DEAR DESIGNER,

We are excited to share Design and the Social Sector: A Guide to Partnering with you!

In 2011, Design Impact (DI) and the Tarsadia Foundation (Tarsadia) identified a common vision: foster the role of design in the social sector and support cross-sector collaborations between designers and organizations working to address critical human needs. During this process we identified a critical ‘gap’ at the intersection of design and the social sector; namely a lack of understanding of each sector for the other’s processes and models for change. These two sectors often speak different languages and work at different speeds, and frequently work with different incentives. This lack of understanding is a key factor that can hinder productive collaboration between the two sectors.

In addition, we believe that in order for the design field to create positive social impact, it is essential that designers establish strong relationships with social sector experts. Design and the Social Sector: A Guide to Partnering is written specifically for designers and other innovation professionals who are interested in building partnerships with non-profit, NGO, or social enterprise organizations. It is our hope that this guide will help designers increase the success of their cross-sector engagements.

The content of this guide draws on experiences from DI’s partnerships over the last four years with numerous innovative social sector organizations in India. However this guide with its tools and practical tips is applicable to social design projects based anywhere in the world. This guide was created by Design Impact with special thanks to the Tarsadia Foundation for their financial support and guidance.

This partnership guide is broken down into three main sections. Section one provides a framework for internal evaluation. This includes examining your own practices as a designer or design-based organization, understanding what your organization has to offer, knowing your limitations, and articulating what you hope to gain from engaging in social sector work. The second section provides suggested steps on how to build strong partnerships with social sector organizations. This includes building a partner assessment tool and defining a collaborative project. The third and final section provides insights on how to foster and maintain these relationships through specific, hands-on techniques.

Before we begin, it’s important to note that we hope you will use this guide however you see fit. There are many great ways to get involved in social design work, and many different process steps that can help build a successful engagement. While this guide is written with a bit of a chronological bent, it is not meant to imply that you need to stick to this “formula.” Please innovate—switch around the order, add other insights that you find relevant, or discard the steps that don’t apply to you. Just as great designers in commercial spaces need to stay flexible and iterative, so do great social designers!

We hope that you find Design and the Social Sector: A Guide to Partnering useful in your work to design for social good. Let us know how you use it. We’d love to hear your stories.

Sincerely,

RAMSEY FORD, DESIGN DIRECTOR, DESIGN IMPACT
KATE HANISIAN, EXECUTIVE DIRECTOR, DESIGN IMPACT
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• STRENGTHS AND LIMITATIONS
• YOUR PERSONAL MOTIVATION
• CREATING A VALUE STATEMENT
As we mentioned in the introduction, if you want to work as a designer on problems that address basic human needs or community issues, you will most likely need to connect with either a non-profit or other social sector organization. In fact, we recommend that you go beyond having just one or two meetings to build a more in-depth, sustainable partnership. Ideally the social sector leaders and agencies that are working full-time in your area of interest can also implement your design efforts.

However, before you connect with potential partners, it is important to assess yourself and/or your team. Working as a designer in the social sector can be challenging, so understanding your own capabilities will help you develop a better sense of the project landscape and provide you with the incentive to keep persisting even in the face of difficult circumstances. Tactically, taking the time for self-reflection is essential to completing the next steps in this guide.

The **Personal or Organizational Self-Assessment** outlined has three sections. The first is a critical look at your strengths and weaknesses as they relate to working in the social sector. The second is an opportunity for you to reflect on your intended results. The final section allows you to create a value statement that communicates the first two sections to potential partners.
Before approaching new partners or beginning a social design project, you have to know what you offer. Luckily the skills you use in your current services will also be the ones you rely on when taking on a social design project. Keep in mind that working in the social sector may also challenge you to bring more to the partnering table, and it is important to take stock of the holistic talents that you have or can leverage from colleagues before entering into a partnership.

>> See the Strengths/Weaknesses worksheet.

Take a moment and think about your own professional strengths and weaknesses as they relate to a potential social design project. For example, what do you enjoy doing? What have others told you that you do exceptionally well? What skill sets do you have? On the flip side, what do you not enjoy doing? What type of work would you like to avoid?

