audience. New and underutilized partners require more patience and support. Reaching new local partners may require communicating using different methods or languages. Build in time to help these partners acclimate themselves to USAID and the co-creation process.

HOW SHOULD I TALK TO PEOPLE ABOUT CO-CREATING?

When engaging others in the co-creation process, consider their potential concerns and address them proactively in the communication and design of the process.

TECHNICAL STAFF	A&A STAFF	IMPLEMENTING PARTNERS	NEW OR UNDERUTILIZED PARTNERS	COUNTERPARTS OR OTHER STAKEHOLDERS
<p><i>Potential concern:</i> Co-creation will only help if I have buy-in from front-office staff and OAA.</p> <p><i>Potential response:</i> Engage A&A early and often throughout the process.</p>	<p><i>Potential concern:</i> Co-creation increases the risk of violating procurement rules.</p> <p><i>Potential response:</i> Learn from other missions that have successfully managed risks in co-creation processes.</p>	<p><i>Potential concern:</i> Competitive co-creation takes a lot of time and energy. What it will lead to is unclear.</p> <p><i>Potential response:</i> Clearly state in procurement documents whether an award is anticipated with details about timing and value when possible.</p>	<p><i>Potential concern:</i> A lack of familiarity with USAID is unlikely to result in tangible benefits.</p> <p><i>Potential response:</i> Engage in single stakeholder co-creation to help partners understand how USAID works while jointly developing opportunities for collaboration.</p>	<p><i>Potential concern:</i> Limited time available to participate in a long co-creation event.</p> <p><i>Potential response:</i> Clearly communicate the objectives of co-creation and how USAID strategies or programs will change as a result. Design agenda to maximize participant engagement.</p>



Example

Through the Strengthening Civil Society Globally (SCS Global) Leader with Associate (LWA), FHI360 held co-creation workshops with eight USAID missions to generate local buy-in to and ownership of the program’s approach as it enters a new country. In SCS Global’s 2020 report “[The Peaks and Pitfalls of Co-Creation](#)”, FHI360 highlights the importance of USAID mission alignment — e.g., regarding geographic focus — for productive co-creation. Certain disagreements are impossible to avoid, but these experiences highlight the importance of (1) internal USAID alignment and (2) alignment between USAID and its partners. Read more lessons from SCS Global’s use of [co-creation around the world here](#).

HOW DO I GET INTERNAL BUY-IN FOR CO-CREATION?

Effective competitive co-creation during the procurement process hinges on close collaboration between program/technical staff and A&A staff. Ideally, A&A staff work in lockstep with program or technical staff to ensure co-creation objectives can be met without violating procurement rules or regulations. For USAID missions, **talk to the following people along the journey:**

- **Front Office:** Mission Director and leadership buy-in are crucial. Do not forget to invite them to the actual event. Opening remarks by leadership can go a long way with participants.
- **Contracting Officer (CO) or Agreement Officer (AO):** A&A staff should be part of the core team and attend the co-creation event.
- **Executive Officer (EXO):** They can help with logistics and would like to know early on if they need to write a purchase order for your co-creation facilities.
- **Resident Legal Officer (RLO):** They can provide tips on avoiding organizational conflicts of interest and other legal considerations.
- **Controller (OFM):** Do you need funds for a pre-award event? Could you use host-country funds? Let the budget experts help.
- **Program Officer:** They can help coordinate design and are vital players in communication and mobilizing the mission. They can also help tap into interagency players who might be valuable.

Considerations for co-creation in Washington. The creation of multidisciplinary teams to oversee the co-creation process tends to be easier in country missions. In Washington, technical teams and OAA are the foundation of competitive co-creation and should work closely throughout the process, including the co-creation event itself. PDT encourages broader participation when possible so that different offices can benefit from learning generated through co-creation.

Additional USAID stakeholders to consider. There are many other USAID stakeholders that can assist in co-creation, including gender specialists, environment officers, monitoring, evaluation, and learning specialists, PSE specialists, and development outreach coordinators.

DO I NEED A FACILITATOR?

BENEFITS OF PROFESSIONAL FACILITATION SUPPORT

Having professional facilitation can not only help the process run smoothly and stay on track, but a professional facilitator can manage unequal power dynamics or other inequities by ensuring:

- All voices are heard, and cultural considerations are taken into account
- Responses and feedback are positive, constructive, and neutral
- No person or organization can dominate conversations (or intimidate other participants)
- Varied activities include all types of communication styles and comfort levels with public speaking



Myth

I need my workshop facilitator to be a technical expert in the relevant topic.

Reality

A facilitation team need not be steeped in technical knowledge of the topic at hand. Professional facilitators are experts in collaboration, adult learning theory, collective impact, or human-centered design. Professional facilitators help ensure participants are engaged and collaborating so that technical experts have optimal opportunities to share expertise. Professional facilitators are unlikely to unconsciously manipulate the process.

PDT RESOURCES FOR CO-CREATION FACILITATION

PDT offers training, guidance, and consultation on a myriad of subjects, including co-creation. PDT has both an Introductory Co-creation Facilitation course, as well as an Advanced Co-creation Facilitation course to meet varying knowledge levels. These courses provide staff foundational co-creation facilitation skills that are further enhanced through experience. Participants receive a certificate of completion and are entered into the PDT Facilitator's Network to provide facilitation for the Agency. In addition, **PDT has a contract with an external facilitation organization**, which allows staff to buy-in to the mechanism when internal facilitators are unavailable.

HOW DO I RECRUIT PARTICIPANTS?

Challenges related to recruiting participants will vary with the circumstances. Be strategic about whom you invite. Think carefully about the roles they will play during the process. Discuss internally. For competitive co-creation, PDT generally suggests limiting participants to **two people per organization**. PDT also suggests those participants be **technical staff**. Ask implementing partners to recommend additional local partners. If appropriate, allow primes to invite representatives from their local partners. [Module 4](#) and [Module 5](#) provide more guidance on how to target potential participants.

MESSAGING	CHANNELS	ACCESS
<p>Emphasize the purpose and value of co-creation.</p> <p>Co-creation is more likely to be impactful when the process is valuable to participants. What will they get out of it? Spend time thinking about this before engaging participants. For example, if it's an industry event, clearly state to potential participants why USAID is seeking the information and what they plan to use it for.</p>	<p>Think carefully about how to reach your ideal participants.</p> <p>Co-creation activities benefit greatly from partners USAID does not typically hear from. These actors are likely not monitoring USAID's business forecast. Consider posting your solicitation in the local language and leveraging diverse media such as Facebook, radio, and TV spots.</p>	<p>Ensure co-creation is accessible and use people's time wisely.</p> <p>Participants are more likely to participate if the barriers to attending are low, including in venue, format, and duration. Will holding events outside of the embassy or capital encourage participation of nontraditional partners? If your three-day event has eight-hour sessions, will your target audience be able to attend?</p>



Warning

Previous USAID co-creation guidance has suggested hosting a pre-workshop meeting specifically to help new partners learn USAID terminology and procurement. However, experience has shown that this type of workshop can have an opposite effect — special treatment for new partners emphasizes the gap in understanding between them and USAID's traditional partners. Instead, organize a pre-workshop call for ALL participants and then structure your agenda to level the playing field for all without emphasizing differences in understanding.

HOW DO I CRAFT THE INVITATION?

Consider the following guidance when crafting your invitation to co-creation participants.

