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## A Story of Journeys: Contemporary Design Facilitation

How is design itself transitioning and transforming as it moves into more complex domains of organizational and social change. In many of these contexts, designers now play roles as facilitators, working in complex systems and dynamic environments. Design facilitation itself is moving from being a vessel for participation and becoming a vehicle for organizational transformation and change. The authors use a case study of a multi-stakeholder international design facilitation project with UN Women's Fund for Gender Equality to highlight some of the critical features of a design facilitation process, from mediation and navigation of systems of power and hierarchy within organizations to an expansion of designerly duties 'before' and 'after' a design intervention. Reflecting on this experience the authors propose possible models for design facilitation to further develop its approach, and offer future questions for the nascent field as it develops into a critical component of contemporary design practice.

Keywords: design facilitation, social innovation, social field, transformation, strategic design

### Introduction

A key point in a discussion of design is its own process of transition and transformation as it moves into more complex domains of organizational and social change. Design has expanded into new fields, from visual communication to industrial design to now a focus on the non-physical. Designers now work on problems of organizational and social structure, on interpersonal interactions, service and experience design. (Norman, 2010). In many of these contexts, designers now play roles as facilitators, working in complex systems and dynamic environments.

While many, since and including Papanek and Simon have anticipated this transition of design to new realms of the non-physical and intangible, design education and practice have still fallen behind. Designers often fail to understand the complexity (see Fig. 1) they are dealing with, and lack the tools and models to approach the interlocking complexities of human and social behaviour, of business and culture, of privilege and power.

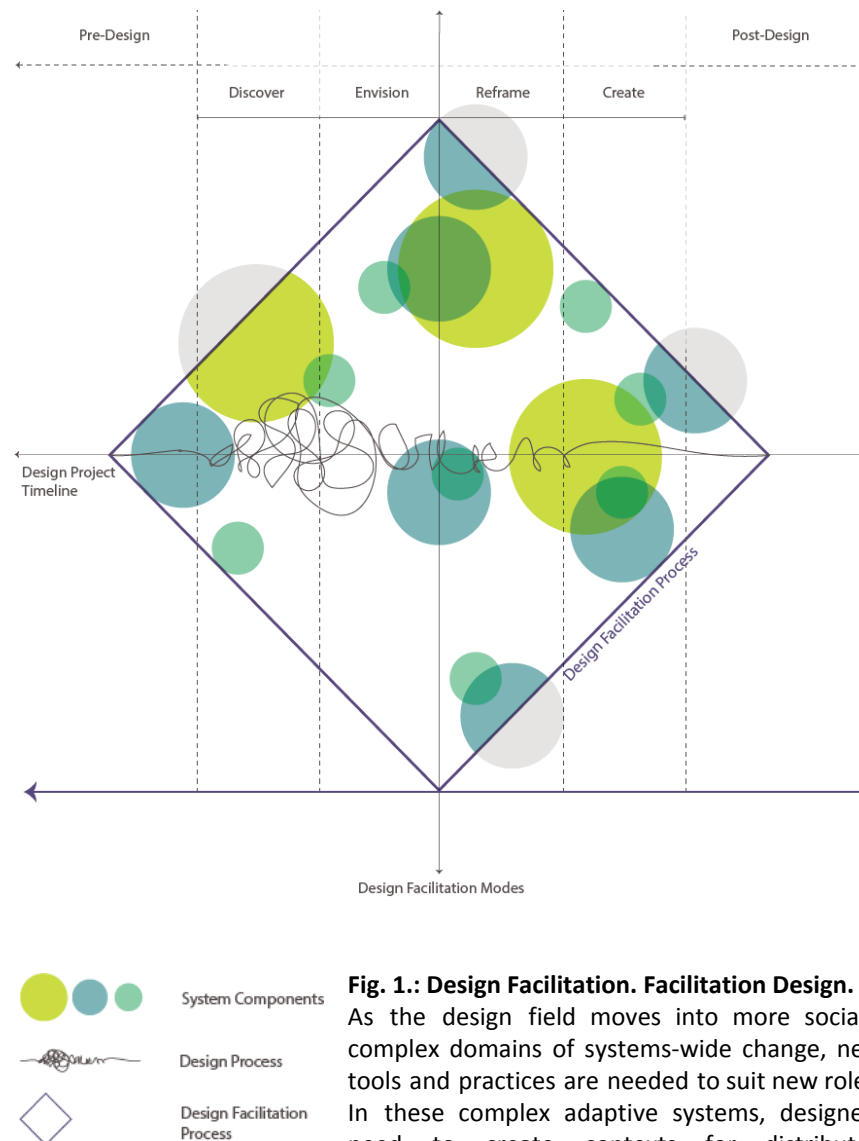
Correspondingly, there is a challenge and question about the role of the designer themselves, the role of expertise and the skills they provide and bring to processes described variously as "co-design" or "participatory-design" or perhaps even design facilitation. Sanders and Stappers identify the need for the inclusion of non-designers in such projects, and begin to explore how this inclusion blurs the lines traditionally held between roles in the design process. (Sanders & Stappers, 2008).

