



EPPR CO-CREATION FIELD GUIDE

A&A Lab Co-Creation Throughout the
Procurement Cycle for the Field (Version 2.0)



USAID
FROM THE AMERICAN PEOPLE

PURPOSE OF THIS GUIDE

Co-creation is a valuable tool in helping USAID find sustainable and innovative solutions to development challenges. It can be used across the entire program cycle—design, solicitation and implementation.

The purpose of this guide is to address advancement of the Effective Partnering and Procurement Reform (EPPR) co-creation recommendation. It is not meant to supersede existing federal regulation or policy. The guide briefly defines co-creation, attempts to dispel common Agency myths about implementation, and provides links to existing resources.

Co-creation is not a procurement mechanism (e.g. BAA, APS, or NOFO). It is an intentional collaborative design approach that can be done in both competitive and non-competitive arenas and during different activity phases, such as design, solicitation, implementation, and closeout. Co-creation may result in a procurement action or may be used outside of procurement altogether. It may be internal to USAID or involve external actors, and it can be used no matter the mechanism and at any stage of the program cycle. Co-creation can be done in person or virtually.

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Co-creation is broadly defined as, “a design approach that brings people together to collectively produce a mutually valued outcome, using a participatory process that assumes some degree of shared power and decision-making.” The time-limited process focuses on generating a specific outcome.

Co-creation can range from facilitated brainstorming to active listening to find innovation and a mutually valued outcome. Through several sessions or a longer process, it transforms an idea into solutions. The process strategically invites multiple partners and stakeholders (including beneficiary groups) or single entities to jointly produce a mutually valued result. Co-creation is done during a set time period and results in an operational way forward.

There is a spectrum of co-creation options beyond the time-intensive, large-scale BAA co-creation session. Co-creation can use USAID’s ability to convene key groups (e.g., local government, donors, civil society, private sector, and faith-based organizations) to find solutions for local ownership and implementation that do not result in a procurement. For example, co-creating with local governments may help find a solution to a challenge and advocate for funds from the appropriate ministry. Once competition is satisfied, co-creation can be done one-on-one or be built into adaptive management to facilitate work planning, pause-and-reflect periods, or pre-closeout learning.

USAID staff play a vital role in co-creation and are encouraged to participate. We must create a safe space within procurements to allow for active participation without fear of running afoul of procurement regulation. In the procurement realm, USAID staff invited to participate in multi-stakeholder co-creation are encouraged to actively engage and share ideas based on their technical area of expertise and to have meaningful conversations at the event. The Contracting Officer (CO)/Resident Legal Officer (RLO) can provide guidance on rules of engagement as needed for each solicitation as these may vary. Once competition requirements have been met, one-on-one co-creation allows for even broader engagement. Please consult your CO and RLO on your individual action for a determination of when competition has been met. Post-award and co-creations resulting in no procurement action have broad latitude for USAID staff to share their expertise with the development community.

WHAT IS CO-CREATION?

Why do Co-creation

USAID values co-creation as it can increase return on investment (ROI), bring together greater intellectual resources with a breadth of perspectives that can challenge assumptions, and create shared ownership. Co-creation:

- Adds value, using the crowd as an innovation partner.
- Involves the outside community, including local and non-traditional partners, in the ideation process.
- Delivers increased innovation capacity.
- Increases innovation velocity (couple of days versus couple of months).
- Reduces innovation risks (participants have a wide range of expertise with their topic).
- Allows participants to have a better understanding of the system around a development challenge, develop their own future work objectives, and inform the Mission's future theories of change.
- Creates a space for USAID to engage actively with prospective partners to build trusting relationships, learn from local knowledge, break down traditional power dynamics, and hold candid conversations to improve programmatic designs and outcomes.

¹Discussion Note: Co-Creation Additional Help at:

https://usaidlearninglab.org/sites/default/files/resource/files/co_creation_discussion_note_august_13_2017_final.pdf

DISPELLING MYTHS OF CO-CREATION

Myth: Co-creation can only be done externally with partners.

Co-creation can be an internal tool. Take advantage of co-creation within your teams to create a people-centered organization driving a culture of constant innovation and instituting behaviors needed to operationalize change. Use internal co-creation to leverage your USAID team's collective tacit knowledge—knowledge that is difficult to write down, visualize, or transfer, such as language, innovation, leadership, cultural nuances, intuition, and emotional intelligence. This can create better Country Development Cooperation Strategies and activity designs, and can enhance complicated internal operations that require a creative solution. Trust paired with tacit knowledge is one of our organization's greatest tools for innovation and change management. Take time during internal co-creations to build trust and leverage collective team wisdom.

