APPENDIX

A Design Tool-Box to Scale Social innovations from one context to another

Master Thesis

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Appendix A
Project Brief
(Chapter 1.4)

Personal Project Brief - IDE Master Graduation

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Supporting Urban Social Innovators to scale out in multiple contexts   project title

Please state the title of your graduation project (above) and the start date and end date (below). Keep the title compact and simple.
Do not use abbreviations. The remainder of this document allows you to define and clarify your graduation project.

start date   01 - 09 - 2020   18 - 03 - 2021   end date

INTRODUCTION *
Please describe, the context of your project, and address the main stakeholders (interests) within this context in a concise yet complete manner. Who are involved, what do they value and how do they currently operate within the given context? What are the main opportunities and limitations you are currently aware of (cultural- and social norms, resources (time, money,...), technology, ...).

Cities can be seen as ecosystems of artifacts, where different systems co-evolve, co-exists and interact with each other (Manzini, 2019). Urban environments have the generative potential of being hubs for innovation as they integrate diversity through interaction and network. Mobilisation of civic creativity and problem-solving capacity can bring immediate solutions to the pressing social issues citizens face and in the long term all those innovations together can push for a transition and have a larger impact on reshaping the current system and institutions (Avelino et. al., 2019). In this context, Social Innovation (SI) is one of the most promising frameworks for delivering service innovation and achieving urban sustainability transitions (Manzini, 2015) [figure.1]. SIs can be defined as: 'new ideas (products, services and models) that simultaneously meet social needs (more effectively than alternatives) and create new social relationships or collaborations' (Avelino et. al., 2019). In this scenario, design is seen with a fundamental role of enabling, driving and supporting bottom-up, local innovations in the perspective of a systemic change (Concilio & Tosoni, 2019). This role is studied in the Designscapes Project, a H2020 funded by the European Commission with the aim of enhancing and upscaling social innovations across European cities. In particular, the project aims to build the needed capacity among those urban innovators so that they can ideate and implement their initiative in one city and then scale it and replicate it in other contexts as well (designscapes.eu, n.d.). Up to now a "Training and guiding program" is planned to serve that and tools and design methodologies are provided to the participants to support their process. The participants of the Designscapes Program are following the Social Innovation process (Murray et al., 2010). Currently, the applicants of the program passed the prototyping and implementation phase and some of them have been selected for the next phase: scaling in order to achieve a systemic impact. According to Mulder (2019), the role designers will have in the scaling phase is still open for exploration and experimentation.
Therefore, the challenge and focus of the project is to realize tools that can sustain expert and non-expert designers to implement and scale an initiative from a context to another one to eventually achieve a large-scale impact by replicating a certain 'culture'. According to Northouse (2012), culture is a specific mix of values, learned beliefs, rules, norms, symbols and traditions shared by a group of people or community. In regard to the Designscapes initiatives I define 'culture' as referring to the organizational model, the way of allocating and structuring resources, the processes, the capabilities and skills, the relations, the business model, the mission and vision; however, more research still need to be done to better define 'cultural replication'. There are different ways an innovation could scale and different strategies that could be adopted. Since SI are deeply connected with the social and cultural norms, institutional routines and values of a context and its local stakeholders, it is important to understand deeply and qualitatively the socio-cultural context where the intervention will be adopted. In order to do so social innovators need to engage and collaborate with the local stakeholders. For instance, this can be facilitated by effective communication strategies and the use of narratives of change techniques: narratization (narrative-making) permits a collaborative approach to sense-making (Price et al., 2018). Storytelling ensures narratives surpass time and contextually sensitive factors.
The graduation project aims to contribute to the research and outcomes of the DESIGNSCAPES project, as well as empower through design the applicants of the program to successfully scale their innovation.

Avelino, Flor, Julia M. Wittmayer, Bonno Pel, Paul Weaver, Adina Dumitru, Alex Haxeltine, Ren Kemp, et al. Manzini, Ezio. 'Design in the Transition Phase: A New Design Culture for the Emerging Design'. Design Philosophy Papers 13, no. 1 (2015). https://doi.org/10.1080/14487136.2015.1085683.
MULDER, Ingrid, and Maaike VAN SELM. On Transforming Transition Design. Conference Proceedings of the Academy for Design Innovation Management 2, no. 1 (2019).
Price, Rebecca, Cara Wrigley, and Judy Matthews. 'Action Researcher to Design Innovation Catalyst'

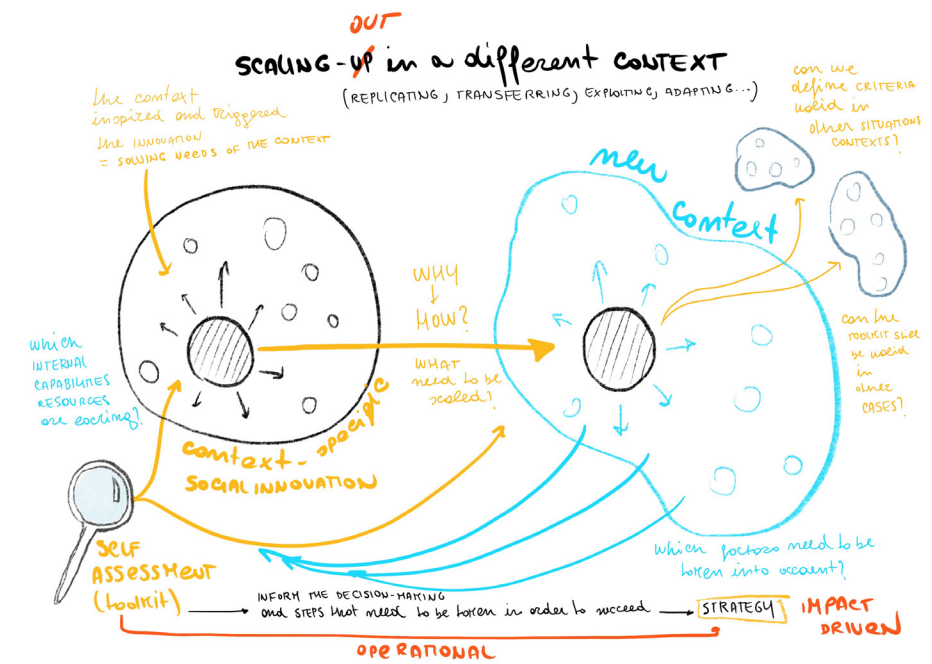introduction (continued): space for images

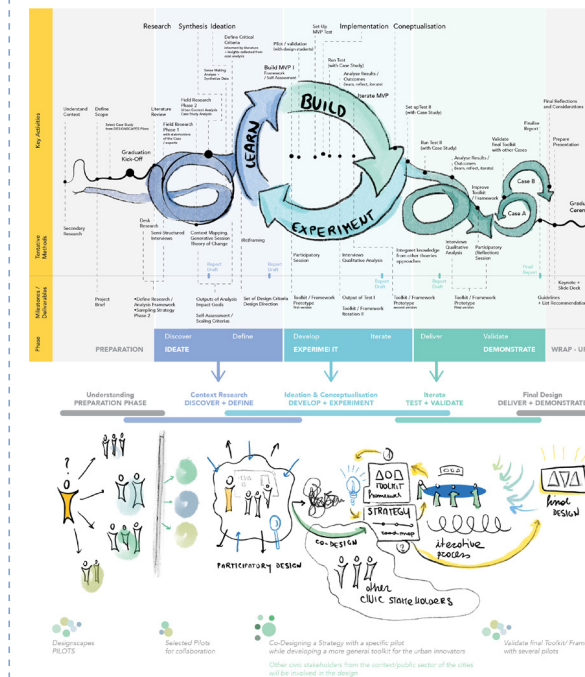image / figure 1:   An overview of the context and what it means scaling out a social initiative to other cities.

image / figure 2:   My design process will follow a learning driven and participatory approach

PROBLEM DEFINITION **
Limit and define the scope and solution space of your project to one that is manageable within one Master Graduation Project of 30 EC (= 20 full time weeks or 100 working days) and clearly indicate what issue(s) should be addressed in this project.

Most of the time, these innovations are hyper-localised and context specific. They are dependent on certain local resources (Mortati & Villari, 2013) and embedded within the cultural norms, institutional routines and values of a specific context. Therefore, this might be a challenge if they want to replicate, expand or adapt the innovation somewhere else. However, contexts may have more similarities than thought, and bringing together the collective intelligence from these contexts can be beneficial to all (Kersten et al., 2015). Instead of focusing on the differences we should focus on similarities and common grounds in order to replicate successfully a certain 'culture'. Another challenge these small-scale interventions face lay on a lack of capabilities and resources to release their potential to grow (Cangiano et al., 2017). In both cases, collaboration and networking are powerful tools for scaling (Tether, 2002), and could help social innovators to disseminate practices across borders (Strasser et al., 2019).
Therefore, the challenge is to investigate how design can support social innovators developing an impact driven strategy to scale out their innovation in multiple contexts while replicating a certain 'culture'. By cultural replication I mean certain contextual factors, internal resources, organizations & relations, skills & capabilities needed that would help to scale out in multiple contexts. However, more studies need to be done for a better understanding of what replicating a culture means and how that can be triggered through design.

Cangiano, Serena, Zoe Romano, and Matteo Loglio. 'The Growth of Digital Social Innovation in Europe. An Open Design Approach to Support Innovation for the Societal Good'. The Design Journal 20, no. sup1 (2017).
Mortati, Marzia, and Beatrice Villari. 'Design for Social Innovation. Building a Framework of Connection between Design and Social Innovation'. In Design for Social Innovation. Building a Framework of Connection between Design and Social Innovation, 2014.
Strasser, Tim, Joop de Kraker, and René Kemp. 'Developing the Transformative Capacity of Social Innovation through Learning: A Conceptual Framework and Research Agenda for the Roles of Network Leadership'.

ASSIGNMENT **
State in 2 or 3 sentences what you are going to research, design, create and / or generate, that will solve (part of) the issue(s) pointed out in "problem definition". Then illustrate this assignment by indicating what kind of solution you expect and / or aim to deliver, for instance: a product, a product-service combination, a strategy illustrated through product or product-service combination ideas, ... In case of a Specialisation and/or Annotation, make sure the assignment reflects this/these.

Designing a toolkit / framework that support social innovators to scale-out their innovation from a context to another one

Main research question:
How can social innovators scale-out an intervention from a context to another one? Would be 'cultural replication' an effective way of scaling-out to multiple contexts?
What are those key factors that need to be replicated when scaling into another context?

First of all, 'cultural replication' need to be better defined as well as understanding what type of contextual resistance the Designscapes initatives face when scaling out into a different context and what are those main barriers (among cultural norms, institutional structures, lack of connections with local stakeholders, lack of resources...). Therefore, I will start researching and exploring the context and assessing what need to be scaled (which key innovative factors, contextual circumstances, internal resources or capabilities) in order to replicate; then, with the insights collected during the context research phase, I will investigate how those social innovators can scale out their initiative to another context and how, as designer I can support and empower them through a toolkit/framework.

The aim of the assignment is to devise a toolkit or framework which can support urban and social innovators to develop an impact driven strategy to scale out the initiative from a context to another while replicating a certain 'culture'.

Project Process
(Chapter 02)

The two above Figures (1, 2), show the process followed during the project, where Research Questions, Goals and Hypothesis formulated are mapped out and insights connected to those that have been explored along.
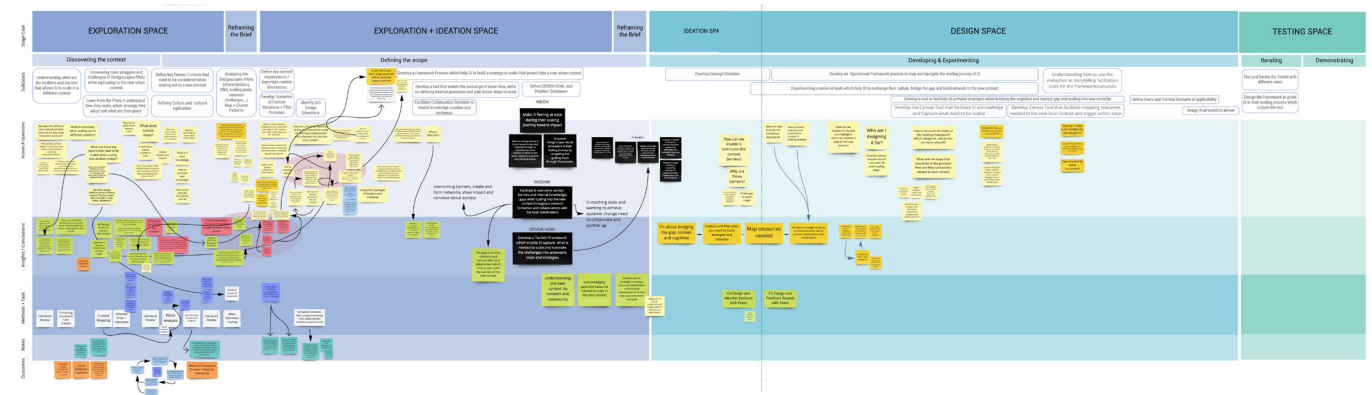

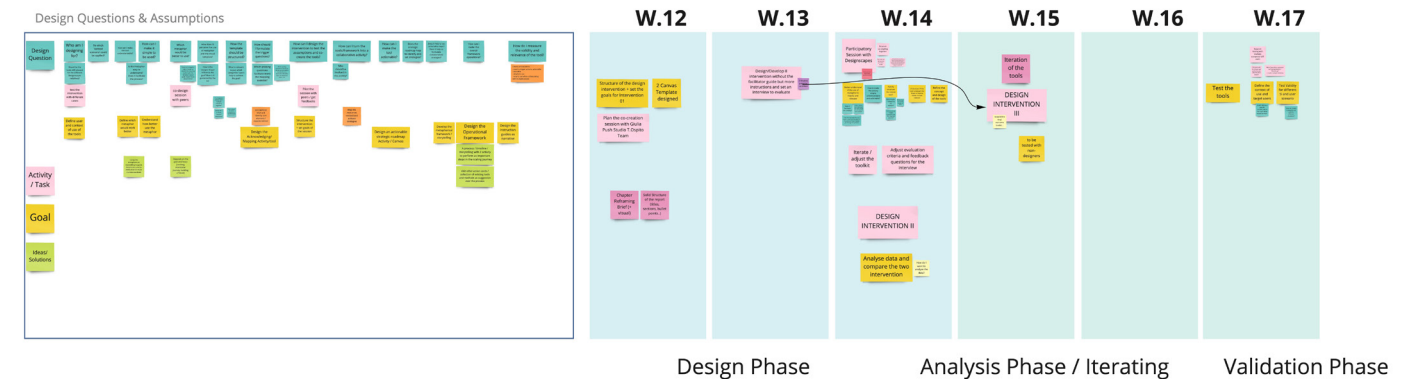*Figure 01 Screenshot of the process mapped out in Miro Board*

Figure 02 Screenshot of the weekly plan with goals and research questions to explore

Appendix B

Literature Research

THE INNOVATION PROCESS
(Chapter 3.1)

The social innovation process has been used as base for the development of the scaling framework process. In addition to this, the Transformative Capacity and learning process has been also used as theory informing the steps of scaling. Scaling can be resembled to those processes.

Idea Generation [Discover + Define]
1.Exploring opportunities and challenges
In this stage the innovators look out to the world in search of inspirations and 'problems' to solve. In this case it is important to find the right questions in order to be able to find the right answers later on.
2.Proposals and ideas
This aligns with the idea generation phase that can be found in the design process as well. Throughout different (design) tools and methods ideas can be fostered and generated.

Prototyping Phase [Develop + Deliver]
3.Developing and Testing
However, ideas are at this moment only a product of our minds and need to be proved valid and effective in the real world. This means building prototypes and interventions to get the ideas tested in practices in order to gain understanding if what has been thought is valuable for other people, hence desirable, in the sense that there is demand and the demand is met.
4. Making the Case
This phase regards marketing and communication strategy to get stakeholders involved and attract users before to really implement the solution in the real context.

Implementing and Scaling [Deliver]
In the traditional business sector this will be recognized as going to market and then grow and expand the success. Usually the traditional Design Process stops at the prototyping and initial implementation phase. This graduation project aims to go beyond and explore new design paths, which means applying traditional design methods and tools to facilitate the scaling process of SI.
5. Delivering and Implementing
Once the ideas have been proved to be 'desirable' and generate demand, they need to be embedded into everyday life by proving themselves as viable and financially sustainable.
6. Growing, Scaling and spreading
At this stage a strategy to scale will be developed in order to bring the innovation to benefit a larger pool of people.

Systemic Change
This is the ultimate goal of social innovations: giving a new face to the old and dusty systems which are not functioning effectively anymore. However, this cannot be achieved by a single project alone, because it entails the interaction of different elements, such as social movements, business models, laws and regulations, data and infrastructures, mindset and paradigm shifts (Mulder and Maaike, 2015).

Scaling Theories and Case Studies
(Chapter 3.2)

During the Literature Research, several successful Cases of business and Social Enterprises have been selected to be analyzed; a final comparison between two famous Cases have been drawn with the goal of retrieving insights and key learnings, but also to see what the Social Sector could learn from the Business Sector. Social enterprises are judged by both their social impact and their ability to thrive as financially sustainable businesses. Therefore, it makes sense to identify what successful social enterprises are doing well and to replicate those successes (Thane Kreiner, 2017) in the context of Designscapes.
Addressing RQ2: What should be scaled? What are the key factors?
Case Studies in the social field + understanding the Social Franchising Model

McDonald formula to scale is about capture success factors to replicate and adapt to the needs of the new contexts and markets.

The McDonald Franchising Approach	The Grameen Model
What MacDonalds did is not just a 'copy-paste' of a (successful) formula; it extrapolated the successful part of the idea, its DNA and then created a formula that can be easily adapted in different local contexts.	*Grameen Bank redefined the industry, introduced new standards, norms, and set of services that did not exist prior to the innovation (Acs and Sany, 2009). 'Grameen created a methodology and an institution around the financial needs of the poor, by creating access to credit.*
What did work well?	
☐ Quality Check + maintenance of consistency	☐ It leveraged on contextual factors;
☐ consistent and strong brand image = good communication and storytelling which engage and attract people	☐ It started with replicating in similar socio-cultural contexts (with similar demand, needs, challenges..)
☐ performance optimisation and efficiency	☐ It identified core components of the SI — it's DNA
☐ Replication of a formula / guidelines — manualisation and contracts	☐ It built a system/format easy to be replicated somewhere else by someone else
☐ adaptation to the context and customer's tastes	☐ It was able to communicate and show the 'business validity', while creating advocacy
☐ Ability to synthesise different cultural and local nuances, and continually innovate, while maintaining a global brand identity.	☐ It was able to engage in networking — networks helped to facilitate the diffusion of the 'model'
☐ simplification of the idea and working process in the sense of standardisation	☐ created social value and opportunity for the most vulnerables of the society: empowered women and poor

SIMILARITIES

Similarly to the McDonald successful approach, the Grameen Model of poverty reduction was successful not only because it has been able to sustain its business throughout cost-effective practices but especially because it was able to adapt to serve the needs of different communities with different sets of culture and social needs.

- scale a radical innovation that bring up systemic transformation and paradigm shifts

- able to frame the vision and take up on opportunities

- leadership and a great capacity of resource mobilization (Campbell, 1997)

- the network of stakeholders as critical enabler factor for scaling, especially in the 'replication model'

DIFFERENCES

Even though some strategies adopted are similar, on the other hand what really distinguishes the two sectors is the motivation and drivers behind. For social entrepreneurs, the level of social or environmental impact they can achieve is what drives them and fuels their passions. Social enterprises differ from non-profit organizations (NGO) because of their business models, they apply business principles and earn profits to support, partially, their operations and to be able to sustain themselves in the long run (Thane Kreiner, 2017).

Difference of Priorities and Goals

- Market Orientation - Technology Driven & Market Pull - Business type of relationships with the partners and stakeholders, where profit and money value is exchanged and used to measure success.	- Social Value Creation and Social Impact Goals - Social Needs Pull and Personal motivation and benefit for the society as drivers, bring positive change within a certain community. *Social entrepreneurs play the role of change agents; they focus on driving social change for the benefits of society, especially the part of society which is more vulnerable and usually not addressed by the traditional type of companies (Martin & Osberg, 2007).* - The social actions are shaped and influenced by social context, norms, and values. - Engaging in a process of continuous innovation, adaptation and learning (Dees, 2001) - They tend to create new social relationships.

Interviews with Social Entrepreneurs
(Chapter 4.1)

Several Social Enterprises (SE) around the world have been selected according to the following criteria:

- focused on social impact and social profit;
- scaled (successfully) in at least two different geographical contexts;

Successfully in the sense that the business model proved to be sustainable in the first place;

- the initiative demonstrate somehow to generate positive impact and to benefits the targeted society/users;

GOALS:
- Understand the replication pathways of social ventures, steps and challenges;
- *What is scaled, what is copy and pasted and what is adapted to the new context?*
- Main challenges of scaling social ventures;
- The influence of the context in the innovation process;
- The influence of the context in the scaling process;
- *How to choose where to scale?*
- *How context is explored, what is it taken into account? Which local characteristics?*

Here an example of the structure of the interview carried with Professional Social Entrepreneurs:

1. Could you tell me more about your role in the process of replicating and scaling social ventures?

   o   Please provide me with some concrete examples or projects you worked on...

2. So for example... let's take one of the Cases you mentioned... can you mention briefly the steps and process followed from start to the end regarding the development of a project?

   o   Is this a small-scale project?

   o   Is there a single team working on the project from start to end?

      ▪   How does this work?

3. After having implemented the project in one context... how do you decide to scale somewhere else?

   o   Why?

   o   Can you tell me more about the scaling and replication pathway?

      ▪   What are the main steps to undertake?

      ▪   And, what are the main challenges faced during this path?

         ▪   Can you provide me with some real examples?

      ▪   How do you decide what it will be scaled?

         ▪   What is copy and pasted exactly as it is and what is it adapted to the new context?

         ▪   How do you define what is replicated and what will be changed?

            ▪   Why?

Okay, let's move to the next topic... I want to know more about the context.

3. Would you define the project context-specific?

      ▪   Is it embedded in the context?

         ▪   How?

         ▪   Why?

4. How does this context influenced the development of the project?

      ▪   What are the local characteristics that influence or shaped the project?

