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Insight to Actions: Our Role as Facilitators

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In our work at Final Mile, we leverage behavioral science and design expertise to gain a fresh perspective on wicked problems in the development sector. We have learned that for a new approach to be beneficial and sustained over time, it must be owned by those who are working on the ground and embedded in the context. People who live with a problem have the deepest understanding of how it can be addressed, and how changes to their approach will impact the overall system. And since systems and contexts are ever-changing, interventions can best be adapted by those who remain after our participation has ended.

This has driven us to frame our role as being facilitators of change. We work with communities, NGOs, and implementing partners – but it is they who ultimately lead that change.

Our role is to equip them with a new framework for viewing their problem, and to build their capacity to use this framework to address the problem by implementing interventions. In the stories that follow, we share our process and lessons from engaging with three sets of partners.

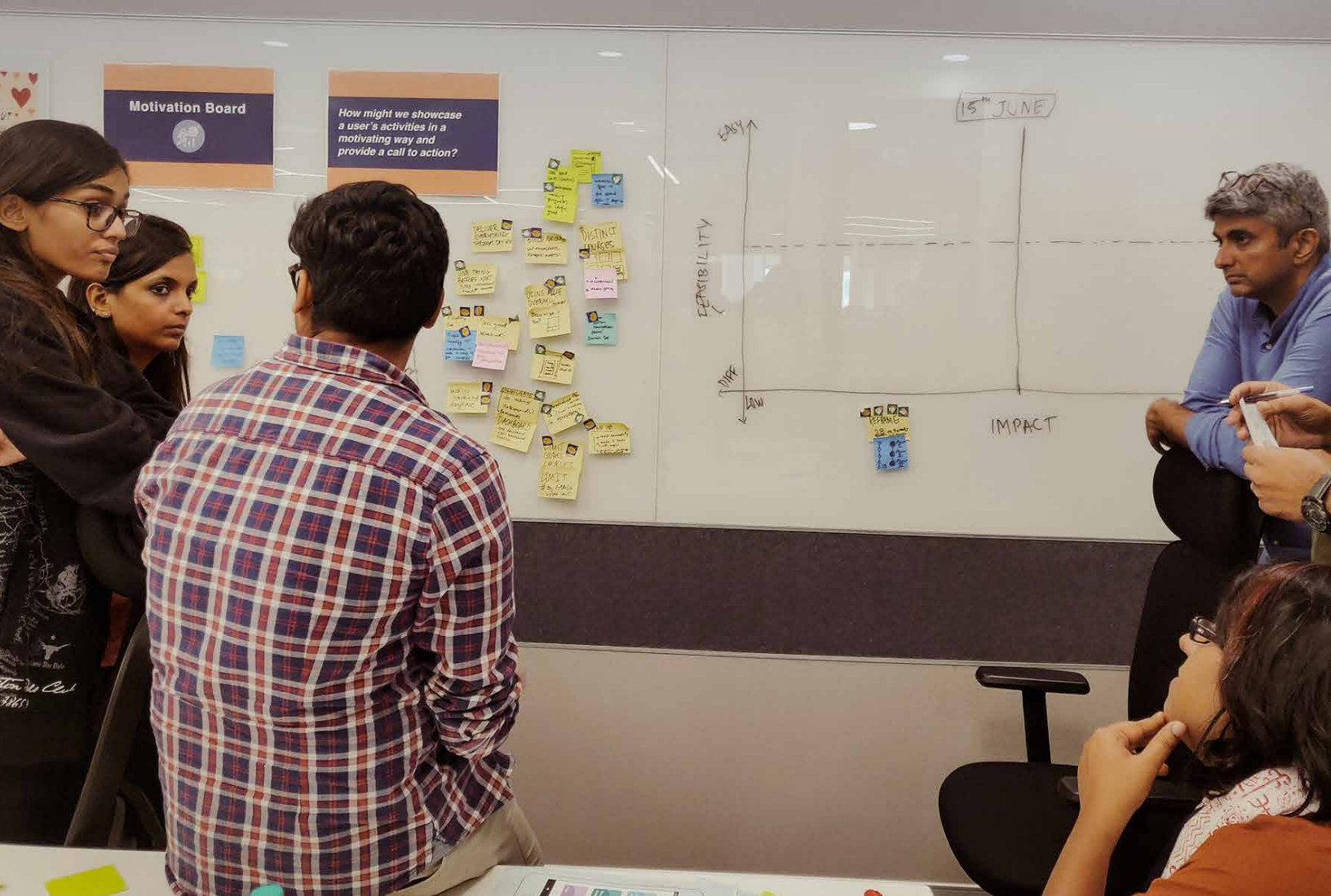
These experiences were quite varied. For example, the ed-tech implementation teams we worked with in the self-learning sector expressed interest from the beginning, but we had to evolve our process of collaboration to build strong enough ownership among them to drive them to action. With Jan Sahas, an Indian NGO supporting victims of sexual assault, the key to building ownership was how we established and managed our relationship with them from day one. And while collaborating with implementing partners for the pilot of a community-based HIV prevention program in South Africa, we had to build ownership of the approach not only within the leadership but among all the teams we worked with.