Myth: Collaboration and co-creation are the same thing.

There are a lot of ways to collaborate, consult, convene, or partner during activity design, solicitation, and implementation, but those are not always synonymous with co-creation. Nor is co-creation a good fit for every situation. Solutions, partnerships, and problems can be defined through a variety of collaborative approaches. Co-creation typically includes some degree of power sharing and decision-making that distinguishes it from other tactics. Co-creation can also be a tool for adaptive management and as part of the closeout learning process.

Myth: Co-creation has to be done through a large workshop.

Co-creation can be done in many ways, from large groups to small groups, to one-on-one with a partner or donor. If you face geographic and time constraints it can also be done virtually. Co-creation can also occur over a series of interactions throughout the life and closeout of the activity and can be used for adaptive management.

Myth: Co-creation should be used for everything.

Co-creation is a valuable tool but not appropriate for use in all instances. If you are buying commodities or services and know exactly what you need, co-creation is not right for you. You also need to look at your personnel and follow up plans, as co-creation typically requires a significant investment of time from dedicated staff. Does the team have the level of effort to get the job done in a thoughtful way?

Myth: Co-creation can only be done using a Broad Agency Announcement (BAA).

Co-creation can be done in a wide variety of modalities throughout the procurement cycle (design/solicitation/implementation), from RFIs and industry days during design to collaborative work planning with partners and beneficiaries. Co-creation can be done through an APS or under a traditional RFA with language added to allow multi-stakeholder or one-on-one co-creation with the apparently successful applicant(s), or to co-create during work planning or monitoring and evaluating. The key is adding clear language in the solicitation or notice of funding opportunity to indicate this is possible.

Myth: Co-creation is a stand alone tool.

Co-creation is the first step. Innovation is a long-distance race based on continued collaboration and learning. You need to have a plan for how you will use your co-creation after it occurs.

Myth: The USG can never offset participant costs.

In some instances, subject to availability of funds, participant costs can be offset if done in an equitable manner for all participants. Check with your General Counsel (GC) or Regional Legal Officer (RLO) for options.

Myth: In the competitive BAA process, participants always want to share information.

Nonprofit does not mean non-competitive. NGOs and contractors compete for funds. USAID and potential partner expectations do not always match. USAID expects partners to be willing to learn about a problem and help find a solution and theoretically feels a five-page concept note should be less costly for a partner to produce. Partners are “in it to win it” and have invested time and money to create their proposal. They may have legally binding teaming agreements that make it difficult for them to build new alliances. Have empathy for partners and, where possible, provide instructions and manage USAID expectations up front. Consider noting the dollar range at the beginning so partners can determine if they want to invest and provide guidance that the intention is to make the process simple and inexpensive.

Myth: Profit has no place in co-creation.

For-profit entities can participate in co-creation. Enhancing collaboration with the private sector can help USAID achieve greater impact and leverage private sector innovations to fill critical gaps in market systems. The private sector is a key stakeholder for creating sustainable, market-based solutions that can move countries toward greater self-reliance.

DISPELLING MYTHS OF CO-CREATION

Myth: USAID technical participants can only offer general guidelines or instructions and cannot participate actively due to competition rules, procurement sensitivity, or the need to minimize expectations.

Competitions held under a BAA, APS or other mechanism that enable any type of co-creation should encourage Mission staff to actively engage and bring their technical expertise to the table during the workshop. Once competition is satisfied, OAA and technical teams have even more freedom to engage.

Myth: Co-Creation can only be performed in person.

Co-creation can be done in a virtual setting. You need to determine if it is right for your activity. If you aim to mirror a traditional co-creation virtually, consider the different group dynamics and forms of online collaboration. If this is your first time conducting co-creation virtually, consider bringing in a professional facilitator and technical support who can guide you through the process. Check out M/OAA/PDT's [Virtual Co-Creation Resources](#) for tips for ensuring collaboration from multiple stakeholders without being physically present, hosting virtual meetings, managing participant dynamics, and overcoming obstacles with the right tools.

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

Co-creation can be transformative. However, getting there takes lots of behind-the-scenes planning and logistics. You need to be prepared. You need to have the time, funds, and people to get the job done. You also need to plan for what happens after co-creation. Before you dive in, ask yourself the following:

- 1. Is co-creation right for my activity?*
- 2. How and when do we want to use co-creation?*
- 3. Does my team have the time, funds, and people to get the job done?*
- 4. How can we get the right participants in the room?*
- 5. How can we be inclusive? What are the power dynamics and cultural considerations that might impact effective co-creation?*

Is Co-creation right for my activity?