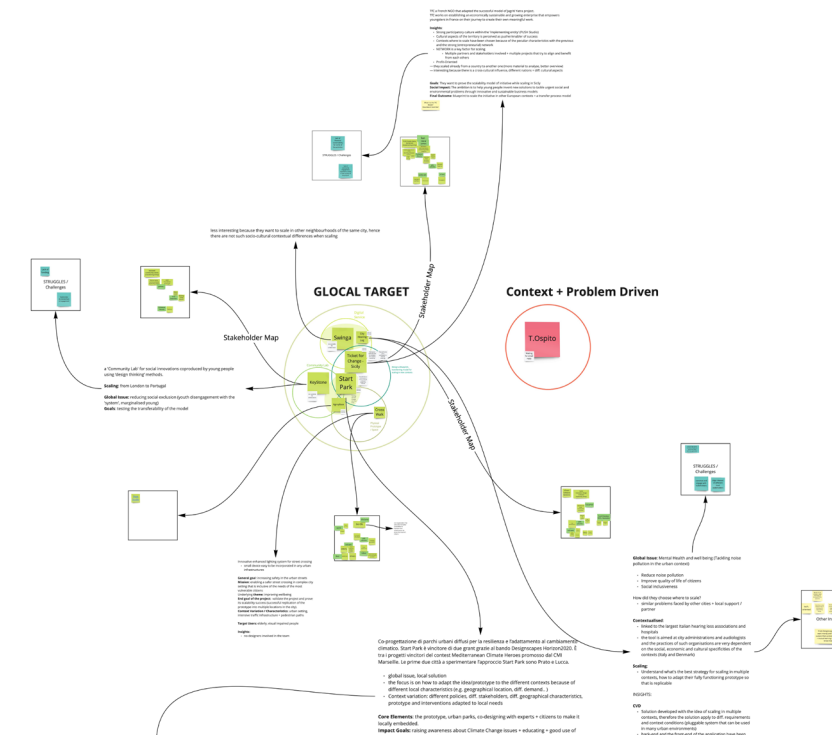5. How do you decide for the new context where to scale the project?

Appendix C

Context Mapping and Other Design Activities
(Chapter 06)

Conclusions and Main Findings from the Document Analysis

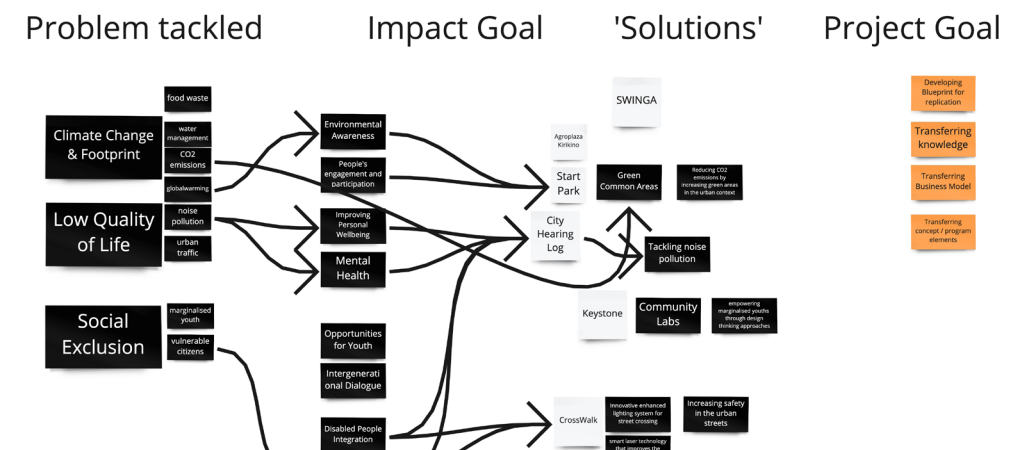*Figure 03 Mapping the stakeholders of Designscapes Initiatives in Miro Board*

Figure 04 Mapping Designscapes initiatives goals and clustering per 'themes' and topics of the project

They solve glocal challenges at a local level, hence they are hyper-localized projects.

They are all embedded in an ecosystem of networks locally. They took advantage of collaborating with different local actors and cultural associations. Moreover, since the project they are scaling is not their full job. Those people tend to use the knowledge and experiences gained from other field and other projects, which provide a competitive advantage.

Online Surveys

Multiple online surveys have been shared in the Facebook Community Group of Designscapes and to each initiative individually by email. However, just two initiatives filled in the forms shared (Crosswalk and Agroplaza). The first survey was designed to get a better overview of the vision and scaling goals, as well as motivations of the urban innovators; The second form tried to understand how context plays a role in the implementation of a project, with the goal of extrapolating the main elements that could ostacolate or enable the scaling process. Due to little participation on the questionnaires patterns cannot be drawn, however the answers obtained from the two participants have been used as starter of conversation and furtherly addressed during the interviews with the two initiatives.
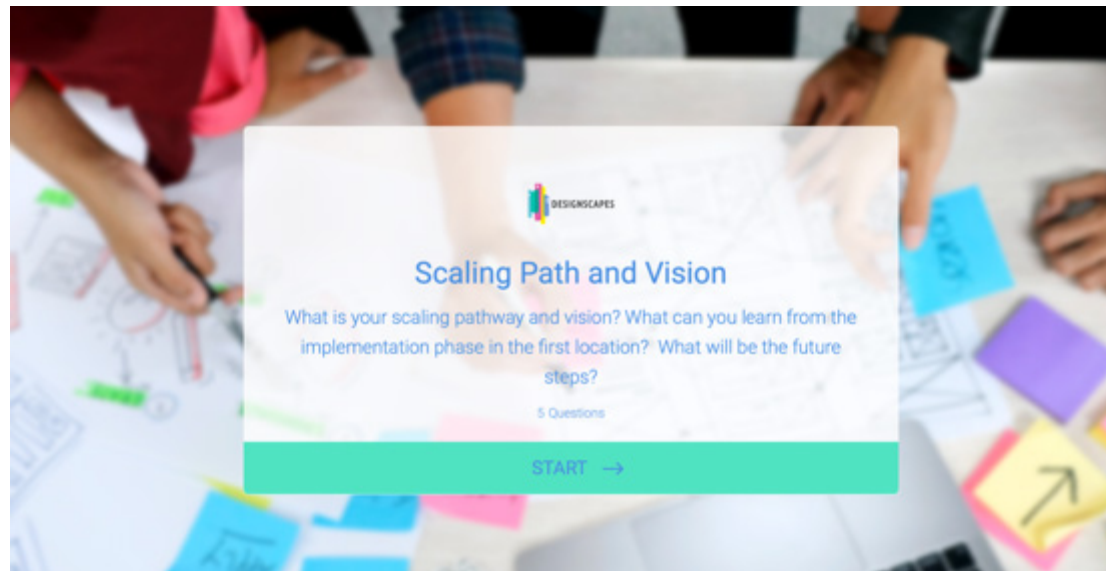

Figure 03 Screenshots of the Questionnaires shared with Designscapes initiatives during the Context Mapping Phase.
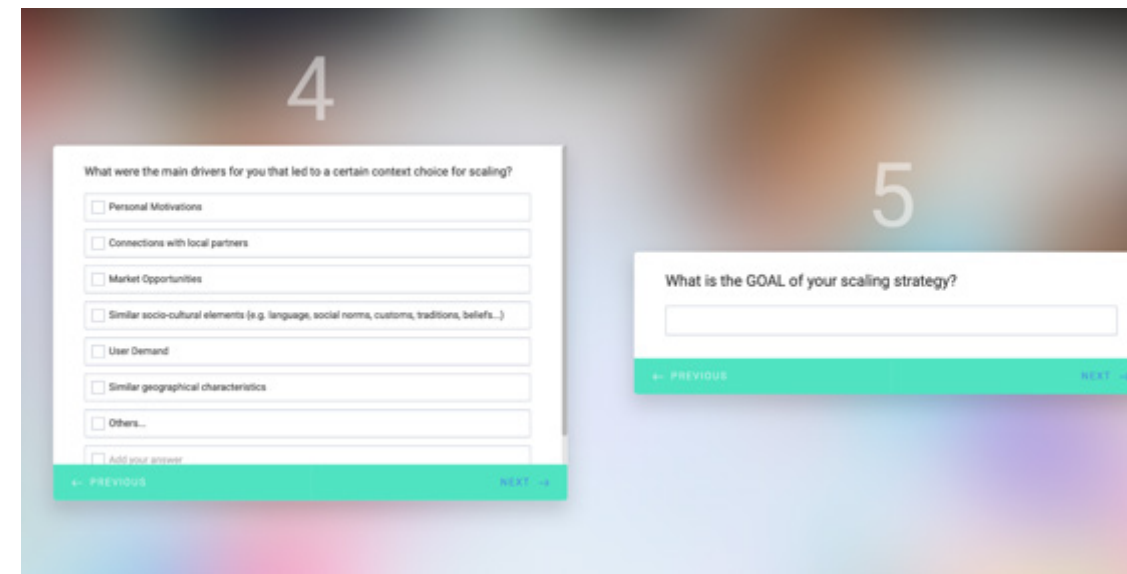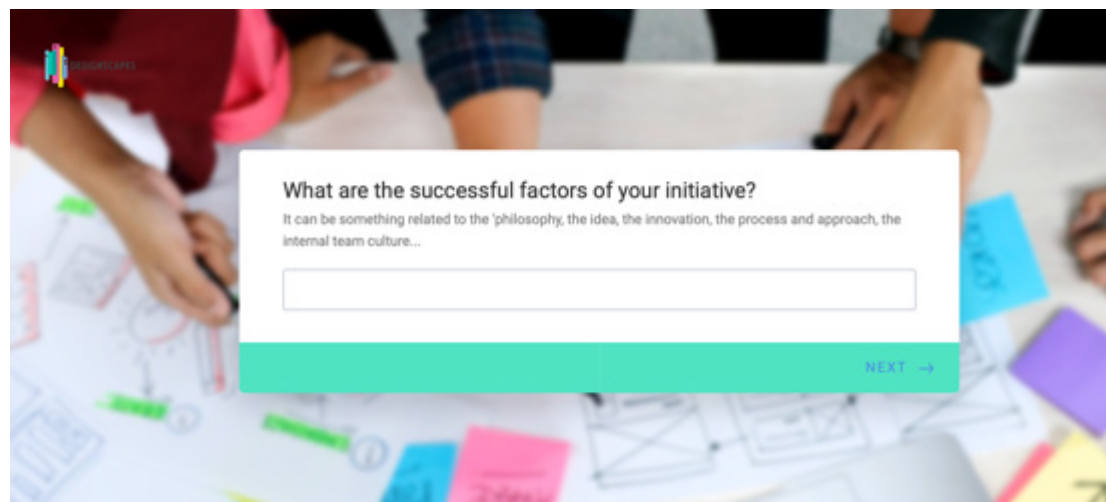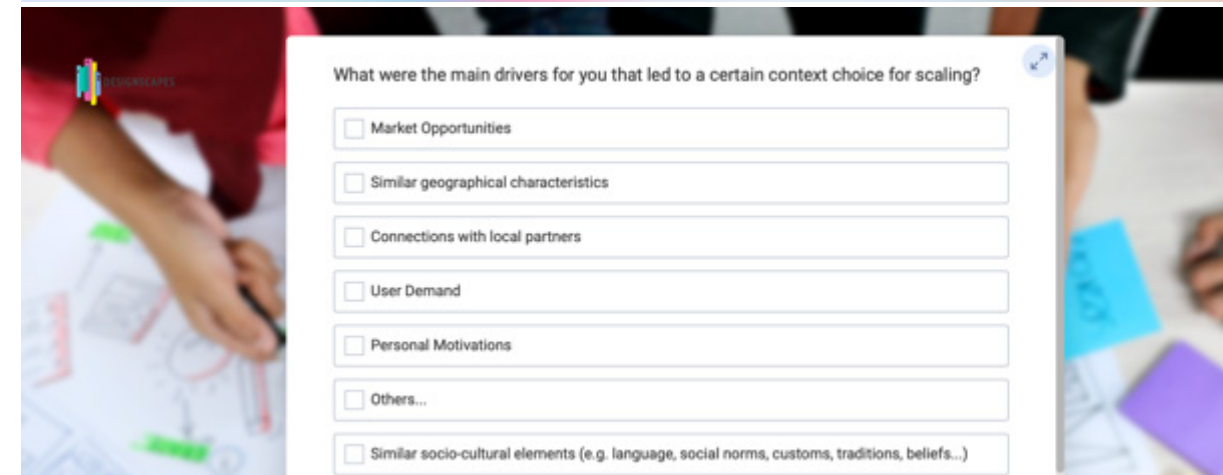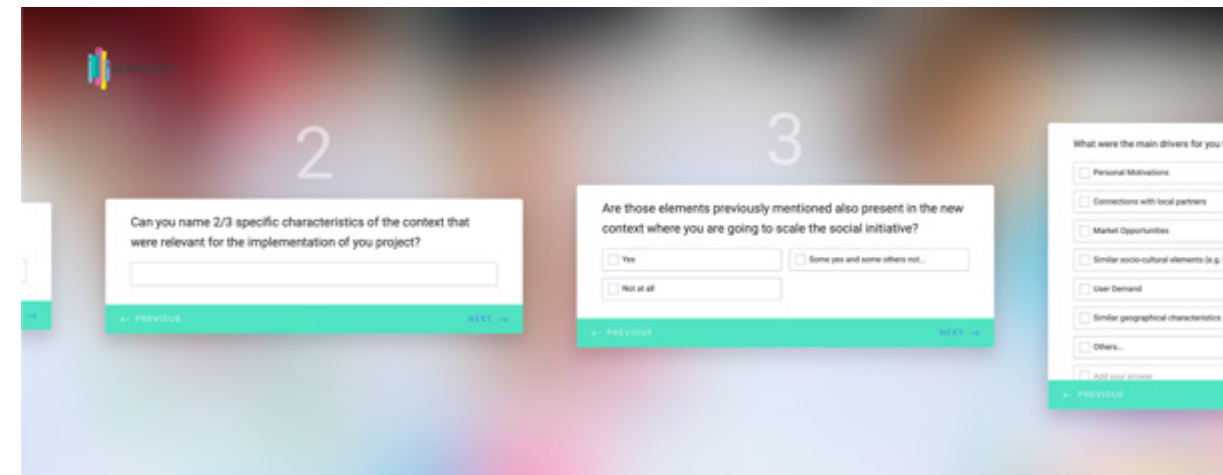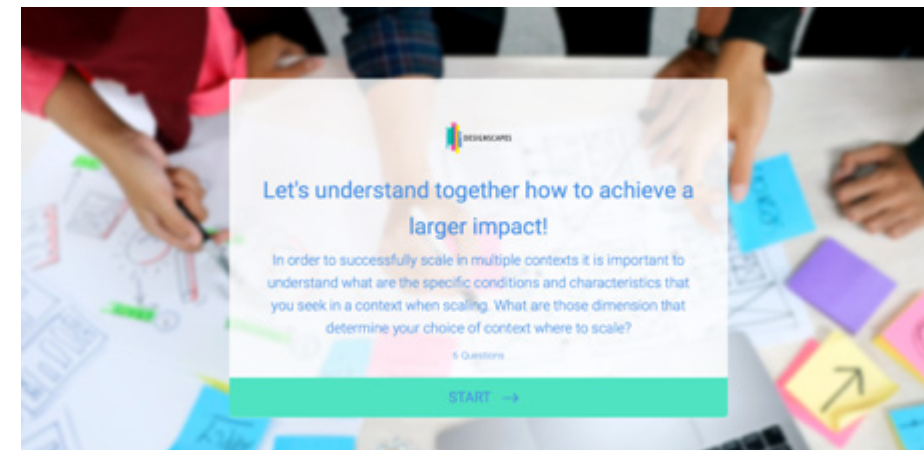

Figure 04 Screenshots of the second form sent out to the users.

Semi-Structured & In-depth Interviews
(Chapter 06)

Structure and Process

In the first round of (informal) interviews the following questions have been addressed:

- *What are the Designscapes pilots going to scale (product/service or idea, way of working, or the organizational model)?*
- *Which approach of replication do they want to adopt?*
- *What do they want to achieve?*
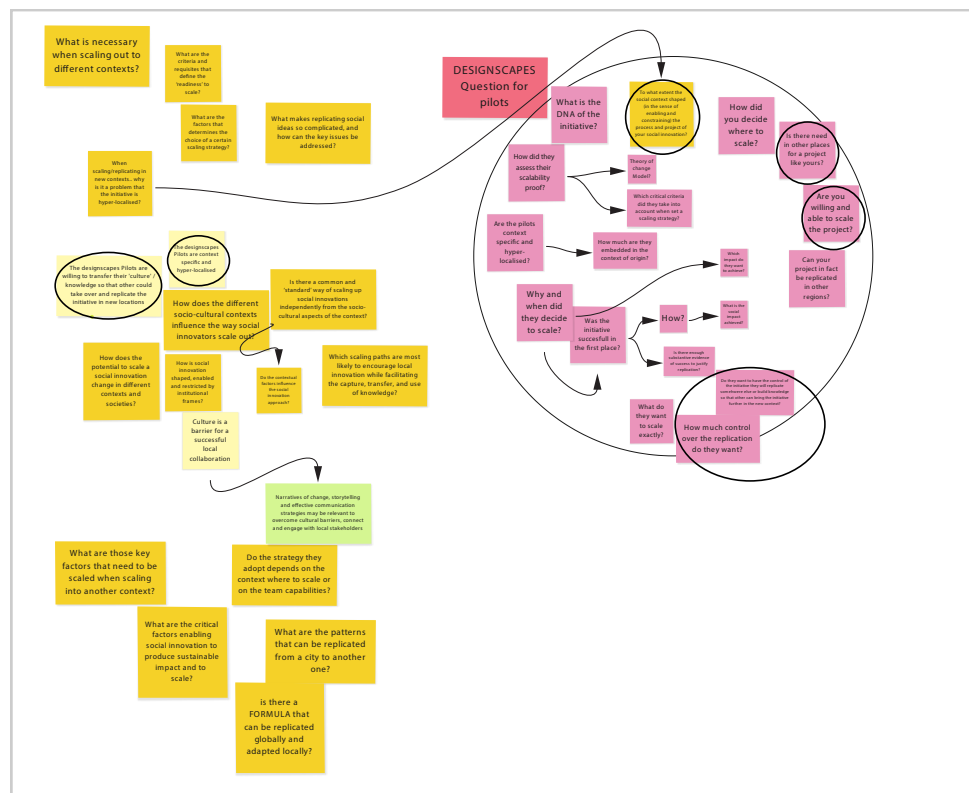- *How did they decide where to scale and why?*

Figure 05 Assumptions and questions to explore while mapping Designscapes initiatives and dive deeper into their context

Results & Main Findings

The findings from the interviews gave important insights as regards the struggles and challenges Designscapes are facing during their process. Moreover, throughout these activities a better overview of who are the participants, what they are doing, how and where they are in the scaling stage has been achieved. Initial differences and similarities among the users have been mapped out; those common elements could be perceived as the pillars of scaling SI and key factors enabling the process. For example, 'community engagement' and collaboration are key characteristics of Social Urban Innovation projects, and have been defined as such in Literature as well.

Other Interviews Structures

Other academic experts have been also contacted for an interview in order to gain more knowledge in certain expertise areas that was touching upon the topics of my research. An

example of the interviews conducted with Aldo de Moore, an academic researcher and stakeholder involved in the Designscapes project.

INTRODUCTION

  Collaborative Networks, Patterns among Designscapes Initiatives, Collaborative Culture dissemination

GOAL: I want to know more about how the initiatives collaborate together and how in those collaborations organisational culture has been exchanged between two parts or multiple actors.

Interested in how they have been able to ovrcome the differences of culture between the different contexts and communities, how did they aligned in the different patterns, terminologies..

How can we bridge the conceptual gap that often exists between networks of communities to reach beyond their individual interests and practices?

How can we externalize the tacit knowledge of participants in community networks into conceptual structures that provide a means for others to interact with, react to, negotiate around, and build upon?

What collaboration patterns grounded in the ontology can be identified to support this scaling up of the collaboration?

  The above questions from the paper captured my attention and wish to be the focus of this talk...

General Overview of the Research

  Which interesting patterns did you notice when doing your research?

  o What do the different initiatives has in common and what are the biggest differences?

  o What were the most interesting patterns noticed when analysing the different type of initiatives?

  o How did you cluster them?

  o Which different type of SI categories did you find?

  ▪ While analysing and clustering them... do you think they all embrace a collaborative culture within their 'organisation/initiative'?

  ▪ How do they differently embrace this type of culture?

  o What unexpected insights and outcomes did you get?

Collaborative Networks & Collaborative Culture

  What did you learn about collaborative networks?

  How do you build collaborative common ground?

  o which techniques, methods, methodologies or tools have been used or work best?

  o How do you define the common mapping language to map the connections among the collaborations?

  o How do you resolve the different epistemologies when different associations, actors and

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Interview Guide of one of the second-round of interviews conducted is shown below (the interview has been preceded by a Generative Exercise, a sensitizing toolkit has been sent out to be filled one week before):

Procedure & main topics of interview...
Building networks and community, Relationships, Scalability

Project general
- ☐ How did the workshop go?
- ☐ What was the outcome?
- ☐ What other updates on the project do you have?

Engagement of stakeholder (Building network & community) (use the sensitizing as conversation starter)
- ☐ How do you engage the stakeholders atm.? Strategy?
- ☐ What challenges do you face or barriers to overcome?
- ☐ How did you built the network of stakeholders in the old context?
- ☐ What was the strategy?
- ☐ What was different in the engagement with citizens and municipality people?
- ☐ How will you engage with the stakeholder in the new context?
- ☐ How will you build the network in the new context?
- ☐ Is there a partner will you be more close to in the new context?
- ☐ How will the new interactions with the new actors will change the way you work?
- ☐ What is it changing in the process?
- ☐ How does the differences in the external context influence your internal culture and approaches?
- ☐ How do you exchange and share knowledge with the new actors of the new context?

Team dynamics & Internal Culture
- ☐ How would you describe your team dynamics/ relationship?
- ☐ What is the most important aspect here?
- ☐ If you think about how you tackle a challenge, do you see that your team mates tackle them differently? How? Why?
- ☐ How are internal dynamics influenced by external factors (such as other stakeholders beliefs, new interactions, new policies..)?

Communication Strategies
- ☐ What do you think is a good way to communicate with stakeholder?
- ☐ What is most needed to convince stakeholders?
- ☐ How did you adapt differently your communication style in the new context? What did it change?
- ☐ Do stakeholders have to communicate your idea further to other stakeholders?
- ☐ How is this going?

