



# DESIGN FOR SOCIAL IMPACT

## INTRODUCTION

This workbook accompanies “Design for Social Impact: How-to Guide” and is intended to help design firms navigate through the modes of engagement. Use the activities that follow to prompt discussions with your team and to develop an action plan for engaging in social impact work in a way that makes sense for your firm.

Keep in mind that the focus of these activities is on process and not content. There is an ongoing tension within every design firm to balance the desire to engage in impactful work with the need to run a business. This workbook is not intended to be prescriptive, rather it is intended to help you think through your strategy for engaging in this work. We hope the exercises prompt you to think of new ways to continue the impactful work you are already doing and to increase your involvement in a sustainable way.

STEP ONE

ARTICULATE YOUR INTENTIONS

# GOALS

Prioritize Your Drivers

Construct Your Dream Project

Define Social Impact

# PRIORITIZE YOUR DRIVERS

To start off, it's important to think about why your firm wants to get involved in social impact work. What's motivating you to move into this sector? Why will it be beneficial to your firm? Start with the drivers below and indicate the level of importance of each (low, medium, or high). Reflect on the associated questions and jot your notes below. Identifying the drivers will help you select the offerings with which to experiment.

## SOCIAL IMPACT

Do you want to use your design expertise to have social impact? Are you proud of your current portfolio? How important is a global reach to your work?

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## RETENTION

Do you have people in your firm who are really passionate about this work? Do they currently have sufficient outlets for doing it? Would doing more projects strengthen employee loyalty?

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## HONING DESIGN SKILLS

Would this type of work put you on the cutting edge of design? Could you use these projects to sharpen the skills of your team and present them with new challenges?

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## REPUTATION

What is your firm known for? Could social impact projects improve your reputation or attract more attention? What stories might attract new clients or employees to your firm?

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## PROFIT

Could you imagine making social impact a core part of your business? Might social impact work lead to projects with corporate clients? Can you afford to do this work pro bono?

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# CONSTRUCT YOUR DREAM PROJECT

Use this tool to quickly identify where your passions lie for engaging in social impact work. As you think about projects to bring in, consider using these passions as your initial targets. Defining your view of a social impact project will enable you to be more concrete in your responses in the remaining activities.

By checking all the boxes that apply, design your dream social impact project.

**OFFERING**

- Product design
- Service design
- Brand strategy and communication
- Growth strategy
- Organizational transformation
- Ethnographic need finding
- Technology strategy
- Other: .....

**SECTOR**

- Basic services
- Health
- Environment
- Education
- Livelihoods
- Technology
- Other: .....

**GEOGRAPHY**

- Asia
- China
- India
- Africa
- Latin America
- Europe
- North America
- Other: .....

**FOR WHOM**

- Rural
- Urban
- Women
- Children
- Bottom billion
- Working poor
- Middle class
- Other: .....

**PARTNERS/CLIENTS**

- Foundation
- Government
- Non-governmental Organization (NGO)
- Social Enterprise
- Multinational Corporation (MNC)
- Other Design Firms
- University
- Other: .....

**DURATION**

- One hour
- One week
- One month
- Three months
- Six months
- One year
- Other: .....

**BRIEFLY DESCRIBE A PROJECT YOU IMAGINE.**

Keep this in the back of your mind as you do the other activities in this book.

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# DEFINE SOCIAL IMPACT

What does social impact mean to you? What types of change do you want to make? Fill in the blanks to create your statement about what social impact means to your firm and how you plan to measure it.

will  
DESIGN FIRM

identify projects as “social impact” if they positively affect

communities/individuals  
ADJECTIVE (circle one)

in . We can make  
PLACE

the most impact by working with organizations that are

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ADJECTIVE ADJECTIVE

and . We expect to see  
ADJECTIVE

impact in our clients by  
ADJECTIVE

conducting  and  
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and measuring  
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NOUN NOUN

In five years, we hope that   
DESIGN FIRM

will have contributed to   
VERB (-ING)

in .  
NOUN PLACE

STEP TWO

ACKNOWLEDGE YOUR STARTING POINT

# TOOLS

Record What You're Already Doing  
Take an Inventory of Your Resources

# RECORD WHAT YOU'RE ALREADY DOING

Think about your portfolio of volunteer, pro-bono, low-bono, non-profit, and government projects. Flip through the menu of offerings and check the ones you're already doing. Use the blank spaces below to add any offerings not included here.

