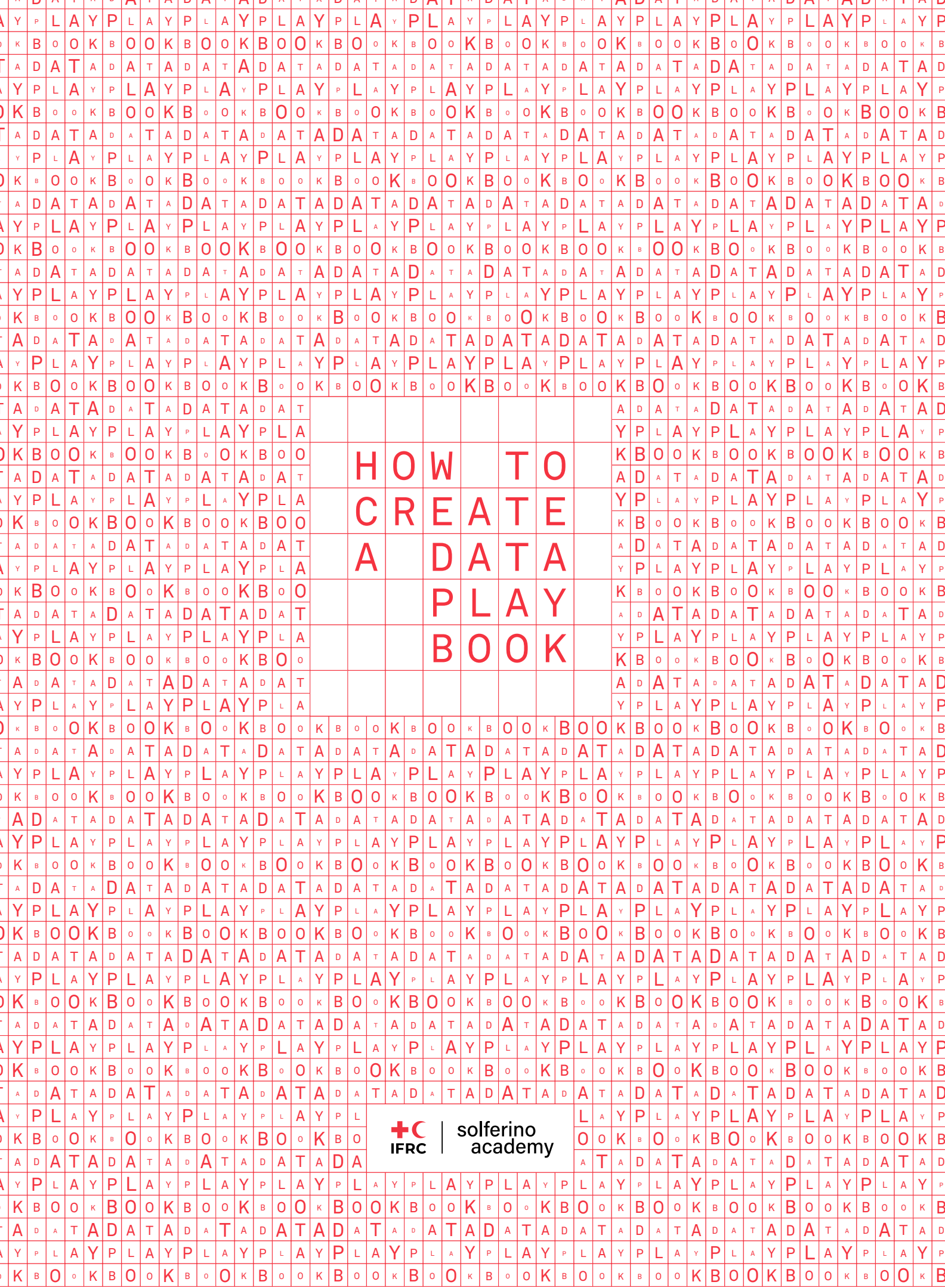
HOW TO
CREATE
A DATA
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DATA PLAY BOOK