Fill out the diagram and be specific. While it’s important to list out both strengths and weaknesses in order to understand your own capabilities, be sure to focus more time on your strengths as they will be what you rely on most and will help ensure a positive social design engagement.
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Now reflect on your limitations. This includes what you can’t offer as a service, but it also needs to reflect the very real limitations of time, money, and passion.

>>See the Time, Money, and Passion worksheet.

Take a moment and think about realistic expectations for yourself in these categories. Ask yourself, how much can I give? Where do I draw the line? Fill out the diagram and remember—be realistic!

**Tip:** Remember, the lack of resources and the complexity of problems being addressed often means that it takes longer to get things done in social sector organizations and/or in resource-poor settings. So, when you’re thinking about timelines, be sure to leave extra room for these realities.
your personal motivation

After looking inward at your strengths and limitations, it is equally important to articulate your goal for what you would like to gain from the social design experience.

There are many drivers, or motivators, for doing social design work. You might be motivated by the idea of affecting millions of people on a particular issue that has affected your life or the lives of those you love. Or maybe you are interested in demonstrating the design process so that non-profits can benefit from its creative problem-solving aspects. You could also be motivated by personal education or development that could come from engagement with a social enterprise. The point is that you need to identify what motivates you and what impact you hope to make, even if it’s a combination of three or four factors.

You are more likely to develop strong support for your work if you can articulate why it is that you are motivated to take on a social design project. Having a thorough understanding of your motivation and your desired results are central to producing legitimate work and being satisfied with your engagement.

>> See the Your Motivation worksheet on page 7.
### Reason for Doing This Work/Change I Hope to Make

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### Reason for Doing This Work/Change I Hope to Make

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The workbox below provides space for you to explain what you hope to gain from your experience and rate those goals based on which are most important to you. Take a moment to jot down your reasons for wanting to get involved in social design work and what you change you hope to make. Then, go back and rank their importance by circling a number next to each reason (1 = most important; 4 = least important).
Now that you’ve articulated your strengths, limitations, and motivations, it is important to write a sentence or two that capture the most salient points and helps you communicate with potential partners. You want to write a statement that inspires others to work with you, and clearly communicates your purpose for engaging in this work.

You may end up using this statement in a presentation, or as a mission statement for your organization, or just in conversation—but it’s helpful to sit down and work on it so that you can explain your work in a clear and succinct manner to any potential stakeholder, partner, or beneficiary.

Use the suggested structure below to help create this statement. Feel free to play with this structure and move pieces around to make the statement work well for your purposes.

- your name/organization
- descriptor
- service
- service
- practical partner, organization or issue
- goal/reason

In _________________. We do this because we hope to ____________________

- place
• DON'T FALL IN LOVE WITH YOUR SOLUTION
• YOU HAVE TO START SOMEWHERE
**DECIDE ON YOUR OPPORTUNITY SPACE**

At some point in this process you will arrive at the particular project that you are going work on. When and how you choose your project scope varies from person-to-person. You might have a particular solution already in mind that you want to implement and just need to find the right partner. Or you might be in just the opposite position and know you want to work in a particular space but have no idea where to start.

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**DON’T FALL IN LOVE WITH YOUR SOLUTION**

If you already have a very specific solution that you want to implement, we suggest that you take a step back and engage with the community you are hoping to affect and the social sector experts in that community before deciding that your idea is the way forward. In short, just because an idea sounds like it is the right one to you, there could be many reasons outside of your understanding why it may not be appropriate. You want to be sure to loosen your framework enough that there’s room for innovation and input from expert users.
YOU HAVE TO START SOMEWHERE

On the flip side, if you are a designer who has no idea where to start but want to use your skills in some way for positive social change, you have to narrow down your scope of interest in order to make progress towards engaging in a specific project. You want to be sure to tighten your framework enough that you aren’t overwhelmed by options or unclear to your potential partners about what you want to do. Below are some suggestions for ways to narrow your thinking.
**REGIONAL**

Are you limited to working in a specific geographic region? Is there a part of the world you are particularly passionate about? Selecting which region (community, local, state, national, or international) you want to work in is a great way to narrow your focus. It is important to understand what the opportunities are within the region, how the region compares to the rest of the country, and what the current development focus is within that region. While there are shortcuts to getting to this point, studying regionally-specific artifacts, blogs, newspapers, and history/sociology books can give you a great deal of insight. Talking to folks from your area of interest is another great way to learn about the subject and local context.