<p>Co-creation objectives. Clarifying these objectives is important so that attendees know what USAID seeks from co-creation and how they can help USAID achieve the objectives.</p>	<p>Participant considerations. Is there a limit on the number of participants from each organization? Can primes bring staff from their partners in a competitive co-creation process?</p>
<p>Pre-event work required. If you want participants to prepare presentations or handouts, request these materials in your invitation. If not possible, state when such requests will be made.</p>	<p>Draft agenda. Include a draft agenda for the co-creation event. See Module 6 for additional guidance on developing a co-creation agenda.</p>
<p>Location and format. Indicate whether the event is in person or virtual. Explain what accommodations will be made — for example, for people with disabilities or in rural areas.</p>	<p>Language considerations. What language will be used for the co-creation event? Will simultaneous translation be offered?</p>
<p>Cost considerations. Indicate whether financial support is available for those who attend. For example, if the event is virtual, will support be available for those in rural areas who must purchase internet access?</p>	<p>Other expectations. Inform participants that involvement does not guarantee them a share of the program budget or special status. When participants pay for their involvement in co-creation, they may have heightened expectations.</p>



Myth

Competitive co-creation events must be in English.

Reality

No! Co-creation events can take place in any language. In some instances, holding a co-creation event in English could work against your objectives. If USAID seeks to engage new local partners, requiring English will likely discourage new participants from joining. If you can hire an external facilitator, consider a local firm that can navigate language and cultural considerations.

WHERE CAN I GET HELP?

<p>M/OAA PDT TEAM</p> <p>These USAID experts in co-creation can provide guidance on successful co-creation, training for facilitators, and access to a facilitator alumni network. Contact PDTandME@usaid.gov.</p>	<p>PRIVATE SECTOR ENGAGEMENT TEAM</p> <p>These USAID experts in co-creation using approaches with the private sector and other partners can provide technical support.</p>
<p>LOCAL WORKS TEAM</p> <p>These USAID experts in locally led development (development processes in which local people take the lead) can provide technical support for innovative and experimental approaches.</p>	<p>MISSION AND WASHINGTON COLLEAGUES</p> <p>Many of your colleagues across the world have experience with co-creation. Reach out to them so that they can share their tips!</p>

MODULE 4. COMPETITIVE CO-CREATION

This module provides information and guidance related to co-creation that takes place during competitive processes, typically USAID procurements. *From PDT’s Co-Creation Conversations series, [click here to watch “Co-Creation in the Competitive Space.”](#)*

At a Glance: Tips for Managing Competitive Co-Creation

Promote USAID participation! The best competitive co-creation processes include significant and dynamic USAID participation. This means that USAID staff use their technical expertise to contribute to the discussion. Work closely with your CO/AO to navigate procurement rules.

Leverage other USAID experiences. Supporting competitive co-creation for the first time may feel a bit daunting. How can we co-create without violating procurement rules? How can we facilitate trust among competing entities? USAID has a growing body of successful competitive co-creation examples. Contact PDT or your colleagues to learn how they navigated issues.

Be strategic about sequencing. Discuss with your design team where the right place in the procurement cycle is. See a chart of different BAA pathways later in this module for an illustration of co-creation’s flexibility. If you do not have time to co-create before award, consider incorporating language to put in the solicitation for post-award co-creation.

Have empathy for partners. Be realistic about the extent to which organizations or companies competing for a new program will collaborate. *Non-profit* does not mean *non-competitive*. NGOs and contractors compete for funds. USAID and potential partner expectations do not always match. Building co-creation early or late in the procurement process could yield better outcomes.

WHAT IS COMPETITIVE CO-CREATION?

As interpreted from FAR Part 6, competition begins immediately after a solicitation is issued. If co-creation is anticipated, the solicitation should state where in the procurement process it will occur so that offerors understand the procurement expectations, competition is fair and transparent, and offerors are evaluated in accordance with [solicitation requirements](#). Although co-creation is most often associated with BAAs and APSs, it can be used in both acquisition and assistance instruments. Have questions or concerns about using competitive co-creation in a particular mechanism or context? Involving your CO, RLO, and/or other internal stakeholders early can help! You can also always reach out to PDT at PDTandMe@usaid.gov for support.



“Co-creation has easily become a ‘best practice’ in the A&A process. Through ideation we are able to bring together the brightest minds and partner to implement innovative solutions that directly respond to USAID’s Mission.”

– Ayla-Rebeka Brooks, Branch Chief, M/OAA

ILLUSTRATIVE MECHANISMS FOR COMPETITIVE CO-CREATION

Annual Program Statement (APS)	Broad Agency Announcement (BAA)	Statement of objectives (SOO)	Challenges, ventures, prizes, open-sourcing
Global Development Alliance (GDA)	Request for concept papers	Multi-step Request for Proposals (RFP)	Multi-step Request for Applications (RFA)
Oral applications and presentations	Draft scope of work	Request for information (RFI)	Industry days or pre-solicitation conferences

COMMON OBJECTIVES OF COMPETITIVE CO-CREATION

1. **Understand the problem.** Develop a stronger problem definition based on multiple, intersecting perspectives. Better capture the context, needs, and constraints on the ground. Develop a common understanding across stakeholders. **Example:** soliciting feedback on a draft scope of work followed by an industry day event to engage in co-creation.

2. **Form partnerships for action.** Build coalitions that combine complementary skills and resources, attract new resource partners, catalyze collective action and commitment to an issue, and build the mission's network and reputation. **Example:** USAID/Nigeria held a co-creation workshop that provided U.S.-based implementing partners with a platform for networking with local partners.

3. **Develop solutions.** Generate innovative solutions by bringing new or nontraditional voices into the design process and by transforming traditionally siloed stakeholders into a collaborative community. Develop solutions that are more responsive to needs and constraints on the ground and that make better use of local resources. **Example:** A firm implementing a USAID contract with a large grants under contract facility organizes a workshop with prospective grantees to provide guidance on project objectives and feedback on concept note solutions.



Myth

Competitive co-creation always starts with concept papers.

Reality

Not necessarily! BAAs and some other mechanisms often start with co-creation, but as the graphic on the following page shows, the sequencing of a given co-creation can vary dramatically. To learn more about BAAs, [click here](#).

COMMON CHARACTERISTICS OF SUCCESSFUL COMPETITIVE CO-CREATION

TECHNICAL STAFF AND A&A STAFF ALIGNED

The most successful co-creation events tend to engage the AO or CO early and throughout the process. This engagement fosters productive collaboration that achieves the technical team's objectives, addresses the procurement expectations of the AO or CO, and means co-creation opportunities and parameters are clear to participants.

USAID ACTIVE IN THE CONVERSATION

USAID staff play a vital role in co-creation. We must create a safe space within procurements to promote participation without fear of running afoul of procurement regulation. USAID staff invited to participate in multi-stakeholder co-creation are encouraged to engage, share ideas based on their technical areas of expertise, and have meaningful conversations at the event.



“Not silenced by regulations, the Broad Agency Announcement actually encourages Agency personnel to speak up and chime in. Watching this play out has often been entertaining. Staff worry about prejudging the outcome of the process while attending groups over-search for signals from USAID about direction. But during the course of a well-run workshop, people ultimately come to understand the process, and irrespective of organizational affiliation, work together to design optimal technical solutions to whatever problems are before them.”

— Charles Kiamie III, Deputy Director, Center for Education/IDI

CLEAR EXPECTATIONS SET AND MANAGED

Setting clear expectations is essential to successful multi-stakeholder co-creation workshops that include firms or organizations that view each other as competitors for USAID funding. Implementing partners are likely to make more conservative recommendations if they suspect USAID is not open to significant changes (e.g., regarding solicitation design) or engage in co-creation to “check a box.” Clearly communicate the objectives of co-creation and what changes USAID hopes to see as a result — e.g., new partnerships, changes to solicitation designs, or significantly revised concept notes.

TIMELINES NEITHER RUSHED NOR PROLONGED

The best co-creations (1) span multiple days to allow time for reflection and deep thinking but (2) do not drag out for months. Generally, a multi-stakeholder co-creation workshop should be a **minimum of two days** (see [Module 6](#) for more guidance). The overall co-creation process should conclude in **six to eight weeks**. USAID missions have sometimes used co-creation to negotiate a performance work statement or action plan with implementing partners over many months. However, this approach forces the partner to absorb significant costs and does not constitute true co-creation.