Manzini pushes forward with his provocation that an expert designer must be wary of merely fulfilling an administrative role. What, therefore is the role of expertise in these new design processes? Manzini expresses that the expert designer can select and develop design methods and tools for use in their practice, but also that their practice must be discerning and self-reflexive. For this reason, he argues, the expert designer must also create artifacts, proposals, and provocations that can be used in tangible processes. Manzini argues that



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this understanding holds true for all levels of design from the local to the systemic and therefore whoever is classed as a design expert also carries within them a design methodology and design culture. (Manzini, 2016).



**Fig. 1.: Design Facilitation. Facilitation Design.**

As the design field moves into more socially complex domains of systems-wide change, new tools and practices are needed to suit new roles. In these complex adaptive systems, designers need to create contexts for distributed participation. In these living systems, designers

must address the underlying conditions for spontaneous emergence, or creativity, in the generation of new forms, that drives self-organization and system evolution. Designers need to be stewards, coaches, and shepherds of the process, designers need to be facilitators for emergent transformation.

Along these lines, Sanders and Stappers underscore that the move from the traditional user-centered design process to a design process based on collective creativity. Whereas a traditional design process may have a designer translating between different user groups, a co-designed initiative turns the designer into a facilitator between participants, designing a process of guiding and supporting individuals of varying levels of inclusion and creative confidence, to participate within a process. (Sanders & al., 2008 and 2012).

However, is this too narrow a view of facilitation and the role of designers in this process? If the role of the designer is to operate as vessel does it not miss the role of the designer as participant? What happens to agency of designers facilitating such processes as roles increasingly start to blur? Yet, design, whether graphic, industrial, multimedia, interior or architecture, and whatever the intention, purpose or function, is a discipline that requires the shaping of form. (Wahl, 2008). Designers, therefore, bear responsibility to a future output;

this also proves to be true when designing the invisible. Furthermore, the concept that co-design is inherently ethical because of the reciprocity that it entails also suggests a profoundly interactive and user-orientated aspect to design.

This paper explores the evolution of the design field and the rise of the practice of design facilitation as a significant component of contemporary design practice. Using a project co-implemented by the authors as an example of what this work looks like in action, we observe a mismatch between current literature and the needs of the design facilitation process. Arising from this, the paper offers criticisms as well as potential pathways for design to further develop design facilitation, and begins investigating what such development would need to involve and include.

## 1. Contemporary Design Practice and New Design Methods

Design has developed dramatically over the last twenty years, and strategic design practices have matured into a real alternative to conventional problem-solving strategies.

This contemporary view of design not only encompasses the traditional alliance of design with market-based considerations and consumer culture, but also accounts for design as a locus for public and social innovation: design intended as a combination of ways of thinking, knowledge and skills to be applied to the most diverse kind of artifacts, provision of services, communication, organizations and policies. (Manzini, 2012).

Increasingly, designers are facing these open-ended challenges head-on, and are called upon as uniquely effective translators and synthesizers of this class of societal problems that are not neatly bounded, but ill defined, ill structured and “wicked”. (Rittel & Webber, 1973). Yet, as many scholars and practitioners have noted, most models of the design process fail to capture the new reality of contemporary design.

Designing for systems and social change is not the same thing as designing physical artifacts. It is more than a question about a linear increase in scope and scale. It is a qualitatively different act. Therefore, it needs its own theory and grounding to be successfully applied. Prior models of design while often necessary cannot be sufficient. *And when one is designing to catalyze social change through systemic reconfiguration, the problem grows even more complex. The process changes, the content changes, and outcomes change in ways that present unique and vexing challenges for traditionally trained designers.* (Hunt, 2014, p.14).