Our facilitating role has remained the same, but we have adapted our process based on the needs of our partners, to give them the best chance of success when they lead the approach and effort on their own.

It is extremely rewarding when our partners take what we have shared and make it better. In the quest for more such moments, we will continue to learn from our partners and experiences and evolve our role as facilitators.

STORY 1

An Evolving Co-design Process



A learning mindset is essential in today's world, but driving change in the education system is tough. Educational technology (ed-tech) apps can be an entry point to supplement formal education and develop a learning mindset, given the growing popularity of smartphones in developing countries. Ed-tech apps provide a free alternative learning platform with good content, but they suffer from low rates of use and retention. Along with Grey Matters Capital, our funder, we set out to create a framework to enable ed-tech teams working on apps for students in India to address use and retention through a behavioral science and design lens. Through interactions with the leads of these teams and immersive, explorative research with students and their parents, we developed an Engagement Blueprint for self-learning, outlining a new approach to identifying and addressing usability issues.

Since ed-tech teams are the experts in the field and at the forefront of implementation, the blueprint was intended as a tool for them to create maximum impact for the learners. Our pilot set out to test its efficacy and how best to transfer this approach to implementation teams. We learned that although the teams were excited about the blueprint, they needed help using it to prioritize the key challenges to address – both to make better use of their resources and to internalize the behavioral principles they would be using. This led us to create an accelerator program, in which we worked with ed-tech teams for a six-month period. Through this program, our reach and scope expanded beyond India and K-12 students to countries such as Kenya and Vietnam, and to vocational training, government job test preparation, and adult learning.

Each team was passionate about their product: it was their baby, so it was important for us to establish our role as being part of the team, not external critics. A team must have a shared understanding of the purpose of the product, and a shared vocabulary. We developed the accelerator program to enable this. In conversations with the team leads, they shared what they wanted to achieve through the product, and their perceptions of where they had succeeded and where they were facing challenges. For our part, we familiarized our partners with behavioral science concepts and how they are used in the self-learning space.

Soon we were all using the same terminology and were on the same wavelength when discussing challenges.

Working together, we used the Engagement Blueprint to examine their products with a new lens and prioritize the key behavioral challenge to be addressed. We leveraged our research with users and our experience of building the Engagement Blueprint, while the partners brought their expertise on what was needed and feasible.

In the first iteration of the accelerator program, after problem-framing the Final Mile team suggested design concepts exemplifying specific behavioral principles. This was followed by discussions on implementation and the necessary refinements prior to roll-out. But we felt we could further improve the ed-tech teams' ownership of the approach. In the second accelerator program, therefore, problem-framing was followed by a co-creation workshop in which we helped the teams use the relevant behavioral principles from the Engagement Blueprint to create design concepts themselves. These were prioritized using an impact and feasibility matrix.

Having in hand basic wire-frames of design concepts they had created themselves gave the teams a head start in making the necessary changes to their apps – and they were emotionally invested in seeing these changes come to life.

We have worked with more than 20 teams from a range of countries and areas of self-learning. We helped them achieve greater impact, but these collaborations have also been an immense learning curve for us.

With each new ed-tech team, and every new space of self-learning, we have developed our Engagement Blueprint and the way we deliver it, to make it more usable and enhance its ownership by the teams. We are now developing part of the Engagement Blueprint as a self-service online platform, for individuals to understand the application of the behavioral science and design-led approach in the ed-tech space and use it to appraise their products.

Over the last three years we have learned a lot about the education sector and the science of learning, but also about the processes of working with implementation teams. We recognize we have a lot more to learn, and are looking forward to moving from ed-tech to blended learning – and hopefully to solving larger complex problems in the education system, to create a learning mindset.

