



Designing and running co-creation workshops

Use: To prepare to run design workshops with your prospective partner(s) to co-develop the scope and plans for the partnership.

Who should use it: Partnering Lead and Workshop Facilitator

Tool type: Guidance

How to use it: Reference the preparation steps and tips when planning for effective discussions with prospective partners.

Partnership stages: Scoping and structuring

Purpose of Co-Creation Workshops

Well-designed and managed co-creation workshops with a prospective partner are an effective and time-efficient means of finding practical, creative, and complete solutions to challenges or opportunities. Through structured discussion, brainstorming, and ideation, co-creation workshops help to draw out ideas, risks, approaches, and clarity that can lead to better partnership designs and better outcomes during implementation.

Co-creation workshops energise prospective partners in ways that invite more adventurous thinking, trust, and stronger commitment than less personal or interactive communication channels enable. They enable you to establish and test rapport with prospective partners, and to build trust and personal connections that can help facilitate better communication in the future, yielding better outcomes and smoother implementation.

How to Structure Co-Creation Workshops

First, plan a workshop well in advance. Thoughtful preparation will significantly impact the effectiveness of the time together.

Structure the co-creation workshop in consultation with your internal stakeholders and the prospective partner(s). Agree to the objectives of the meeting with the primary point people at each organization. Agree to an overall format, location and duration of the workshop. Determine what the minimum and maximum number of people is to make the discussion effective. Determine what time duration is required to address priority agenda items. In some cases, a few hours might be sufficient. In other cases, two or three days of discussion are necessary.

Exchange targeted, short pre-reads, if possible, to save time in the session.

Workshops held in-person are generally preferable to those relying on more limited, remote participation, though sometimes in-person participation is not feasible. When designing the workshop, determine whether all participants will be present in person. If not, identify constraints and possibilities for inclusion of remote participants.

Plan to have a workshop facilitator, even if this person is internal to your organisation or the prospective partner. Plan also to have a note-taker. This person should be able to focus on capturing the key discussions and decisions of the co-creation workshop without needing to also be an active participant in the majority of discussions.

You or the other workshop designers should structure the workshop to handle topics and discussions in productive ways. In addition to determining the purpose, participants and parameters of the co-creation workshop, begin to think through how to shape the sessions so they encourage a sense of equity among the parties, encourage transparency and a sense of trust, and enable the participants to contribute their ideas and expertise.

Consider whether to hold an internal meeting to ensure alignment about the goals, structure, or roles of participants in the co-creation workshop before convening the prospective partner(s). You do not want to discuss that there is a misalignment in your team's expectations for the partnership or approach to co-creation while sitting across from a prospective partner.

Building an Agenda

Build an agenda in consultation with the primary stakeholders and the prospective partner organisation. See a sample agenda at the end of this guide. The agenda should include:

- Objectives
- Participant list, with names, titles and organization
- Location
- Pre-reads
- Session-by-Session plan, with topic, purpose, desired outcomes, time allotment, identification of facilitator or presenter, and participants

Co-creation workshops generally have a common arc that can be anticipated to sequence the agenda topics for a particular co-creation workshop.

- **Commonality:** At the start, parties need to engage the core, common area of interest, gaining clarity on its importance and meaning to the different parties. This discovery happens at the same time as participants gain initial familiarity with one another, if relationships do not already exist. Establishing a feeling of cohesion, openness and trust-worthiness is important.
- **Options:** After the initial work of exploring different perspectives on common interests, the parties are able more deeply to explore particular technical or practical questions. Sometimes these are discrete and easily addressed. Other times these require that the group explore complexity and multiple alternatives. Drawing out diverse perspectives and encouraging creativity and debate is important.
- **Agreement:** After looking at options, the discussion turns to agreeing—or surfacing irreconcilable perspectives—on what a realistic, desirable scope or structure entails, what can practically be done and how remaining uncertainty will be addressed. Highlighting or regaining clarity is important.
- **Coordination:** Having better clarified what the parties could do together, thoughts turn to how the parties would work together, the dynamics of decision-making, relationships and

communication. Partnerships are, after all, voluntary and always involve relationships. Communication and mutual expectations are important.

- **Next Steps:** Finally, participants identify what comes next. Concrete, predictable actions are important.

In addition to thinking about this arc and the concrete technical or practical issues on the agenda, build the agenda so that the other party or parties have equal space and time in the agenda.

Build time into the agenda to recap what has been discussed, what achieved or clarified, and what topics remain outstanding. If the workshop lasts more than one day, build time into the agenda at the opening of day two onward to summarize. Build time into the agenda for different parties to confer on new information discovered in the workshop itself. This might be particularly necessary if the workshop lasts less than a full day.

If critical stakeholders cannot participate for the entire session, ensure newcomers are briefed on the side, or that time is built into the agenda to orient a batch of new participants so they can effectively participate. That said, consider availability of critical stakeholders when building the agenda and setting dates. There must be a core, common group of interlocutors participating in the entire workshop for a co-creation workshop to be effective. Do not allow participants to flow in and out multiple times at any point throughout the workshop unless no other option exists.