*Papanek may have been masterful at rethinking the process of design, but the opportunity he missed was that process could also be designed. Too often, designers go through the motions of creating inclusive, participatory design projects that follow, with pious devotion, the rote clichés of participatory methods; they surrender all creative capacity to non-designers, as if it were the case that the only things those communities lacked were enough marker pens, sheets of paper, and Post-it notes to see their way out of the challenges they face. According to this playbook, the designer’s role shifts to facilitator, as if this were a capacity inherent to designers (which it is not).* (Hunt, 2018, p.187).

This suggests an evolution in how we think about the design process when it applies to these kinds of complex systems and organizational moments. Design research is now a participatory process, sense-making a dynamic facilitation, ideation part of a negotiation of vulnerability and power, and iteration becomes grounded in capacity-building. Yet even here, perhaps we can move further. As Scharmer argues, “the key for successful prototypes lies in creating generative holding spaces.” (Scharmer, 2007, p. 204). Yet to what extent are design facilitation and its tools being developed to create these spaces? How are designers being trained to build and rise to these moments?

## 2. Design Facilitation

With design at times being closer to a social process than craft, the designer’s role is changing. Often times, designers find themselves in roles mediating a consensus amongst participants who may have differing interests both within the design process and in terms of its outcomes.

Napier and Wada identify as design facilitation a process of including individuals with differing decision-making capacities and areas of expertise in order to develop more desirable, viable and feasible design outcomes. (Napier & Wada, 2016, p.156). Embedded in the understanding of design as tool for strategy and innovation, Martin describes the term as a process that has been shown “to aid and abet innovative practices within and between organizations and organizational cultures, and, in some cases, to help them gain competitive advantage in particular markets.” (Martin, 2009, p.57). Design facilitation moves our focus as designers from products and artifacts, from apps and brand architecture, to process; in surfacing the needs and goals of

participant populations and better understanding what is needed next for a design intervention to succeed. (Napier & al., 2016).

For designers to be successful facilitators, it entails development and competency in skill sets focused on participatory practices. Qualities of listening, consensus and relationship building between individuals and organizations, a social and inclusive understanding of a community and its diverse constituents all emerge as critical skill sets for designers acting as facilitators. (AIGA, 2017).

Thus a question must be asked in how might one differentiate design facilitation from more general facilitation practices. Body, Terrey and Tergas, through this contrasting, argue that design facilitation entails a focus on creation, a human-centered and user-centered design research process, and one that embodies design attitudes, competencies and capacities: to be deeply empathetic, iterative, oriented towards abduction and anchored within a design methodology. (Body, Terry & Tergas, 2010)

From this review, when taking on the role of a design facilitator, the authors recognize the development and enhancement of the collective capacity of the group crucial to the achievement of transformative design processes considering the high involvement of participants throughout the process. It is apparent that such a process entails distinct instantiations of designerly skills from other areas of design practice. It is also embedded within a design strategy process; and successful, participatory social innovation design often necessitates design facilitation within the context of a particular project or practice.

### 3. Design Facilitation in Practice

Drawing from our shared experience and research, what follows is an attempt to reanalyze key elements of a design process in terms of a design facilitation practice. To do so, we will be introducing a pilot initiative - *Rethink.Experiment* - launched by the Fund for Gender Equality (FGE), a grant-making mechanism of the United Nations Fund for Gender Equality and the Empowerment of Women, that aimed at exploring the potential for design to serve as a tool for innovation in women's rights programming by involving partners and beneficiaries in the construction and implementation of programs. (UN Fund for Gender Equality, 2018)

In doing so, the project team saw an opportunity "to do international development differently" with the objective of creating positive and more lasting impact while at the same time, putting into practice much of what the FGE had been advocating for - placing beneficiaries at the heart of the work, flexible and adaptive processes, addressing root causes using systems thinking, and co-creative approaches that allow for inclusive and participatory development. Furthermore, the project team also meant to encourage women civil society organizations (WCSOs) to explore, generate and test design as a tool for their own social innovation in a safe-to-fail environment.

We, therefore, use this initiative as an example of contemporary design practice and design facilitation, and through this example reveal some of the deeper considerations and complexities at play within the design process that current models are insufficiently addressing or missing entirely. Summarizing the previous discussion, that process currently entails (1) develop a collaborative design process, (2) utilize appropriate design research methodologies and (3) channel results into stakeholder appropriate action.