Determine [if co-creation right is for you](#). If you have specifications or are buying commercial off-the-shelf products, or know exactly what you need down to the last detail, then co-creation is not for you. Go buy it.

Check out CollaborateUp's [Co-Creation Quiz](#) to see if co-creation is right for you.

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

Do you have a “wicked problem?” Wicked problems are issues that are difficult to define, have many interdependencies, are often multicausal and socially complex. In essence, there is no clear solution or the issue is resistant to solution or can lead to unexpected consequences.

Do you have a development challenge that requires a creative solution? As you grapple with this question, the [Local Systems Framework](#) may help guide in best practices for sustainable solutions working through local actors.

- Examples of challenging problems include, but are not limited to:
- River water contamination
- Assisting returning combatants
- Food security
- Sustainability in education
- [Drug Addiction Prevention](#)

While co-creation might not solve the unsolvable wicked problem, it is a great resource for helping find potential solutions to complex problems. Co-creation utilizes a brain trust of multiple stakeholders in a participatory process with some degree of shared power and decision-making to build better ownership of the way forward. This is true even when co-creation is not meant to lead to a procurement action.

Types of Co-creation on the Openness and Ownership Continuum			
OPENNESS		OWNERSHIP	
			Initiators (USAID)
	Anyone Can Join	Crowd of people (crowdsourcing)	Community of kindred spirits (community database)
	Selection Process	Club of experts (very specific/ time pressed)	Coalition of Parties (share knowledge and assets)

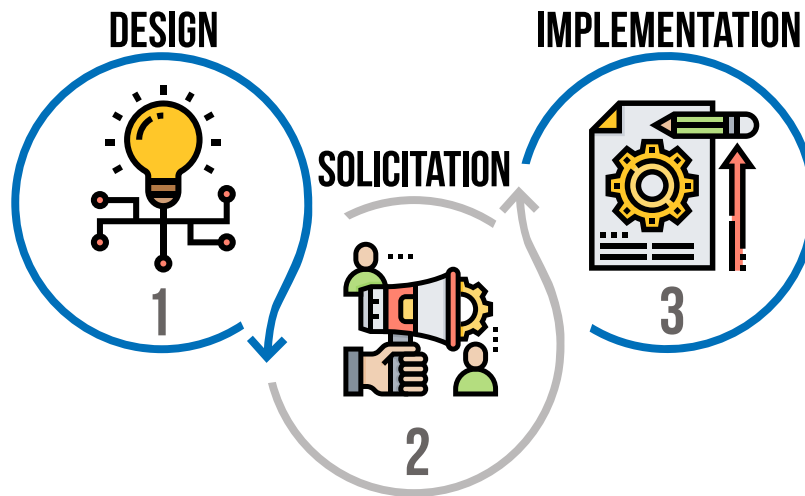
Most of USAID’s current co-creation efforts fall in the Club of Experts realm where we quickly gather experts, seek solutions, and then USAID implements it through a partner. As we work with countries on their journey to self-reliance, we need to slowly move the ownership and accountability needle to allow for greater participation and ownership of the solutions. The “Crowd of People” approach is demonstrated in the USAID Local Works: Burma Drug Addiction Prevention Workshop, which was also held in the local language.

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

How and when do we want to use co-creation?

Co-creation can be used throughout the procurement cycle and can be done under both competitive and non-competitive circumstances. Co-creation is also encouraged and useful outside the procurement cycle for adaptive management and for its convening power to have groups find their own solutions and take ownership of them.

ACTIONS RESULTING IN PROCUREMENT



DESIGN

COMPETITIVE

- Actively discuss with your design team where in the procurement cycle it is appropriate to have co-creation, craft language to put in the solicitation, and account for it in the IGCE (or find pre-award funding).
- Use co-creation as part of a request for information (RFI) or sources sought notice. Create an online open ideation platform to solicit ideas and innovations from stakeholders.
- Host an Industry Day or Partnership Summit and solicit ideas on your concept. Invite not only regular partners but also new and local partners, other donors, universities, local government, and private sector. This is a good area for interagency collaboration with State or with Commerce.