SCALABILITY PERSPECTIVES (share future scenario creative task)
- ☐ Why do you scale your project in the first place?
- ☐ Why do you think scaling is important/ relevant?
- ☐ When is scaling a success for you?
- ☐ 'Agroplaza consists of modular systems that can get adapted to different environments and uses, which make the project flexible and scalable.'
- ☐ How and what is flexible and scalable?
- ☐ Do you see the potential to scale in other locations of Spain as well?
- ☐ How? Why?
- ☐ Scalabiliy Goal: make a service out of the product
- ☐ What do you mean by that? How do you envision this?
  - *Project Champions and Change Agents...*
- ☐ How are you going to transfer knowledge and the succesful factors to someone else or somewhere else?
- ☐ Let others replicate and diffuse the same 'concept' vs keep ownership over scalability?

Generative Exercises
(Chapter 06)

Sensitizing Toolkit

One week before the actual interview, the sensitizing exercises have been sent out via email to the users with the instructions on how to complete each task. The activity has been organized as a toolkit, formed of 3 small creative tasks (Figure 5, 6). This sensitizing toolkit plays with metaphors and make use of visuals to trigger and engage with the user. The whole exercise has been developed digitally on a Miro Board and a link has been shared via email.

Goals and Research Questions

The overall goal of this second round of interviews were to better emphasize with the user's context and collect richer insights into certain underlying aspects not fully covered during the previous interviews, such as the concept of culture. This concept, due to its level of abstractness and complexity require indeed different design approaches to be tackled.

In addition, the generative exercises, aimed to better map the context to better understand the complex ecosystem of relations Designscapes initiatives are embedded in. Indeed, the sensitizing toolkit has the specific goal of letting the users map their context, capture their vision & mission and articulate the scaling process by mapping milestones, challenges, failures or successes; while, other tasks wanted to let the user start exploring the (internal) culture of the initiative. On the other hand, these generative exercises aimed to explore the use and effectiveness of design methods such as metaphors and visual storytelling to dive deeper into more abstract themes and support SI in their scaling journey.

The following Research Questions were tackled at this stage:

- ☐ *What is the DNA and culture of the initiatives?*

- ☐ *How is this perceived and expressed?*

- ☐ *How is it influenced by external factors and the network of stakeholders?*

Process and Structure

Multiple different generative exercises (Sanders & Stappers, 2018) have been created with different purposes and using different metaphors. Those generative exercises were not only developed and sent out to the initiatives participating in the interviews but also to others as well. Some exercises have been structured following the Path of Expression (Sanders & Stappers, 2018); The use of the path of expression helps to connect people to meaningful experiences and use it as a way to ideate about the future (Figure 07). Some other parts of the toolkit have been designed keeping in mind insights reprieved during the previous research phase, such as 'the importance of mapping differences and similarities of the contexts when scaling out'; so in the task participants are asked to first map the current context with the focus on their ecosystem of relations, and then capture the 'future' context (Figure 07). The reasons to focus on networks and ecosystem of relation,

while comparing contexts, is related with the knowledge gained from the previous research and the fact that 'networks and local partnerships' have been identified as key important factors enabling to achieve larger impact. All the tasks have been designed to be interactive, engaging and as something fun to do.

This way of getting in touch with the initiative (referring to generative exercises and small task to complete) did not work out as expected, indeed no one filled in the tasks properly and only one initiative took a look at the exercise just before the interview. This is because Designscapes initiatives are very busy and the tasks were perceived as too much effort demanding. Nevertheless, sometimes those exercises are not meant to be fully filled in, but they aim to trigger some thoughts in the user's mind and prepare for a deeper conversation during the interview (Sanders & Stappers, 2018).

The Creative Task tried to go beyong the 'digital tool' and asked participants to complete tasks in the 'real life'. This was an experiment to see whetear some creative exercise could trigger deeper throughts and insights in the user such as metaphors and 'role play', but also by asking participants to prepare a dish while thinking about the questions asked in the toolkit.
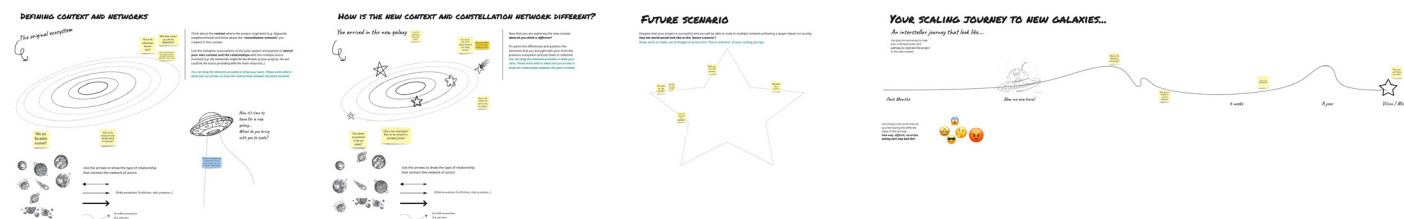

Figure 07 Mapping differences and similarities between the two contexts as regard people and networks of relations, using the metaphor of planets and galaxies.

The assessing criteria summarised in the Table, and derived from Literature (PHINEO, 2016), are aimed to assess whether social innovators are ready to out scale, their potential to scale, and to check at which scaling stage (Gabriel, 2014) they are.
→ The 6 R of the Logic Model has been used to inform the development of the principles and criteria of scaling as presented in the final Scaling Framework (Chapter 9.3).

Readiness (Maturity)	Relevance (Need)
Is the innovation ready to be scaled?	
Is the Team/Organisation ready to transfer the project? Do you have the necessary experience? Which experience/capabilities do they need?	Is there demand or need for the initiative in the new contexts? Is there willingness to invest time and money in implementing it? > Effective Demand
• Internal commitment from staff team and board?	Is the initiative superior to existing similar alternatives?
Resources	**Receptivity**
Do you have enough internal and external resources? What do you need in terms of internal and external resources to scale the initiative? > Effective Supply (= meet objectives with minimum resources and maximum impact)	> the readiness of the context to embrace the innovation External context open to the project including stakeholder buy in? Significant market exists?
• Is there a network of Supply able to support the grow? > Social networks or Strategic Partnerships (collaborations with local stakeholders) How will you collaborate with the local stakeholders of the new context? Do you have evidence to convince those people about the effectiveness and success of the project?	> Adequacy > Comparability Are the conditions of the new context similar to the original one? > Compatibility → with existing infrastructures > Openness to embrace the innovation How open people are to collaborating and spreading the innovation in the local community?
> Simplicity > Efficiency	Are the values promoted by the initiative shared by the community?
Returns	**Risks**
How to magnify positive social impact?	What could be the downsides?
> Sustainable Business Model Do you know what are the most important factors that determine the success of the project or make it successful? What are those key elements that make it effective and cannot lack when transferring the project? What are you going to scale? Is the project/ the formula you will scale simple enough to be replicated and taken over by other local stakeholders?	
> Low-cost structure → low margin costs + relaying on supportive networks > Observable results	

Figure 08 Assessing criteria and questions used as guiding questions to explore the initiatives and their potential to scale-out

OUTCOMES OF THE FIRST PART OF THE RESEARCH PHASE 1 AND 2 INFORMED THE DEVELOPMENT OF THE STEPS OF THE THEORETICAL FRAMEWORK PROCESS, as showed in the Figure 09.
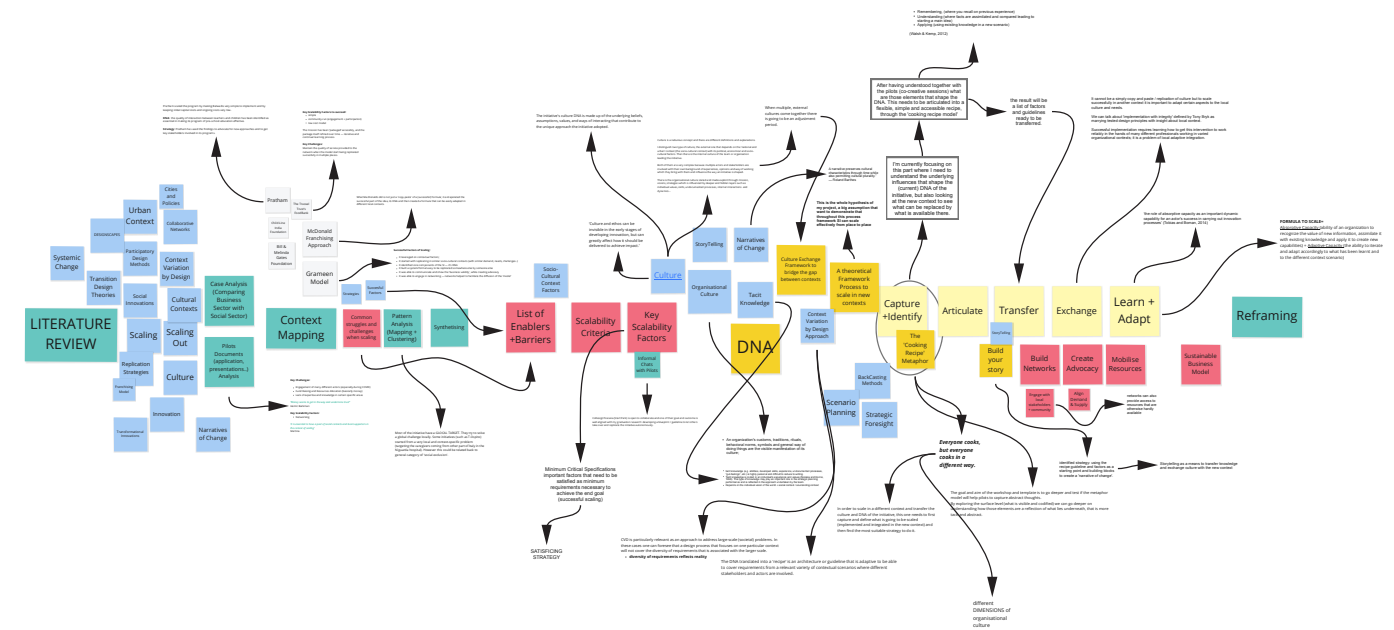

Figure 09 Structure of the research process informing the development of the theoretical Scaling Framework

Mapping Context Factors
(Chapter 9.1)

While mapping the context of Designscapes, I learnt about the challenges these social initiatives face in their scaling journey. After having analyzed all the insights collected during the two research phases, it has been concluded that some challenges are connected with the context (context-specific). This was a confirmation of some insights previously retrieved during the Literature Research, where context is mentioned as an influencing factor that could either act as barrier or enablers when scaling across contexts and cultures.
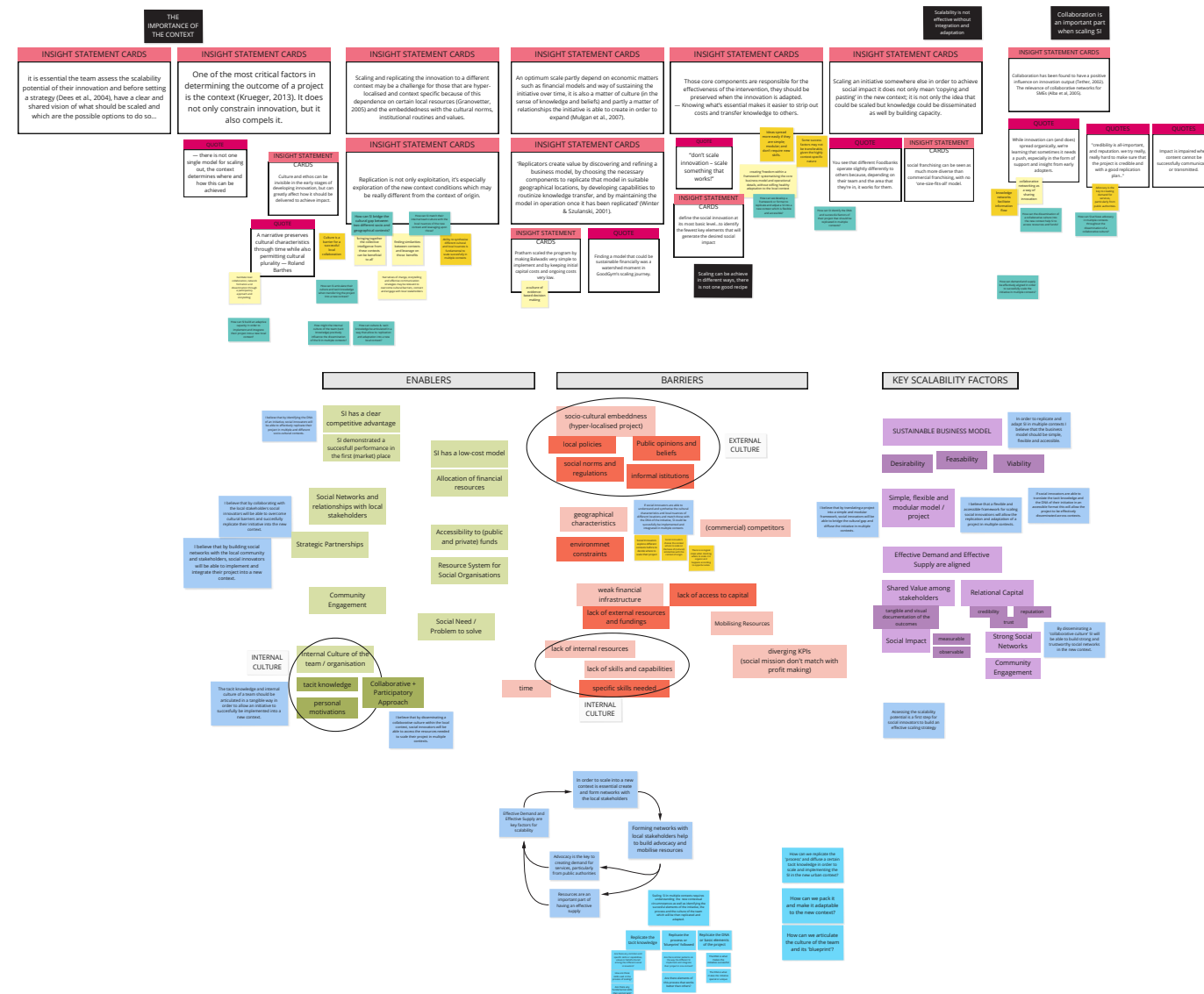

Figure 10 Initial clustering of the context factors. This mapping exercise have been done iteratively and new insights and understanding about those factors retrieved with different explorations till the very end of the project

Insights retrieved throughout interviews, case analysis and creative sessions with the 'users' and other stakeholders have been clustered according to the different 'context barriers categories' and some are presented in the following Table.

EXTERNAL (Context) BARRIERS

Political Factors

⬜ **Laws and Regulations Restrictions**

'We must gain some approvals from several other public institutions. So this is highly dependent on the country and their governmental things..' [Filip, Crosswalk]

⬜ **Institutional Capacity & Mindset**

'It is more difficult to engage with institutions and local authorities. They are less responsive to certain innovative ideas…' [Elisa, Agroplaza]

⬜ **Political Orientation and Government Structure**

'The mayor was like a very right party so they were not very conscious about environmental problems' [Elisa, Agroplaza]

Economic & Market Conditions

⬜ **Competitiors and Market Alternatives**

"For instance, in Copenhagen we'll face the presence of a more developed net of services addressed to people with hearing disability." [City Hearing Log]

Socio-Cultural Aspects

⬜ **Public Opinion, Values & Beliefs**

'...people then started thinking that the project itself was part of this corruption.. so in the end was not very well understood and accepted by the community.' [Elisa, Agroplaza]

'what make a difference is the mindset of the people and stakeholders you need to engage with' [Filip, Crosswalk]

Urban Infrastructure & Geographical Aspects

⬜ **Dimension of Scaling & Demographic Aspects**

The community is now bigger, new actors will be involved, but also geographically speaking the size is different...' [Giulia Sala, Ticket to Change Sicily]

In Rome the main issue relates to the logistics, given the metropolitan dimension of the city. Rome will require more efforts in terms of planification of workshops and connection with city administrator. [City Hearing Log]

'We realized that solutions that work in other parts of the world don't necessarily work where you are now' [German Zubia, Connovo]

EXTERNAL (Context) ENABLERS

Political Factors

⬜ **Government Structure & Mindset**

'The new Government would like to do something new, which is different from the old ones and which ask for more participatory, more democratic and a more inclusive citizens involvement. (Chuan Li, WDC)

Urban Infrastructure & Geographical Aspects

⬜ **Dimension of Scaling & Demographic Aspects**

'…also like Bilbao is quite a small city. So once you start to work, you know, more or less the people that work in different institutions.' [Elisa, Agroplaza]

Socio-Cultural Aspects
☐ **The advantage of a similar context**
We are going to scale in a similar 'socio-cultural' context within the same region of Toscana therefore there may not be a big diversity. [Rita, Co-Design Toscana]
INTERNAL GAPS
Lack of finances and resources;   'Money is always an issue and one of the main reasons why we participate in these EU Calls so that we can get some fundings..' [City Hearing Log]
Limit Capacity of Engagement;   'It is challenging to gain the approval and interest of public authorities while company will be easier to engage if you can show them the value they are getting' [City Hearing Log]   Also because now [referring to the new project - TtC Sicily] we don't have this interpersonal relationship that we had in previous projects that was built over years. [Giulia Sala, Push Studio]
Remote Collaboration   'It is difficult to gain the trust of stakeholders, especially when everything is online and the communication remote..' [Giulia Sala, Push Studio]
Community and People Mindset;   And also there is a very strong atmosphere in the city to initiate associate innovation.
Conflict of Interests and Cultural Differences;   [...] there's a lot of criteria in our operational level, but at a very high level, I would say that the most relevant thing, it's made sure that the incentives are fully aligned. You know, there's also the culture of the company or the regional governor things, but you need to align very carefully, this, then the incentives, if not, it is gonna be tough. [German Zubìa, Connovo]   The key requirements and challenge of scaling in different contexts is engaging with diff. stakeholders, policymakers, citizens, experts... Each of them has a diff. problems that want to be solved, diff. needs and requests we need to accomplish. [City Hearing Log]
INTERNAL OPPORTUNUTIES AND STRENGTHS
Organizational Structure & Networks;   'we are part of WikiTalki which is like a coworking, a collaborative lab of people and So we have also a relationship with the City Hall which belong to the same network. WikiTalki is an Association... we received some findings from the vast government to be what we call creation industry. [Elisa, Agroplaza]   'deve essere un'associazione che ha collaborato a lungo con la pubblica amministrazione del luogo che ha permesso che si riesca ad agganciare più facilmente determinati tipi di stakeholder.' [Lucca Creative Hub]

With the 'barriers and enablers' and different influencing factors identified relations have been drawn and in the end a 'card deck' have been designed that could be used as trigger of inspiration during the 'workshop activity'.
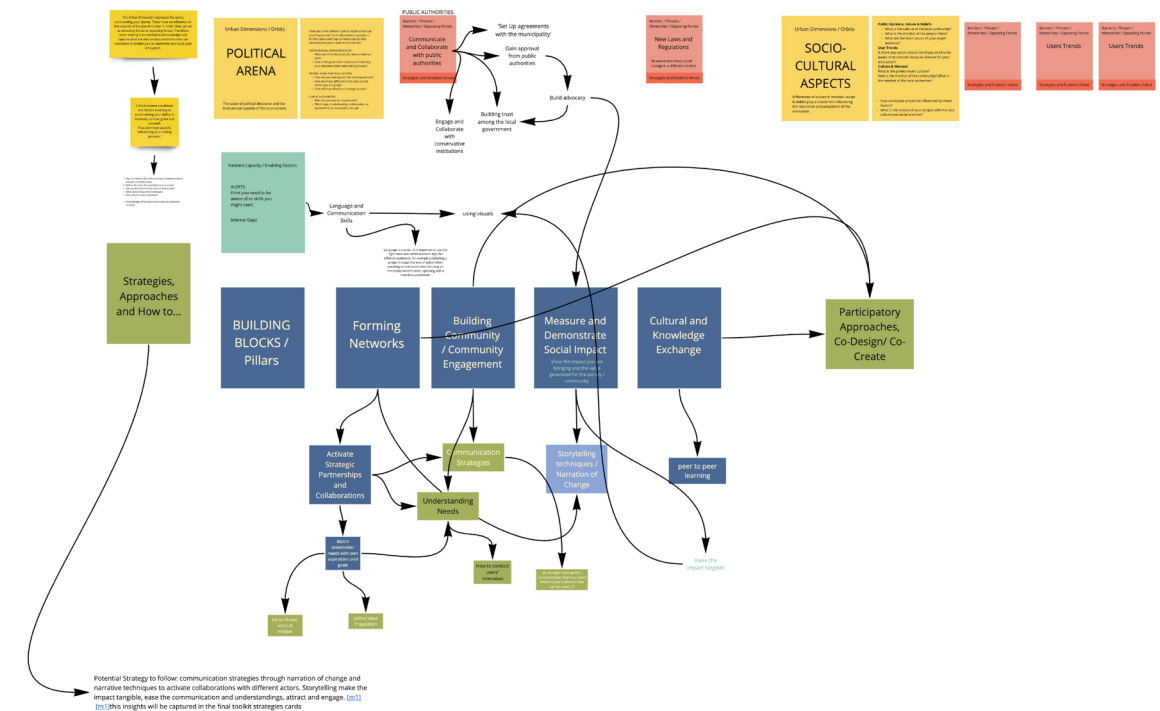

Figure 11 Connecting the influencing factors with the SI principles and pillars and the strategy to scale. Translating research outcomes into design results: a set of cards.

Appendix D

Research Phase 3
(Chapter 08, 09)

Ideation with IDE Master students

(Chapter 8.1)

I decided to involve other designers' minds and brains to get some initial ideas on how something tacit such as 'culture' could be further explored and articulated and get ideas and inspirations on how the Creative Session with the users could be set up. The Research Question formulated in the previous chapter will be then used as a starting point to set up this session.

Brainstorming Session Set-Up & Process

The session took place throughout Zoom Call and carried on the digital Miro Board. In total, five students participated in the session.

Goals of the activity:
- *How can I dive deeper into more abstract and tacit layers, such as the concept of culture?*
- *Which design tools and methods can I use?*
    - *How could design enable and facilitate culture replication?*
    - *How can I trigger SI capturing the ecosystem of interconnected relations and elements they are embedded in?*

Structure & Process
The session started with a brief introduction of the project and goals to provide the participants with contextual understanding. Then, participants have been pulled directly into the activity through the 'guided fantasy' technique (Heijne & van der Meer, 2019); this helped to make a bridge between their context of expertise and this project context; an analogy has been used to facilitate bridging this gap and let them emphasize better with the topic. During the 'guided fantasy', I tried to leverage the senses and force them to use them to come up with more rich ideas.

The ideation started with 'shedding the known', where participants purged all the ideas they had in their mind to come up with more qualitative and in-depth ideas in the later steps. Afterwards, more specific 'How To' questions have been addressed to reach the activity's goal.