**SECTOR/ORGANIZATION**

Have you always wanted to work with a non-profit? Are you fascinated by the social enterprise space? Are you interested in working with a business to help them be more socially-conscious? Do you want to help government agencies design more user-friendly services? To help narrow your search, consider what sector(s) or type(s) of organizational structure appeals to you most. It’s important to note that some sectors have more financial resources than others—this can affect your ability to implement a project. Similarly, some sectors/organizations are more familiar with design, which can make collaboration easier.

**ISSUE/END-USER**

Have you always been passionate about climate change? Do you have a friend that suffers from a disability? Are you a member of any social awareness clubs? If you have a particular issue that really fires you up, or a particular group of stakeholders that you are really passionate about, focusing your design efforts in this space may be the best way to choose your project scope.

So now you should have an idea of the type of work you’d like to do, the locations you find most interesting, and/or the issue you’d like to work on. The most important part about project scope is balancing your role as a designer, your own ideas for change, and leaving a large amount of room for input and leadership from your social sector partner. We’ll talk more about that later on in this guide.
• Approach
• Define your ideal partner (internal)
• Develop assessment questions (external)
• Create a rubric
• Make a list
• Research and rank the list
• Making contact
• Ask for something
• Red flags
• Memorandum of understanding, contracts, or agreements
No matter what stage you are in in defining the type of project you would like to work on, this section will help you figure out how to determine the right partner organization for your efforts. A partner assessment is not unlike the self-assessment that you’ve already completed. The purpose of the partner assessment is to have an objective and consistent tool for understanding what kind of organization would make the best partner for your project.
We call this tool a ‘partner assessment’ and not ‘capacity assessment’ because, as designers, we’re not experts at assessing organizational capacity. Capacity assessments are tools used by development practitioners that provide insight into organizational abilities and outcomes. This is not the purpose of this tool. The tool you will build will be specifically targeted at understanding what potential partner is best suited to work with you.

Be considerate. From the organization’s perspective, having a stranger come in to assess their organization in any manner is a bit like going to the doctor; very few people are excited about it. Therefore, when you use a partner assessment with a potential collaborator, it is advisable that you build it naturally into initial conversations that take place over several interactions (the organizations are most likely assessing your potential as well during these conversations). In order to do this successfully, you need to have a thorough understanding of what you need in a partnership and what you are trying to assess.
A partner assessment must be based on your expected goals for the partnership. This means going back to your goals for the project. Is your vision to partner on a project that impacts the lives of a million people? Is it to help a single organization become more financially stable? Is it to create more awareness around an issue? Is it a combination of all of these? The scope and direction of your vision will directly affect what you need from a partner.

Consider what your self-assessment indicates. For example, if you know that one of your limitations is that you can’t work on your project for more than one day a week, it’s important that the organization be open to this type of arrangement. To start, break down the type of support structures you need into categories, such as activities, staff, financial, networks, infrastructure, implementation, and size in order for a successful partnership.

See the Define Your Ideal Partner worksheet on page 19
FINANCIALS
Will my potential project or engagement need funding for design, implementation, or dissemination? If so, how much?

BOARD + STAFF
What skills does the staff need in order to support my project? How much of their time do I need? Does the board need to be involved?

ACTIVITIES + PROGRAMS
What type of programs does the organization need to have in order to support my project?

NETWORKS + CONNECTIONS
What outside resources are needed? Does the organization have networks that support my project?
Fill out the worksheet below. Keep in mind that this step is only for your internal purposes.

### INFRASTRUCTURE
Where does the organization need to be located? What physical resources are needed?

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### IMPLEMENTATION
Will my project require implementation support from my organization after I have finished with the design phase?