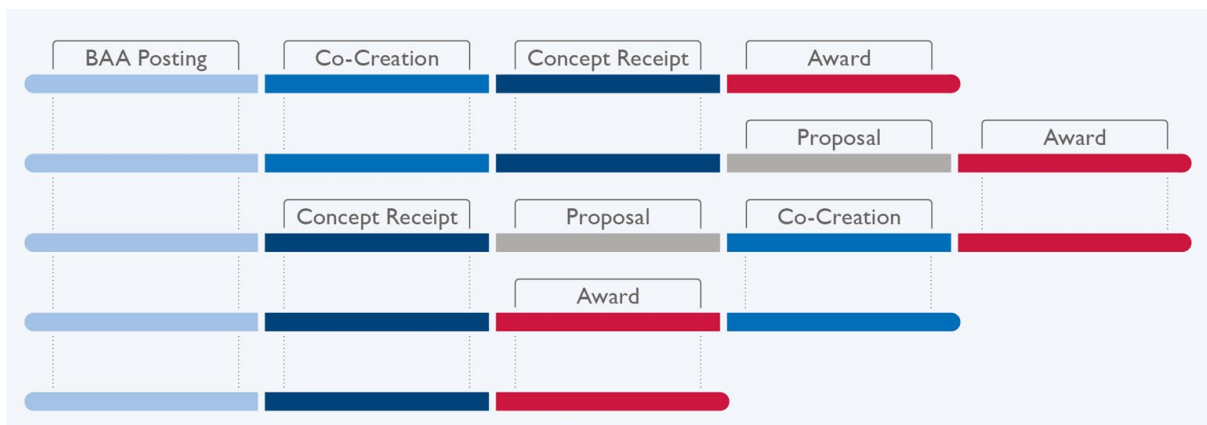
Example

USAID/Indonesia organized and CollaborateUp facilitated a four-day competitive co-creation workshop. On day three, a participant approached the facilitator and said, “When is USAID going to tell us what they want?” Many in the development community are under the impression that USAID already knows what it wants and is withholding information. This anecdote is a good reminder of why it is important to set clear expectations and reinforce them through a well-conceived communications strategy. These strategies almost always include a version of “We know we want your involvement and input, but we don’t know exactly what we in terms of procurement.” Stating this message clearly will help yield better co-creation outcomes.

SEQUENCING COMPETITIVE CO-CREATION

Deciding when to co-create in a competitive situation can be as important as deciding how. There are many sequencing options, as the graphic below shows. Co-creation earlier in the process is better if a primary goal is facilitating partnerships with local organizations. Co-creation later in the process allows for more open dialogue and solution development. For example, USAID/Senegal organized a co-creation process as part of an APS after identifying apparently successful offerors. The process facilitated more open dialogue among implementing partners, USAID, local government, and civil society counterparts because implementing partners were no longer competing.

Options for Sequencing Co-Creation in BAAs



COMMON CONCERNS AND HOW TO ADDRESS THEM (OR NOT)

PARTNERS WORRY ABOUT SHARING INTELLECTUAL PROPERTY

Both large and small organizations may worry about openly sharing the “secret sauce” underlying their strategies, fearing that others will steal them. Poor communications, workshop design, or facilitation may heighten this concern. Explore ways to facilitate discussion without requiring partners to share details about their strategies. Allow sufficient time for relationship building. Consider options to provide protection, such as non-disclosure agreements. In extreme cases, consider single stakeholder co-creation through key informant interviews rather than attempt to elicit sensitive or proprietary information via public co-design sessions. [Click here to watch “Intellectual Property in Co-Creation” from PDT’s Co-Creation Conversations.](#)



Warning

It is normal and good for partners to have some skepticism or questions about the co-creation process. USAID should expect and plan for these questions. In fact, answering them will benefit the co-creation and help level expectations and power among participants. See [Module 6](#) for suggestions on how to provide space for partners to ask these questions before and after co-creation.

AO OR CO WORRIES ABOUT VIOLATING PROCUREMENT RULES

Competitions held under a BAA, APS, or another mechanism that enable any type of co-creation should encourage USAID staff to engage and bring their technical expertise to the table during the workshop. The CO/RLO can provide guidance on rules of engagement for each solicitation as needed. Once competition requirements have been met, one-on-one co-creation allows for broader engagement. Please consult your CO and RLO to navigate your competitive co-creation.

PARTNERS HAVE LIMITED RESOURCES AND CAN'T TELL IF PARTICIPATION IS WORTH THEIR TIME

All organizations have limited resources, especially small businesses and local organizations. Partners must make difficult decisions about how to allocate their resources. When USAID anticipates a competitive co-creation will result in a new award, consider noting the dollar range so that partners can determine whether they want to invest and state that the intention is to make the process simple and inexpensive. If a high value award is anticipated (over \$25 million), small and local USAID partners may be less likely to attend. In these instances, think carefully about how you communicate the opportunity with local USAID partners and clearly state why their attendance is important.

DEVELOPING A LIST OF WHO SHOULD BE APPROACHED/INVITED/CONSULTED

If the competitive co-creation begins with a concept note, participants will come from the organizations that are shortlisted based on their concept note. Remember that participants will have varying backgrounds. Some small businesses, for example, may send their most senior leaders. Larger organizations may send technical experts who must consult with others before making decisions. If you are planning an in-person event, confirm that partners with fewer resources can attend. See the table below and Module 2 for additional guidance on recruiting participants.

PARTNERS	LOCAL ORGANIZATIONS	SUBJECT MATTER EXPERTS
Set limit to 2 participants from each organization, encouraging implementing partners to send technical staff who understand the context and technical issues of the program.	Encourage maximum participation from local organizations. Invite them directly or request that other implementing partners bring their local partners to the event.	Inviting outside subject matter experts to engage others in co-creation may make sense if USAID feels additional specialized expertise is needed.

MODULE 5. NON-COMPETITIVE CO-CREATION

This module provides guidance on using co-creation in non-competitive settings. As [Module 1](#) explains, co-creation is widely used by the private sector, other U.S. government agencies, public institutions, and other actors. This module focuses primarily on applications within the USAID programmatic context.

At a Glance: Tips for Managing Non-Competitive Co-Creation

Embrace USAID’s convening power. The incentives for non-competitive co-creation are different because participants are not jockeying for funding. USAID’s convening power can be critical – bringing diverse stakeholders together to shape development investments and outcomes.

Go beyond the co-creation “event.” With limited or few regulatory constraints, take advantage of the flexibility for non-competitive co-creation. Build co-creation into all aspects of your work. Apply co-creation to one-on-one meetings or focus groups. Engage in more open dialogue with implementing partners and stakeholders.

Ensure co-creation is politically informed. For non-competitive co-creation, analyze and respond to political economy considerations as early as possible. These considerations are particularly important when engaging government, civil society, or private sector stakeholders.

Don’t underestimate the power of “we don’t know.” Partners often assume USAID knows what it wants. Telegraphing early that USAID is acting with humility and curiosity can dramatically improve partner participation and new partners’ willingness to take a chance on us. Go one step farther by engaging in deep listening to fully understand the perspectives and ideas of others.

WHAT IS NON-COMPETITIVE CO-CREATION?

Non-competitive co-creation occurs when firms or organizations are not competing against one another or procurement rules and regulations do not apply. Non-competitive co-creation allows for more open dialogue and focus on exactly what actions will occur as a result. The boxes below highlight some of the mechanisms and instances for USAID non-competitive co-creation. Have questions or concerns about using non-competitive co-creation in a particular mechanism or context? Involving your CO, RLO, and/or other internal stakeholders early can help! You can also always reach out to PDT at PDTandMe@usaid.gov for support.