NON-COMPETITIVE

- Donor to Donor: Work with another donor on a joint design for solicitation and implementation. (Check with your RLO if non-disclosures are required.)
- Government to Government (G2G): Use the convening power of the U.S. Government to help local government strategize utilization of resources and share ideas with one another.
- Host an Innovation Jam: Pioneered by IBM, jams are large-scale internet-enabled brainstorming events that can be used to identify opportunities and create customer-focused solutions. See how IBM jams [here](#).

SOLICITATION

COMPETITIVE

- Co-creation can be done under both Acquisition and Assistance. Pick your solicitation modality—request for proposal (RFP), notice of funding opportunity (NOFO), Annual Program Statement (APS), Global Development Alliance (GDA), Broad Agency Announcement (BAA), Challenge, etc. Include language if you are hosting multi-stakeholder engagement or one-on-one co-creation.
- Host a co-creation workshop or a virtual co-creation online.
- Host a pre-application conference, pre-bidders conference, or mid-solicitation Industry Day.
- Include language in your solicitation that allows for post-award co-creation, such as work planning, pause-and-reflect periods, and pre-closeout learning.

NON-COMPETITIVE

- In donor to donor, government to government (G2G) and public international organization (PIO), host a co-creation to work together on the scope of the activity.
- If another donor is buying into our programs or you need local government participation for sustainability, consider inviting them to your co-creation events.
- Pre-competed mechanisms: Associate under leader with associate (LWA) awards.

IMPLEMENTATION

COMPETITIVE

Refinement: Collaborators work to refine one or more targeted services to enhance delivery and the customer experience.

- Monitoring and learning plans that meet both USAID and partner needs.
- Co-design needed adaptation and adaptive management
- [Pause and Reflect](#)
- Expedite modifications
- Pre-closeout learning

Design co-creation into your budget and work planning processes, including activity monitoring, evaluation and learning (MEL) plans, to create solutions with targeted beneficiaries.

NON-COMPETITIVE

Habituate co-creation as a way to approach change. Embed it into your process. Invoke your collaborating, learning, and adapting (CLA) clause and host a co-creation event to get your partners to find better ways to collaborate and adapt.



KEEP IT SIMPLE

Solicitation: Consider cost of entry for new and local partners. Traditional full applications and proposals and full-cost narratives can cost a lot of time and money (\$10,000 and up). Request an expression of interest (EOI) or short concept note as a lower-cost ticket in the door to co-creation.

Evaluation: Move away from numerous criteria with sub-elements. Consider quick screening methodologies such as red and green lighting and write them into the solicitation.

NON-PROCUREMENT ACTIONS

Don't forget, co-creation can be done outside of procurement to convene, share solutions, enhance communication, and promote adaptive management.

Does my team have the time, money, resources, and people to get the job done?

Co-creation has to be organized, managed, and facilitated. Despite their interest and energy, a group of stakeholders or individual participants are at best mere potential for value creation. In order for this potential to be transformed into tangible value, participants need resources and processes to convert their creativity.

While it can be used to identify new issues, it's best to frame the problem before jumping into a workshop or co-creation interaction. Co-creation can be uncomfortable, as ideation is human-centered and utilizes social capital to find solutions. Acknowledge this, especially in a competitive environment where the stakes are high. In a group setting, loosen up participants before you start to brainstorm. Don't jump immediately

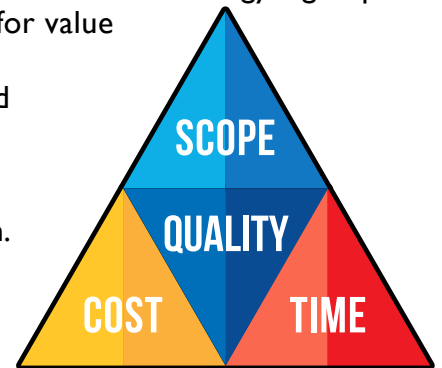
into ideation—allow for time for people to get to know one another and network. Coffee breaks and lunches provide low-stakes networking opportunities. People love to talk about themselves.

Check out some great USAID Professional Development & Training (PDT) sample timelines and welcome packages such as a ([Co-Creation within the BAA](#)) that can be adapted for other modalities.

Time

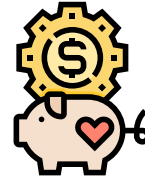
Acknowledge up front that a good co-creation takes time to develop. Have you planned adequate time in your event or procurement processes? A facilitated co-creation event takes approximately four months of planning to get the agenda, logistics, and team mobilized.