How to Create a (Data) Playbook

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Summary

The International Federation of Red Cross and Red Crescent Societies (IFRC) Data Playbook started in 2016 and is now entering its sixth year of activity as a project and a product. As a project, the goal was to convene and co-create a network-centric resource with data-skilled colleagues across the IFRC. As a product, the Data Playbook is a toolkit to help teams improve their data skills, and it also became the cornerstone of the first IFRC Data Literacy programme. The initial programme included four key activities in support of a network-centric approach to Data Literacy: the Data Playbook, a Microsoft Excel pilot, Missing Maps engagement, and Data Protection/Responsible data activities. We used an agile innovation approach: research (2016), pilot, test, co-create, beta launch (2018), pilot, test, revise, and finally deliver version 1 (2022).

This report provides insights and methodology, with reflection on the initial idea, pilot, beta, version 1, and product launch phases. We conclude with overall lessons. Data Playbook implementation and translation activities are ongoing and not included in this report.

Background

Research and Pilots

How can the world's largest and most diverse humanitarian network learn and share data skills to support their collective humanitarian response? In 2015 – 2016, Heather Leson led some data skillshares with Qatar Red Crescent Society, Qatar Computing Research Institute, local entrepreneur networks, and other Qatar-based humanitarian actors. A humanitarian approached her and advised that AI and emerging tech was far from their day-to-day data needs: they wanted practical hands-on data skills. So Heather used some School of Data and Aspiration co-creation models to attempt to bridge such a wide community need with this local network. When she joined the International Federation of Red Cross and Red Crescent Societies (IFRC) in 2016, the idea was to test if the methods of data skillshares could be grown with the IFRC network.

Conducting individual and team user interviews was critical to determine the most appropriate tactics for a new data literacy programme. Any global training efforts would need to be flexible to suit the context and type of work that teams deliver around the world. Plus, this approach would build on the existing skills and talent rather than 'hiring a writer from an outside network.'

Data and digital literacy activities in humanitarian work require focus on trust and humanitarian accountability. A social learning approach aligns building for and by the community within the fundamental principles of the IFRC global federated network. By designing with people at the centre, the goal was to have shared ownership and common materials that match the work. We were inspired by initiatives such as the Community-based Health and First Aid (eCBHFA) and the CEA Toolkit. Both tools focused on the use of behaviour change team learning with 'pick and choose models' to scale to millions.

Early network feedback also indicated a need to build on existing data practices across the IFRC network and to make activities that were asynchronous across other programmes and global activities. There was no global data training programme, yet there were great data skill training examples available across the various teams and locations. Thus, instead of attempting to convene a new community of practice or create only brand new content, it was deemed more productive to simply embed activities within the existing networks of information management, innovation, cash, health, and planning, monitoring, reporting and evaluation. These networks had global reach and could both guide the content and bring participants to the conversations.

The Data Playbook project and product was inspired by the best practices of Aspiration, School of Data, Atlassian's Team Playbook, and the DIY toolkit. The innovation techniques incorporated included a mix of open organization principles, patterns/ blueprints/playbooks, collaboration, and participatory design.

From September 2016, we created, piloted, revised, and reused data training content to serve many audiences. With minimal resourcing (staff and funds) for the data literacy activities, the pilots started with lunch-and-learn workshops in the IFRC Secretariat headquarters in Geneva inviting all staff.

We then convened an 'informal data working group' to discuss and deliver joint events to support a data culture. We used existing materials and created new content as needed. In parallel, there was a steady stream of key informant discussions to identify the needs, questions, and potential ways to contribute to the data playbook. This was ever changing due to the nature of humanitarian operations and staff availability.

Between September 2016 to June 2018, thousands of people were engaged and contributed in each region both online and in person. This included events with partners with the OCHA Centre for Humanitarian Data, ICRC, RightsCon, Internet Governance Forum, Humanitarian Network Partnership Week, and Qatar Computing Research Institute.