ILLUSTRATIVE MECHANISMS FOR NON-COMPETITIVE CO-CREATION			
Donor to donor	Public international organizations (PIOs)	Sole source award	Innovation competitions
CDCS development	Strategic planning	Single-holder IQCs	Leader with Associates (LWA)
Inception phases	Work planning	Implementation	Grants with bilateral donors

COMMON OBJECTIVES OF NON-COMPETITIVE CO-CREATION

I. Strategy development. Co-creation can be a valuable tool for generating strategies outside the procurement process. For example, USAID/Ghana conducted a series of workshops to co-create a set of development priorities that, in turn, became the foundation of an APS. Because the workshops

were held well before the APS was designed, procurement rules and regulations did not apply.



Example

In Zambia, the Youth Lead Activity (YLA) — an associate award under the SCS Global LWA — formed a multidisciplinary advisory board at project startup that included youth leaders, civil society activists, and representatives of two ministries. One of the board’s first tasks was to engage in co-creation to finalize the program’s design. As noted in [The Peaks and Pitfalls of Co-Creation](#), the board “was excited to be able to provide input in post-award co-creation and helped spread the word about the program. The Advisory Board felt invested in the program since they helped create it. This has had a powerful impact on implementation: SCS was able to reach diverse youth, and build momentum for the program quickly. The Advisory Board has also continued to disseminate information about ongoing program opportunities.”

2. Work planning. Co-creation can be built into how USAID programs are managed to facilitate agreement between USAID, implementing partners, and counterparts on action plans to achieve development objectives. Ideally, this work planning allows collaborators to introduce their ideas for approaches rather than merely validate or augment pre-conceived ideas.

3. Innovation. Co-creation is often used outside international development as a design approach for generating and identifying innovative ideas. One example is the [IBM InnovationJam](#) — large-scale internet-enabled brainstorming events useful for identifying opportunities and creating customer-focused solutions. USAID and its partners can also use co-creation as an innovation tool.

4. Partnership development. CollaborateUp organized the Honey Bee Health Summit — a co-creation workshop focused on the causes of declining bee health and how stakeholders could help. The Summit led to the creation of the [Honey Bee Health Coalition](#). This is just one example of how co-creation can facilitate public-private partnerships.

5. [Inception phase activity design](#). Long used by FCDO and the Australian Department of Foreign Affairs and Trade (DFAT), inception phases provide time at the beginning of an award for implementing partners to engage in co-creation with USAID and stakeholders, jointly designing program activities and strategies. See the next page for an example of how USAID’s Transparent Public Investment (TPI) activity in Peru used co-creation during its inception phase.

COMMON CONCERNS AND HOW TO ADDRESS THEM (OR NOT)

PARTICIPANTS UNSURE CO-CREATION IS WORTH THEIR TIME

Competitive co-creation generally has a clear outcome: a new award with funding attached. The rationale for non-competitive co-creation is not always so straightforward. As you identify participants for co-creation, consider their possible motivations for participating. If necessary, adjust your engagement strategy so that those individuals do not need to spend several days in a workshop.

IMPLEMENTING PARTNERS EAGER TO GET TO WORK

When non-competitive co-creation occurs in the context of program implementation, implementing partners might worry that the process will be a distraction. If you mandate co-creation, work closely with implementing partners and stakeholders to shape it to benefit all participating in the process. Schedule co-creation for as early as possible post-award to avoid unnecessary delays in implementation. Remember, co-creation is a time-bound process.



Example

The solicitation for USAID’s TPI activity was designed to incorporate co-creation throughout TPI. The proposal process included government participation in oral presentations. After award, TPI had a six-month inception phase centered on co-creating activities with government, private sector, and civil society counterparts. The contract allowed flexibility in the strategy and activities, not objectives and targets.

TPI did an in-depth political economy analysis during the inception phase to shed critical light on challenges and opportunities. This work resulted in a shift in TPI’s geographic focus. The team then worked with USAID in designing and executing a co-creation workshop with government, civil society, and private sector stakeholders. Some key lessons from TPI include:

- Mission Director and Deputy Mission Director participation was critical to secure key government stakeholders’ participation and elevate TPI’s importance.
- The TPI team wanted open-ended discussion, but securing government stakeholders’ participation required a more rigid agenda and discussion topics.
- A virtual workshop on corruption required extreme sensitivity — e.g., participants did not want to be recorded.
- The TPI Chief of Party had three or more conversations with each key stakeholder before the event to ensure they were comfortable and prepared.

The TPI team found the co-creation process to be critical in securing buy-in from various stakeholders and allowing deliberate adjustments in a dynamic political environment.

SENSITIVE TOPICS

Political economy concerns tend to be more prominent in non-competitive co-creation, particularly when it concerns particularly sensitive topics. Participants likely will not want the conversation recorded. Some may be unwilling to engage in dialogue virtually. You may adapt co-creation strategies to these contexts, but the USAID mission or operating unit will need to decide how to proceed.



Myth

Co-creation can only be done externally with partners.

Reality

Co-creation can be an internal tool. Take advantage of co-creation within your teams to foster a people-centered culture that drives continual innovation within your organization and institutes behaviors needed to operationalize change.

HOW OFTEN CAN I CO-CREATE (AND HOW OFTEN SHOULD I)?

Remember that one of co-creation’s key characteristics is that it is **time-bound**. In competitive situations, the procurement timeline will restrict the co-creation’s duration. In non-competitive situations, co-creation may become protracted. Do not allow this to happen. Co-creation can be integrated into the way USAID and its implementing partners work but must not be a distraction. Never-ending co-creation in program implementation diverts attention from technical activities. As with a CLA approach, be deliberate and thoughtful about when to co-create. Do not repeat co-creation more than yearly unless extenuating circumstances exist.



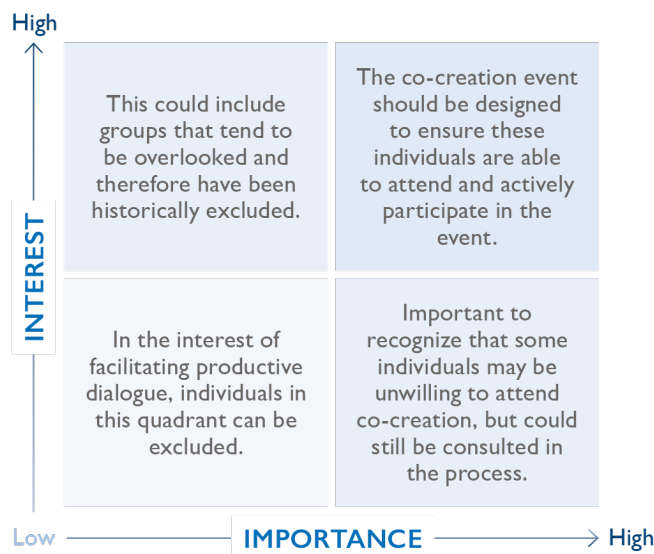
Warning

Timing matters! In 2014, USAID recognized a gap in its strategy for combating wildlife crime — the transportation of illegally procured plants and animals. In response, CollaborateUp facilitated a co-creation process with airlines to identify areas of mutual interest that could help reduce this illegal trade. The killing of **Cecil the Lion** created a groundswell of pressure on the airlines to act, creating a critical opening for USAID and CollaborateUp. The resulting co-creation process yielded the USAID Reducing Opportunities for Unlawful Transport of Endangered Species (ROUTES) Partnership.

DEVELOPING A LIST OF WHO SHOULD BE APPROACHED/INVITED/CONSULTED

The two most important challenges of a co-creation effort are (1) engaging the right representatives/groups and (2) facilitating effectively. Consult with local partners, implementing partners, and others to determine who should participate in co-creation activities. Breaking up co-creation into separate events (e.g., focus groups and key informant interviews) to engage different beneficiaries or stakeholders may make most sense given the topic or people’s willingness to participate. Often, targeted outreach, not just a simple invitation, is needed. Several meetings or phone calls with key stakeholders may be necessary to ensure participants are willing and prepared to attend a co-creation event. The best general approach to identifying participants for a non-competitive co-creation is to apply a simple stakeholder mapping framework, such as the one below.