One of the core values of co-creation is that new thinking and new players are at the table. This takes work. Don't assume everyone understands government procurement. Communication is critical, especially for new entrants who may not understand the 'rules' or process. Be transparent about expectations and if you are asking participants to travel. Make sure to allow them enough time to get there and consider visas and other travel needs,



MY TEAM'S FIRST CO-CREATION NOW — WHAT?

DON'T FORGET TO BUDGET FOR CO-CREATION!
(costs will depend on modality and location)



Workshop (illustrative budget) 2 days, 50 people, offsite

Fully Outsourced (contractor led)*	2 USG TDYers with in house logistics*	In House (Done by Mission)**
\$35,000 - \$50,000	\$10,000 - \$15,000	\$5,000 - \$7,500

NOTE: Workshop costs do not include travel and related costs of the individual participants. *Please note costs provided are illustrative and budget depends on length of co-creation, preparation and debrief time with office/mission and location. **Don't forget [M/OAA Professional Development and Training](#) can help you train your staff to be facilitators. Costs will be less for simpler forms of co-creation.

If you are going to have your implementing partner do the co-creation during implementation, don't forget to budget it into your IGCE and award costs.

Co-Creation Also Has Cost to Partners

As noted from the Management Bureau Office of Acquisition and Assistance's (M/OAA) first ever Reverse Industry Day, partners put substantial effort and investment into bidding. Regarding co-creation, partners appreciate:

- Consistency in the agency forecast and early notification.
- Transparency about size and scale of the contract so they can make the decision to invest or not.
- The number of iterations needed. Multiple iterations prior to award for issues that can be addressed post-award run up costs. This can create barriers for new partners and small business and has a long-term impact of running up indirect rates.

Noted: Concept papers cost almost as much as full technical proposals to produce. Ballpark cost estimates were 0.5–1.5 percent of award value or \$3,000–\$10,000 for every \$1 million of contract cost spent on putting a bid together.

People

One of the reasons many initiatives fail is that they are built on the margins of the Mission internal ecosystem and don't truly alter the way an organization functions. Before embarking on co-creation, keep the Mission family happy by getting leadership buy-in and a team empowered to move forward. Mission also needs to have a plan for what to do with the innovations generated during co-creation. It is also good to have the team pause and reflect over what went well and what they would change when doing the next co-creation.

Invest in a quality facilitator. Make sure they can professionally keep you on track, manage schedule shifts, and help read and manage or diffuse various group dynamics and the logistics and IT team. [M/OAA/PDT](#) has training and help. A bad facilitator and poor logistics can ruin the co-creation experience for participants and lead to poor outcomes for the Mission. Keep your planning team small and agile but be sure to bring in key internal resources as necessary. Allow this team time to struggle and plan for the who, what, when, where, and why of your co-creation. Give them the resources they need to get the job done.

You can have too much of a good thing. Loop in your Resident Legal Officer (RLO) for tips on avoiding organizational conflicts of interest. Consult with monitoring and evaluation (M&E) experts to determine if the method you plan to use needs a joint monitoring, evaluation, and learning (MEL) plan. Collaboration should continue—not end at award.

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

Talk to the following people along the journey:

- **Front Office:** Mission director and leadership buy-in is crucial. Don't forget to invite them to the actual event. Opening remarks by leadership can go a long way with participants.
- **Contracting Officer (CO):** Acquisition and assistance staff should be part of the core team and attend the co-creation event.
- **Executive Officer (EXO):** They can help with logistics and would like to know early on if they need to write a purchase order for your co-creation facilities.
- **Resident Legal Officer (RLO):** They can provide tips on avoiding organizational conflicts of interest and other legal considerations.
- **Controller (OFM):** Do you need funds for a pre-award event? Are there host country funds that can be utilized? Let the budget experts help. This team also historically produces good facilitators and co-creators.
- **Program Officer (PRO):** They can help coordinate design and are vital players in communication and mobilizing the Mission. They can also help you tap into interagency players who might be valuable. Don't forget them.

Other experts to consult with (list not exhaustive):

- **Gender Specialist:** To help with the gender aspects of solicitation and provide cultural context of gender power dynamics.
- **Mission Environment Officer:** In cases where environmental impact may need to be mitigated.
- **Monitoring and Evaluation (M&E):** Does the method you plan to use need a joint monitoring, evaluation and learning (MEL) plan? Collaboration should continue not end at award. Tap them for ideas early on.
- **Private Sector Engagement Specialist:** Co-creation can often be a powerful tool to find intersections between USAID philanthropic interests and sustainable market systems.
- **Development Outreach Coordinators (DOCS):** They can help to communicate and document your event. Washington loves success stories. Let them tell yours. DOCS can leverage in-country media connections to help publicize your co-creation event (if public).