Figure 12. Screenshot of the Brainstorming Set Up on Miro Board. Each step corresponds to a specific 'How to' question used for ideating.

Brainstorming Session Results
Ideas and Insights

From the final discussion and the brainstorm activities carried the following ideas and insights have been generated:

- To understand what and how to implement with 'integrity' and replicate culture is important to know the contextual background and the reasons behind. Knowing the background story might help to articulate and transfer culture.
- Involving users in a replication workshop could help to see how different people interpret the same concept, such as culture, differently.
- Using visuals and analogies to articulate abstract concepts.
- Using the idea of a 'tourist booklet' to articulate and transfer culture, experiences and knowledge gained.
- Using a game to dive deeper into deeper levels.
- Using a mediator or facilitator.
- Using symbolic objects to represent concepts and ensure the same understandings.

Conclusions & Reflections

Since the session did not have a particular goal and clear structure, the outcome was quite generic and eventually diverged significantly from the initial intention set. It is a good learning point for the next activities. Moreover, it has been observed that, when talking about abstract and complex concepts such as culture, clear examples need to be provided to generate a common understanding.
'Sometimes it felt a bit unclear what is meant by culture' [Svenja]
Although, the outcomes led me to realize that metaphors and analogies could be a valid tool to use to facilitate the communication and dive deeper into the different layers of a complex ecosystem such as the one of Designscapes. For this reason, in the next activities metaphors will be used to 'break these concepts into something more digestible and edible'. The results of the session led to the decision of exploring the use of narrative techniques, visuals and metaphors during the next design explorations.

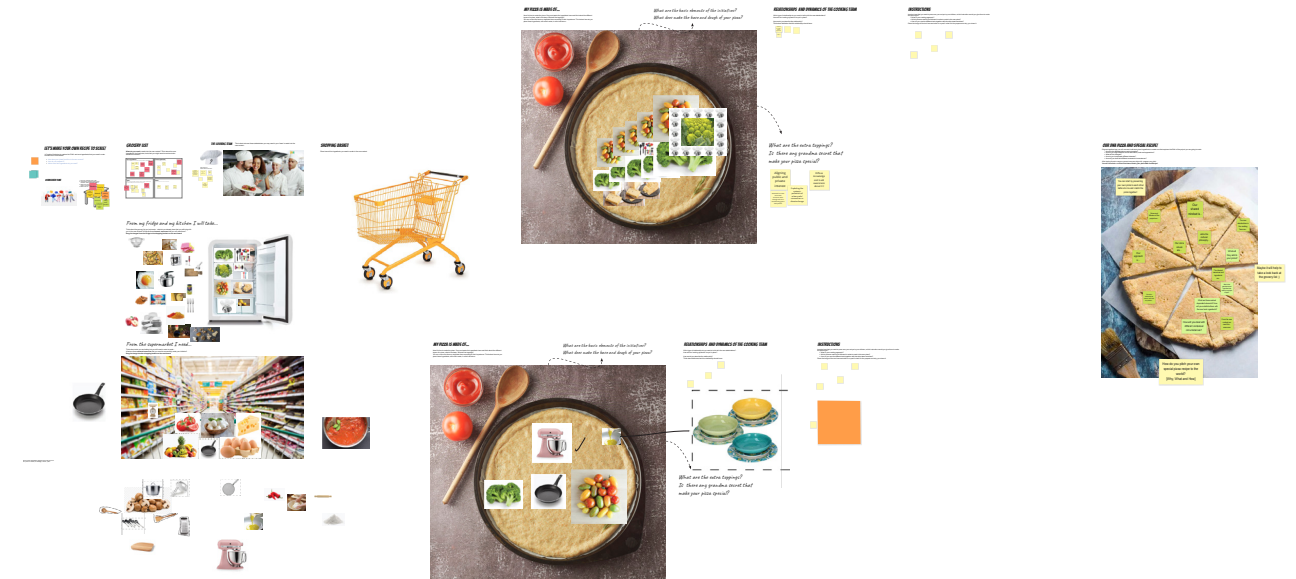# Design Interventions
'The Pizza Workshop'

(Chapter 8.2)

Figure 13 Screenshot of the session carried on Miro with Start Park Project

Structure & Process

In order to tackle some of the challenges posited by the online tool, fun has been used to structure the session and keep people more engaged. Therefore, the intervention has been structured using the metaphor of food. The metaphor responded to two main functions; on one side as research means to uncover the internal culture and the DNA of Designscapes initiatives; on the other hand as a facilitation tool to help the participants dive deeper into more 'hidden' layers and support the dialogues and discussion when talking about 'fuzzy' and abstract concepts. It has been said (Price et al., 2018; Sanders & Stappers, 2018; van Boeijen et al., 2013) that visuals, storytelling and narrative techniques are an effective communication tool and a powerful way to connect and engage with people. For this reason, these design 'tricks' have been adopted to set up the explorative workshop.

Introduction and Icebreaker
Through the 'Pizza Workshop' urban innovators will identify and capture the DNA of their initiative.
The Session started with an introduction and an 'ad hoc' icebreaker to drag people into the 'mood' and make them feel at ease. The icebreaker was also designed with the metaphor of food in mind and it used the 'analogy technique' (Heijne and van der Meer, 2019); in this way participants could start getting warm about thinking per analogies and metaphors.

Step 1 - Purge and Shed the known through the Grocery List
Afterwards, participants were invited to discuss differences and similarities between the two contexts;
Those 'ingredients' were mapped in a matrix grid framed as 'Grocery List' (Figure 1). Here they are asked to differentiate from the 'local ingredients', those that are specific to the context and the 'core ingredients', those that cannot miss no matter which context. In addition, 'tools' that helped them scaling are also mapped down. This was a first step to acknowledge what is it that needs to be preserved and what instead will need to be changed when replicating in the new context.

Step 2 - Grocery Time!
With the list of ingredients in mind, participants are now dragged into a metaphorical exercise. The activity make use of the 'analogy technique' and the 'role play' methods because of their characteristic of triggering imagination and 'out of the box' thinking (Heijne & van der Meer, 2019; Sanders & Stappers, 2018; van Boeijen

et al., 2013), but also to foster an interactive and collaborative environment. The idea is to let the participants immerse fully into the topic and generate new insights or perspectives while diving deeper into more abstract and tacit layers. On the other hand, the hypothesis is that by talking through (food) metaphors and analogies could be easier to have the same understanding and the same 'base' of communication. Participants are asked to first 'check out' the ingredients present in their fridge (metaphorically representing the internal resources owned) and then listing what will instead need to be 'bought' at the supermarket (representing the context and the external resources needed), the resources they still need to acquire in order to (successfully) replicate in the new context. Different visual hints and images have been placed around to trigger thoughts. Participants have to think in terms of analogies when using the images to capture what to scale. After having acknowledged what they have and what they need, they will buy the missing ingredients and explain why are those crucial for scaling.

Step 3 - 'Making the pizza'
At this stage, the two teams (transferring and implementing parts) have been split and for each have been provided a board to work on individually. Here they are asked to 'make the pizza' with the ingredients collected during the 'grocery activity'. The goal is to capture the 'DNA' of the project, the key basic elements forming the initiative and other 'secret ingredients', hidden and tacit layers which make the project unique. This exercise focuses on the elements characterising the project implemented in a certain local context, without referring yet to what will be instead worth replicating in the new context.
The purpose of carrying this exercise split is related to the fact that the two teams represent the two contexts which are different, therefore different ingredients will be considered or mapped. In this way in the next phase, similarities and differences will be compared and the two teams will collectively think about how to make the project work in the new context and what will be scaled, changed or replicated as it is. This will be done by 'cooking the pizza together' and finding common grounds.

Step 4 - 'Matching the pizzas'
In this last step of the session, the two teams are asked to collectively discuss what are the crucial factors that need to be scaled; hence they will prepare the pizza together capturing the DNA and culture of the initiative, while aligning on same visions and finding a common ground.
The participants will then present the 'results' in the form of an 'Elevator Pitch'. This has the scope of empowering them to promote and communicate the value of their innovation to external stakeholders, partners and the public authorities they need to convince to get support. It is also a way to draw conclusions and make the results of the session tangible, especially because the whole session was quite abstract with the use of the metaphors.

Ideating & Exploring
(Chapter 10)

Some of the several opportunities and design directions identified during the research process are listed below in the form of 'How To' questions:

- How to capture what is worth scaling and could work in the new context?
- How to reframe the DNA of the initiative and its operations according to the new context conditions?
- How to replicate the organizational culture of the initiative?
- How to trigger culture and knowledge exchange when transferring the project to a new context or to someone else?
  - Transfer know-how through 'culture exchange'
  - Develop tools that facilitate and enable the exchange of experiences and knowledge while co-defining the internal approaches and processes to plan future steps and strategies together.
  - By finding local champions to whom transfer the learnings and recipe to scale the project in their own community and trigger diffusion by inspiring people to take over the idea to multiple contexts.
- How can we make the information accessible for transfer?
  - How to pack information accessibly for transition and scalability?

- How to support SI form networks with local actors and stakeholders?
  - By developing communication strategies to engage with the different stakeholders.
  - By translating the DNA into a storytelling to share when activating collaborations to mobilize resources needed

H1 Mapping as a sense making practice that facilitate the knowledge share and co-creation

'Like in this case, in Malawi, we put the maps in a circle. And we just had every group explain the maps to one another and my colleague, she was on our knees with pieces of rope very symbolically, connecting different maps like an organization that was in one map and another she put a piece of rope between them.'

'So here is, and also this one you see they're sitting in a circle, explaining the maps to one another. This is ownership. This is transferring that newly found sense of connections.'

(Aldo de Moore, 2020)

H2 Storytelling & Narrative Techniques as a way to articulate learnings and transfer knowledge to someone else

H3 Using the **metaphor** as a means of communication, and as contextual and conceptual framework for mutual understanding

- Enables an individual to cooperate because individuals are more likely to understand the other and therefore more able to cooperate, when they share a common purpose and language (Collins & Smith, 2006).
- This **common grounds** and language leads to mutual understanding between source and recipient (Vlaar et al., 2006). Mutual understanding between source and recipient is a critical aspect to investigate from a knowledge-based view perspective (Grant, 1996).

Figure 13 Design hypothesis formulated during the ideation phase that could be explored through design interventions with the initiatives
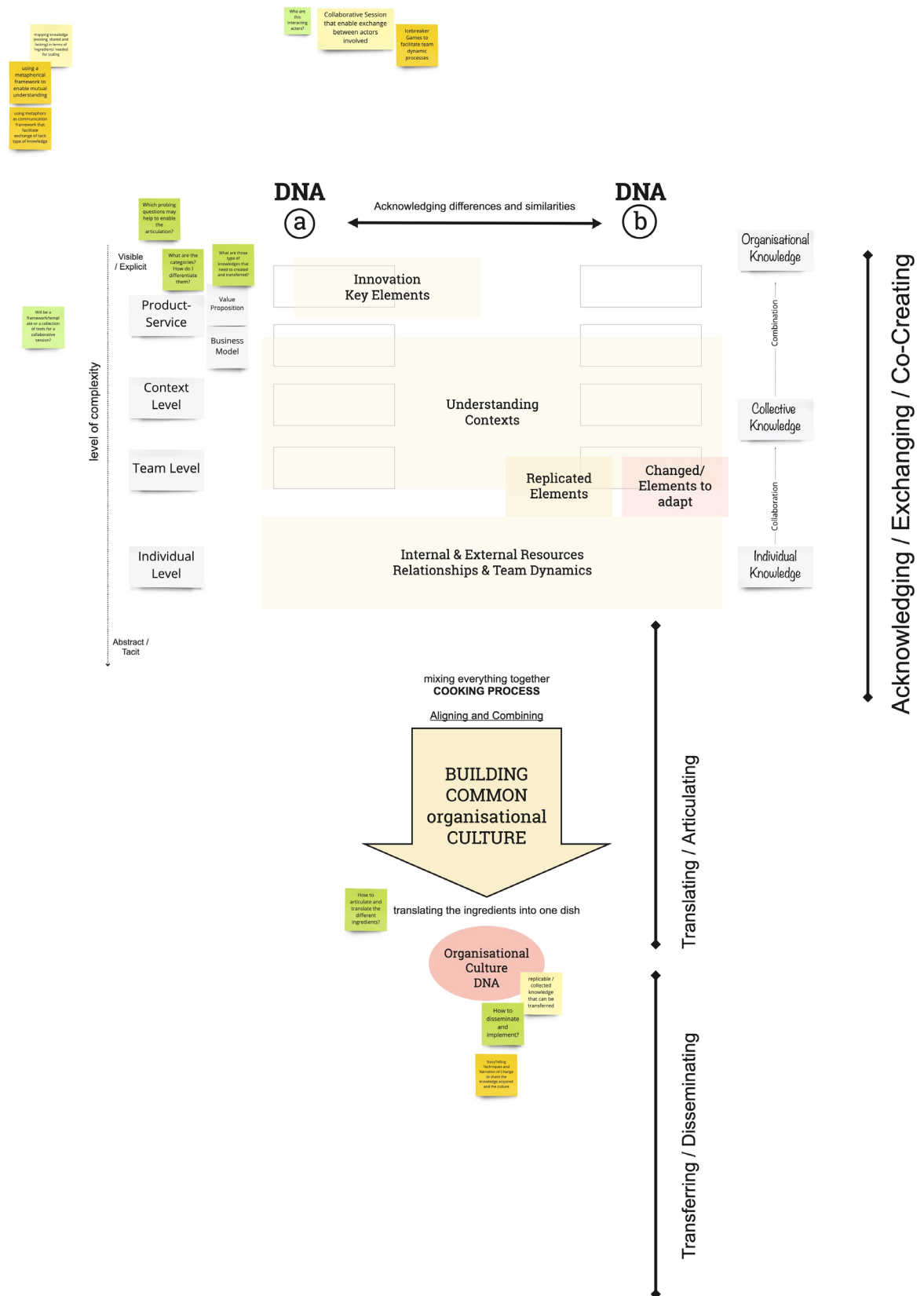
Figure 14 First drafts of the Concept Prototypes of the toolkit developed. Ideating and Designing an activity proposal focused on 'Acknowledging similarities and differences between Context A and B and the evolution of the DNA from A to B

Exploring Potential Directions
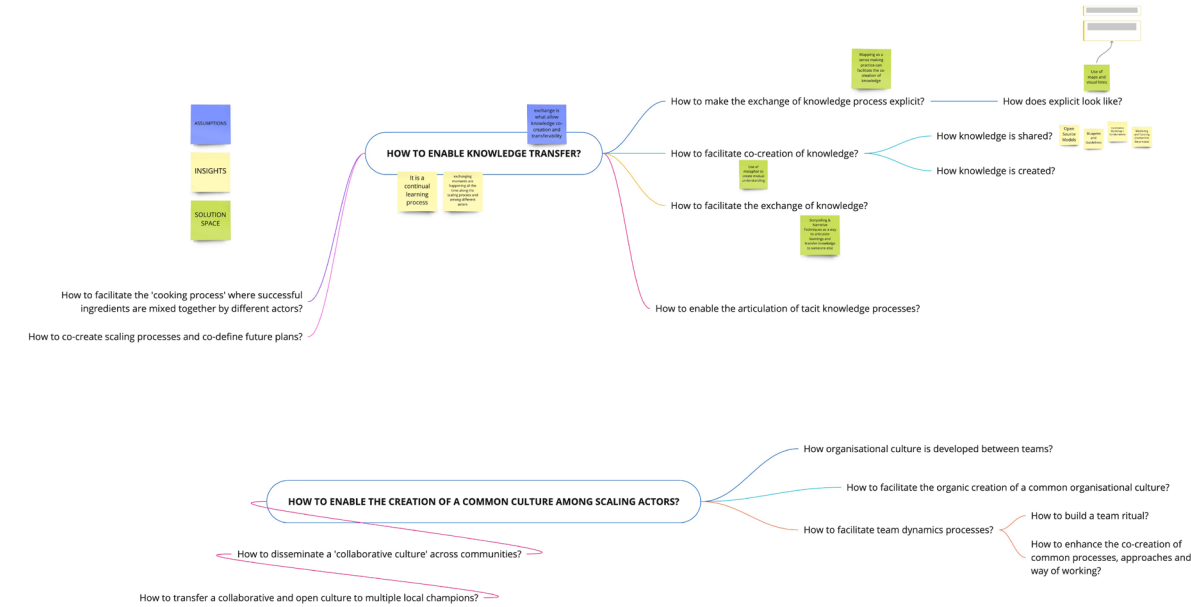
Figure 15 Mind-map of How to questions regarding one of the potential direction that could have been explored: knowledge transfer

The two creative sessions brought up a lot of interesting insights which opened up the door for multiple directions that could be explored. In the following images some of those directions are presented.

Exploring an Alternative Direction
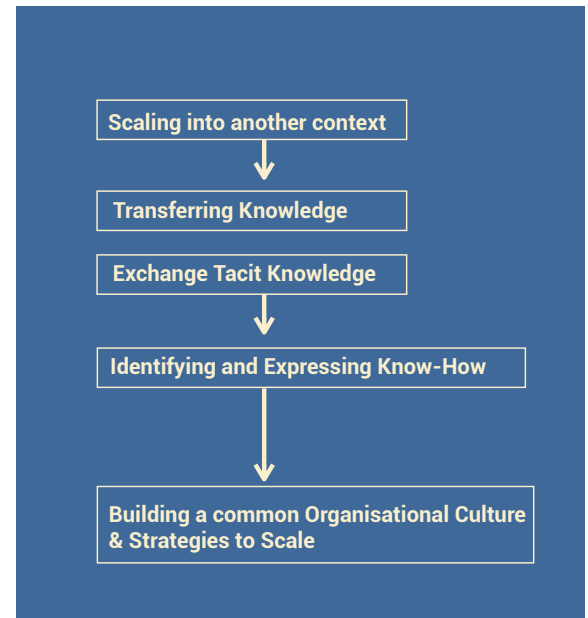
At a certain point of the project process I took a direction a bit out of the scope and started exploring that, only after I realized the mistake and came back to the main 'road'. This because while exploring cultural replication, some insights, especially the one related with 'culture exchange', brought to the direction of Tacit Knowledge transfer. Culture indeed is connected with the knowledge that is transferred implicitly throughout experiences and social interactions. Hence I started researching about this and clustering and categorizing the data again according to this perspective.

Figure 16 Clustering Data about Tacit Knowledge Transfer (exploring new directions)
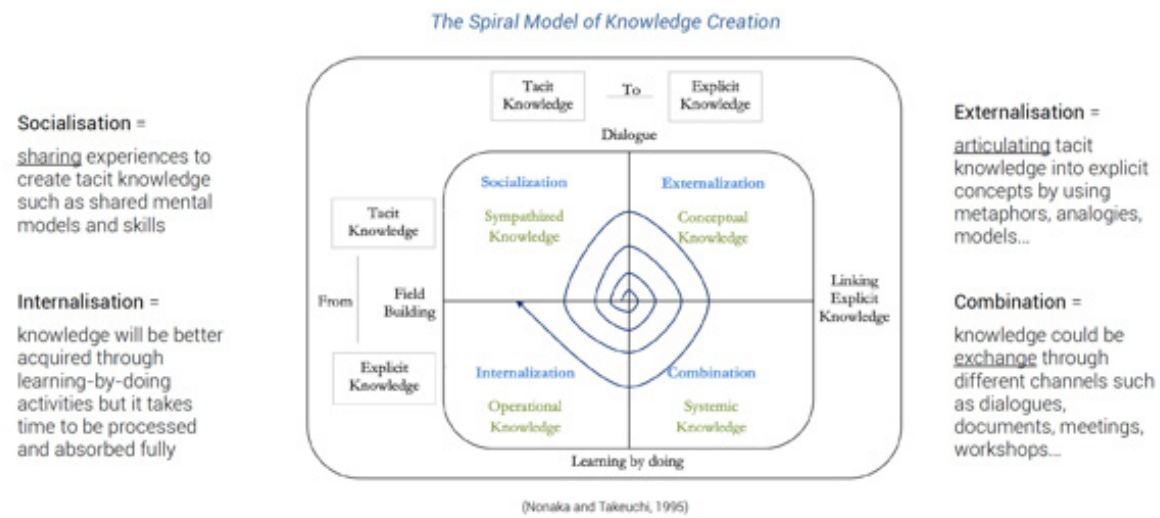
Figure 17 Literature and theories about the learning process have been used to inform the theoretical process of scaling SI. Here in the image is reported the Spiral Model developed by Nonaka and Takeuchi (1995) and on the sides how this could be used as base to inform the development of the steps of the scaling process developed in the Framework.
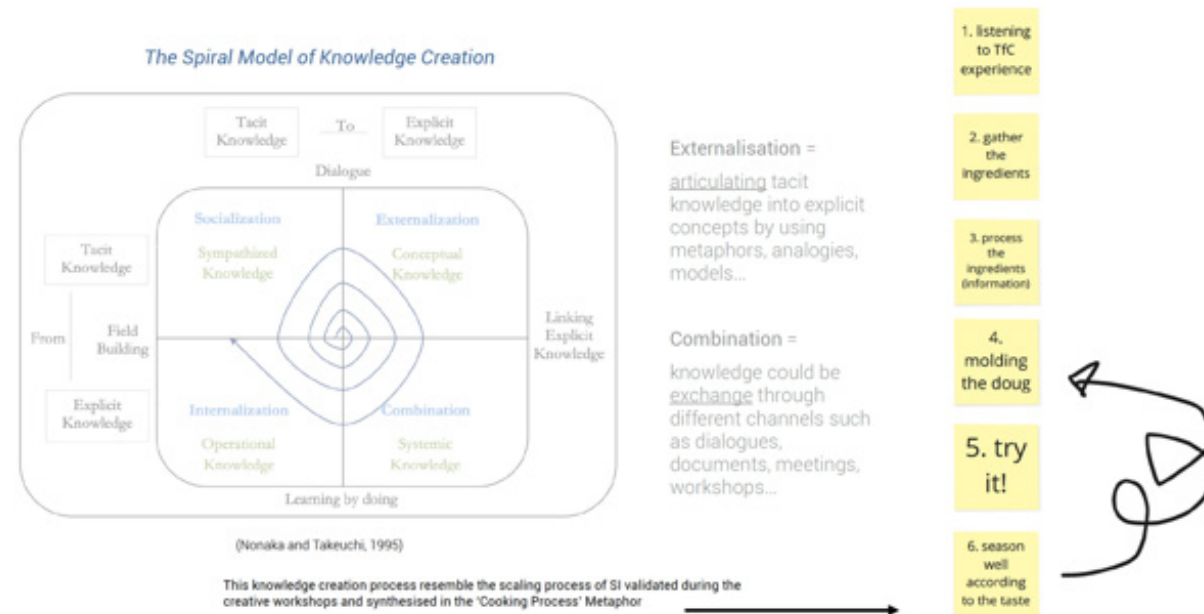

Figure 18 Comparing the Learning Process of Nonaka and Takeuchi (1995) with the scaling process followed by Designscapes initiatives, according to what has been found during the creative session.