General Stakeholder Mapping Framework



Myth

The more people attending my co-creation, the better, right?

Reality

Co-creation is an opportunity to promote inclusivity and bring new voices into the discussion. Co-creation with too few participants could exclude critical voices from the process. However, too many participants could make it more challenging to facilitate meaningful dialogue.

When determining whom to invite, focus on the primary outcomes you hope to achieve via co-creation, but remember that there are often valuable secondary outcomes, such as buy-in, trust, rapport-building, and goodwill.

MODULE 6. THE CO-CREATION EVENT

This module provides advice on managing successful co-creation events, including competitive [workshops as part of an APS](#) or multi-stakeholder meetings as part of CDCS development. For general guidance on successful virtual events, read [CollaborateUp's Virtual Event Strategy Guide](#).

At a Glance: Managing Successful Co-Creation Events

Start early. A successful co-creation event hinges on planning. This planning requires time — ideally, eight weeks of lead time — and a thoughtful approach. Engage facilitators as early in the process as possible. Share information early and help participants prepare for success.

Get an external facilitator when possible. Professional facilitation support has many benefits. Professional facilitators are neutral observers who know how to help stakeholders quickly connect and build relationships. If you lack funding to hire an outside facilitator, consider finding a seasoned facilitator within USAID. [Contact PDT for recommendations or advice.](#)

Be flexible and ready to deviate from your plan. Power and internet outages. Last-minute cancellations. Conversations that veer outside the scope of your program. Co-creation workshops are rife with uncertainty, but they may yield unexpected and powerful outcomes if you are flexible about how you reach your objective. Just make sure to set clear limits to keep people focused.

Communicate expectations and limits. Lay out clear expectations for participants and the limits of what might come out of co-creation. If it is seen as a likely precursor to grant applications, for example, set clear limits on what USAID can fund. Help people focus on what can be supported. In competitive co-creation, be transparent about what USAID can and cannot discuss.

WHAT TYPE OF EVENT?

The most popular form of co-creation currently used at USAID is the multi-stakeholder workshop, but its form varies. Other types of co-creation have included a prototyping hackathon, a structured one-on-one collaboration, and a small high-level strategy session. Carefully consider what type of activity will best match your objectives and circumstances (e.g., particularly sensitive discussion topics and reticent co-creation participants).



Warning

In one co-creation reverse industry day, a participant described co-creation workshops as “heaven for extroverts and hell for introverts.” When structuring a co-creation event, consider how to ensure that introverts have the space to contribute and feel welcome to do so and that extroverts do not dominate all aspects of co-creation.

WHERE SHOULD I CO-CREATE?

Carefully consider what “room” you are asking the participants to join. Will holding events outside the embassy encourage more participation from nontraditional partners and help reduce intimidating power dynamics? If co-creation focuses on issues mainly affecting rural areas, does it make sense to hold the event in the capital city? Ask implementing partners to suggest local organizations to invite directly to co-creation and allow implementing partners to bring additional local partners.

Pros and Cons of Virtual Co-Creation Events

BENEFITS	DRAWBACKS
<ul style="list-style-type: none"> • Simpler logistics and lower cost, particularly for participants. • Increased flexibility with workshop timing (e.g., non-consecutive days and partial days). • Inclusive participation is easier to achieve (internet connectivity permitting). • Digital tools available to facilitate the collection of ideas and decision-making. • Simultaneous translation is easier to facilitate. 	<ul style="list-style-type: none"> • Requires the same if not more preparation — everything needs to be planned in advance. • Trust building and virtual networking are extremely difficult, which can disproportionately impact organizations new to USAID. • Varying degrees of technology literacy and access can prevent inclusive participation. • Harder to hold participants' attention. • Different time zones can complicate scheduling.

Before March 2020, most co-creation events happened in person. However, the pandemic forced USAID and its partners to shift to virtual events, which present pros and cons (see table above). As infection rates subside, PDT anticipates increased **hybrid co-creation events** that include in-person and virtual participation. For example, USAID/Honduras is experimenting with a model that enables some USAID staff to participate remotely with a mix of USAID and external participants in person. During the event, all participants will work on their computers using shared documents for real-time collaboration. Given USAID's limited experience using hybrid co-creation, [contact PDT](#) if you are interested in a hybrid co-creation event and want the most up-to-date guidance.



Myth

USAID can't do anything to help control costs for co-creation participants.

Reality

Creative measures can be taken to control costs for participants. USAID/Jordan reviewed the applicants for a small business set-aside procurement and recognized that the participants were U.S. small businesses overwhelmingly based in Washington. Rather than require participants to fly to Amman, USAID/Jordan sent a small delegation — the technical team and RLO — to host the competitive co-creation workshop in Washington.

HOW CAN I PULL IT OFF (AND WHO SHOULD FACILITATE)?

CHOOSING A FACILITATOR

PDT recommends an outside facilitator for co-creation workshops. Experiences to date have shown the importance of facilitation support to guide the group through activities and discussions so that everyone arrives at the desired endpoint by the workshop's close. Trained facilitators know how to use different techniques to help participants feel comfortable engaging in co-creation and establish the trust necessary for productive dialogue. See [Module 3](#) for additional guidance on how to select a co-creation facilitator and mechanisms for engaging or contracting trained facilitators.



Myth

If I want a strong facilitator for my co-creation event, I need to look outside USAID.

Reality

No! Factors such as a limited budget or timeline may mean an internal facilitator is your best option. Thanks to PDT's training courses, USAID has a growing number of trained staff in the **PDT Facilitator's Network**. Reach out to PDT if you seek an experienced internal facilitator or are interested in facilitation training opportunities.

External International Facilitator	External Local Facilitator	USAID Internal Trained Facilitators	USAID Technical Staff, Inexperienced
Professional facilitators with significant USAID co-creation experience can preempt issues and apply best practices	Professional facilitators with language and cultural understanding can help reach new local partners and navigate cultural differences	Trained internal facilitators can potentially be deployed quickly to apply lessons and training specifically geared to USAID co-creation	Untrained technical staff bring deep understanding of co-creation context, but lack facilitation skills and experience



Warning

Successful co-creation hinges on proper planning and outreach. Co-creation is not effective if overly compressed or rushed. If your timeline is condensed, consider shifting co-creation later in the program cycle or using a modified approach.

SETTING AN AGENDA

A multi-stakeholder co-creation workshop should be a minimum of two days to provide time for reflection and deep thinking. Generally, in-person co-creation workshops are two full days followed by a half day for final reflections and takeaways. Keeping virtual workshops to no more than four hours per day is a best practice, so virtual co-creation workshops are often spread out over four days. Tips for developing a co-creation agenda include:

- Organize a **pre-workshop call** approximately one week in advance to set expectations and allow participants to ask questions. Having this call ahead of time enables participating organizations to change their attendees, if appropriate, to help USAID achieve its objective.
- Devote time at the start of the workshop to **state the desired objective, the desired dynamics among participants, and USAID’s plan** for next steps after the workshop.
- Communicate **USAID’s role** in the workshop — facilitator, technical expert, equal participant, quiet observer, or guiding decision-maker. When possible, allow USAID staff to engage as equal technical thought partners in discussions.
- Recognize the **challenges of holding people’s attention** during virtual workshops. Give breaks of around ten minutes every two hours. Plan for interactivity every seven to eight minutes, after which people’s attention tends to drift.
- Set aside time at the beginning of the workshop to assure participants that **their voices count and they are on equal footing in this setting**. If appropriate, have OAA provide an overview of the procurement process and next steps to get all participants on the same page.
- Provide space for partners to **meet and build trust**, particularly if networking is a co-creation objective. Short ice breakers and energizers help build camaraderie and energize the group.
- Plan agendas that have time for participants to **voice frustrations, concerns, and questions as well as to provide anonymous feedback** at the end of each day.
- Build in flexibility to **make adjustments to the agenda** each day.
- Consider **spreading out co-creation sessions** for virtual workshops (e.g., three sessions over two weeks). Avoid scheduling too much time in between them to maintain momentum.
- Offer a **post-workshop Q&A** call seven to ten days after the final workshop session so that participants have space to provide feedback and get clarity on post-workshop actions.