STORY 2

A Unique Collaboration

When consultants are brought in by the funder of an implementing partner, the partner often sees them as outsiders coming in to solve all the problems – or as evaluators who need to be pleased. When we were commissioned by EdelGive Foundation to work with Jan Sahas, an Indian organization that supports survivors of sexual assault, we sought a different relationship with them.

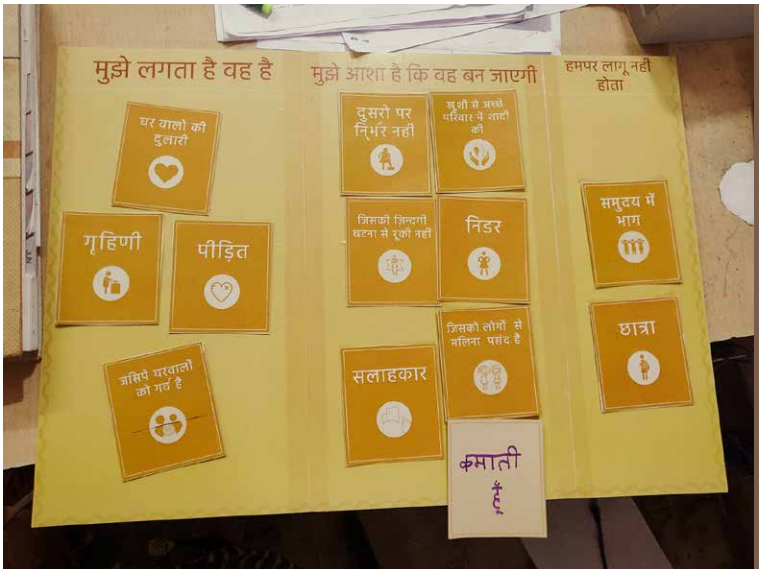
Our scope was to understand how narratives of trauma are created and reinforced following assault, and what factors influence adaptive coping among survivors. Throughout our interactions, we sought to communicate that our intent was to collaborate with the Jan Sahas team, leveraging their expertise and experience to offer a new lens through which to view and attempt to solve the problems.

Our relationship was built on the foundation of respectful learning sessions, during field trips to meet the women, and over many shared cups of tea and lunch tiffins.

We knew that in the kind of work we do there is often a tendency to maintain distance from the local partner in order not to be biased; but we gained greatly from choosing to be embedded into the context, while maintaining an independent view. It allowed us to bring a new perspective to understanding the survivors, and enable those supporting them to do their work even better.

During the initial phase of research, the Jan Sahas team acted as our guide, helping us navigate the medical and judicial systems within which they operate, as well as state systems more broadly. The case workers' interactions with survivors and their families were a key interaction that we could influence to help their work, and we came to understand their perspective as they walked us through survivors' case reports. In a way, the case workers were playing the dual role of guides and research subjects at the same time.

Cognizant of the sensitive nature of the work, we were committed to building a safe and comfortable space for survivors to share their experiences, both as survivors and with Jan Sahas itself. We designed tools to enable story-telling and a safe space for data collection. We trained the case workers to leverage the relationship of trust and comfort between them and the survivors, but we discovered that survivors felt indebted to the case workers and as a result would not speak freely. However, they did feel comfortable talking alone with us, if the case workers introduced them to us and then remained in the vicinity in case they were required. Thus, Jan Sahas was aware of what we would be discussing, and set up the conversations, but did not conduct the interviews.



Our collective efforts and honest communication enabled us to carve out this rather specific role for them in the research team.

Our collaboration gave us a 360-degree view of the systems within which survivors of sexual assault find themselves – their families, medical and legal processes, and their interactions with Jan Sahas case workers. This allowed us to understand all the different narratives and to reconstruct the story from multiple viewpoints. By layering behavioral science principles on this narrative, we developed a tool offering a new lens to view the interactions and barriers in the system, along with recommendations on changes that could help. We needed to communicate these in a manner that would be understandable and acceptable to Jan Sahas, knowing that they were emotionally invested in their cases and saw themselves as advocates for justice. This meant framing our tool such that our intention to enhance rather than evaluate their work was clear. It was important to us that not just the leadership but all the case workers were able to relate to the tool, build their own experiences into it to improve it, and own it.