#### *The Rethink.Experiment*

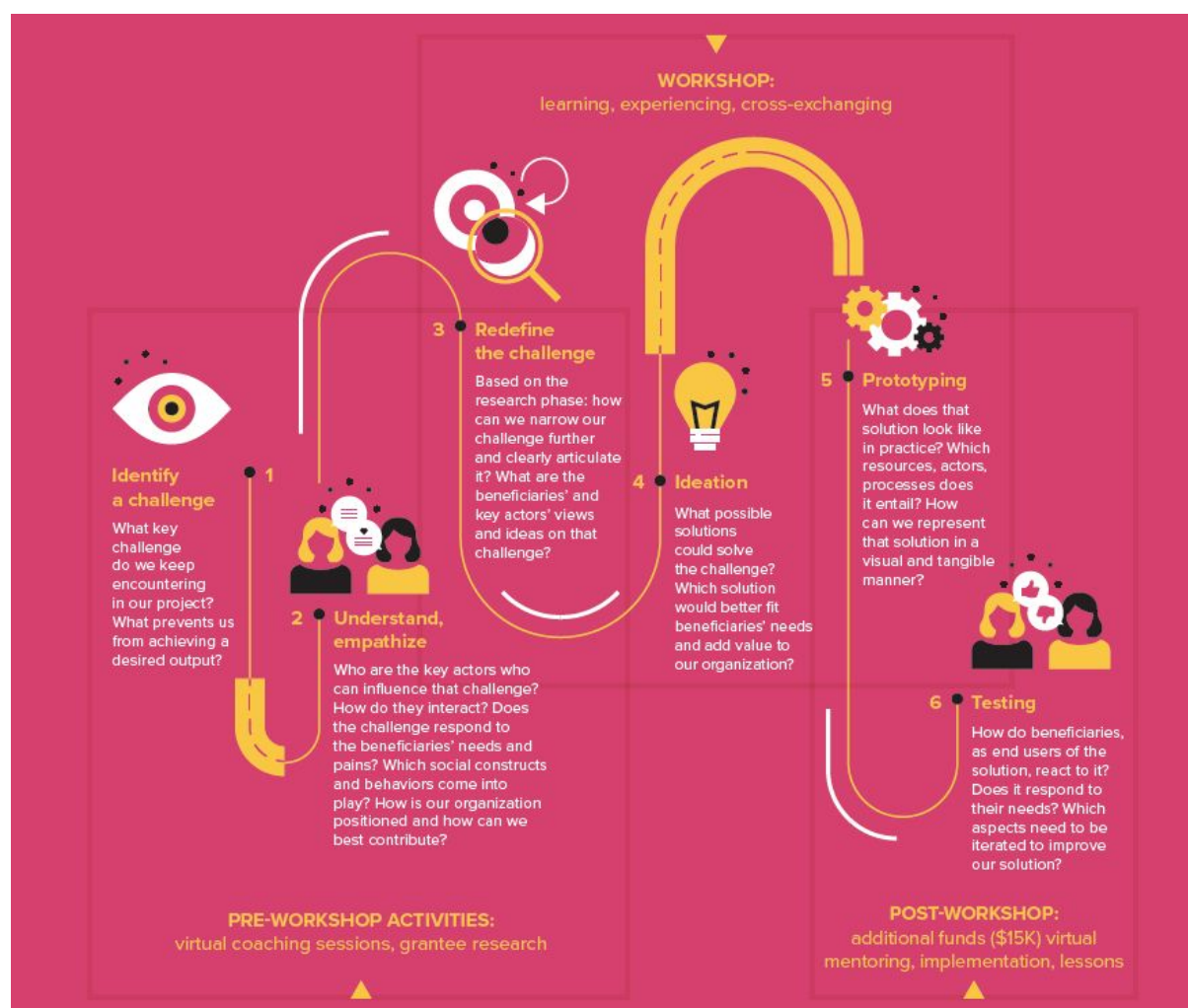
Over the past nine years, the UN Women's global grantmaking mechanism, the Fund for Gender Equality (FGE) has directly impacted the lives of over 580,000 women and girls from the most marginalized groups across 80 countries, and reached millions through policies and public campaigns. Its strategy combines the provision of grants for high-quality projects supporting women's economic and political empowerment and strengthening the capabilities of women's organizations through technical assistance and training has been validated by independent evaluations. Its projects have demonstratively advanced gender equality, especially affecting changes around social norms, the creation of women's collective structures and development of their skills on the local level.