Example

In 2020, the USAID Africa Bureau Office of Economic Growth, Environment, and Agriculture (EGEA) organized a BAA co-creation workshop for sustainable development in Africa. A document with lessons learned from that experience includes many useful tips, including: “The group photo was very worthwhile. We asked people to hold up something meaningful to them, and the facilitator then asked a few people with unusual items to explain them. We all got a laugh out of the array of objects, which included a huge, shaggy dog, a few kids, and a small figurine that a participant described as ‘her holy cow.’”

CHOOSING TOOLS FOR VIRTUAL CO-CREATION

Technological tools for enabling productive virtual engagement are constantly changing. The chart below highlights tools preferred by those with virtual co-creation experience as of March 2022. *To learn more about lessons from virtual co-creation events, [click here](#).*

	VIDEO TELECONFERENCING	VIRTUAL COLLABORATION	FILE SHARING
Function	Serves as a platform for video call among participants.	Creates a virtual whiteboard that can support the ideation process.	Allows participants to access and share files, if needed, during co-creation.
Options	Zoom, Google Meet, WebEx, Microsoft Teams, etc.	Miro, Jamboard, Google Slides, etc.	Google Drive, Dropbox, etc.
Preferred tool for co-creation	Zoom is the preferred platform for co-creation workshops. Zoom excels in simultaneous translation, breakout rooms, and automatic closed captioning.	Miro is the most used digital whiteboard tool for USAID’s co-creation workshops. When internet connectivity is a serious issue, consider alternatives.	USAID uses Google Drive, so it is the easiest and most logical tool for file sharing with participants. Participant feedback on this tool has been positive.

WHAT WILL HAPPEN?

- Often, co-creation involves a discovery process through which strategy emerges. Be ready to adapt while also reminding participants of the limits so that discussion does not veer too far from your objective and co-creation does not feel too chaotic.
- At the end of each day of co-creation, the facilitator and design team at USAID should talk about what went well, what did not, and how to adapt the agenda the following day.
- Ideally, two people should “run” the virtual platform during co-creation. This redundancy will help co-creation stay on track in the event of connection problems, make it easier to deliver presentations, and assist with managing the breakout groups.
- Participants might mimic or affirm USAID’s ideas rather than share their ideas or other participants’ ideas. Once USAID commits to an observer or listener role, participants typically engage more confidently and offer their perspectives.
- If USAID seeks to build its facilitation capacity, take advantage of this opportunity. Let someone shadow the facilitators. Provide experiential learning opportunities.

MODULE 7. THE OUTPUT AND FOLLOW-UP

This module focuses on the steps to take after a co-creation event, regardless of the format, approach, or point in the program cycle.

At a Glance: Ensuring Successful Co-Creation After the Event is Complete

Report out to participants and provide space for feedback. Whenever possible, organize a post-co-creation call with participants seven to ten days after the event. Use the call to share key takeaways and action items. Invite further questions or feedback regarding the co-creation.

Provide follow-up support when needed. Co-creation with local partners can be much more complex than with international partners because local partners may not understand USAID's operational realities. Local partners may agree to unfeasible items or timelines. Recognize that this form of co-creation may require intensive support for local partners after the event to ensure success.

Don't forget that co-creation is time-bound. It can take time to act on the ideas generated in a co-creation workshop. Give your team time for follow-up and analysis, but keep in mind that co-creation is a time-bound process. Overlong co-creation will divert resources from program implementation.

HOW DO I COLLATE AND REPORT THE INFORMATION?

An external facilitator can play a leadership role in collating and reporting information from the co-creation workshop. Ensure collating and reporting information from the workshop are part of the facilitator's scope of work, when appropriate. The types of information to capture may include:

- **Participant data collection.** The data collected from participants during co-creation will be a primary source of information. You may gather this data using interactive brainstorming tools, such as Miro, or post-event surveys. Make sure digital whiteboards are saved and shared. Summarize key takeaways from breakout groups. Be transparent with participants about how data will be collected and used.
- **Event recording or notes.** When a co-creation event is recorded, share recordings or written notes in a Google Drive folder with internal stakeholders and external participants. Particularly sensitive topics or in-person co-creation workshops likely will not be recorded. In these cases, collate notes and circulate them via a shared Google Drive folder.
- **Report.** Depending on the type and objective of co-creation, it may make sense to capture the lessons and outputs of the event in a written report. Focus on the key takeaways and your original co-creation objective. For non-competitive co-creation, consider asking implementing partners to integrate the co-creation report into already required deliverables, such as quarterly or annual reports.
- **Solicit and document participant feedback.** Systematically collecting feedback from co-creation participants is a best practice and can provide useful information for determining next steps. Conduct a post-workshop survey. Request that participants complete the survey before signing off from the event to maximize response rates while information is fresh.



Warning

Make sure participants receive actionable feedback during or shortly after a competitive co-creation. For example, does USAID hope participants will revise and improve their concept notes? If so, explain how those concept notes could be improved. Otherwise, participants may feel pressure to add a partner or make another change just to show that the workshop informed their approach.

WHAT DO I DO WITH WHAT MY PROCESS DESIGNED?

Now comes the question: What do I do with this information and data? Remind the team of your original co-creation objective. The worst-case scenario is when co-creation adds time and effort and does not result in substantive changes (e.g., changes in solicitation design, the quality of proposals submitted, or the composition of organizations participating).

- **Identify assumptions and risks.** After co-creation, consider the key assumptions underlying the output of the design process. For example, if co-creation yielded an innovative approach to helping at-risk youth find education or employment opportunities, think about what assumptions underlie the approach. Do those assumptions require validation, or are you and your partner ready to pilot the approach and learn from that experience?
- **Communicate strengths and weaknesses to partners.** Post-workshop, USAID can work with participants to revise solution concepts before deciding whether to move forward. This type of flexible engagement enables USAID to pursue more collaboratively created, innovative, and comprehensive concepts.
- **Recognize that additional support is likely needed, particularly for new ideas or partners.** The output of your co-creation will likely change. When co-creation generates an innovative approach, there may be challenges to launching that innovation. When co-creation centers on a new partnership with a local organization or private sector entity, the USAID partner may agree to deliver items or follow timelines that are unfeasible (due to lack of experience working with USAID).

HOW DO I ESTABLISH AND MAINTAIN FEEDBACK LOOPS?

Feedback loops should start from your co-creation event. For workshops, use morning polls and closing questions to take the pulse of the group. Then, organize a call no longer than two hours between seven and ten days after the co-creation event for participants to reconvene. During this call, USAID should summarize key takeaways from the event and reiterate expectations for participants (e.g., changes to concept notes). Space should also allow participants to reflect on the event and ask questions. For non-competitive co-creation embedded in program implementation, co-creation feedback loops can be built into management approaches and annual work planning processes (see below).



Example

In Zambia, YLA (see page 22 of [Module 5](#) for more about the project) established an advisory board of youth leaders, civil society activists, and ministry representatives. The board functioned as a mechanism for recurring engagement and advisory support. In this way, YLA—an associate award under SCS Global LWA—provided a structured feedback loop throughout implementation.