The result was the first IFRC Data Playbook beta product and a network of early adopters who contributed to the pilots and project. The pilots and convenings were really the 'data literacy project' which shaped the 'data playbook.' The Data Playbook was to support the allies on this journey to understand and bridge the diverse data skills needs.

Beta

We had draft content and a network of allies. We partnered with Fabriders to help us convert the content to the Playbook and assist in connecting contributors throughout the beta creation process.

The most important guiding principles of the beta Playbook were that it be network-centric, transparent and open in its processes, and easy to use. Our network told us that they wanted content that they could download, revise, and use offline. We deemed this as the minimum viable product to serve the needs of the global network.

To verify the table of contents and coordinate the product development, we decided that user convenings were important. Given the global nature of the organization, we conducted outreach to invite inputs in a number of ways: we sent emails inviting input, joined regular team calls of the key teams, and continued to engage individuals as they connected and became contributors. These activities culminated into a 'sprint week' to coordinate the draft playbook with input from colleagues.

These activities helped us socialize the network-centric approach to product development, plus provided opportunities to obtain valuable input. We used the conference room walls to display the table of contents

and asked for input into the exercises and methodology. Engagement with the content in this visual way provided user verification, potential gap analysis, and insights while refining the scope. We wanted to approach data skills as part of anyone's job rather than an individual or a specific department. The terms we used were data curious, data advocates, data active, and data ready. There were conversations about those who did not self-identify as any of these groups. Clearly, a data culture takes time, discussions, and negotiation.

Every activity in the Data Playbook has credit to recognize the contributors. It was essential to respect that many people shared their knowledge and skills. Plus, if there was shared ownership throughout the process and end product, we wanted to test whether the contributors would become the data champions/ advocates in their part of the IFRC. This turned out to be the case, but with limited time and budget, supporting the contributors to bring the data literacy programme to scale would require an organizational culture shift, strategy, and policies.

In June 2018, we launched the beta version of the Data Playbook to learn from its use. The beta was shared with a Creative Commons license (CC BY-NC 4.0) to make the content freely available for use and remixing.

We created it with minimal design and a lightweight file system for sharing. The beta toolkit was designed with pdf and editable versions of each of the nine modules and 65 types of content. We learned a lot about co-creating with the network.

Our objective for the beta was to learn and understand how it was used to inform what would need to go into the V1. We released the content for testing in a lightweight format. The beta was not a 'web ready' product based on the feedback from the users and

contributors. However, we took the opportunity to collaborate with the GDPC to host the beta version of the playbook. Having a web presence could help us further the outreach while continuing on the pilot and iterating on the content. Workshops continued as we refined content and supported data advocates in every region of the IFRC.

From Beta to V1

While the Data Playbook beta content was being used by various data advocates, we noted that the product would only be successful if it was adopted within organizations as part of the data culture initiative. Data advocacy is a team sport.

Our focus was the International Red Cross and Red Crescent federated network. We were delighted to hear from many data literacy practitioners in the humanitarian, governmental, and development space. They wanted to use the Data Playbook for their work and they wanted to learn about our journey. We convened the Data Literacy Consortium as an informal network to support network-centric learning around data literacy. This was done in partnership with Fabriders and the Centre for Humanitarian Data (OCHA). Together we investigated if we could make the V1 of the Data Playbook a cross-organization tool in the humanitarian sector. After some research and discussions, it was not deemed the shared priority for all members.

Meanwhile, we asked – What would it take for a whole national society to embrace data literacy as part of the work? Fortunately, early feedback from the IFRC Strategy 2030 research found that digital transformation (and data literacy) was a top priority of National Societies. Building on this strategic pillar, the lessons from the Data Playbook pilots and product were used to support both the first and final draft of the IFRC Digital Transformation Strategy and the Red Cross and Red Crescent Movement Digital Pledge.