The scaling process works similarly to the process of knowledge creation, it's a learning process

EXCHANGE AS A PROCESS OF REFRAMING THE ORGANISATIONAL CULTURE AND ITS INTERNAL PROCESSES AND ADAPT IT TO THE NEW CONTEXT SCENARIO, WHICH MEANS CO-CREATING AND TRANSFERRING KNOWLEDGE.

Exploring the Directions through an Intervention

Multiple design directions and opportunities have been found. In order to take a decision on which one to follow an intervention has been organized with one of the initiative (Civimetro) to assess their interest and their opinions regarding the directions identified. The goal was to eventually co-develop a concept direction that could be further explored in the project. To do so, the intervention has been held on a Zoom Call and Google Slides have been used to present some rough concepts of the directions formulated. Then some questions in the form of an interview have been specifically asked to get the feedbacks and dive deeper into certain aspects.

Figure 19 Screenshot of one of the Google Slide presenting one of the rough concepts developed to be further explored

Figure 20 The 5WH Method has been used to co-develop with the innovators a certain scaling scenario. Beforehand a short scenario was presented and it was told them to imagine to be in that situation, then specific questions were asked to explore how culture exchange and interactions with local networks would work and unfold according to the initiative.

Zoom-Out

The Scaling Process Framework is a collection/package of tools that facilitate each step of the scaling journey, with a focus on the knowledge exchange moments.

A framework to map the scaling journey steps to guide social innovators in their process and strategies.

This framework help to understand what need to be scaled and transferred
+ give space for moments where knowledge and culture can be exchanged and co-created
+ help develop scaling strategies

However, the direction of tacit knowledge transfer and exchange has been discarded because too from the focus set for this graduation project. So, then new directions have been developed taking into account the theoretical Scaling Framework and its steps.
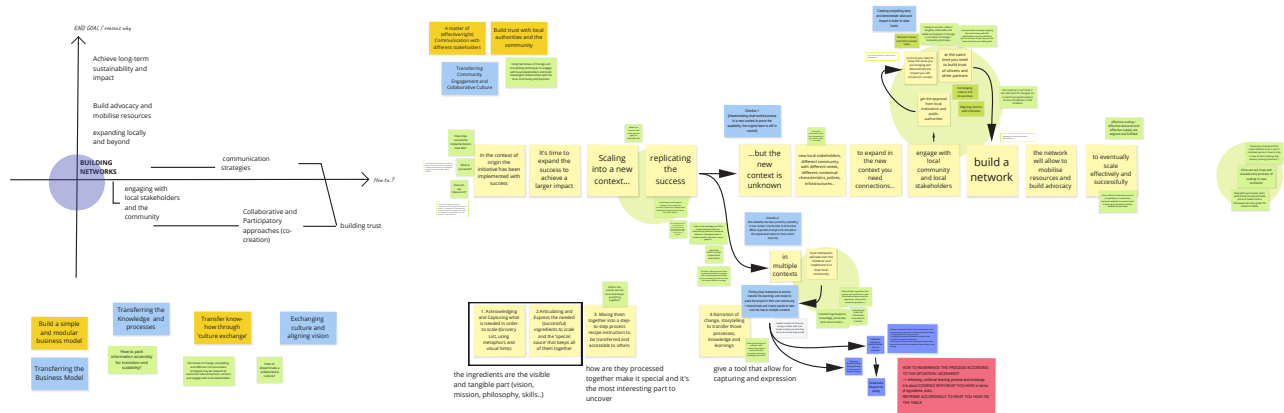

Figure 21 Spotting Design Directions and opportunities by following the framework of scaling developed
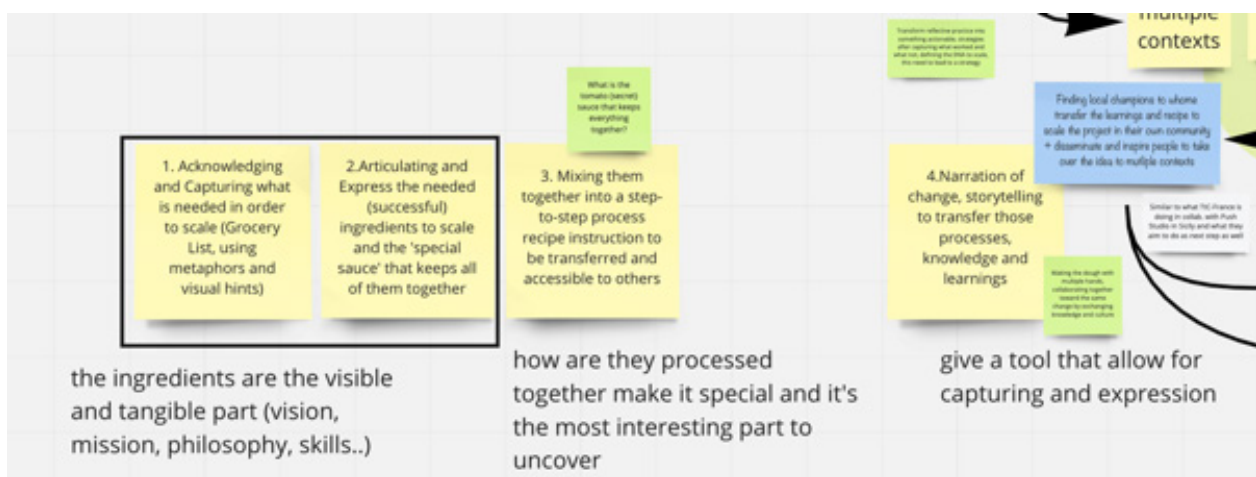

1. Acknowledging and Capturing what is needed in order to scale (Grocery List, using metaphors and visual hints)

2. Articulating and Express the needed (successful) ingredients to scale and the 'special sauce' that keeps all of them together

3. Mixing them together into a step-to-step process recipe instruction to be transferred and accessible to others

4. Narration of change, storytelling to transfer those processes, knowledge and learnings

the ingredients are the visible and tangible part (vision, mission, philosophy, skills..)

how are they processed together make it special and it's the most interesting part to uncover

give a tool that allow for capturing and expression

Figure 22 Formulating Design Directions according to the identified crucial steps of scaling
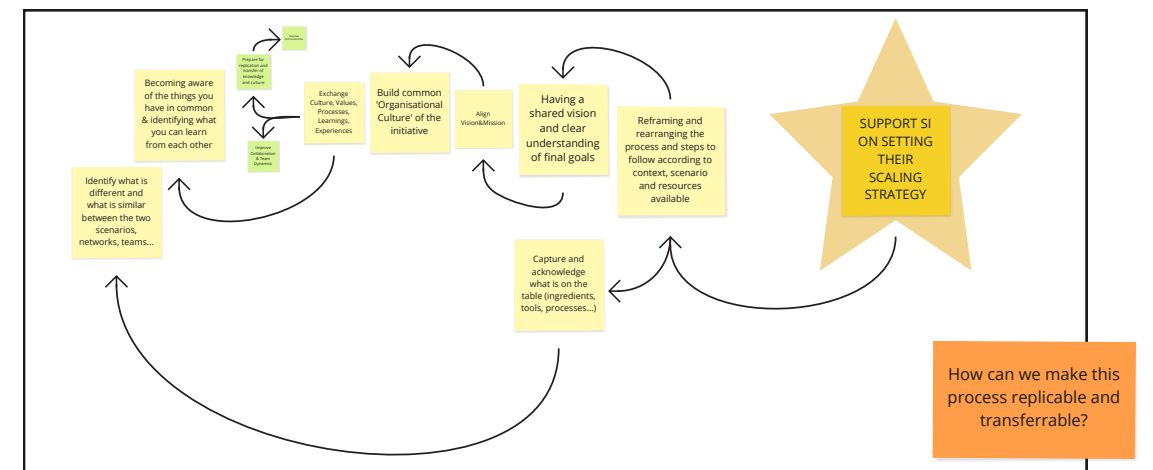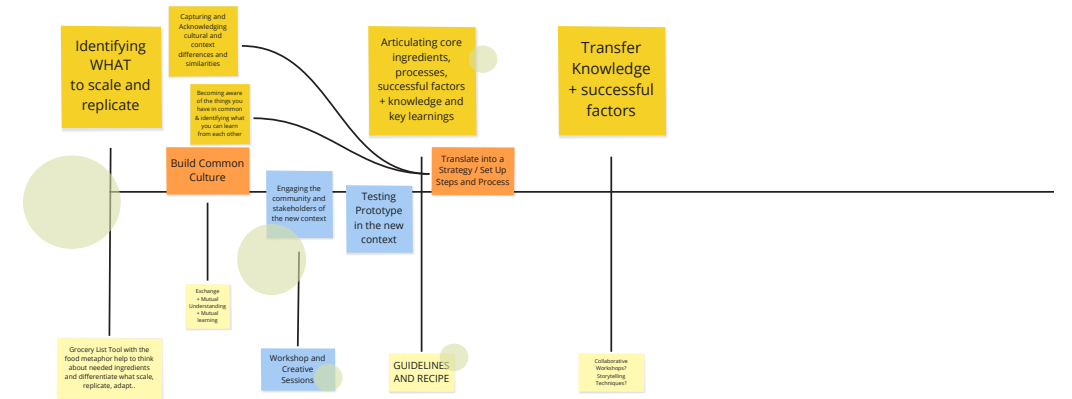
Scaling Stage

Figure 23 Using the Back Casting Methodology to resonate about the direction to take

Participatory Co-Design Sessions with 'peers'

(Chapter 10.3)

After having explored multiple directions, three have been chosen because more coherent with the initial project brief and the research insights got. Then, with a defined design goal, three Participatory Session have been organized and set-up as a useful test-bed generating insights to inform further RTD interventions to carry out with the actual users of the project. In these sessions a mix of Master students from the Industrial Design Engineering faculty of TU Delft and other non-design practitioners will be involved. Carrying out small design interventions with 'peers' is an opportunity to gather new insights, get feedback on the ideas already generated and to evaluate the use of visual-storytelling and metaphors as a facilitation and communication tool.

At the end of each activity I held an open discussion and reflection, where I addressed some specific questions to the participants also regarding the process and structure of the session. Those reflections and insights helped me to keep iterating and improving the facilitation over the three sessions carried. Some of the main reflections are discusses and reported as conclusions at the ends of this section.

Goals & Questions

The overall goals of the sessions are the following:
- Co-Design a design intervention with the users;
- Gather ideas on how to…
  - …Develop a Toolkit/ Framework which enable SI capture internal (knowledge) gaps and external (context) 'barriers';
  - …Develop a tool/activity which enable SI to identify what are the resources needed to overcome those gaps and challenges;
  - …Develop a tool/activity which facilitate SI to turn resources needed into concrete actions and strategic collaborations;

- Evaluate the use of a metaphorical framework to facilitate SI in their scaling process;
  - *What do people think about the way metaphors and visual-storytelling are used for the scope of this project?*
  - *How could this technique could be better used to structure design interventions with the users?*
  - *How can metaphors be better used to facilitate the scaling process of SI?*

Apart from ideating and co-designing, the session aimed also to gather fresh perspectives and critical feedbacks regarding the overall design goal and the design directions elaborated.
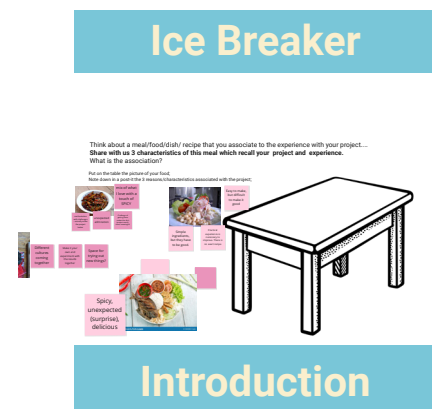
Figure 24 Screenshot of one of the Participatory Sessions organised on Miro

Set Up

Several design students and non-design practitioners have been invited to participate in the sessions. Three different sessions have been organized with different goals and settings; for each session there were about 3-5 people. All the sessions have been held online, in a Zoom call, and carried throughout the Miro Board.

Session 01

Goals

Learning how to set-up an effective design session.
This first session aimed to trigger more critical feedbacks among the participants and to ideate and co-design ideas regarding the following design goal presented:

Develop a Toolkit/ Framework which enables SI capture (knowledge) gaps and resources needed and translate those 'barriers' into call to action and strategies.

In addition, the following questions have been addressed during the session:
- *Which design tools, methods or techniques can I use or develop to support SI in their scaling journey according to the goal above mentioned?*
- *What do people think about the ideas I generated?*
- *How can I design an intervention to further explore the design goal with the users?*

- How is the use of metaphor techniques perceived?
  - Which metaphor could work better for the purpose?
  - Are the metaphors clear/understandable?
  - Are the metaphors relevant and coherent for the goal?

- How do people perceive the design goal?
  - *Is it clear to them the way I present it?*
  - *Is there any gap or pitfall that I should consider?*

Structure and Process

The session started with a brief introduction and an icebreaker activity. Then, an extensive presentation has been given regarding the project and its design goal as formulated. The reason to provide more details about the project itself was related with the fact that I was aiming to trigger discussion, questions, and gather more critical feedbacks. After that, the goals of the session have been clarified and participants were dragged directly into the co-creation phase. In this phase, I let participants explore the rough ideas and 'prototypes' and then I opened up a collaborative and diverging discussion. The session ended with a brainstorming activity, where two 'How to' questions were addressed.

Recommendations & Key Learnings

Ideas about the Design
Tools/Framework

About the Session

Reflections on my project
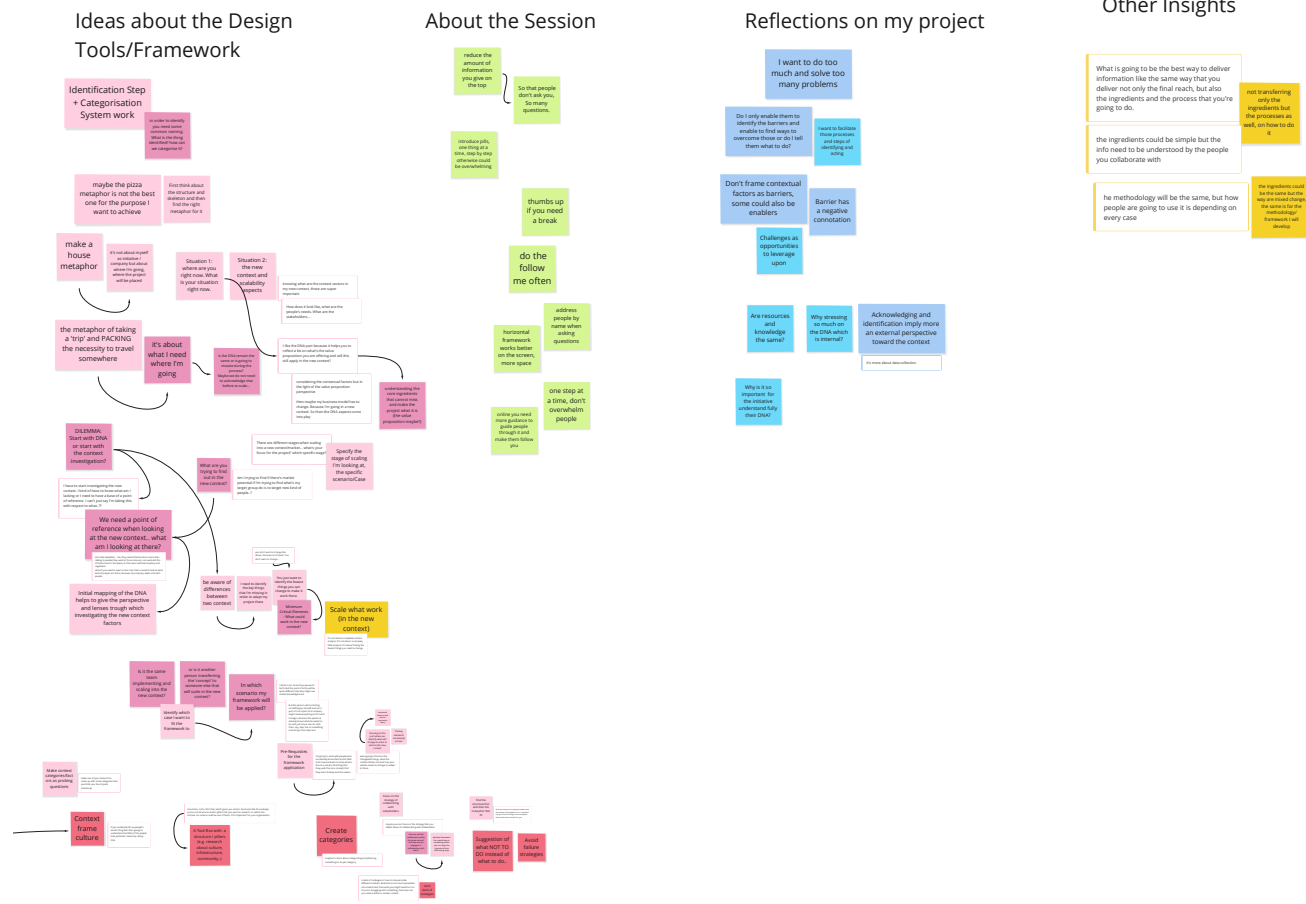
Other Insights

Figure 25 Screenshot of the analysis and collection of main insights and feedbacks, resulting from the Session 01

The long presentation and the not-well-structured session generated confusion among the participants and, in the end, participants felt overwhelmed by the amount of information provided. Also, the design goal presented has been perceived too ambitious because it includes multiple sub-goals in once. Therefore, it has been suggested to focus on one goal at a time and prepare smaller activities for smaller goals.

- It could be more effective to introduce only those information necessary for the purpose of the activity.
- The horizontal framework works better on the screen because it gives more space.
- When facilitating online sessions is better to address people by name when asking questions, *(people don't see if you are staring at them)*
- I should guide the participants step-by-step and introduce one single thing at a time to avoid confusion.
- The world 'barrier' used in the design goal has a negative connotation, maybe it can be rephrased into something more positive, like opportunities.

Session 02

Goals

Because of the feedbacks received during the first session, the goal has been broken into smaller (digestible) goals and split over different activities. Moreover, the goal of the session has been formulated in a more clear way.

Goal of the session:
'Co-Design a toolkit / framework to help Social Innovators overcoming different contextual 'factors' when scaling in a new context.'

Structure and Process

This time, the introduction about the project has been shorten up; to make it simple and easy to understand, I made use of a metaphor to explain the context and problem domain addressed.
After the introduction, an ideation phase followed. The 'How to' Technique (Heijne & van der Meer, 2019), has been used and the following question has been addressed: *'How to enable SI acknowledge and highlight contextual differences and internal (knowledge) gaps?'*

Since I did not want too generic ideas, to help participants generate more specific and 'ad hoc insights' I provide them a 'case example' and some other probing information, such as common challenges SI faces. Those were meant to make the context more feasible and to trigger more concrete ideas.

The ideation phase was a good warm-up to get the participants into the (right) mood and attitude for the next phase of co-designing a solution. The first part of this co-design activity was focused on:
1. understanding the new context;
2. acknowledging gaps and resources needed to scale;

The next phase of the co-design activity focused instead on developing ideas and design tools which could facilitate and enable SI turn gaps and resources needed identified into strategic collaborations and actionable steps. Rough ideas and prototypes have been presented to the participants and an open discussion held to get insights and feedbacks. Lastly, before the reflection part, a brainstorm activity has been carried out to develop specific ideas on 'How to turn context challenges and resources needed into actionable steps and strategies' The main scope was to get ideas on how to develop a tool which could be actionable.
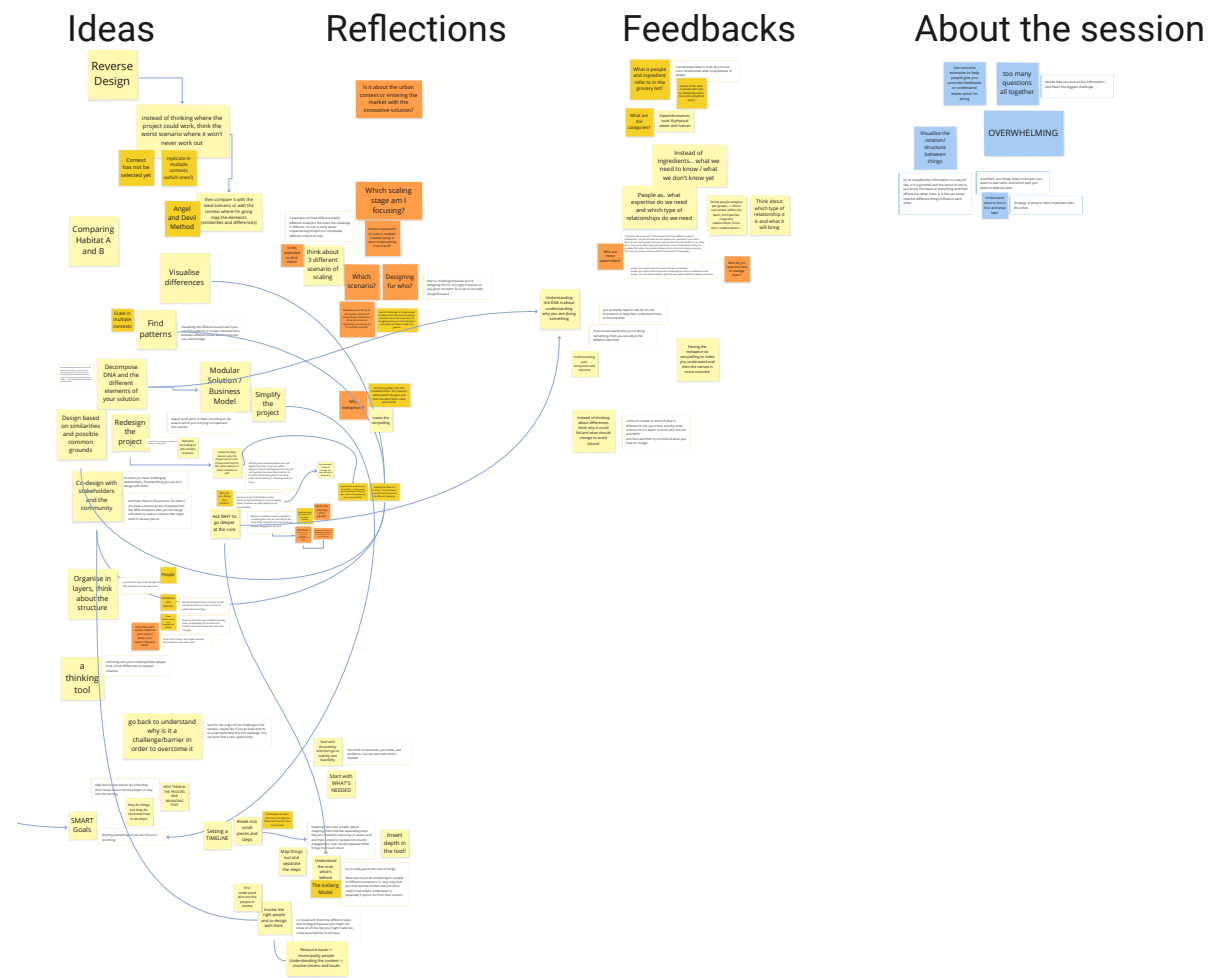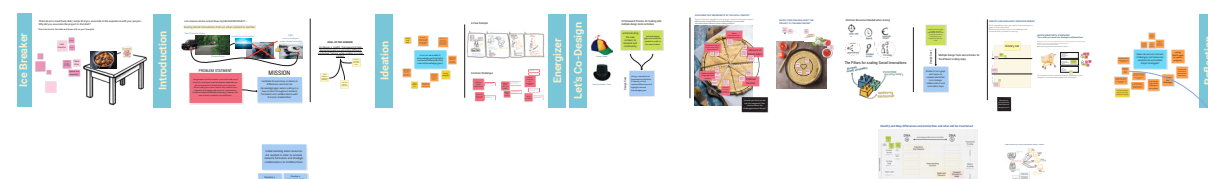
Results & Insights

Figure 26 Screenshot of the analysis and collection of main insights and feedbacks, resulting from the Session 02

Session 03

Goals

For the purpose of this session , the goal has been reformulated as follow:
'Co-Design a tool/framework which facilitates Social Innovators in their scaling process.'