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**MODIFYING THE WAY YOU WORK?**

Concept incubation

Design + implementation

Business as usual

Scale to fit

Guide clients

Sabbatical

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**MODIFYING THE WAY YOU WORK? (CONT.)**

Catalogue of design challenges

Project scoping

Design review

Concept brainstorm

Other



# RECORD WHAT YOU'RE ALREADY DOING (CONTINUED)

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**EDUCATING OTHERS?**

d.school .in/.za

Empathy field trips

Design certification

Intern hosting

Publishing

Process workshop

Other

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**DEVELOPING NETWORKS?**

Local partners

Design competitions

Contribute to existing networks

Other

# RECORD WHAT YOU'RE ALREADY DOING (CONTINUED)

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**IDENTIFYING FUNDING STREAMS?**

- Design industry fund
- Raise and manage a pot of money
- Internal subsidies
- 3<sup>rd</sup> party sponsorship
- Project financing
- Other

OFFERING (ARE YOU ALREADY...)

WHAT YOU'VE DONE

**MODIFYING YOUR STRUCTURE?**

- .org
- .in/.za
- Center of excellence
- Other

# TAKE AN INVENTORY OF YOUR RESOURCES

TAKE AN INVENTORY OF

Think about the resources that you already have and could dedicate to social impact work. Then, think about what resources you might need. Recognize that this initiative must fit within the realities and objectives of your business and be realistic about what makes sense to commit.

	HAVE	NEED
	<input type="radio"/> A Lot <input type="radio"/> A Little <input type="radio"/> None	<input type="radio"/> Need to get <input type="radio"/> Don't need
<b>PEOPLE</b> Do you have people with expertise in design for social impact?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Who? _____ _____	<input type="checkbox"/> <input type="checkbox"/> Who? _____ _____
<b>PASSION</b> Do you have people with passion for social impact work?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Who? _____ _____	<input type="checkbox"/> <input type="checkbox"/> Who? _____ _____
<b>PROCESS</b> Do you have a process that works in this context?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> What process? _____ _____	<input type="checkbox"/> <input type="checkbox"/> What process? _____ _____
<b>LEGEND</b>	<input type="radio"/> A Lot <input type="radio"/> A Little <input type="radio"/> None	<input type="radio"/> Need to get <input type="radio"/> Don't need

	HAVE	NEED
	<input type="radio"/> A Lot <input type="radio"/> A Little <input type="radio"/> None	<input type="radio"/> Need to get <input type="radio"/> Don't need
<b>TIME</b> Do you have time to commit to building these capabilities and doing these projects?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> What blocks time? _____ _____	<input type="checkbox"/> <input type="checkbox"/> What blocks time? _____ _____
<b>NETWORK</b> Do you have connections in the social sector?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Who? _____ _____	<input type="checkbox"/> <input type="checkbox"/> Who? _____ _____
<b>MONEY</b> Do you have financial resources to dedicate to this work?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> How much? _____ _____	<input type="checkbox"/> <input type="checkbox"/> How much? _____ _____
<b>LEGEND</b>	<input type="radio"/> A Lot <input type="radio"/> A Little <input type="radio"/> None	<input type="radio"/> Need to get <input type="radio"/> Don't need

STEP THREE

DECLARE YOUR PORTFOLIO

# PLANS

Portfolio Suggestions

Consider a Portfolio

Define your First Steps

Planning Sheets

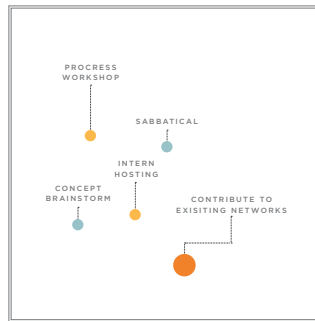
# PORTFOLIO SUGGESTIONS

Engaging in social impact work is a journey and a choice. You may decide from doing these exercises that you'd like to stick your toe in or jump in head first. Or, the exercises may guide you to choose not to engage at this particular time. Wherever you are in the journey, we have envisioned a series of offerings that might be right for you.

## IF YOU ARE NEW TO THE SOCIAL IMPACT ARENA

### CONSIDER STARTING WITH:

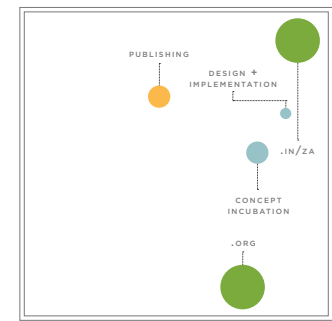
- » A sabbatical (to build expertise)
- » A concept brainstorm (to engage your employees)
- » Intern hosting (to raise awareness in your firm)
- » A process workshop (to build your network)
- » Contributing to existing networks (to build expertise)