However, following its first independent evaluation and a self-reflection exercise, the FGE realized that its projects were not tapping into the full potential of the organizations driving them, that much more could be achieved with the same or even fewer resources: Are we grant-makers and project implementers working in the most efficient and effective ways? Are our projects designed to respond to the real needs of the furthest behind? What alternative approaches and tools can lead to more transformative results?

These questions were the starting point of the Fund's *Rethink.Experiment* initiative, launched in 2018, through which nine women-led civil society organizations operating in eleven countries, over a period of nine months were introduced and trained in key principles of the design process to address a specific project challenge using a beneficiary-centered design approach reaching from "how might rural women from disadvantaged communities transition from small-scale producers to profitable entrepreneurs" to "how can we find creative solutions to keep women's rights in the political agenda in a conflict setting".

As the Fund supports women's organizations that can reach end beneficiaries – especially the most marginalized communities – and have the capacity to influence at a national level, investing in their innovation capabilities has a powerful catalytic potential hoped to result in positive changes in the lives of marginalized women and girls. (UN Women, 2018).

While structured into six main phases of iterative character: 1) Identify a challenge, 2) Understand and Empathize, 3) Redefine the challenge, 4) Ideation, 5) Prototyping, and 6) Testing, the process was designed with the intention of creating participants with a safe-to-fail environment that encourages participants to explore, generate and test design as a tool for social innovation.



**Fig. 2: The Rethink.Experiment Process:** Nine FGE grantees with capacity to absorb additional funds, potential for larger scale impact, and strong reporting skills were selected. With the support of social innovation experts and the FGE team, they are learning about and experiencing the stages and loops of innovation processes thanks to virtual coaching, one face-to-face training, peer exchanges and \$15,000 to test their solutions. Source: Fund for Gender Equality

Given the current literature, a designer looking to facilitate such a process, would most likely follow similar steps, and might even consult the literature cited earlier for a framework of design facilitation. However, as many practitioners might attest, there is a mismatch between current literature and the needs of the design

facilitation process: designers working in such context are required to use their designerly expertise and skills to design individualized processes using contextual-design tools.

In the case of the *Rethink.Experiment*, as this was the first time for the Fund and its grantees to explore the potential benefits of applying design methodologies to gender equality programming, the project followed a multi-phased approach that included an expanded phase of coaching on design and research methods in the early phase of the project as well as allowed for testing of tools and adjustment of working methods in real time. The extended focus on research also aimed at deepening understanding and building empathy with the multitude of constituents involved in each context.

Considering that the participating organizations were located in nine countries taking into consideration the specific complex context of each one not only seemed crucial to the success but also ethically appropriate considering the nature of interventions. All research activities were, therefore, co-created taking into careful consideration the specific reality of each context, leading to different research activities for each organization. For example, while in conversation with grantee partners in the Philippines, observation was considered to be an apt method, others, such as the Paraguayan partners, were encouraged to engage in in-depth interviews or mapping exercises, or - as in most cases - a combination of multiple methods.

Furthermore, through acknowledgement of the unique, complex environment of each organization and a strong emphasis on co-creation and capacity building, the team hoped to fabricate the condition that allowed partners to adopt broad and general design principles to their very specific contexts. Additionally, "exporting" particular design practices - which might be seen as political as they often come value systems attached - might lead to unintended consequences and hinder pluralism in design practices.

Using this specific context to raise more general concerns, the authors observe that models design facilitation neglect critical areas of practice in the field and raise the following questions of the design facilitation process.

#### *What is the role of the designer in mediation within a design facilitation context?*

This kind of multistakeholder process involves multiple actors co-creating with multiple interests and multiple dynamics and processes at play. This includes navigation of systemic power biases and structures within the organizations and participant social structures. Through the construction and activation of a design facilitation process, how are designers successfully identifying and managing these mediatory considerations? If facilitation is a designed process more than a crafted artifact, and therefore if the success of a design initiative is to be impacted by the success of that social process, what are the skills and techniques to be employed by designers? How are designers providing value as mediators?

In the FGE example, how do designers mediate a process between various international and local organizations, mediate an intersectional process, mediate a collaboration between those funding the funders, the grantees and the funding organizations - each with their own concerns, vulnerabilities, anxieties and interrelated power imbalances?