In addition to that, along the session, other two more specific design goals have been addressed in two different co-design activities:
1. Develop a tool/activity which enable SI to identify and map the resources needed for scaling, by using a metaphorical framework.
2. Develop a tool/activity which facilitates SI to turn those resources needed into concrete actions and strategic collaborations;

Structure and Process

This last session has been structured differently from the previous two and a new metaphor has been used: building and replicating a 'house' in a new urban context. This has been used either as metaphor to explain the context of the project, but also to structure the co-creation activities.
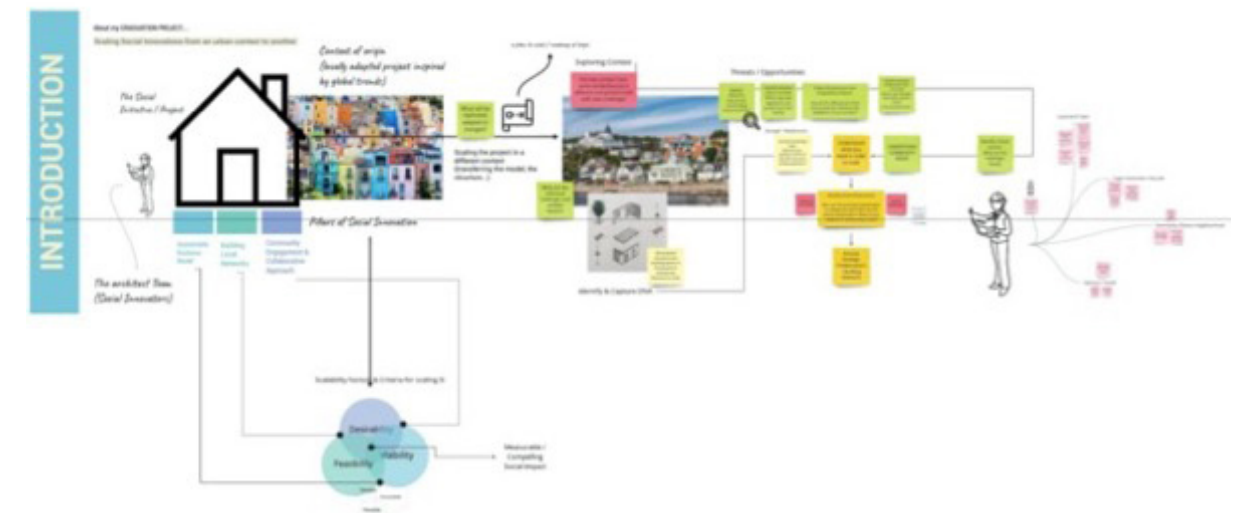
Before introducing the context of the project throughout the metaphor, a brainstorming exercise has been set. Participants were asked to think about different metaphors that could fit different scenarios presented, this has been done using the 'Flower Association' Technique (Heijne & van der Meer, 2019). The purpose of this was double, on one side I wanted to have new ideas about how and which metaphors could be used for the different goals set; on the other hand, this was helpful to let participants start activating a certain type of thinking, as a sort of warming-up activity.
The first co-creation activity proposed had the goal of thinking 'How I could support SI decomposing their DNA and mapping what to scale'; a rough structure was proposed as a suggestion to trigger further ideas and feedback.

The second exercise was structured using the 'How to' Brainstorming technique (Heijne & van der Meer, 2019) and the following questions were posed:
- *How can we turn what needs to be scaled into actionable steps?*
- *How can we help SI to activate strategic collaborations with local stakeholders in order to mobilize resources?*

In this case, some ideas and probes where given to the participants to steer them toward a certain direction I was aiming for.
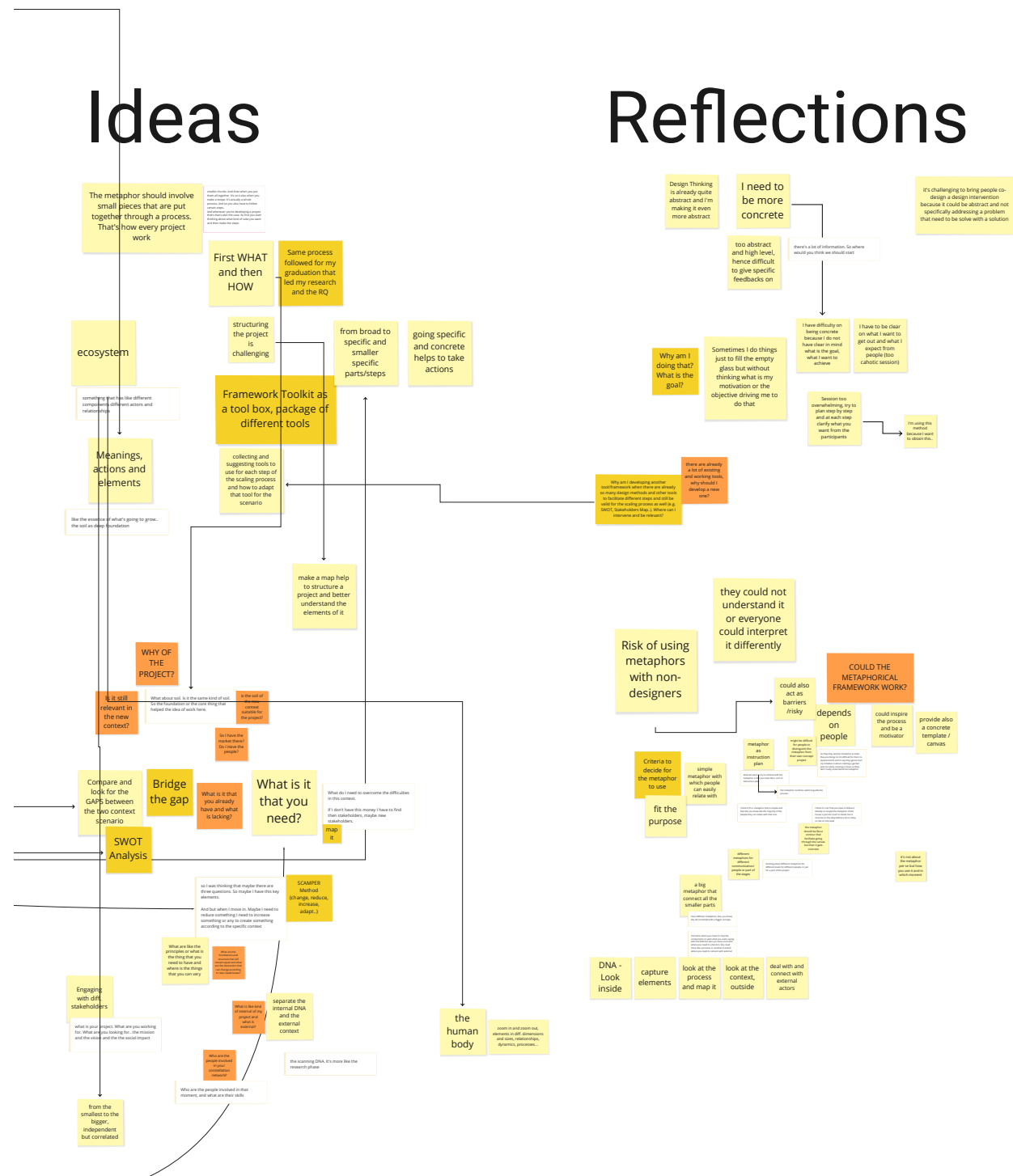
Figure 27 Screenshot of the analysis and collection of main insights and feedbacks, resulting from the Session 03

Conclusions & Reflections

Reflections & Discussions

During this session I collected a lot of ideas. Regarding the use of metaphors and storytelling techniques
advantages and disadvantages have been discussed. Metaphors are a good creative tool that might inspire and trigger the users, however particular attention needs to be put on the way those are used. It is important to keep the activity on concrete levels, otherwise it might get too abstract for the users, especially with non-design oriented people. Some participants suggested to use the metaphor mainly for the instruction that guide Social Urban Innovators in the process or as a communication tool to ease understandings and enhance engagement. Some others suggested to use multiple metaphors for different goals and purposes along the process. However, the most important thing to consider when choosing a metaphor is to first define the content, and then the container that could fit, instead of the other way around.

Additionally, according to the feedbacks, I should work more on the formulation of my design goal which is still too broad and not enough defined. For instance, I could think and specify who I want to target, what is the context scenario or application of the outcome and what I want to focus on. Those aspects will help to make better design decisions on how to develop the final toolkit; however, those will be decided at a later stage.

Recommendations for the next activities

Carrying several Participatory Session with peers and design students allowed me to learn a lot on how to carry online facilitation sessions. This was a good way to test my skills and be ready to set up next design interventions with the actual user of the project.

When setting up a session I should be more structured in the way I formulate my goals and the way I will evaluate the outcomes. The session has been perceived too ambitious and participants felt overwhelmed by the amount of information given all at once. It would be better if, instead I focus on one thing at a time and break the goal into smaller ones. In this way it will be more simple for the participants to follow the process. Moreover, in order to let the participants better understand the context of my project I should provide more concrete examples. Indeed, several students had difficulties on grasp the core of the project and this made it more difficult for them to provide critical feedbacks. The same applies also to the words used, which were perceived too generic; for instance, when talking about people… *who are those people?*

'[...] people you need to recruit to work with you in the team, or people you need a relationship with and people you want to collaborate with… people You just need to inform right like what type of different people you need?'

Overall, new insights have been collected which will help me to proceed on the process, but also several good critical point have been raised. When you are so much into your own process it is difficult to get the big overview and zoom-out, that's why it is relevant to discuss ideas and doubt with other people. However, you still need to be critical because you can obtain 'cool' ideas but probably not that relevant or coherent with the research done. Other people can give you their own perspective, but then it will be up to me to filter out and see how to use the insights.

When setting up a session I should be more structured in the way I formulate my goals and the way I will evaluate the outcomes. The session has been perceived too ambitious and participants felt overwhelmed by the amount of information given all at once. It would be better if, instead, I focus on one thing at a time, breaking the goal into smaller ones and guide the user step-by-step. In this way it will be more simple for the participants to follow the process.

Appendix E
DESIGN PHASE

Conceptualization & Design Prototype
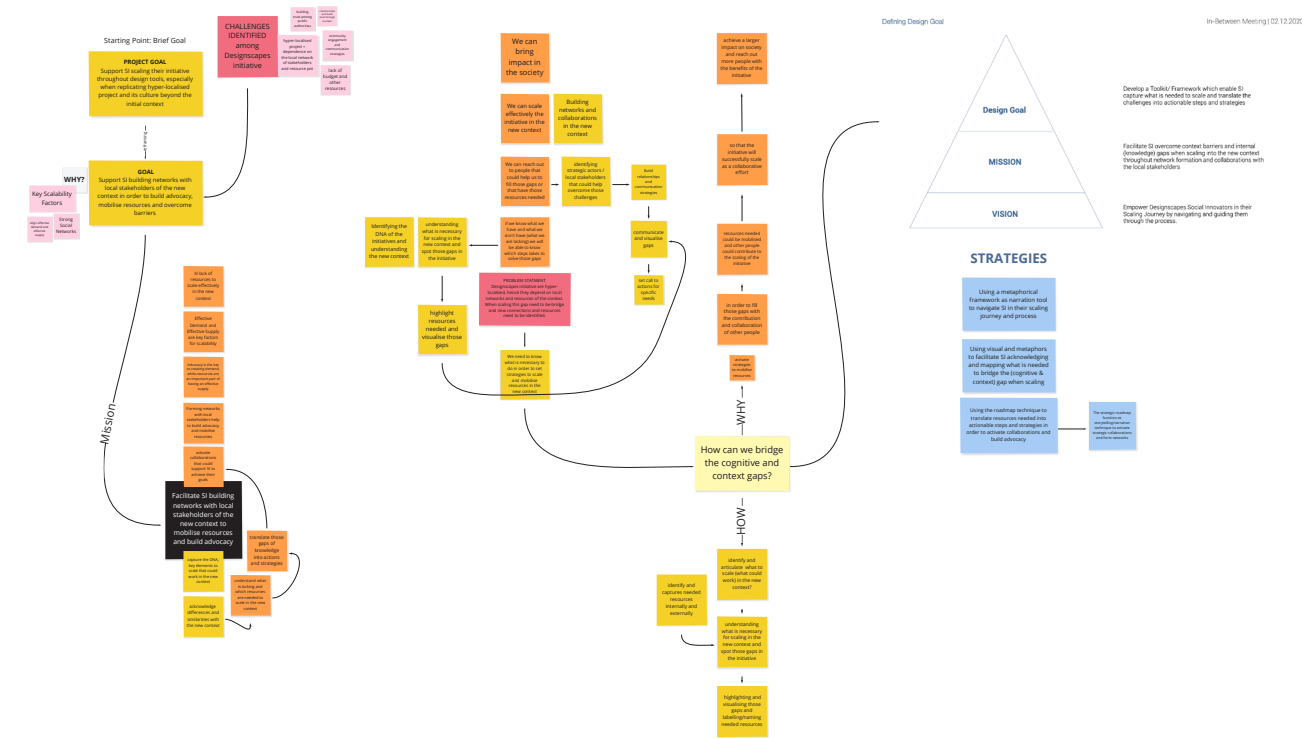*Moving from Problem to Solution Space*

(Chapter 10, 11)

Figure 28 Laddering Techniques have been used to map possible design direction and choose which one to take

Figure 29 Designing the Strategic Roadmap activity for the interventions with the users (on the left) and the final framework process outcome (on the right)

Figure 30 Sketching and ideating the concept prototype and the tool-kit activities

DESIGN INTERVENTIONS

'The Interstellar Journey of Scaling'
(Chapter 11.2)

Setting goals and Research and Design Questions to explore during the design explorations with the users.
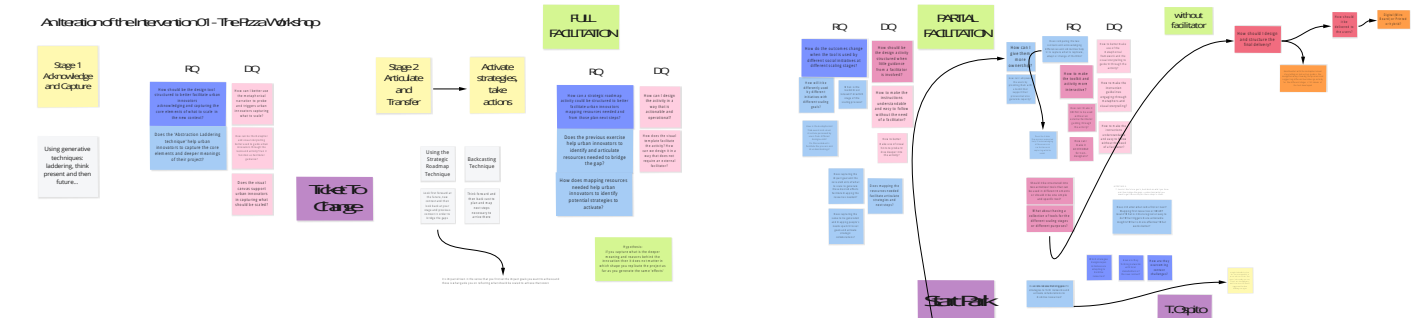
The overall goal of the intervention is to explore how visual storytelling and metaphors can be used as a facilitation tool to probe urban innovators setting goals and plan actions. The intervention is organized into two activities / exercises, each with different goals corresponding to the crucial steps

identified with the theoretical framework process of scaling.

A Sensitizer Toolkit in the form of Google Slide presentation has been sent out before the actual workshop as sort of preparation phase for it. The storyboard functions as a short inspiring guide willing to navigate the users through the crucial steps of scaling, by means of metaphors and analogies. On the other hand, this is a way to validate the relevance of developing a pamphlet guide functioning as narrative instruction of the scaling process.

How would the users perceive to receive the toolkit packed into a sort of Guidelines / Ikea Booklet about scaling? Would this work, would they use it/ read it?

As follows, some of the slides used for this introduction guide.
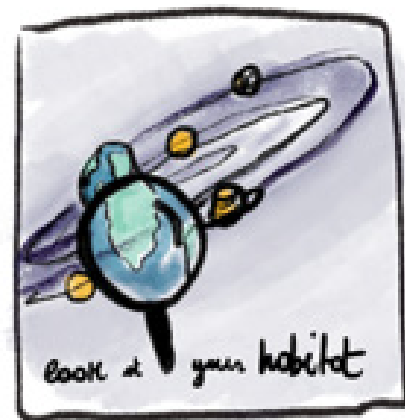
Explore your ecosystem.
Where do you come from?

Before to scale and replicate in a new context is important to first understand what are the enabling factors of your 'habitat' that helped you to thrive.

- Acknowledge key characteristics and factors of the initial context that influenced the implementation of your project;

What are those context enablers?
Can you find similar enabling factors in the new context?
Who's part of your current ecosystem?
How do those local actors sustained your initiative to grow?

'It's important to know where you're starting from to know from where to build momentum.'

Frog Design, 2020

Activate Strategies and Collaborations
What are the next steps?

Map and articulate resources needed in order to activate strategies and mobilise those resources that will allow you to grow in the new habitat.

- Identify potential strategic connections with local stakeholders and respond to the local community needs
- Set SMART Goals to reach to your final destination.

Who can help you with those and support your project?
What are the next steps to plan and which strategies can you activate to achieve those goals?

Sustained lasting value will require a thriving ecosystem comprised of partners committed to a shared purpose and a collaborative, strategic way of working.

Frog Design, 2020

A Strategic Roadmap to Scale

Strategies depends on goals and motivations.

1. Set your Vision & Mission
2. Acknowledge underlying motivations of your project and the effect/impact you want to generate
3. Capture core elements that allows you to achieve those
4. Identify Key characteristics of the context that enable you to scale
5. Match with the local needs
6. Map resources needed(in terms of internal capacity or external assets)
7. Articulate SMART Goals
8. Plan next steps and activate strategies to mobilise those resources through networks and partnerships

List of Evaluation Criteria / Design Requirements

Is it relevant?
1. How much does it help you in your scaling phase?
2. How much is it relevant for what you are doing? Why?
3. **What do you think was the most relevant part of the whole exercise?**

Is it actionable?
1. **Does it help you to start planning strategies and next steps?**
   a. How?
   b. Which part of the exercise help you most with that?

Is it operational?
1. Does it help you to proceed in your scaling process? How?

Usability of the tool
1. **Are the tasks and activities of the tool clear to you? if not, what and why?**
2. **How easy is it for you to use the tool?**
   a. How easy is it to accomplish the tasks?
3. Is there anything that should be simplified?
4. How much are the instructions clear for you?
5. Are the name and words used clear to you? What's not and why?
6. Would you need addition guidelines and more instructions before to start the activity?
7. **What do you think about the structure?**
   a. **Does the structure help you in achieving the goal?**

Facilitating through metaphors and visual-storytelling
1. Does the visual template guide you through the activity?
2. **How much does the metaphors and visuals help you better understand the activity?**
   a. Do they facilitate and guide you through the process?
3. **Do the visual template and metaphors probe you to reflect?**
   a. Do they trigger you to go deeper in capturing the core elements of the DNA?
4. **In what way do the visual storytelling and metaphors help you most?**
   a. What do you like/dislike of them?
5. How do you perceive different the use of metaphor this time compared to the pizza workshop?
   a. Does it matter to you which metaphor is used?
   b. Does it make a difference? Why?

How does the visuals and metaphors contribute to generate mutual understanding?
1. Does the metaphors facilitate communication between participants?

Depth
1. Do the 'How&Why' questions help you to dive deeper and extrapolate the essence and key elements of what to scale?
2. How much meaningful is the activity?
   a. **Does the tool help you to reflect?**
   b. Does it help you to reach deeper levels?

Collaborative Activity
1. Does the activity spark collaborations?

Some of the design criteria and requirements have been used to set-up the following evaluation points and questions to carry in a feedback interview at the end of each session. This has been set up as an open discussion and collaborative reflection.