How can we get the right participants in the room?

Be strategic in who you invite. Think carefully the roles they will play during the process. Co-creation activities benefit greatly from the active participation of local partners USAID does not typically hear from. Additionally, other donors, local government, CSOs, and faith-based actors might provide a useful voice to your co-creation. However, these actors are likely not monitoring USAID's business forecast.

Consider posting your solicitation in the local language and leveraging diverse media such as Facebook, radio, and TV spots. Mission leadership involvement in media outreach can strengthen the public perspective that the Mission is "open for business." Carefully consider what "room" you're asking the participants to join. Will holding events outside of the embassy or capital encourage wider participation of non-traditional partners and help reduce power dynamics? Ask implementing partners to suggest additional local organizations for direct invitation to co-creation and allow the implementing partner to bring those additional local partners. USAID/Azerbaijan used a public Local Works Partnership Summit to build momentum for a future broad agency announcement (BAA) workshop.

See [lessons learned from the Local Works Azerbaijan Partnership Summit](#).

How can we be inclusive? What are the power dynamics and cultural considerations that might impact effective co-creation?

A good host thinks about their guests' comfort in advance. Do any guests have disabilities and need reasonable accommodation? Are there any faith-based accommodations needed such as a quiet room or breaks at specific times? Do we anticipate major language barriers and need an interpreter? Ideally all co-creators have an equal seat at the table. Are there any hierarchies, gender imbalances or norms, or power dynamics in the local context you need to consider? Can any of these be addressed by requiring co-creation participant organizations to send diverse representatives as part of your notice of funding opportunity (NOFO)?

Co-creation is designed to be adaptive, so make sure your guests' voices are heard. This can involve initially seating affinity groups together until they are comfortable with the process and then moving them apart. Using sticky notes and having a gallery walk of ideas can help the quiet voices in the room add their value. Options are endless.

Lastly, it is a good practice to allow participants to have access to information. This can include taking photos of ideas generated and being transparent about what the information generated will be used for, what you can and cannot share, and that they are free to take with them what they learned, further sustaining your innovations. In the digital arena, record your sessions and share them.

Utilization of the private sector during co-creation and beyond.

The private sector is a valuable resource in moving countries on their journey to self-reliance. However, USAID is still working to maximize its utilization of the private sector in its procurement modalities. Decide the common objectives you wish to partner or collaborate on with the private sector. Are you looking at narrow corporate philanthropy or more broadly strategic interactions to build markets and enhance value chains? Consider engaging the private sector and local institutions long before a solicitation hits the street. While USAID has traditionally gone the [Global Development Alliance](#) (GDA) route, private sector partners can be used for so much more. They are a valuable resource in helping co-create a Country Development Cooperation Strategy (CDCS) and [Private Sector Engagement \(PSE\) Strategy](#) for input on how to build and connect supply chains. This helps economic development in emerging markets with potential to enhance both USAID and the private sector's return on investment (ROI).

Figure out how to speak the same language. Development objectives do not always translate into how corporations function. Your development challenge is their emerging market challenge. Look at your challenge through a business lens. Play to USAID's competitive advantage with our on-the-ground footprint:

1. Knowledge of local markets and cultures.
2. Knowledge of local compliance and corruption issues.
3. Information on adequate local suppliers and distributors that could help a multinational or U.S. corporation enter the market or build a better foothold in the country.

USAID can find programmatic overlap in value chain enhancement, helping local firms enter the supply chain of larger markets, work towards eco-label or ISO standards, and improve environmental, health, and safety standards that make them more marketable.

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

The best PSE opportunities are when you find the overlap and intersection that creates mutual ROI, simultaneously solving business problems and finding opportunities while overcoming development challenges. As you conduct market research, take time to understand the challenges of the corporate value chain and consider engaging the U.S. Chamber of Commerce and local trade associations for input. The USAID [Private Sector Engagement Team](#) has a wealth of resources to assist you. Check out [PSE Resources](#) and [Round Up of Resources on Co-Creation in the Private Sector](#) and [PSE Initiatives and Support Mechanisms](#) too.

Lastly, if you are incentivizing contractors or grantees to leverage private sector resources, make sure you give them enough time to do so. Large private sector organizations have their own bureaucracies and terms of engagement. It might not be reasonable to have this locked in at concept note but incentivized during performance.

Co-creation in support of USAID initiatives.