#### *How is design facilitation developing and connected to strategic vision?*

A critical piece of all design practice is the articulation and formulation of the design problem. That itself is a process of discovery, introspection and transformation. How does design take this deeply internal process embedded in design expertise, and enable its exploration in collective, collaborative processes by multiple stakeholders? How is vision, and the design problem at play, turned into a dynamic investigation as opposed to a static destination?

In the FGE example, the complexity and diversity of challenges faced meant that identifying the design problem was a critical collective competency to be developed. Designers could not come and provide the frame of the problem, and instead had to help participants develop intuitions and insight into their own evolving situations. Yet simultaneously, and paradoxically, vision, structure, purpose and strategy, needed to be developed out for participation to occur. The process had to both provide form and help generate form simultaneously for vision to emerge.

#### *What is the role of the designer before and after the "design process"?*

What are the considerations designers need to manage and maintain in the introductory phase of this work? When building space for co-creation and building a culture through a project for a design mindset and orientation? How are designers practicing preparation of their participants in this kind of transformative process? Furthermore, what are the roles, responsibilities and expectations for designers at the culmination of

a design sprint or project? In a systems context, there is continuing work that must be planned for and accounted for in helping build solutions that possess resiliency and sustainability in their scale of impact and endurance of effect.

In the FGE example, how does design prepare participants who are not otherwise exposed to design processes, encourage vulnerability and risk-taking, and prepare participants to engage with discomfort? How do we prepare participants to be open to the new, and move beyond the cynicism of failed initiatives past? How do designers help participants understand and approach future prototyping and development of design competencies and approaches after the end of the workshop, and help participants as they face challenges previously unanticipated?

*How are we creating space for reflection and transformation within the facilitation process?*

Co-creative approaches rely on participants coming to new kinds of approaches and embodying that newness in their work moving forward. Such processes are by definition transformative, yet how are designers trained and practicing personal and organizational transformation?

In the FGE example, how do designers make space and provide form for participants to become anew, and create the opportunity for new initiatives to take shape. How are we designing for embodiment, designing for resonance and designing for new futures and possibilities to take flight?

## **4. Social Models to Underpin Design Facilitation**

These questions suggest a much more fundamental need for models to apply in design facilitation. When and what is design operating on within the context of a team, within the context of an organization? What are we focusing on when design acts through facilitation upon a social dimension?

One answer may lie in the work of Scharmer and the social field. In Peter Senge's description "...in every setting, from working teams to organizations to larger social systems, there is much more going on that meets the eye. Many of us have known firsthand the excitement and energy of a team that is deeply engaged in its work, where there are trust, openness, and a pervasive sense of possibility. Conversely, we have also seen the opposite...where each statement has thick political overtones of defending one's position or attacking others'. Scharmer calls this the 'social field'" (Scharmer, 2007, p. liii.).

To us this immediately calls upon a quality, or dynamic that a design facilitation seeks to develop and embody. Scharmer, in his work on a theory of organizational change, theory u, argues that fundamentally, a key aspect of facilitation and transformation comes from an attention paid to a "blind spot" (ibid), "From a structural point of view, the blind spot concerns the fact that most of the key issues of institutional development cannot be solved at the level of the organization. Today's organizations are often too big to deal with the small problems that are better solved locally, and too small to adequately address the big problems that must be considered in the context of the larger ecosystem of value creation". (ibid).

What is critical in our context as design facilitators is then understanding that beneath the veneer of a facilitated group process is a complex social dynamic that must be charged and cultivated, redirected and opened. And immediately lays bare a paucity of design training in the underlying transformational issues at play. Adding to this complexity, is the inherent need for translation of and between disciplines, contexts, communities, and organisations that designers are required to fulfill.

Using such a model leads to questions and considerations that are provocative additions to the practice of facilitation. One such example is the creation, use, development and nature of "vision" and strategic intent within the facilitation process. This model suggests that the concepts of vision and intent are dynamic, and their interpretations are both temporally and socially bounded by the individuals connecting to them at any given point in time. Building on Scharmer's work and Senge's *creative tensions*, Stroh emphasizes: "If people hold to the vision of what they want and are simultaneously clear and candid about where they are, then the tension will tend to resolve in favor of what they want. This principle applies both at the individual level and the collective level. Translated to the collective level, when people have a common aspiration - as expressed by a shared vision, mission, and set of values - and a shared understanding of not only where they are now but also why - then they establish a creative tension, which they are drawn to resolve in favor of their aspirations". (Stroh, 2015, p.73).