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### SIZE
Do I want to work in a small grassroots organization or a large organization?

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### OTHER
Are there any other factors that I need to look for in an organization?

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DEVELOP ASSESSMENT QUESTIONS (EXTERNAL)

After you have a firm understanding of your ideal partner, create a set of questions that will help you get more insight when you talk with them. These questions will not be the first topic of discussion in your meeting, but you want to have questions prepared ahead of time. Be sure to work on the wording and prioritization of the questions to be sensitive to their time and resource realities.

Try writing out some questions of your own. Some sample questions are listed below:

1. Is the organization interested in working with a designer? Would it be helpful to them?
2. How is the organization supported (through grants? donations? generated income?)
3. What are the backgrounds of the key staff members I might work with? Do their backgrounds match-up with the skills needed for this project?
4. Who has what role within the organization? Who has decision-making responsibilities? Does that person have the time and/or interest in this project?
5. What staff will be dedicated to the project?
6. Is the board supportive of the project?
7. Do other programs or activities support the partnership/project direction?
8. Does the organization have a strategy, mission, and/or vision statement? Would this project align with the core values and direction of the organization?
9. Does the organization have a history of working with outside partners? What other outside resources can the organization bring to bear on the project? How might this affect the project?
10. Does the organization have the physical infrastructure to support this partnership? Is the organizational location conducive to project needs?
11. Are there any other questions I should be asking?
Is the organization interested in working with a designer? Would it be helpful to them?

What are the backgrounds of the key staff members I might work with? Do their backgrounds match-up with the skills I am looking for?

What staff will be dedicated to the project?

Who has what role within the organization? Who has decision-making responsibilities? Does that person have the time and/or interest in my efforts?

Is the board supportive of the project?

How is the organization supported (through grants? donations? generated income?)
Do other programs or activities support the partnership/project direction?

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Does the organization have strategy, mission, and/or vision statement? Would my project align with these?

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Does the organization have a history of working with outside partners? What outside resources can the organization bring to bear on the project? How might this affect the project?

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Does the organization have the physical infrastructure to support this partnership? Is the organizational location conductive to project needs?

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Are there any other questions I should be asking?
• • • CREATE A RUBRIC

In addition to your questions, it can also be helpful to develop a rubric for use in your assessment. At a simple level, a rubric can be assigning a number (1-5) to the partner for their strength against each of your assessment questions. However, for consistency across time and multiple assessors, it is very helpful to define what each number means for each assessment area. These definitions can be very brief, but should be as explicit as possible.

• • • MAKE A LIST

The next step is to make a list of potential partners. While this might seem easy, there are millions of non-profit organizations registered around the world—not to mention socially conscious businesses, social enterprises, and government institutions. Hopefully you have narrowed your scope of interest sufficiently to know the type of organization you’d like to work with.

The best way to populate a list is to use your personal and professional networks. If you know people working on the issue you are interested in, they are the best places to start. A second option is to search existing networks. These can be open networks like those found on idealist.org or selective networks like TED. One of the benefits of working through existing selective networks is that often these organizations have already gone through someone else’s process and have been vetted as high achieving organizations. This does not mean that they will be a fit for you necessarily, but it is certainly not a bad place to start. On the flip side, partnering with an award-winning organization might mean that it is a very well resourced organization. If your goal is to add value to an under-resourced organization with identified potential, you may want to start with a different approach.

Whichever path you choose, you should be able to assemble a substantial list of potential partners from a thorough research process.
Once you have compiled the list, read as much as you can about each organization. As you read, consider how the organization stands relative to your organizational needs and goals. Can they satisfy the basics? Do they align with your vision? At this point you should have a basic list of organizational characteristics that you are looking for and can rank the potential partners accordingly. This is a very qualitative ranking and it is ok to go with your instincts.
MAKING CONTACT

COMMUNICATION TIPS

After ranking potential partners, you should reach out to the top few (2-4). Since you are likely contacting them from a distance and may be in a situation where you are not sure of shared language capabilities, it is recommended that you send an email. In this email you need to explain who you are (1-2 sentences) and why you are contacting them (1 sentence). Next, state why you believe they might be a great partner for you (citing a specific example) and explain why you would be a great partner for them (include a link to your work or some representation of the value you can bring). Finally, you should ask a question that requires a response.