Finally, do not forget to build in breaks!

Key Roles in the Workshop

Several roles should be identified in advance: your organisation's lead, the potential partners' lead, the meeting facilitator, the meeting scribe or scribes, and technical contributors for all parties

The meeting facilitator can be anyone capable of and available to play this role.

The meeting scribe will likely be someone who would otherwise play a less active role in the meetings. It is often *not* recommended that a very junior person or intern capture notes, as notes are a critical output of the workshop. The prospective partner might also have a designated scribe.

Technical contributors will convey critical, orienting information and participate in brainstorming options and solutions.

Facilitating the Workshop

The facilitator serves the parties considering a partnership. The facilitator is responsible for creating and maintaining a productive, equitable space for scoping or structuring discussions. The facilitator must help advance concrete topics while helping participants develop rapport and while maintaining a sense of equity and fairness in the power dynamics of participants. The facilitator should be perceived as a neutral party, serving the interests of all participants.

Good facilitation is a balance between being tolerant and being tough. The facilitator requires both determination and sensitivity to the situation alongside a clear commitment to listening carefully, and mediating or redirecting, if necessary. He or she also needs to have a good instinct for when to challenge or push forward the discussion and when to hold back and allow it to take its own course. Like many other aspects of facilitation, this requires the facilitator to 'read' the mood and capacity of the group accurately and to be prepared to carry the risk involved in a hands-off strategy.

Bear in mind:

- **There are many different ways to facilitate well.** As a general rule, it is best for each facilitator to build on his or her own professional competencies, for example, good organising ability, active listening skills or capacity for synthesising information, rather than trying to copy someone else's facilitation approach
- **Everyone can become better at facilitation** with practice and perseverance
- **Co-facilitating with a colleague can take off pressure** and add a useful further dimension

All facilitators need to be able to:

- **Listen well**, including listening to what is not being said
- **Observe** how people are feeling, responding and relating to each other
- **Keep their opinions** to themselves
- **Think clearly** and rapidly take new ideas on board
- **Manage** complex situations without being dictatorial
- **Make decisions** about how to proceed in the light of emerging information
- **Provide focus** – specifically to keep the group working to the goals of the session

They will also ideally have a personal presence that gives those being facilitated full confidence that things are under control, ways of working that show discernment rather than judgement alongside management, and leadership skills that can be dedicated to serving the facilitation process and the goals of the session.

Good facilitation leaves people with a sense of having been listened to, actively and creatively engaged, and well prepared for undertaking any agreed follow-up actions. Poor facilitation leaves participants in a state of irritation, confusion or dependency. It can have such a negative impact on working relationships that it can seriously undermine rather than strengthen the potential partnership.

Techniques to Encourage Equity and Manage Power Dynamics

All participants can contribute to equitable dynamics in which all parties actively share their expertise, ideas, concerns and solutions. The facilitator has particular responsibility to maintain constructive dynamics and may employ several of the following techniques:

- Setting expectations for roles, rhythm and dynamics in advance to reduce feelings of uncertainty in social dynamics
- Creating a series of ground rules with the group to ensure that the workshop proceeds with agreement on appropriate conduct. A particularly important ground rule might be 'showing respect to each other and to different points of view'
- Setting up small group discussions or 'buzz groups' as well as plenary sessions to draw out the widest possible range of ideas and opinions

- Using cards or post-it notes for people to write and display suggestions or commitments so that all perspectives are acknowledged, and others can see them and react to them
- Running a 'sky's the limit' brainstorm to stimulate radical new thinking
- Using individual side conversations to check in with the lead and the prospective partner lead to ask if there are any concerns or if discussions need to be redirected
- Keeping to the schedule, and verbally reminding individuals inclined to long presentations or domination of discussions of the need to draw their particular point to a close to achieve the broader workshop goals
- Drawing quieter participants into the discussion, including through transitional statements such as: 'let's hear our other colleagues' thoughts on this matter.'
- Seating people in a circle
- Structuring discussion activities that move people in the room, shifting their configuration
- Verbally summarizing and acknowledging the contributions, ideas and perspectives of the various parties

Workshop Notes

Workshop notes are the primary, critical output of a co-creation workshop. Workshop notes serve as the reference point for each party moving forward. They encapsulate shared understanding and mutual expectations.

Notes should include what the different parties' individual and shared interests are, what was agreed, what key issues are important but remain unsettled, as well as describe key constraints or parameters, timing and next steps.

Whether there is one scribe from your organisation, one scribe from the other prospective partnering organization, or a scribe from each, notes should be summarized and circulated within 1-3 days of the meeting. It is necessary for the lead from each organisation—or that person's designee—to review the notes and ensure that they accurately reflect both or all parties' understanding.

If there is disagreement about key points captured in the notes, the leads for each organisation should confer to work out the issue(s).