We shared our learnings and recommendations in a workshop with Jan Sahas. We started with an illustrated story exemplifying a survivor's journey and describing the typical process and dynamics within the individual person and in their interactions with the systems around them. It was rewarding to hear a case worker respond, "I feel like I knew this but didn't know how to articulate it. You've given us the words and means to do it." We were thrilled that they were able to connect the story with different survivors they had met in the past. In effect, we had disseminated a segmentation tool without the cognitive burden of flowcharts, making it easy for the case workers to connect their personal experiences with the new framework this story provided. We suggested co-creating a training plan for them to implement with a larger group of case workers.

The co-creation and training session allowed the tools to evolve further as the case workers added their own experiences and suggested other channels to apply the learnings.

Jan Sahas's parting statement, "This feels like it is a gift for us for our work," was itself a gift to Final Mile, as they took complete ownership of the new framework for thinking and working that we had built together.

STORY 3

Ownership at Many Levels

In the development sector, behavioral science and human-centered design have generated valuable research insights, but these have not always translated effectively into tangible changes and impact on the ground. When Final Mile and Upstream Thinking formed a consortium to understand the HIV prevention behaviors of adolescent girls and young women in South Africa, a key objective was to pilot interventions built on our research learnings. Although we sought a new framework for viewing a challenge that many had tackled in the past, we also recognized the experience, expertise, and unique position of implementing partners to own and lead change in their communities.

Following our research and analysis, our first step towards developing a pilot owned by in-country stakeholders was a co-creation workshop with stakeholders – Ministry of Health representatives, donors, potential implementing partners, and adolescent girls and young women themselves. Over the course of three days, they prioritized the challenges, considered potential solutions, and helped to filter these concepts based on their feasibility and sustainability.

Including the voices of the users and stakeholders in the co-creation process not only ensured that the pilot intervention concepts were relevant, but also made it more likely that the pilot would be accepted by the people who would eventually participate in, own, and run it.

The concept piloted was a “Relationship Bootcamp”, a community-based HIV prevention program focused on helping young women safely achieve their relationship goals. Ultimately, two implementing partners – TBHIV Care and ANOVA – saw the final concept as aligned with their services and agreed to lead the pilot.

We soon learned that building ownership is not a one-time effort with a single set of individuals, but a continuous process.

It required ownership not only of the overall vision, but also of the operational process to realize that vision. We had to create buy-in among individuals at different levels within our partner organizations – from leaders to structural coordinators and facilitators – who were involved in content development, planning, training, and implementation.

With the onset of the COVID-19 pandemic, it became clear that our content development efforts would have to be facilitated by conference calls instead of through intensive in-person design workshops as originally planned. To enable collaboration in a distributed and asynchronous manner, we developed design briefs and templates to capture ideas and provide a common starting point for development. The implementing partners asked local content writers with expertise in creating programmatic material for adolescent girls and young women to review the materials. They ensured that the activities and language were culturally relevant and understandable to participants and facilitators.

As we moved from concept development to the planning and implementation stage, we recognized that the pilot was not business as usual for our partners, and that it was important to support them to implement it effectively. The pilot required recruiting adolescent girls and young women as participants in a five-day workshop, and ANOVA, which provided services at health facilities rather than in the community, had difficulty doing so.

The leadership considered canceling the pilot, but it was then that we saw ownership shining through: the team leading efforts on the ground refused to give up, because they believed in the work and the value it would create for their organization and its programs.

We therefore worked with the entire team at ANOVA to co-create an alternative strategy for recruitment.

The execution of the pilot became a critical point for complete transfer of ownership from consortium to the implementing partner teams. We noticed our partners' growing dependency on us to address logistical and operational challenges. A course correction was needed. We helped them set up communication channels and identify points of contact and internal reporting lines, to ensure they were managing challenges on their own from the start.

The frontrunners of the program were the facilitators working with the young women. It was important that they believed the program belonged to them, as they were key to forging strong relationships with participants and creating meaningful impact. The program evolved through their feedback and the small changes they made to make activities more relatable to each group of participants.

There were a few healthy skeptics among the facilitators. We believed that discovering the value of the interventions for themselves would create much greater impact than merely telling them about it. We created those opportunities, and after experiencing the first phase of the program, they became our strongest advocates.

As we presented them with their "master facilitator" certificates, we felt we were truly passing the baton on to them, to continue to own the intervention and foster ownership among new facilitators joining their organizations.