## IF YOU WANT TO MAKE SOCIAL IMPACT THE CENTER POINT OF YOUR OFFERING

### CONSIDER:

- » Concept incubation (to increase impact)
- » Design + implementation (to create a network of partners)
- » Publishing (to share your expertise)
- » .org (to show your commitment)
- » .in/.za (to make yourself more accessible)



## IF YOU WANT TO HAVE A LARGER SOCIAL IMPACT WITHOUT DETRACTING TOO MUCH FROM YOUR BOTTOM LINE

### CONSIDER FOCUSING ON:

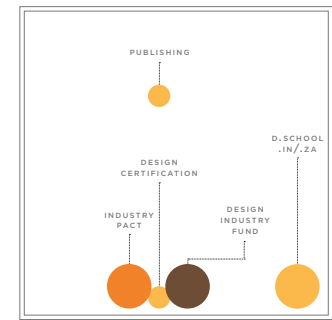
- » Scale to fit (to increase # of clients)
- » A process guide (to increase # of projects)
- » A catalogue of challenges (to utilize unstaffed time)
- » 3rd party sponsorship (to bring in full-scale projects)
- » A center of excellence (to leverage your expertise)



## IF YOU WANT TO CATALYZE THE DESIGN INDUSTRY

### CONSIDER:

- » dschool .in/.za (to build capacity)
- » Design certification (to build a network)
- » Publishing (to share your vision)
- » An industry pact (to raise awareness in and of the industry)
- » A design industry fund (to allow more firms to participate)



# CONSIDER A PORTFOLIO

# PORTFOLIO

CONSIDER A PORTFOLIO

## STEP TWO

Using your own judgement, estimate the required investment (small, medium, or large), the social impact, and the benefit to your firm for each of your five selected offerings.

## STEP ONE

You've now identified what you're already doing, the resources you currently have, and what more you might need to pursue social impact work. Now, think about the future. Pick five offerings from the resource guide that intrigue you. Think back to your drivers. Which might create the most impact? Which would thrill your team? Which might you learn from most? Which could win you some great press? Which might make you some

- 01. ....
- 02. ....
- 03. ....
- 04. ....
- 05. ....

BENEFIT TO THE FIRM

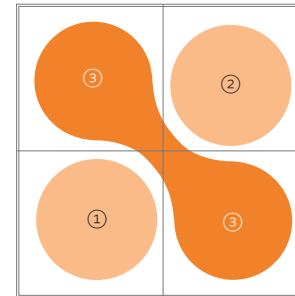
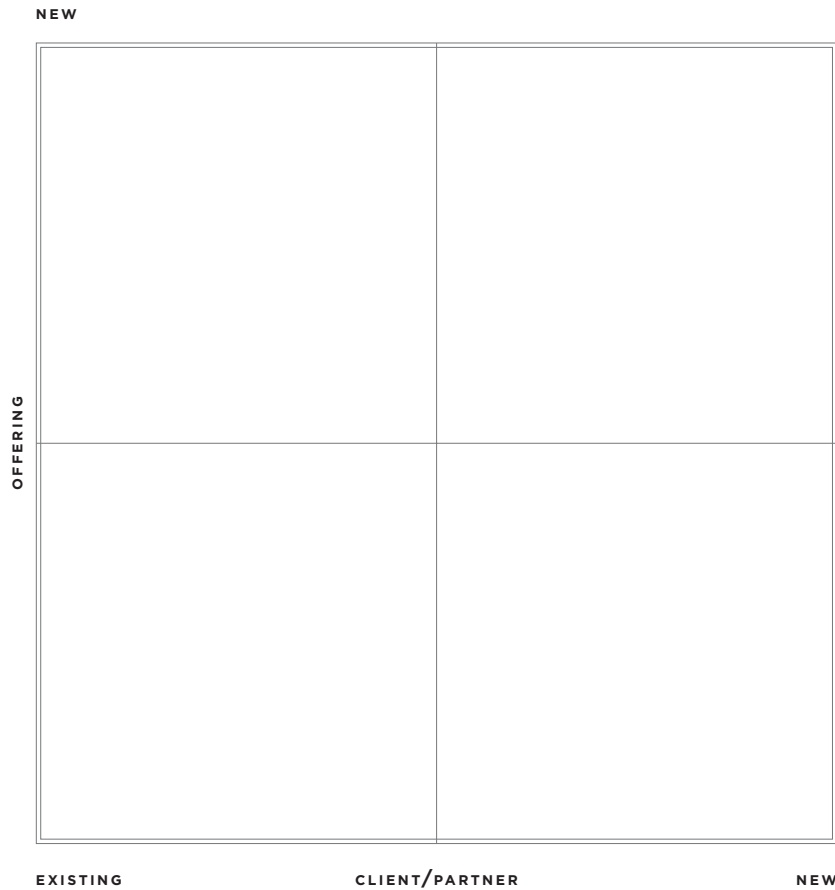
SOCIAL IMPACT