Experiment 01

Figure 31 Screenshot of the set-up in Miro Board of the first design experiment carried with Ticket to Change initiative

Assessing the scope
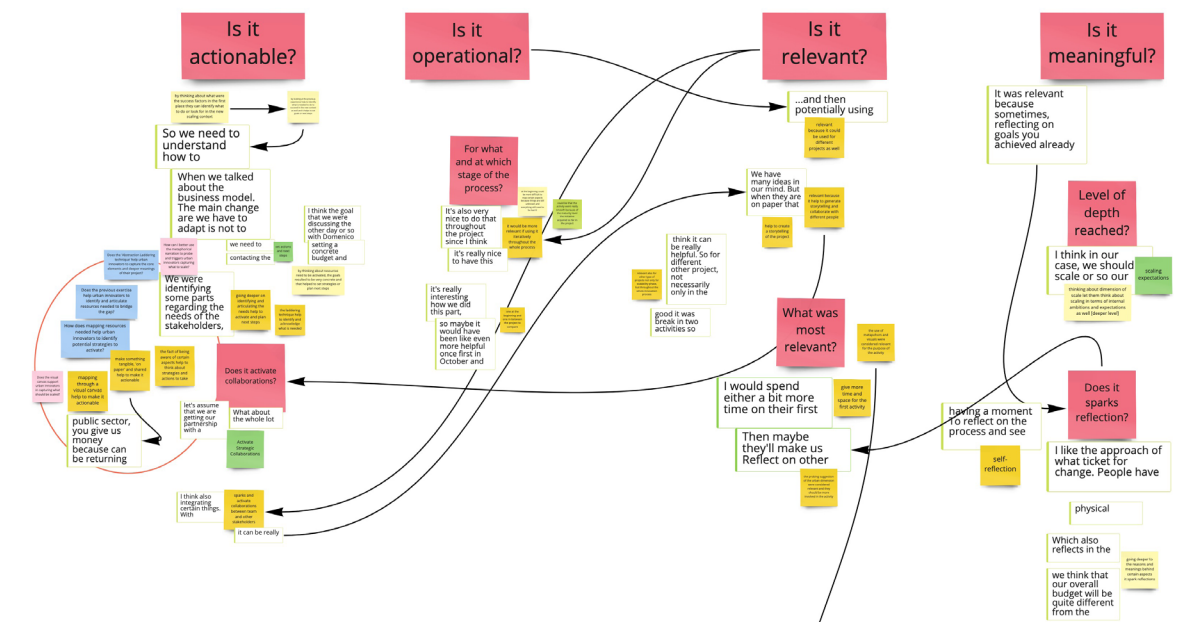
Evaluating design aspects and structure
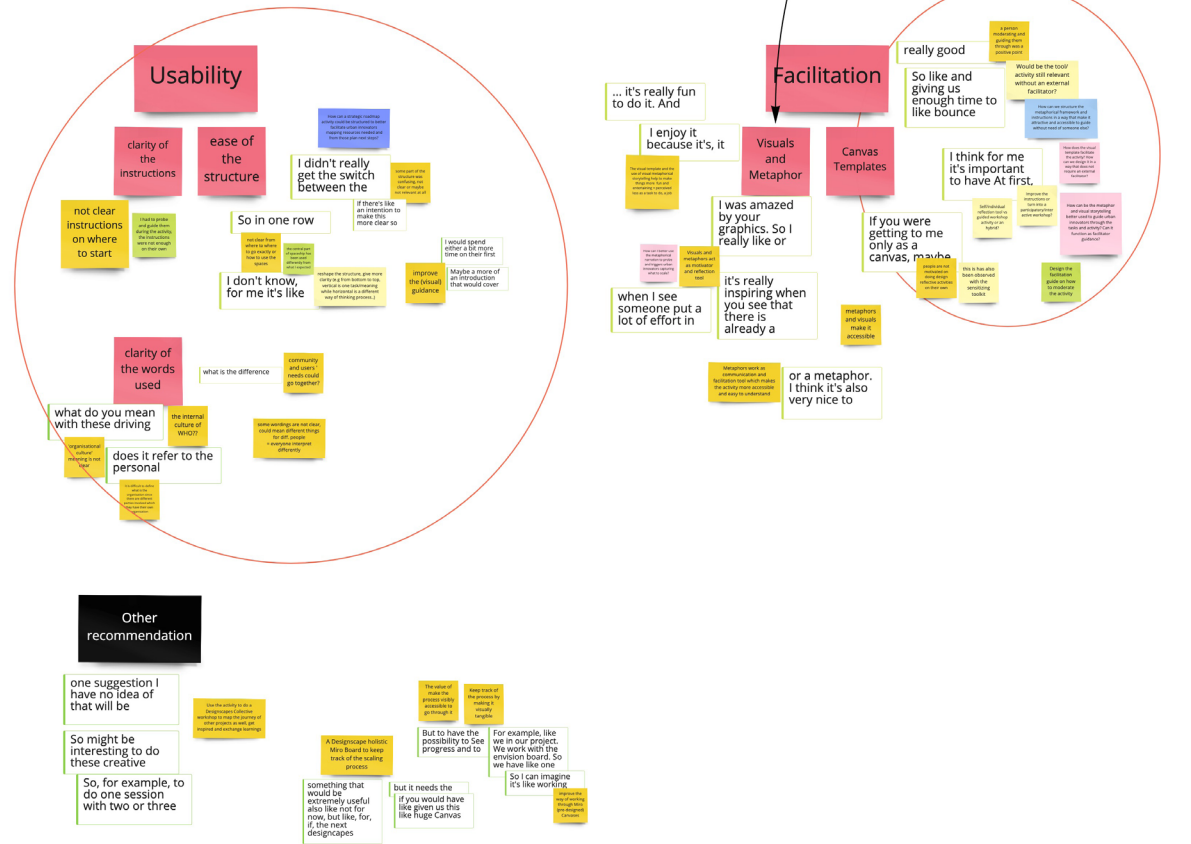
Figure 32 Analysing the insights of the Evaluation Interview carried after the design intervention with Ticket to Change

Conclusions & Main Takeaways

Insights:

Users like to be guided and need reassurance. They have knowledge and skills but they lack self-confidence to put those skills in practice; having someone telling them 'you are doing good' boosts their capacity and faith. This could be perceived as a way of 'empowering' the users proceeding on their scaling journey with confidence.

[..] Having a moment To reflect on the process and see how far you've come is really interesting. (Giulia)

But to have the possibility to See progress and to go back and to have this visually. That would be awesome. (Hannah)

Users need clear guidance and instructions, so the structure should be more simple to be followed.
*I didn't really get the switch between the needs and then putting it type breaking it down into these four pillars. (Hannah)*

Once again, it has been proved that one of the most crucial aspect of scaling is 'network formation' and 'community engagement'. Forming networks allows to build advocacy, especially among the public sector, generate demands among the community, but it will also help to mobilise resources from local actors and other stakeholders. Budget and communication strategies have been identified as critical points during this phase; indeed, the initiative lacks of funds and need to find strategic ways to get the (financial) support from other actors, sponsors or the government; to do so they will need to show and demonstrate the (positive) impact they are going to generate in the society with the innovation, they need to communicate the value that they will create for the community, the users and the stakeholders involved as well.

Potential Strategy to follow: communication strategies through narration of change and narrative techniques to activate collaborations with different actors. Storytelling make the impact tangible, ease the communication and understandings, attract and engage.

Regarding the outcomes and data collected, communication strategies seem to be one of the most common and most relevant strategies to adopt when implementing the project in a new context; especially because 'forming networks' and building a sustainable ecosystem of relationships has been found to be an effective way of scaling out. Therefore the next iteration could be structured with more emphasis and space to think about 'how to set-up' communication and collaboration strategies, for instance by mapping out touch-points, points of contact with the local community and stakeholders. Also, more emphasis can be put on the needs of the people and the value generated for each of them.

Personal Reflection

It was difficult to be present, as designer and facilitator, but at the same time step back and let go of control. As designers, we have a natural tendency on steering and guiding users where we want them to go, either indirectly through the design itself or directly by facilitating. Facilitating means guiding the user toward a certain outcome or direction, which it does not mean is good or bad, but it is 'political', it sets a certain hidden hierarchical power between who is involved.

The above reflections brought me to formulate new considerations and questions for the next research and design phases:

- *Shall I design something that is more open to be used and customized by the users according to their 'needs' and goals or something more rigid and specific?*
- *How much the design should control the process while guiding and facilitating the users through it?*
- *How much freedom should be given to the user to make use of the tool for their own purposes and goals?*
- *How flexible or rigid should be the structure of the tool?*

In the next iteration less facilitation guidance will be provided to give more freedom to the user to explore the tool and its structure. This will give me more valid insights regarding the usability of the canvas and its design, but will also be a way to set how much control and how much guidance should be given to the users.

- *Does the structure on its own, the visual hints, the instructions, the probing questions and the metaphorical framework could function as guidance and facilitation?*
- *How should those be designed to be easy to follow and effective in their function?*
- *How should the tool be delivered to the users?*
  - *Should it be structured as an interactive workshop with external facilitation or as a toolkit with step-by-step instructions and a potential self-facilitation guide?*

In the short time given it was difficult to touch upon all the sections of the toolkit, hence some parts of it were skipped or only mentioned briefly. A good learning point derived from this is the fact that the scope of a design intervention is different from the final deliverable, an intervention does not need to be refined as it could be the final outcome. The template designed for this intervention was already designed too much in detail and it was too ambitious. The time of the session was too short to capture and explore the parts designed and answer to all the goals set at the beginning. There was too much on the plate at the same time, which made it more difficult to really understand what could be simplified and what instead was relevant to keep. For instance, the section of 'urban dimensions' was not touched during the session, but only mentioned briefly. However, according to the user it would have been relevant to go through it and had the time to check it out. The participants showed interest in that specific part where context factors and urban dimensions were suggested to be taken into account.

Additionally, the second canvas developed has been perceived meaningful and valuable to be used also in other context scenarios and set-up, for example during other stages of an innovation process and not only related with the scalability.

I think it can be really helpful. So for different other projects, not necessarily only in the scalability phase because I think that, in this case, especially in the first part, we were talking about scalability. But the second part, I would say that we can actually imagine it for any Type of project, even a brand new one, when you have an idea....
Giulia Sala, Ticket to Change

Experiment 02

Set SMART Goals and Activate Strategic Collaborations!

Now that you have a clear Vision & Mission and you know what you will scale in the new context...

- What do you need to do in order to get to your final destination?
- What are the resources that you may need to mobilise to achieve your goals?

- How can you mobilise the resources needed?
- Where can you find what you need?
- Who can provide you with that?
- Which partnership and collaboration should you activate to achieve the goals?

Figure 33 Analysing the insights of the Evaluation Interview carried after the design intervention with Start Park

Experiment 03

Figure 34 Analysing the insights of the Evaluation Interview carried after the design intervention with T.Ospito

Other Reflections and Observations

Appendix F
Delivery Phase
... toward the final outcome

Who would be the ideal target user and scenario of use of the toolkit developed?

SCALING SCENARIO 2 — Scaling through Networks...

SCALING SCENARIO 1 — Direct Delivery / Scaling w...

SCALING SCENARIO 3 — Open Innovation

Implementing Team Context A + Transferring Team Context B

Participants

Only Team Context A

Scaling Stage

Earlier Stage — After Implementation A Prepare to Bridge and Transfer in B

Diverging

exchange of knowledge will happen here

Using knowledge and experiences gained during Context A implementation to start mapping assumptions for Context B

transferring experiences of implementation in Context A, use as base for developing strategies for Context B

mapping needs of both contexts

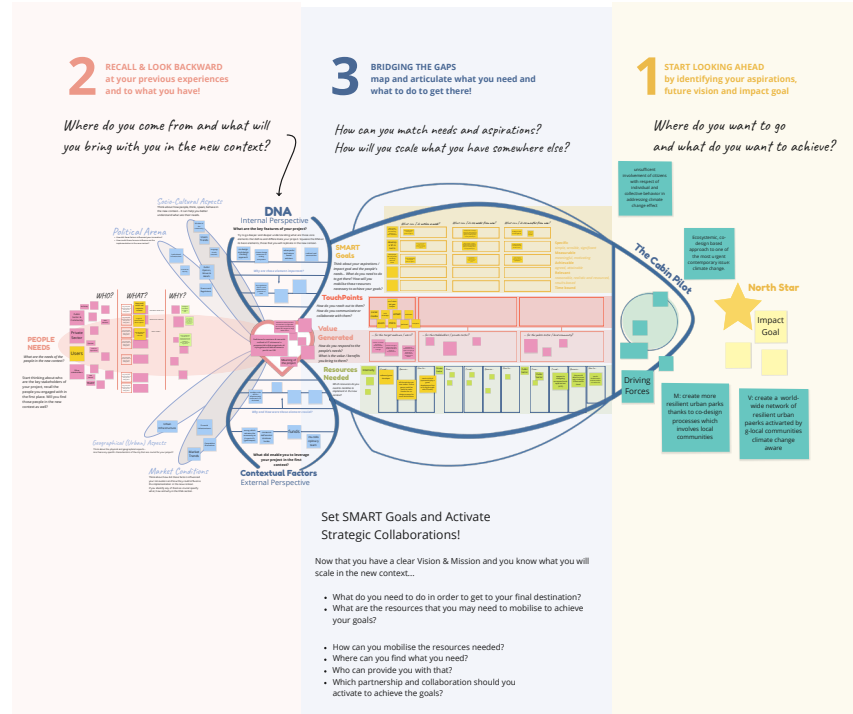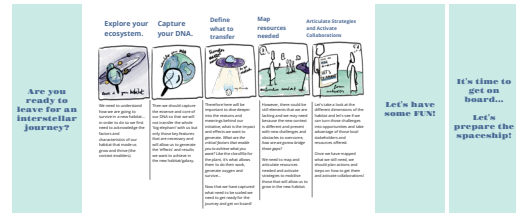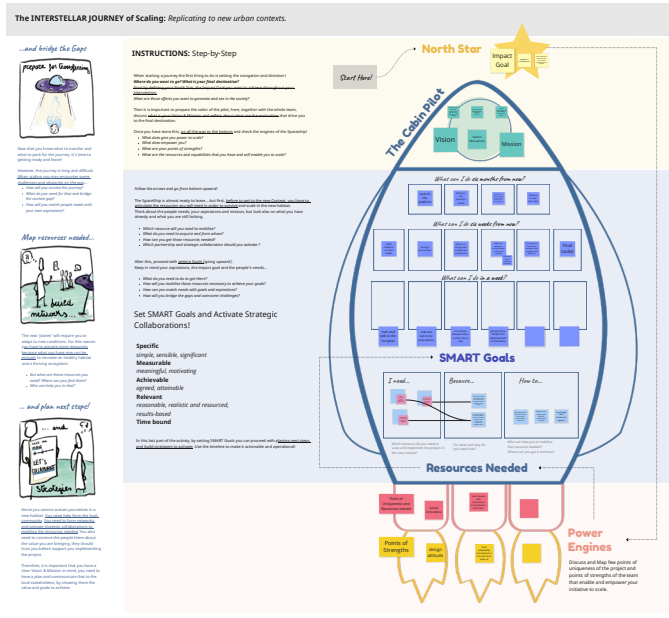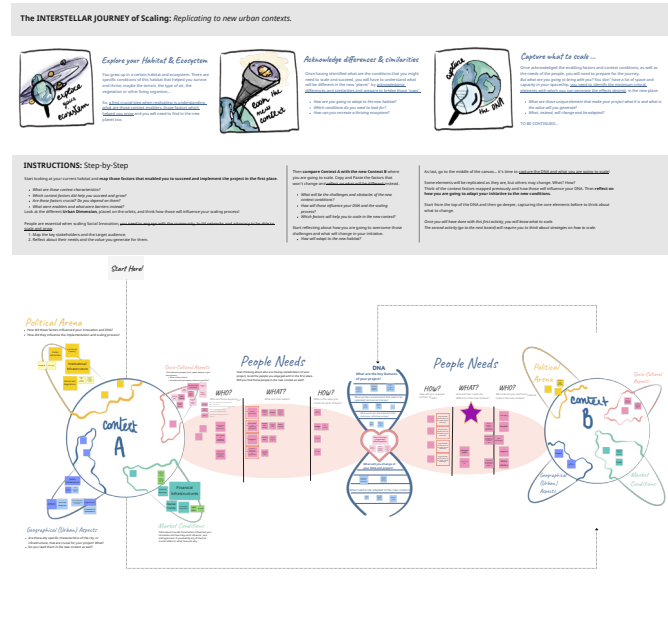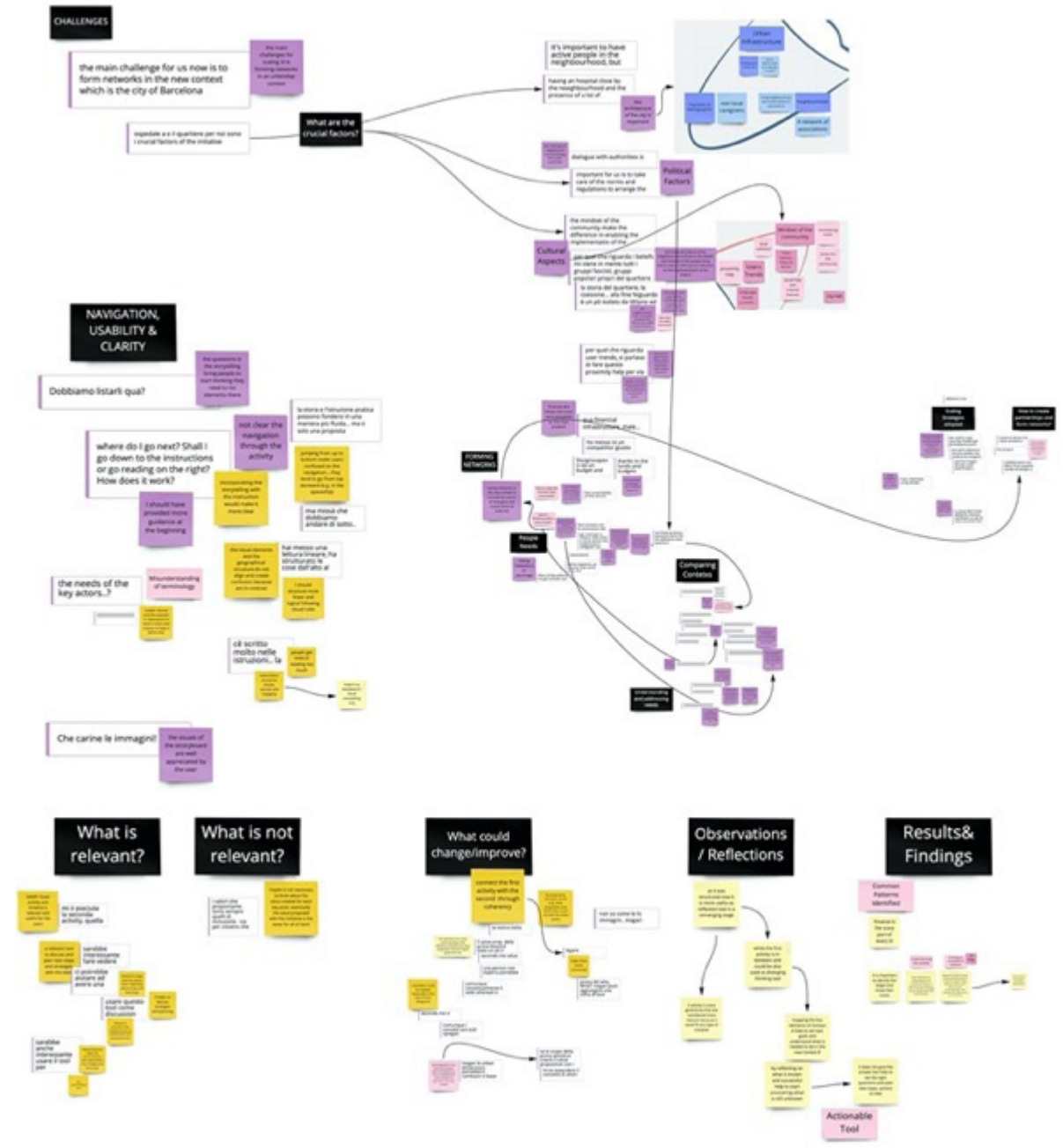Mapping Assumptions Context B to test

Exploration of Context B is ongoing Prepare for implementation

Later Stage

Iterating / Reflecting Converging

Iterating DNA, value proposition, adjust North Star, Vision & Mission

Map resources still lacking and set strategies on how to mobilise through networks and local help

Figure 35 Defining Usage Scenario and Target of the Toolkit by taking back the initial scenarios mapped in Phase 2

What should be delivered in the end to the users?

Framework Process / Strategic Blueprint

Workshop Activity / Toolkit

Probing Cards

Assessing Potential to Scale

Scaling Framework

Navigation Map / process Framework of Scaling

WHAT TO SCALE — Activity Canvas 1

HOW TO SCALE — Activity Canvas 2

CONTEXT BARRIERS — Threats / Alerts Cards

CONTEXT ENABLERS — Enabling Cards

User Guide + Short Movie to convince about the value

Scaling Toolkit

Testing the Toolkit Activities with other experts
(Chapter 12.2)

Like / Dislike?

How do you find it relevant?

Is it understandable?

How to make it usable by social innovators without the presence of a facilitator?

How to make it more accessible to non-designers?

How should it be designed for a better / more effective 'use'?

Is it desirable?

How should the toolkit be delivered to the users? How would you like it 'packed'?

Which platform / media use to present / deliver the visual storytelling instructions?

How to deliver the canvas / tools?

How to convince people to use it?

Figure 36 Insights from the user test of the toolkit/activities carried with a designer and social entrepreneur expert (Anne - Enviu)

Welcome / Introduction

Now that you implemented your project in the first place you are getting ready to transfer and scale it to a new urban context. However the scaling journey is long and will put you in front of different challenges to overcome.... but I want to support you through the process! Hence, I developed a toolkit which will facilitate your scaling journey and will support you achieving your goals.