Only send one email. If a potential partner does not get back to you, this is an indication that they may not be a good collaborator for you. However, if you are really excited about working with them and think they might be the right fit, try sending one follow-up email after some time. If and when they do get back to you, set up further communication, likely a phone call.

A phone call is an opportunity for you to explain in greater detail what you do and how you think your work could benefit the organization. It should also be an opportunity for you to learn more about the organization. Remember that the goal in this process is not just to articulate your services, but to also vet a potential partner. It is likely that there will be more than one call or meeting as you go through this process.

If the organization meets all of your criteria and seems like a good fit, it is a good idea to meet in person. You can find out far more from meeting face to face than you would ever discover over the phone. It is very helpful to see their offices and field operations. It is also important to understand how the staff is treated and how organizational communication works. If at all possible, an in-person visit is essential before starting any project.
A NOTE ON PROJECT SCOPE

These communication points are the best time for you to further determine your project scope. It is important not to come in to any conversation with a pre-formed directive on what the organization should take on as a social design project. Just as you would with any client, ask them about their design needs, study their programs, make suggestions for how your services might benefit their team, and together, outline a project brief. Some organizations may know exactly how they could use your help while others may need some suggestions from you. Be intuitive.

If you do have a specific social design project that you want to work on—but you just need help from an organization to get connected to end-users—then this is a different type of relationship all together. Recognize that in this case, they are the ones helping you. Figure out beforehand how your request can be as reasonable as possible considering their priorities and limitations, or think of ways that you can jointly promote or share the project outcomes.
A NOTE OF CAUTION

You are not the first person to want to work with this organization, nor will you be the last, as organizations receive volunteer and partnership requests all the time. Due to low resources, organizations have to be very selective about how they spend their time and money. Be sure to articulate your value in terms of their needs.

TIP

While design is making headway into the social sector space, the majority of organizations do not know much about design (past graphic/promotional needs) or how it might be useful to their work context. Be sure to articulate your value and the value of applied design thinking in clear and non-industry-specific terms.
ASK FOR SOMETHING

In order to understand if the organization could be a good partner for you, it is a good idea to ask for something to gauge how invested they are in a potential partnership process. The last thing you want to do is put months of hard work into something that no one needs or wants. Understand however that it can be awkward for an organization to tell you that they don’t want your help—so it’s important to look for contextual clues to be sure that your services would be useful to them.

One way to do this is to ask for a sign of their buy-in by requesting something that demonstrates their commitment. This can start out with a simple request like asking for an email reply, but can and should get more involved as your relationship progresses. What you ask for should always be reasonable, relevant, and necessary to them or to the project you are undertaking. The content of the question should be based entirely on what information you need to define a project and complete your partner assessment. This could be a copy of their annual report, or a one-page description of a project they’d like to partner on.

RED FLAGS

Red flags are signs that tell you a partnership may be untenable. They are often difficult to see when you are in the process of building a new relationship or are blinded by your own enthusiasm or passion for an engagement. It is easy to get excited about a potential partner and ignore their deficiencies. So when you start a conversation it is good to review what you need from a partner. Also listen for signals that point to an inability to meet any of these needs. Whenever you hear anything that sounds like it could be an issue, make a note of it and flag it. For example, if you need executive level engagement on the project, a red flag should be raised if the executive you are speaking to is about to retire. If you need committed staff time, a red flag should be raised if your partner can’t identify the staff that will work on the project. You can discuss these flags with your potential partner and see if they can be lowered. If not, it is highly advisable to keep looking.

MEMORANDUM OF UNDERSTANDING, CONTRACTS, OR AGREEMENTS

Depending on the level of engagement you are taking on, the last step before beginning work should be to create a formal documentation of the partnership. This document will signify that you are partners and that you are officially bonded, and should at a minimum outline the roles and responsibilities of each party and include signature of both parties. If you are taking on a pro-bono project as a small part-time engagement, your document should be quite simple—while if you are taking on a funded, lengthy, or full-time engagement it will most likely need to be more sophisticated and include legal stipulations.
The focus of this guide is really on the initial steps for identifying a partner and defining a project. However, partnering is centered on building relationships and it is important to continue to build these throughout the project. While each project is different, there are a few techniques that are imperative to building ongoing relationships.