MODULE 8. THE LEARNING

This module provides guidance on learning from co-creation processes. PDT views co-creation as an integral part of CLA. This section focuses on capturing and disseminating learning so that USAID can continue to improve its use of co-creation.

At a Glance: Learning from Co-Creation

Capture both process and outcome-oriented learning. Every instance of USAID co-creation generates valuable learning. This learning may be event-specific process learning, such as when USAID determines how to facilitate a virtual co-creation event that includes individuals in rural areas with weak internet. This learning may also be outcome-oriented learning, such as when a co-creation event coalesces around an idea that seems innovative and compelling but fails. Embrace and celebrate co-creation learning, whether it is from successes or failures, so that USAID can build on these lessons.

Institutionalize internal learning. Invite USAID colleagues to debrief on a co-creation event so that they can learn from your smart decisions and mistakes. Document and share interesting cases with PDT so that they can be incorporated into training and shared with other offices and missions. At this point, USAID has experienced many co-creation successes, but lessons from these successes still too often reside only in one person's head.

Alert PDT! PDT is charged with collecting and sharing information to improve the use and effectiveness of co-creation by and throughout USAID. No matter where you are in the co-creation process, PDT invites you to reach out (1) for assistance with your co-creation efforts or (2) to help document learning from your experience. [Email us now!](#)

WHAT TYPES OF LEARNING SHOULD I PRIORITIZE AFTER CO-CREATING?

Learning is a key benefit of co-creation — allowing USAID to inject new ideas and voices to help set development priorities or design new strategies that break the status quo. Habituate co-creation as a way to approach change. After co-creation, capture process- and output-oriented learning through after-action reviews (AARs) with the internal USAID team (OAA, technical team, etc.).

PROCESS-ORIENTED LEARNING

Description. Process-oriented learning relates to how USAID and facilitators design and manage co-creation. What worked? What didn't? Post-workshop surveys and Q&A calls will help answer these critical questions. Others in your mission or unit may be interested in co-creation but unable to attend your co-creation. Document the process you took and share written lessons or schedule a debrief to help others learn.

OUTPUT-ORIENTED LEARNING

Description. Output-oriented learning relates to the success or failures of co-creation outputs. For example, if co-creation led to an innovative approach, did that innovation succeed or fail? If a new partnership was the focus, did co-creation yield a successful new partnership? Capture and share learning about the drivers of success or failures of co-creation outputs.



Example

Several USAID missions and operating units have documented lessons from their co-creation experiences. For example, USAID/Colombia developed a [webinar to share best practices and lessons](#) from the mission's experiences with co-creation under the GDA APS. USAID/Mexico held a [webinar to share lessons learned from virtual co-creations as part of BAAs](#) in September 2020. Please share your interesting co-creation cases [with PDT](#) and your USAID colleagues.

WHAT IF THE OUTPUT OF CO-CREATION DOES NOT WORK?

Diagnose the failure. By its nature, co-creation seeks to promote innovative ideas or partnerships that will not always succeed, so co-creation must be tightly aligned with CLA. Although you may not always achieve your primary objective, do not forget about important secondary benefits of co-creation, such as buy-in, trust, rapport-building, and goodwill. Other secondary benefits could be building the capacity of local firms to facilitate co-creation events.

Potential Reasons Co-Creation Output Failed

IDEA NEVER LAUNCHED	IDEA LAUNCHED BUT FAILED	PROCESS FAILED
<p>Did the idea never launch because, for example, partnerships failed to materialize? Or perhaps you had incorrect information during co-creation?</p> <p><i>Even the best co-creation can suffer from flawed assumptions or missing voices. Restart co-creation only if time permits and flaws can be addressed.</i></p>	<p>Did the co-creation process generate an approach or activity design that failed to achieve the impact?</p> <p><i>Good ideas fail all the time. Capture learning, share it, and incorporate it into future efforts.</i></p>	<p>Did the co-creation process fail to generate outputs? Perhaps there was insufficient time, or there were significant delays between co-creation and implementation.</p> <p><i>If time permits, consider restarting the co-creation process or integrating co-creation later in the program cycle.</i></p>

WHEN DO I NEED TO REDESIGN/RESTART THE CO-CREATION PROCESS?

See the chart above for a description of common reasons co-creation fails — insufficient time with participants, the wrong participants, or other timing issues — and considerations for redesigning or restarting the process. Of course, another possible driver of a failed co-creation process is poor design or facilitation. In most instances, particularly for competitive co-creation, the best approach will be to NOT restart co-creation and instead (1) incorporate lessons into future efforts or (2) integrate co-creation into later stages of the program cycle. For example, if a competitive co-creation is deemed a failure, USAID and implementing partners could co-create together or with counterparts during program implementation. Only restart the process when you are confident that previous issues can be addressed.



Warning

Co-creation is not always successful. Success or failure is most often determined by (1) the right participants and (2) effective facilitation. However, other complications can cause co-creation to fail. Regardless of the outcome, remember that co-creation is a **time-bound process**. Do not allow the process to drag on indefinitely, hoping that an elusive “aha moment” will arrive. As USAID expands its use of co-creation, staff and implementing partners are learning to co-create more effectively. Each instance of co-creation helps improve future outcomes. A co-creation may fail today, but another may succeed tomorrow.

ANNEX A. ADDITIONAL CO-CREATION RESOURCES

This annex provides a list of co-creation resources.

RESOURCE	DESCRIPTION
<u>M/OAA/PDT Co-Creation Page</u>	Landing page for M/OAA/PDT resources on co-creation, including training offerings.
<u>M/OAA/PDT Listen and Learn Series</u>	This landing page features videos and case studies describing processes and learning from BAA and APS co-creation workshops in the Democratic Republic of the Congo, Ghana, and Indonesia.
<u>Is Co-Creation Right for You (USAID Global Development Lab)</u>	Helps development practitioners determine whether co-development is the right approach for their goals. Note: not all embedded links in this document are current and accessible.
<u>Should YOU Co-Create? Quiz</u>	Quiz tool developed by CollaborateUp to help USAID staff determine whether co-creation is the right approach for their objectives. Mainly applicable to co-creation within procurement.
<u>Co-Creation Discussion Note (ADS 201 Additional Help)</u>	USAID’s seminal resource on options for co-creation throughout the program cycle.
<u>Toolkit for Innovation Design: Co-Creation (USAID iDesign)</u>	Helps USAID practitioners decide whether they should do co-creation and understand how to plan and run a co-creation activity. Provides examples of existing co-creation activities within and outside USAID.
<u>Round Up of Resources on Co-Creation with the Private Sector</u>	Explores possible modalities of co-creation with the private sector within and outside of procurement and includes tips to get started, available USAID resources, and examples.
<u>USAID Activity Design & Implementation Training Co-Creation Materials</u>	Includes the slide deck and facilitator guide for USAID’s Activity Design & Implementation Training. See Slides 15-19 for co-creation definition, objectives, types, and benefits.
<u>What is Co-Creation? Micro-learn Video</u>	Shares a definition for co-creation and considerations about when to use co-creation (or not) in acquisition & assistance.
<u>PDT Co-Creation & Acquisition FAQs</u>	Provides guidance for using co-creation within an RFP or Request for Quote (RFQ). Topics discussed include when co-creation is appropriate, engaging with potential partners, satisfying competition, and more.
<u>PDT Co-Creation & Assistance FAQs</u>	Provides guidance on using co-creation within an RFA or APS. Topics discussed include when co-creation is appropriate, engaging with potential partners, satisfying competition, roles and responsibilities, and more. Have additional questions that aren’t answered here? Contact PDT (PDTandMe@usaid.gov).
<u>E3/LS Co-Creation</u>	This curated set of materials provides step-by-step guidance on