Designers therefore need new models of facilitation and even of what their participation entails and requires of them. It would involve new models of training to see and preparing to do.

Such models of design practice would involve an articulation of and an understanding of collective intelligence, of shared and built capacity and the ways by which art and form give these conceptions shape and direction. It would be impossible, in such a practice of collectivity and awareness to ignore the hermeneutic element in such a process. "The hermeneutical dimension of the process [of experience] is inescapable: every examination is an interpretation, and all interpretation reveals and conceals at the same time". (Depraz, Varela, & Vermersch, 2003, p.9).

In such facilitation practices, there is a goal or moment of transformation. How are designers being trained to identify and help coalesce participants around these critical moments? We have discussed them in terms of *crystalizing moments* and in terms of *blind spots* within a social field. Capra offers another model to approach the same moment in terms of critical junctures within living systems. There is a spontaneous emergence of order at critical points of instability - emergence or self organization; "in other words, creativity - the generation of new forms - is a key property of all living systems. And since emergence is an integral part of the dynamics of open systems, we reach the important conclusion that open systems develop and evolve". (Capra, 2002, p.13).

This has yet to entail and involve a clarified and critical discussion of power and privilege, of the role of the designer within participatory processes. Design as a discipline has always been vulnerable to a charge of irresponsibility, of creating and designing artifacts with consequences, often dire, beyond the initial intent and predictions of their designers. Through his work and writing, Papanek repeatedly emphasized that "the designer must be conscious of his social and moral responsibility" based on his underlying understanding of design as "the most powerful tool yet given man with which to shape his products, his environments, and, by extension, himself". Designers, he warned, "must analyse the past as well as the foreseeable future consequences of his acts". (Papanek, 1985, p.103). This dynamically comes to the fore within facilitation practices, wherein a designer's actions as facilitator, their wielding of power to enable and disable participants within a process is a significant act of franchisement and disenfranchisement.

## 5. Towards New Models of Design Facilitation

As design facilitation evolves and emerges as a form of design practice in response to a need to develop systems-level design interventions, we must continue to build our understanding of its process and impact. And through these mechanisms develop a deeper understanding of the critical inflection points and key skills of designerly facilitation. As with every discipline and practice of design, some of these skills are a resuscitation of design practice through the ages, albeit through a different lens, and some are the appropriation of other traditions and practices now within a context of design praxis.

To remain relevant in these new professional realities, a sought-after, and, more to the point, effective designer will need to be able to formulate, conduct, analyze and synthesize the results of research that informs design processes and design decision-making beyond the traditional, cursory client interview and a narrowly framed, shallowly plumbed survey of secondary resources. Rather, the contemporary designer will need to possess the ability to cultivate and effectively utilize meaningful input from the varieties of people who both affect and will be affected by the design processes that guide the development of these projects and their outcomes. Failing to broadly account for the social, economic and technological biases of eventual users and audiences will limit the designers' abilities to create useful, usable and meaningful artifacts, services and experiences with, rather than for, these groups.

As we begin to understand this dynamic of design as social practice, design facilitation as intervention, we will need to develop more robust models of design facilitation in practice. This paper proposes but a few critical pathways to address. We will need to draw from schools of mediation and build a designerly practice of mediation within participatory processes. We will need to draw from schools of organizational dynamics and change to build better practices of shared vision development and the collective development of high quality design problems. We will need to expand our view of the design process itself and build new forms and approaches to form for an wider area of design intervention. And we will need to integrate a more collectively reflexive and reflective process to facilitate the underlying social transformation, to better identify the right questions to ground intervention and to even understand our role and impact as designers embedded within and active contributors to a system's change process.



We would speculate that such a process may also involve a return to the artistic, to develop methods and approaches that inspire and are evocative. Design must still delight as well as inform, and operate in a space beyond and between scientist and artist. It could also question the use of the term facilitation itself and whether it is appropriate for the lexicon of contemporary design practice.

Our research into design facilitation questions where and how a designer must carry expertise, and what are they approaching when designing the non-physical? How are designers approaching the design of and for the social field? Current definitions of the design facilitation process outline a series of steps and checklists. Yet as we are finding, when design is a social process, it is a story of journeys and no longer an inventory of destinations. How might we move towards a more plentiful model of design facilitation?

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