INVESTMENT SIZE

# EVALUATE YOUR PORTFOLIO

Plot your selections on the matrix below. The x axis indicates how similar the potential clients or partners might be to your existing clients or partners. For instance, if you've never been involved in publishing, the partners you would need would be new (i.e. far on the right). The y axis indicates how similar the offering or project might be to your existing offerings. For instance, if you have never taught your process, a process workshop would be new (i.e. at the top).



**HOW TO INTERPRET THIS**

Notice where the majority of your selected offerings fall.

**1: INCREMENTAL**

These offerings are the closest to what you're currently doing and could be great as quick wins. Incremental offerings require execution-focused processes and people. If the majority of your selections fall into this quadrant, think about whether you want to stretch yourself a bit farther.

**2: REVOLUTIONARY**

These offerings are the furthest from what you currently do and have the potential to stretch your firm and bring you to very different places. Revolutionary offerings require exploration-focused processes and people. If the majority of your selections fall into this quadrant, think about whether this is realistic. Would you rather start with a few initiatives that are more similar to what you already do?

**3: EVOLUTIONARY**

These offerings provide a mix of the novel and familiar. Evolutionary offerings require a mix of execution and exploration-focused processes and people. If the majority of your selections fall into this section, think about whether you want to be more radical or more conservative? Do you feel comfortable sitting in the middle ground between the two?

# DEFINE YOUR FIRST STEPS

## STEP ONE

Now that you've done Worksheets 6 and 7, list any offerings that no longer seem appropriate and your brief rationale.

OFFERING	CONCERN
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## STEP TWO

Now, look back through the menu of offerings and consider replacing any that you dropped. Think about what initially appealed to you about the dropped offerings and find similar offerings that seem more attainable. List the offerings in your new portfolio below.

### SHORT-TERM

- 01. ....
- 02. ....
- 03. ....
- 04. ....
- 05. ....

## STEP THREE

Now, that you've chosen your first set of experiments, think through your road map for social impact work. Think about where each offering could lead you. In the long-term, what involvement makes sense for your firm?

### MEDIUM-TERM

### LONG-TERM

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|-------|-------|
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| ..... | ..... |
| ..... | ..... |
| ..... | ..... |
| ..... | ..... |



# PLANNING SHEET PLAN SHEET PLANNING SHEET PLANNING SHEET PLAN

Complete one planning sheet for each offering you would like to try.

**EXPERIMENT TO TRY:**

**WHY THIS APPEALS TO ME**

**H M L THIS SUPPORTS MY GOAL OF:**

- Social Impact
- Retention
- Honing Design Skills
- Building Reputation
- Profit
- Other: .....

**HOW THIS CONNECTS TO WHAT WE DO**

How does this enhance our brand?

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How would this challenge us?

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Who could we partner or work with?

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**ACTION PLAN**

**WHAT**

**WHO**

Within 1 Month

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Within 6 Months

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Within 1 Year

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Within 5 Years

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**THIS COULD LEAD TO:**

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**ACTION PLAN**

**WHAT**

**WHO**

Within 1 Month


Within 6 Months


Within 1 Year


Within 5 Years


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**ACTION PLAN**

**WHAT**

**WHO**

Within 1 Month

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Within 6 Months

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Within 1 Year

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Within 5 Years

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**THIS COULD LEAD TO:**

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Who could we partner or work with?

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**ACTION  
PLAN**

**WHAT**

**WHO**

Within  
1 Month


Within  
6 Months


Within  
1 Year


Within  
5 Years


**THIS COULD  
LEAD TO:**

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**HOW THIS CONNECTS TO WHAT WE DO**

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How would this challenge us?

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Who could we partner or work with?

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**ACTION PLAN**

**WHAT**

**WHO**

Within 1 Month

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Within 6 Months

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Within 1 Year

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Within 5 Years

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**THIS COULD LEAD TO:**



THANK YOU FOR JOINING  
JOINING IN THIS EXPLORATION  
EXPLORATION THANK YOU

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THE  
ROCKEFELLER  
FOUNDATION

Tara Acharya  
Demmy Adesina  
Maria Blair

IDEO

Tim Brown  
Aaron Sklar  
Sandy Speicher  
Doug Solomon  
Jocelyn Wyatt