RESOURCE	DESCRIPTION
<u>Workshop Facilitation Toolkit</u>	facilitating a co-creation workshop within activity design.
<u>Virtual Event Strategy Guide</u>	CollaborateUp developed this guide to codify best practices and lessons learned for virtual meetings and collaboration. In most cases, the guide sets standards for meetings of three hours or more and typically meetings of more than one session (i.e., three hours each day on three consecutive days).
Co-Creation Video Series (multiple)	<ul style="list-style-type: none"> ● <u>Co-Creation: What It Is and Isn't</u> ● <u>Co-Creation During the Strategy Design Phase</u> ● <u>Co-Creation in Industry Workshops</u> ● <u>Asynchronous Co-Creation</u> ● <u>Co-Creation During the Solicitation Phase</u> ● <u>Co-Creation During the Startup Phase</u> ● <u>Pause and Reflect</u>

ANNEX B. ACRONYMS

5Ws	Why, What, Who, When, Where
A&A	Acquisition and Assistance
AO	Agreement Officer
APS	Annual Program Statement
BAA	Broad Agency Announcement
CDCS	Country Development Cooperation Strategy
CLA	Collaborating, Learning, Adapting
CO	Contracting Officer
DFAT	Australian Department of Foreign Affairs and Trade
E3/LS	USAID Office for Local Sustainability
FAR	Federal Acquisition Regulation
FCDO	U.K. Foreign, Commonwealth & Development Office (formerly DFID)
LWA	Leader with Associates
M/OAA	Management Bureau Office of Acquisition and Assistance
OAA	Office of Acquisition and Assistance
PDT	Professional Development and Training
PIO	Public International Organizations
RFA	Request for Applications
RFI	Request for Information
RFP	Request for Proposals
RLO	Resident Legal Officer
SCS Global	Strengthening Civil Society Globally
TPI	USAID/Peru Transparent Public Investment Program
YLA	Youth Lead Activity

INTERACTIVE MENU I. FOUNDATIONS OF CO-CREATION

The modules listed below aim to help people deepen their understanding of co-creation. **Click on the module most relevant to your needs and interests, or return to the interactive menu at the bottom of the page.**

MODULE	RELEVANT SUB-SECTIONS
<p><u>Module 1. The Idea</u></p> <p>This module is for people seeking to deepen their understanding of co-creation or early in the process of co-creating.</p>	<ul style="list-style-type: none"> • <u>What is co-creation? Why it is valuable?</u> • <u>How does co-creation relate to USAID initiatives and priorities?</u> • <u>How is co-creation different?</u> • <u>Who uses co-creation?</u> • <u>When does co-creation work well?</u> • <u>What are competitive and non-competitive co-creation?</u> • <u>Do I need to co-create?</u>
<p><u>Module 4. Competitive Co-Creation</u></p> <p>This module is for people seeking guidance specific to co-creation in the context of competitive procurements.</p>	<ul style="list-style-type: none"> • <u>What is competitive co-creation?</u> • <u>Common objectives of competitive co-creation</u> • <u>Common characteristics of successful competitive co-creation</u> • <u>Common concerns and how to address them (or not)</u>
<p><u>Module 5. Non-Competitive Co-Creation</u></p> <p>This module is for people seeking guidance related to non-competitive co-creation across the program cycle</p>	<ul style="list-style-type: none"> • <u>What is non-competitive co-creation?</u> • <u>Common objectives of non-competitive co-creation</u> • <u>Common concerns and how to address them (or not)</u>



MAIN MENU



FOUNDATIONS



DESIGN AND
PLANNING



CO-CREATION
IN ACTION



REFLECTION AND
FOLLOW-UP

INTERACTIVE MENU 2. DESIGN AND PLANNING

The modules listed below aim to help people decide whether to co-create and, if so, how to plan for successful co-creation. **Click on the module or sub-section most relevant to your needs and interests, or return to the interactive menu at the bottom of the page.**

MODULE	RELEVANT SUB-SECTIONS
<p><u>Module 2. The Decision</u></p> <p>This module is for people determining if co-creation is appropriate for their circumstances and how to forge a path to success.</p>	<ul style="list-style-type: none"> • <u>Is co-creation appropriate for me and my team?</u> • <u>How do I apply the 5Ws to clarify co-creation objectives?</u> • <u>How do I develop an outline of the co-creation process?</u> • <u>Setting a timeline: how do I not rush into organizing a workshop?</u>
<p><u>Module 3. The Co-Creation Conversation</u></p> <p>This module is for people who have decided to co-create and are seeking support, both internally and externally.</p>	<ul style="list-style-type: none"> • <u>How should I talk to people about co-creating?</u> • <u>How do I get internal buy-in for co-creation?</u> • <u>Do I need a facilitator?</u> • <u>How do I recruit participants?</u> • <u>How do I craft the invitation?</u> • <u>Where can I get help?</u>
<p><u>Module 4. Competitive Co-Creation</u></p> <p>This module is for people seeking guidance specific to co-creation in the context of competitive procurements.</p>	<ul style="list-style-type: none"> • <u>Common objectives of competitive co-creation</u> • <u>Common characteristics of successful competitive co-creation</u> • <u>Sequencing competitive co-creation</u> • <u>Developing a list of who should be approached/invited/consulted</u>
<p><u>Module 5. Non-Competitive Co-Creation</u></p> <p>This module is for people seeking guidance related to non-competitive co-creation across the program cycle</p>	<ul style="list-style-type: none"> • <u>Common objectives of non-competitive co-creation</u> • <u>Common concerns and how to address them (or not)</u> • <u>Developing a list of who should be approached/invited/consulted</u>



MAIN MENU



FOUNDATIONS



DESIGN AND PLANNING



CO-CREATION IN ACTION



REFLECTION AND FOLLOW-UP

INTERACTIVE MENU 3. CO-CREATION IN ACTION

The modules listed below aim to help people effectively manage co-creation. **Click on the module most relevant to your needs and interests, or return to the interactive menu at the bottom of the page.**

MODULE	RELEVANT SUB-SECTIONS
<p><u>Module 4. Competitive Co-Creation</u></p> <p>This module is for people seeking guidance specific to co-creation in the context of competitive procurements.</p>	<ul style="list-style-type: none"> • <u>Common characteristics of successful competitive co-creation</u> • <u>Common concerns and how to address them (or not)</u>
<p><u>Module 5. Non-Competitive Co-Creation</u></p> <p>This module is for people seeking guidance related to non-competitive co-creation across the program cycle</p>	<ul style="list-style-type: none"> • <u>Common concerns and how to address them (or not)</u>
<p><u>Module 6. The Co-Creation Event</u></p> <p>This module is for people seeking guidance related to tactical planning for co-creation, including tips related to workshops and other common formats for USAID co-creation.</p>	<ul style="list-style-type: none"> • <u>What type of event?</u> • <u>Where should I co-create?</u> • <u>How can I pull it off (and who should facilitate)?</u> • <u>What will happen?</u>



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CO-CREATION IN ACTION



REFLECTION AND FOLLOW-UP

INTERACTIVE MENU 4. REFLECTION AND FOLLOW-UP

The modules listed below aim to help people after the primary co-creation event is complete. **Click on the module most relevant to your needs and interests, or return to the interactive menu at the bottom of the page.**

MODULE	RELEVANT SUB-SECTIONS
<p><u>Module 7. The Output and Follow-Up</u></p> <p>This module is for people seeking guidance on how to translate co-creation outputs into action, including follow-up engagement with participants and navigating challenges.</p>	<ul style="list-style-type: none"> • <u>How do I collate and report the information?</u> • <u>What do I do with what my process designed?</u> • <u>How do I establish and maintain feedback loops?</u>
<p><u>Module 8. The Learning</u></p> <p>This module is for people seeking to capture learning from the co-creation process, including when to restart co-creation.</p>	<ul style="list-style-type: none"> • <u>What types of learning should I prioritize after co-creating?</u> • <u>What if the output of co-creation does not work?</u> • <u>When do I need to redesign/restart the co-creation process?</u>



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