- ACTION ORIENTATION
- SMALL VICTORIES
- OPEN PROCESSES
- END GAME
BE FLEXIBLE

One of the key personal traits that allows for an action orientation is flexibility. Projects and project teams in the social sector don’t always reflect the structure and efficiencies of working on traditional design projects. A social design practitioner needs to learn to be flexible in his/her approach. Keep an open mind to new ways of working and allow yourself to grow with the project.

ACTION ORIENTATION

The creative process can be a delicate balance between reflection and action. When you are working in the social sector with people that are unaccustomed to design or that are investing some of their limited resources in the design process, it is important to stress ‘action.’ This doesn’t mean that you can’t do research, or that you can’t take the time to stop and reflect on what you’ve learned. It does. However, it also means that you must undertake multiple activities at once. So even if you are pondering your next steps and planning a strategic team meeting, you may also be simultaneously creating a prototype that will help you achieve this goal. Prototyping is the essential method for maintaining a consistent ‘action orientation.’ The activity of building and testing prototypes is vital for communicating your thoughts and engaging your partner.
SMALL VICTORIES

Related to action orientation, it is important to recognize that if your partner is unaccustomed to design they may grow impatient if there is no project movement in the short term—especially at the beginning of any partnership. Orient your initial process to allow you to achieve small victories as a team. Developing prototypes, creating visualizations, and running creative sessions are all great ways to achieve these small victories. Even if the victories aren’t directly in-line with your greater process strategy, they will help you generate support and buy-in for your process. Small victories are necessary to get the team to make bigger leaps of faith further along in your process.

LET GO

Let go of your ego and your need for control and embrace the limitations of your personal impact on the world. This work is not about you. To build a partnership that has potential to create change you need to think bigger than yourself. To not become discouraged you need to realize your own limitations. To succeed, let go.
OPEN PROCESSES

Part of the action orientation is opening up your process to others. This means you always visualize what you are doing. It means that, whenever possible, you bring others into your planning and engage them as decision makers and designers. This creates buy-in, and it also transfers understanding of the design process to other people.

DROP THE TECHNICAL TALK

Professionals of all stripes build vocabularies that exclude outsiders from their conversations. This technical or professional lingo needs to be dropped from your lexicon. Using technical and industry specific terms to describe your work doesn’t make you any smarter, but it can easily put a wall up between you and your partner.
**END GAME**

Have a well-defined end game. This shouldn’t be difficult if you have spent the time to understand what you want to gain from the partnership. Designers are often not engaged with the implementation of a project and this is likely where your partner has developed a deep expertise. Decide early how far down this path you want to, or need to go, and be clear about where you plan to leave off. This decision will affect everything you do—from how you assess your partner and define the project to how you manage the collaboration and which techniques you choose to apply. This clarity will also help your partner have a clear understanding of what to expect from you.

**KNOW YOUR LIMITS**

The social sector engages directly with resource poor communities and so there is no end to the opportunities to do more. It is easy to get pulled in many directions, so design practitioners working in this field needs to define their boundaries and protect them. It may seem callous, but it will help you be more effective.
We reached the end of our guide, but with any luck we helped you think through how to implement your life-changing ideas! We hope that these have been useful guidelines to help you kickoff your work in the social sector as a designer. We’re excited to hear more about your project or any tips you learned along the way, so be sure to send your thoughts and suggestions our way to partnerguide@d-impact.org.
Special thanks to Alexandra Dellis-Harcha, Sarah Traxler, Sharmila Sitther, Rafia Usmani, Ali Maiorano, Brian Gough, Josh Treuhaft, Mario Varon, Anisha Shankar, Jed Farlow, Aakash Sethi, Abhijeet Deshmukh, Jeyaraj Elango, and Dr. Neela Onawale.