Consider if your activity can directly or indirectly support the [Acquisition and Assistance Strategy](#) enabling partner countries to plan, fund, and manage their own development on their [Journey to Self Reliance](#) or help USAID build up its new partnership base in support of the [New Partnership Initiative](#) which seeks to increase:

1. *Direct awards to new and underutilized organizations that enable local engagement such as local entities, locally established partners, as well as U.S. and locally based small businesses*
2. *Sub-awards to new and underutilized organizations designed to support more facilitative partnerships for effective local engagement.*
3. *Direct awards to partners to leverage significant private, non-U.S. Government funding to promote effective local engagement.*

Additional information about NPI tools to help new partners can be found at the [New Partnership Initiative Hub](#), [Guidance to Develop NPI Action Plans](#), [PowerPoint - Changing How We Partner](#) and [Resources for Working with USAID](#).

Report co-creation usage.

Our numbers are only as good as your data input please help USAID meet its targets! USAID is currently tracking its utilization of co-creation as a reporting requirement. The [Agency Priority Goals \(APG\) Summary](#) highlights how USAID is measuring progress toward co-creation in four indicators:

1. [Percentage of New Awards Using Co-creation](#)
2. [Percentage of Obligations to New Awards Using Co-creation](#)
3. [Percentage of New Awards Using Presolicitation Co-creation](#)
4. [Percentage of Obligations to New Awards Using Presolicitation Co-creation](#)

MY TEAM'S FIRST CO-CREATION — NOW WHAT?

The current identifiers being utilized for the FY2019 data is:

CD	DESCRIPTION
0	N/A
APS	Annual Program Statement (APS) in ADS 303.3.5.2
BAA	Broad Agency Announcement (BAA) in FAR 35.016
FRA CON PAPER	RFA w/multi-tier review, Concept Paper, ADS 303.3.6.1
RFP RFQ SOO	Statement of Objectives (SOO) in FAR 37.602

There have been discussions to potentially incorporate the new fields below (added to GLAAS 4/12/19) into co-creation numbers beginning FY2020.

AWARD_SOL_CRTN_USE_TYPE_CD2	AWARD_SOL_CRTN_USE_TYPE_DESC
0	N/A
1	Industry Day or Pre-Solicitation Conference
2	Draft Solicitation/SOW/ProgramDesd/Criteria
3	Request for Information//Sources Sought
4	Oral Applications/Presentations/Interviews
5	Incorporated into the Solicitation for post-award

This should also be included in your NPI Action Plan and Private Sector Engagement Plan as appropriate and don't forget to check the box in GLAAS!

Debrief – Capture Lessons Learned

Take a minute to debrief as a team on lessons learned post co-creation. What went well? What would you be willing to change if you did it again? Be willing to share with others. Share your experiences with the [M/OAA Acquisition and Assistance Lab](#) so we can continue to hone best practices in how USAID implements co-creation by sending an email and your examples to: aalab@usaid.gov

Have a plan for what happens after – innovation doesn't stop at an idea:



1. Set clear (but not restrictive) objectives.
2. Prepare for outliers and don't expect "ah-ha" moments.
3. Recruit the right mix of people. Inspire participation by connecting creative minds to share results and continue development.
4. Offer appropriate incentives (credit where it is due).
5. If hosting an event, pick a location that can accommodate guests and provide appropriate refreshments.
6. Bridge language barriers with good translation practices. Language barriers can be a major inhibitor to effective co-creation.
7. Build in time for fun and friendship. This benefits co-creation by helping build trust.
8. Consider inviting and actively engaging the private sector to unleash market power and entrepreneurial energy to overcome problems. In the journey to self-reliance, profit-making can be part of the sustainable solution.
9. Invite local government to create local ownership, accountability, and sustainability.
10. Focus on transparency. Information barriers should be eliminated to a certain degree in order to gain trust from participants. Be clear about what you can and cannot share.
11. Ensure that program and procurement officials have a strong relationship and common understanding of the process, equally value the role of partnerships and collaboration, and feel comfortable with chaos and ambiguity.