The process of scaling is not linear and may differ in different context scenarios. However, some crucial steps have been identified that need to be take in order to scale effectively.
Are you ready to kick-off? Then let's get on board together!
The toolkit developed is deconstructed to respond to the different needs and different workshop activity can be set up for different scaling scenario.
Check the map below and answer the following question to see what would be ideal for you to start with:
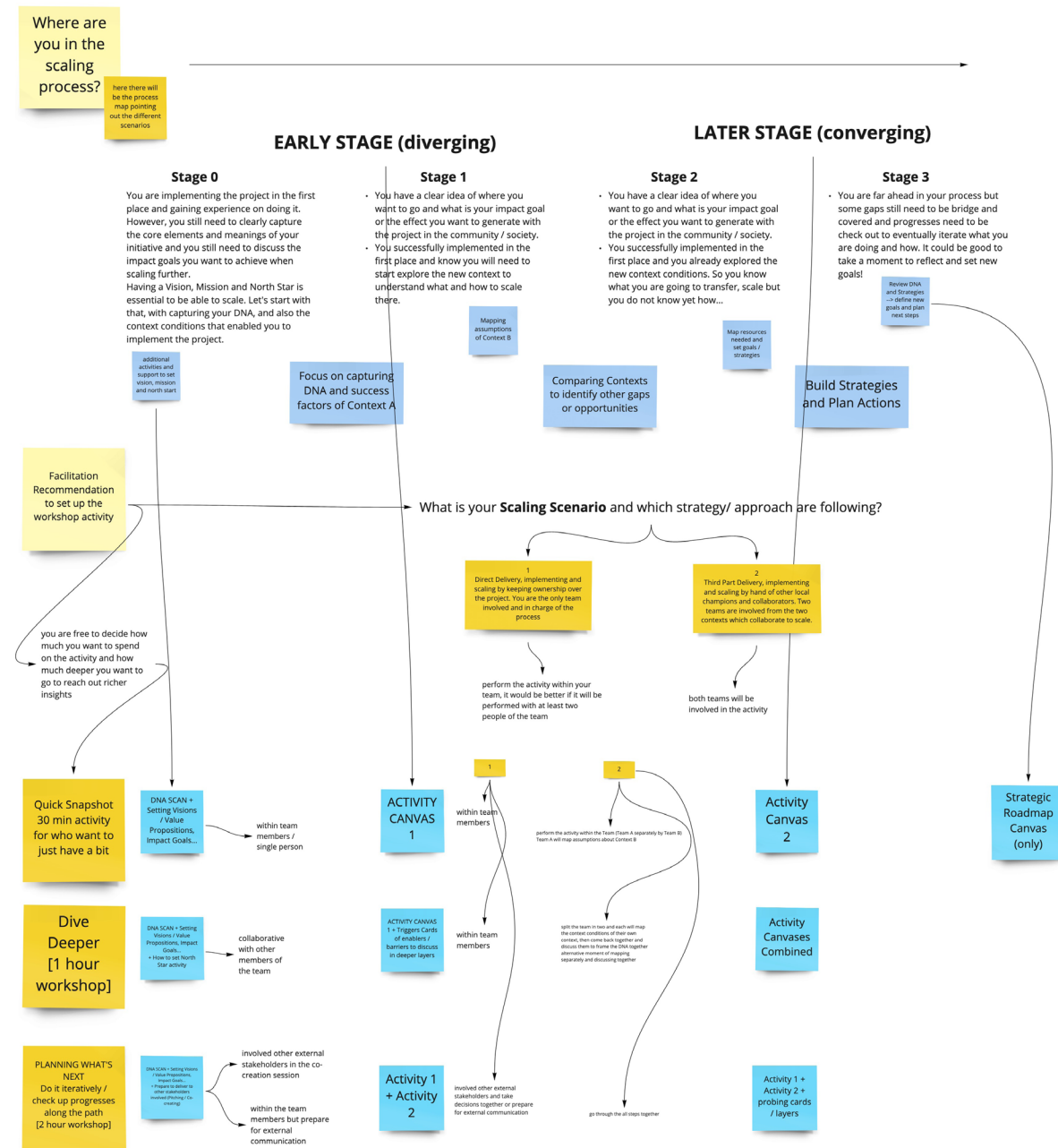At which stage are you at right now?

Figure 37 Structuring the process to develop a flexible toolkit in a workshop Set-up on Miro Board

Ideas:

■ The toolkit could be broken into smaller pieces to respond to different user's needs, For instance by developing a sort of 'Card Deck', actions and activities suggested to be performed along the different steps of the scaling journey. In this way it can turn into a 'Card Deck Game', a collection of action cards and strategies intended to facilitate SI overcome the challenges faced along the process.

This Card Deck can be packed with the 'Blueprint Map' of the scaling process as a sort of 'game' users can use iteratively and collaboratively to discuss critic points, diverge or converge ideas and thoughts together with different people and stakeholders. However, this will remain more as a future recommendation to be explored by other design experts.

■ A digital and interactive workshop set-up which provide different facilitation recommendations for the different scenarios and purposes; then freedom will be given to the users to decide what do best for them. In this way, users can decide how much time they want to spend on each part, which activity to focus on and how much deeper they want to go in the various steps and layers.

■ Another valuable idea suggested is the one of organizing the activity as an online course or Master-Class Workshop where different Social Urban Innovators are invited to learn more about the scaling process and the toolkit developed. Indeed, by experiencing the tool users will be more engaged and attracted to make use of it on their own afterwards.

■ The Strategic Blueprint, a sort of navigation map aimed to visually guide users through the process of scaling. This process is explained with references to the 'design process' and the 'lean startup methodology'. It combines all the findings collected through the different design activities along the research project.
It includes also a set of Cards containing the following:
  o Action Stepsà the activity to perform along the path
  o (internal and external) Barriers
  o Suggested Strategies to overcome the challenges / barriers
  o The Building Blocks (network formation, community engagement..)
■ A Workshop Set-up, this activity intends to zoom-in into a specific phase of the scaling process and it has the scope of facilitating SI bridge the gaps and overcome (cognitive and contextual) barriers in order to replicate in the new context. The strategy chosen and focus of the workshop is on building networks and activate strategic collaborations.

User Tests of the Workshop Activity Set-Up
(Chapter 12.3)

Who was involved in the User Tests carried about the Workshop Set-Up of the Activities?

The first user test, the one that impacted most on the set-up and structure of the Workshop Activity, was performed with a UI-UX practitioner. This test has been set-up on the online Miro board and held through a Zoom Call. I gave the participant a brief explanation of my graduation project and then I let her navigate through the Toolkit and overall setting on their own. I asked her to imagine to be like a Social Innovator and try-out the tool while screening through the steps. I also asked her to think out loud about the steps she was doing and why, or any other feedbacks and comments. The session lasted 2.5 hour. Feedbacks was really good and on point which made me reflect and reorganise all the materials differently. Moreover, it made me better reflect also on how to distribute better the communication and information of the different part of the Toolkit and materials that will be delivered in the end to the real users. From those insights I decided to develop a User Guide 'booklet' as a sort of preparation users have to go through before to arrive on the Miro Board and use the toolkit on a Workshop Setup.
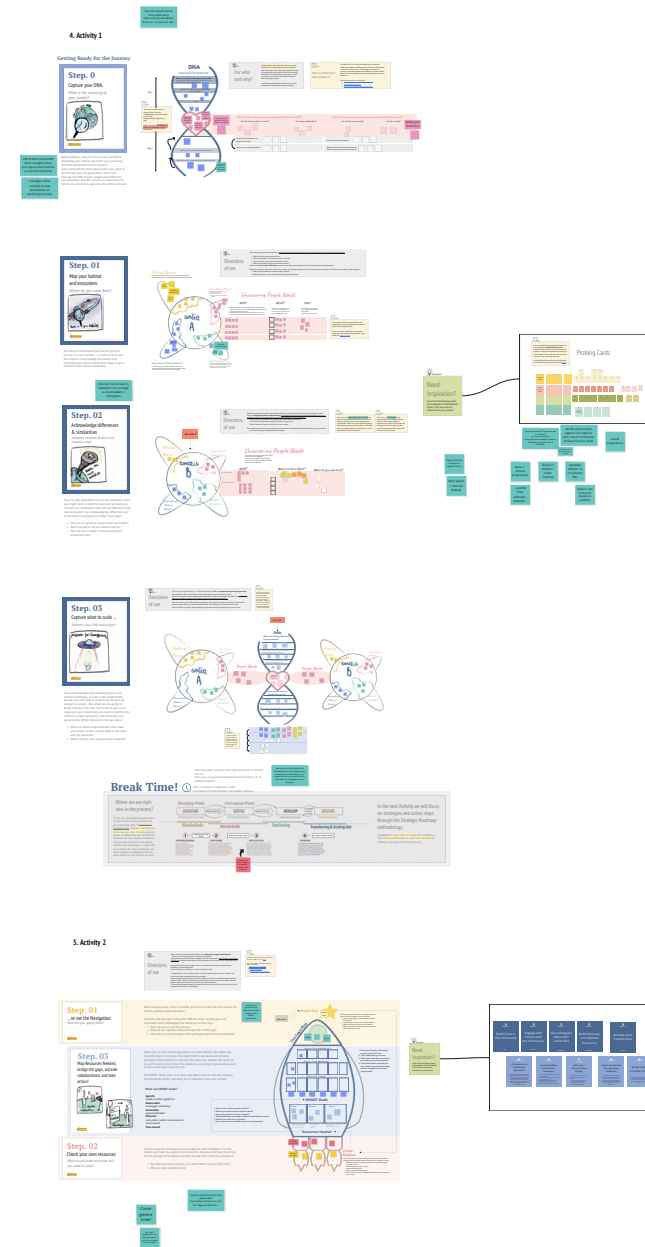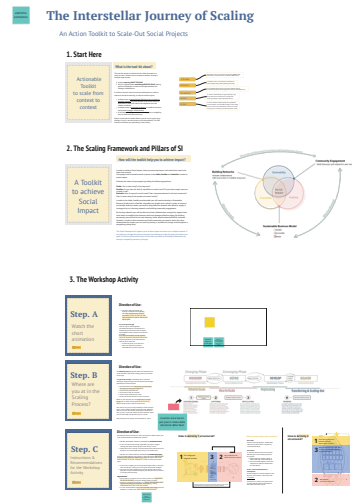
Figure 38 Old Version of the Workshop setup in Miro Board

The main question raised and discussed during the tests was:

- *How can we better organise the different material so that they are clear?*
- *How can we distribute them?*
- *What are the touch-points to reach out to the users and what are the scope of each parts of the overall toolkit?*
- *How can we better distribute information and communicate the relevance of the toolkit?*

Then the Workshop on Miro has also been restructured and it has been suggested to split the different parts and activities in a more clear way by using some dedicated squares (see last version on the Report, Chapter XX or access the Miro Board Here XX).

Discussed point and main changes:

- user guide will be provided as preparation before to start the workshop, and informative of the toolkit. This is something users can print out or read digitally and always have with them in case they want to understand something better. however it's supposed to be something they read the first time and then won't be necessary to be read again.
- the workshop activity is organised in one Miro Board but each 'phase' is clearly separate (using design tricks). So there is the square for the preparation phase, then the square with the cards if someone want to have it also on the Miro Workspace, then the space for activity 1, activity 2 and so on.
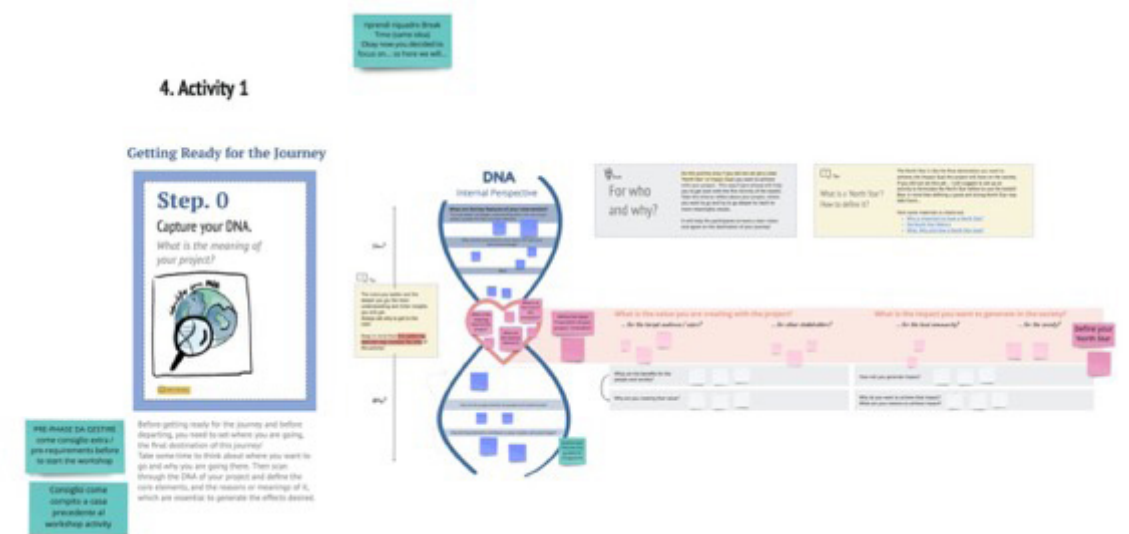

Figure 39 In this case it was suggested to make Activity 0 clearly as something separate and suggest it as a 'homework' to do before the actual workshop (for those users at an early stage of the process)

- it was given more space to activity 0 as something separate. A requirements or 'homework' preparation before to start the actual workshop, instead of being part of activity 1 (this was indeed confusing)
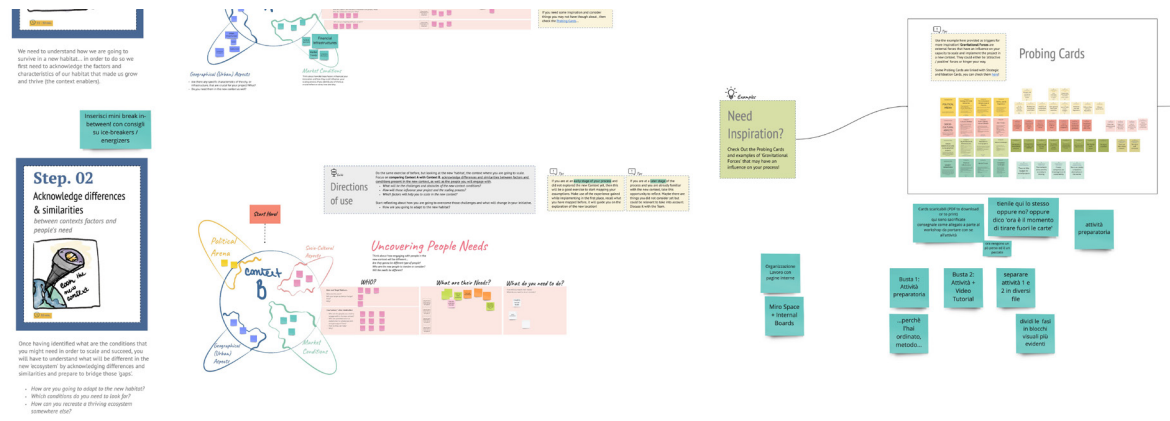
Figure 40 Here it was suggested to include a break in-between those two steps with some suggested energizers games. From here also the feedback of reconsidering the 'time' suggested for each activity. Since it could take longer, especially the first time. In addition, here was also suggested to provide the Card Deck as something to download and check before the Workshop in order to give them more importance. In the old setup they were not enough highlighted or visible, especially because of the relevance they play in the activity.

- more 'introduction' rectangles where every time I was repeating where we are in the scaling process with the map was added with a recap of what has been achieved so far etc. This ensure more guidance for the user that feel empowered and confident on what is doing.
- some breaks were added also with suggestion for energisers because the two activity could be very intensive
- it has been suggested to extend the length of the time suggested for each step.
- wrap-up and closing of the activity is also provided at the end for each of them
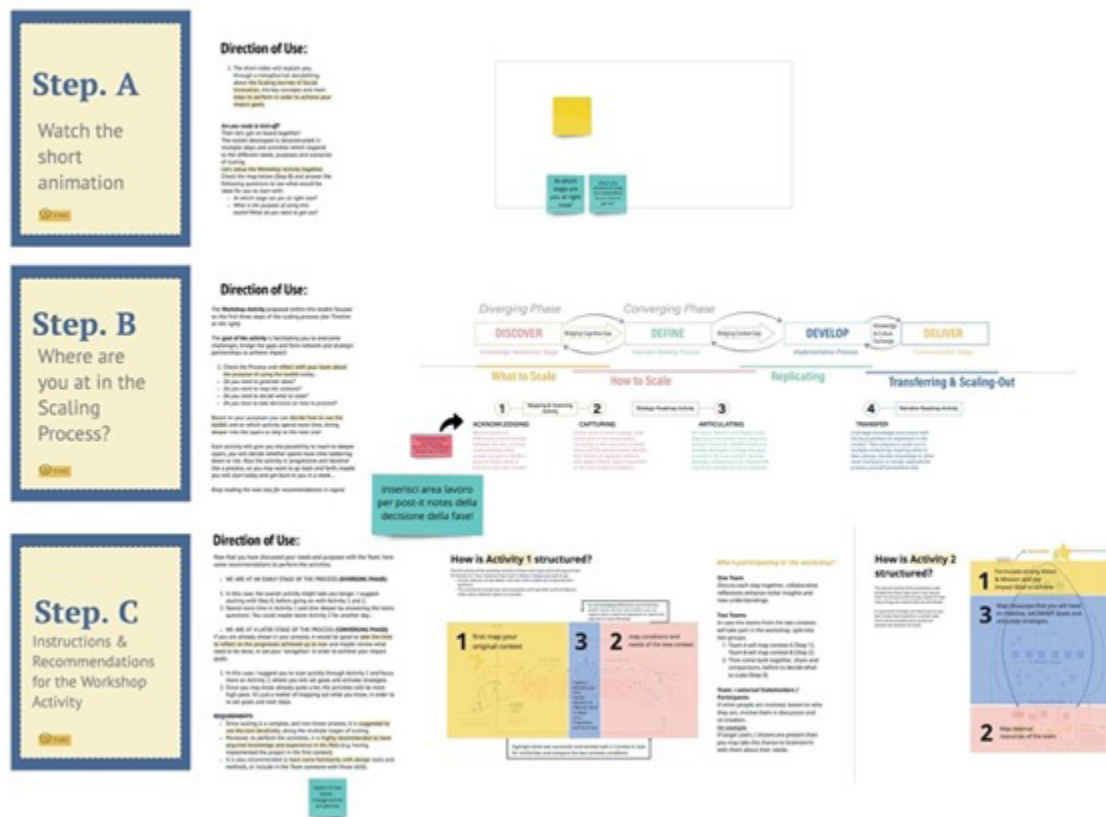
At Step B, when Social Innovators are asked to discuss where they are in their scaling stage in order to know what would be their ideal usage scenario, it was suggested to create a workspace with post-its so that users can gather their thoughts. This has been implemented in the final version.

In addition, small changes have been made also in regards of the aesthetic and design aspects of some elements (e.g. the cover used for the Steps A,B,C but also the one for the storyboard/storytelling, see Figures below).

Figure 41 It has been suggested to change the style and graphic design of the instruction 'covers' and the ones of the storyboards, in order to make them more playful in accordance with the whole tone of voice used. Hence this new version has been developed.
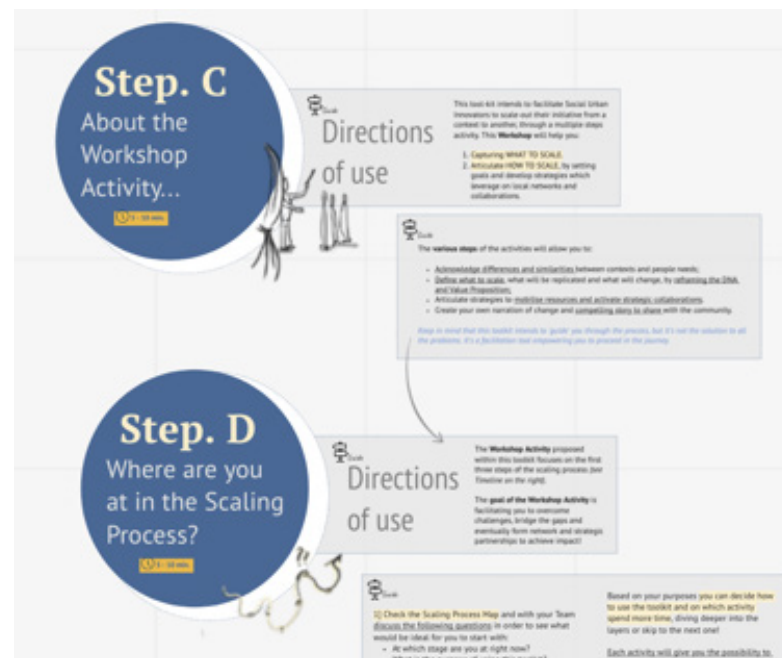
Figure 42 New design version of the instructions provided in the Preparation Phase

Previously it was organized all on one long line, from top to down, as pictured in Figure 01. The process was the following:
first the participants were welcomed in the Workshop Activity, then a general introduction about the 'Toolkit' and why it's relevant was given with the support and explanation of the Scaling Framework. After the general introduction the activity was introduced in three steps (A, B and C).
Step A: participants are prompt to watch a short animation video;
Step B: This is the crucial step where the Scaling Process Map is introduced, which will guide and navigate the user throughout the process and activities. Here the user is invited to check the Map and discuss with the Team what is they need, and goal of carrying the workshop activity and where they are in the scaling process. According to what will be decided the users will be redirected to different 'possibilities' on how to perform the workshop and activities. Indeed the toolkit intend to be flexible for different needs and scaling scenarios.
Step C: facilitation guidance and <u>recommendations are given here regarding the different options about how the SI could set-up their 'personalised' workshop.</u> Then instructions will be provided as regards each of the two activity.

The two activity will follow down. First the Activity 1, with its multiple steps and then Activity 2. <u>The user is guided step by step throughout the metaphorical storytelling. This function indeed as facilitation and communication frame with the scope of making the process more clear, more engaging and more fun for the user. But it also helps for the collaborative discussions where abstract thoughts or concepts are raised. Using metaphors to refer to something help everyone to be aligned on the same page.</u> This particular setting of the activities did not change very much from the old and final version because it's what has been proven to be the most valid and clear way to accompany the user in performing the tasks. This, also during the interventions has been highlighted as the strength of the toolkit itself and one of the part the participants liked most.

In **activity 1**, at the step when users are asked to map out the context conditions, the probing cards are provided here as a sort of inspirational trigger to let the user reflect about other aspects they might not have thigh about. This during the design experiments with the initiatives has also been proven to be valid and very relevant helping them think broader and deeper. However, according to the feedbacks received during the user tests, it has been suggested to provide this card in a different setting. As they were put previously on the side of the canvas activity, designers said they were going to be lost. While instead it would be much more valuable to highlight them more and provide them beforehand the workshop as a sort of preparation phase. In this regards it has been also discussed and came out the idea of build a user guide that prepare the user about the topic of scaling-out, the toolkit and its part and then about the workshop itself. In this user guide the card deck is also included so that the users could take a look even before to start the activity.

Whereas, the second test has been run with a non-designer (an engineer PhD Researcher participated in the second test), the reason to involve someone that has not design experience was to mainly test whether the toolkit is still 'doable' and understandable for who's not an experts in the field and not familiar with such processes. Especially I wanted to see whether I had to make changes in the type of words used, if any too specific, or add more instructions. As results, some changes have been made to the phrasing and sentences in order to make them more clear. But overall, apart from very small changes the process was clear and non-design proved. It has been outlined that it help a lot having the metaphorical storytelling framework guiding the process because it makes it way more accessible.