While co-creation has been around awhile, USAID only started to embrace it about six years ago. You are not alone in your co-creation endeavors. Teams are strongly recommended to utilize existing experts and resources for advice and assistance implementing co-creation. Here are three must-read, must-visit sites for a team starting out:

1. [M/OAA Professional Development and Training \(PDT\)](#): A one-stop shop for co-creation expertise and resources. This team is truly the agency experts in co-creation. They can provide guidance on successful co-creation, training for facilitators and have a facilitator alumni network to tap into. The PDT website has a great wealth of co-creation resources and best practices. Call them and use their expertise.
2. [Discussion Note: Co-Creation \(ADS 201 Additional Help\)](#): This provides approaches to design using co-creation methods and its role in the program cycle and tips on avoiding conflicts of interest. It is a great document to share with the team and your program officer. There are links to samples and additional resources on multi-stakeholder

co-creation workshops, Global Development Alliance APS, Broad Agency Announcements (BAA), government-to-government (G2G), Industry Day (pre- or mid-solicitation), pre-solicitation request for information (RFI) and open ideation platforms, public international organization (PIO) awards and grants with bilateral donors, request for application (RFA), and notice of funding opportunities (NOFO).

3. [Toolkit for Innovative Design: Co-Creation](#): A fabulous, 83-page guide that takes you on a journey through a select, design, run, and reflect process. Step-by-step, it offers a wealth of examples to help you navigate co-creation and designing your co-creation to maximize results from attracting the right partners to developing a resource partner strategy. Run provides lessons learned from workshops and sample agendas to a sample scope of work. Reflect provides tools and templates to help your team adapt along the way. If you are serious about co-creation, provide a copy of this toolkit to your team.

CO-CREATION EXPERTS



PDandME@USAID.gov

[FACILITATOR REQUEST LINK](#)

SPECIAL THANKS TO LOCAL WORKS, the LAB, PPL, ASEAN A&A Lab and all co-creation champions worldwide!

[Preparing a Statement of Objectives \(SOO\)](#): A handy guide drafted by field CO Zachary Clarke that provides guidance, tips for crafting a well-written SOO, questions to consider during development, and a required SOO format.

[Broad Agency Announcement Guidance](#) – coming soon!

ADDITIONAL HELPFUL RESOURCES:

[M/OAA Co-Creation Page](#): Contains great videos on co-creation in both the competitive and non-competitive space to get your teams fired up to do their co-creation. The site is a wealth of resources which include the [Co-Creation Facilitation Design Tool](#) which helps determine if doing it in-house or outsourcing is a good option for you. It offers sample BAA co-creation workshop documents and includes a great video in collaboration with general counsel on intellectual property, which you may wish to share with partners.

[M/OAA/A and A Lab Co-Creation Page](#): Great videos and links to toolkits.

[Global Development Alliance a Tool for Co-Creation](#): Provides characteristics, key processes, guidance, and templates if you choose to use a Global Development Alliance (GDA) as a vehicle for co-creation.

[Innovation Design Resource Tool Kits](#): A wealth of resources on co-creation including a co-creation fact sheet, Is Co-Creation Right for You?, co-creation tools from M/OAA A&A Labs, BAA and co-creation resources from M/OAA A&A Labs, and case studies.

[USAID Learning Lab - Co-Creation](#): Working group resources, library resources, and blogs on the co-creation process.

[M/OAA Listen and Learn and Additional Resources page](#): A bunch of great videos with real life examples about the co-creation process and useful tools such as a co-creation facilitation design tool, podcasts, co-creation reflections, additional help, sample BAA documents, and more.

[Introduction to Co-Creation](#): A short guide that describes when to use co-creation and what you can do with it.

[Roundup of Resources on Co-Creation in the Private Sector](#): Focuses on how to engage with the private sector in co-creation. Has a link to the Private Sector Engagement (PSE) strategy, examples of how co-creation fits with PSE, a list of mechanisms you can buy to support for your co-creation efforts, and links to real world examples of USAID co-creating with the private sector in the field.

[Co-Creation Lessons Learned and Co-Development Workshops in Assistance with FY-End Constraint Limitations](#): Great resources recommended by the ASEAN+ A&A Lab, containing key lessons learned from Mission co-creation activities and sample agendas based on real considerations dealing with FY-end constraints. It contains a nice comparison between a contracted-out co-creation and a self-facilitated co-creation. If your Mission does not have a Development Objective Grant Agreement (DOAG)DOAG/SOAG, read these.

Here are a few other good reads that you may want to consider if you are integrating co-creation into an award mechanism:

1. Co-creation can also be used to pause and reflect which might be appropriate under [Pay for Performance Primer, Shock Response and Adaptive Management](#).
2. You can also link innovators to other opportunities at the USAID-funded Global Innovation Exchange, or find innovative ways to procure at Federal Acquisition Institute's [Periodic Table of Acquisition Innovation, Co-Created Research Initiatives](#).