As data literacy was included in the Digital Strategy approved by the IFRC Governing Board and deemed essential for the IFRC, we were charged with upgrading the Data Playbook from Beta to V1. Our focus was to scale it larger and have it be a supporting tool for the Digital Transformation Strategy and the Digital Pledge. The Data Playbook was not considered a global tool yet and the strategies provided a stronger base for success.

Listen to this Podcast The Road to V1 Podcast
Data is Going Local, Thanks to Human-Centred Design

V1

The V1 work started during the COVID-19 pandemic, which changed how we collaborate and how we connect. The Solferino Academy team had honed our online engagement with senior leader events called Think Tanks and a large scale event – Climate.Red. Our partner, Fabriders, had been learning from its own work supporting network-centric resource designers and had been on a journey to create meaningful online experiences within an increasingly zoom-fatigued world.

Thus, our efforts to combine human-centered experiences while delivering an agile product upgrade offered a good opportunity to champion a methodology based on our previous learnings: network-centric, open/transparent practices, and easy to use/pick-and-choose model product.

To get started on the V1 project, we interviewed around 20 individuals working on building capacity to use data within the IFRC network (more details here). In keeping with our efforts to align data literacy as a priority across the IFRC network, we created the first ever IFRC Data and Digital Week (April 19 – 23, 2021) to launch the Data Playbook v1 workshops in parallel and in support of all other activities.

The event brought more than 4,000 registrants together across 130 virtual sessions in many time zones and languages, sharing data and digital innovations, insights and ideas, an experience captured in our report. We asked for input into the upcoming Data Playbook v1 and we piloted some ideas for new activities. Our team reviewed the content and began the process of planning how to deliver the V1 as a project and a product.

Methodology and Insights

V1 Planning

The IFRC's Solferino Academy (represented by Heather Leson) and our partner, Fabriders (represented by Dirk Slater), began the process of designing a series of sprints to verify the draft Table of Contents and to curate/create any content.

Our user research found that we would need to do three priority tasks with the content: revise beta content, create new content, and expand the modules to meet with the changing needs of the contributors. We designed sessions to be one or two hour activities in various time slots to ensure global participation. Melissa el Hamouch joined our core playbook team first as a module editor and then as a full co-editor. We recruited some participants to lead various parts of the work and we invited some of the beta contributors to join a core planning team to coordinate content and outreach. This team met regularly (about once a week) for over ten months. We held more than 50 online participatory sessions to recruit, engage and learn from contributors. We also held around 50 meetings with the core development team to coordinate towards the delivery.

We had a goal of getting the content completed by the end of 2021. Our experience centered on shared ownership via participatory design methods. We encouraged the wider IFRC network to join the sessions with consistent scheduling and promotion. Each session had some beta leaders and new advocates who expressed interest in taking roles.

By dividing the sessions into specific content topics by module, contributors were able to get involved according to their interests. Given the asynchronous nature of the work, we left content open for editing, and encouraged participants to contact us if they had any additional ideas or feedback. We invited participants to help lead the modules. Through this process we were able to recruit 15 people to become core team/module editors across the ten modules. Altogether, we engaged 270 contributors

throughout the various sessions from Data and Digital Week, the sprints, the review and editing stages, and the final launch. A critical element was engaging people on a draft table of contents and seeing people add what they thought was missing, what they would add, and how it might be useful to them. We knew that busy humanitarian colleagues would be more engaged if the sessions were welcoming, energizing, and provided them with insights that could help them overcome challenges they were currently facing.

Key lessons and methodology

- **Make a network-centric resource** – Collaboration on resources to create assets for and by the network is a transformation. It was an exploratory innovation to create for and by the network using shared and open leadership methods.
- **Network and community building with mentors and ambassadors** – We convened multiple communities and networks across the IFRC network, which encompasses many time zones, skills and languages. While the majority of the sessions were in English, this still provided a unique forum to foster community/network building exercises to support leaders and encourage peer networking for everyone on their data and digital journeys.
- **Skillshares –** By creating content and spaces, we used a sharing and learn by doing approach to support exposure to innovation methods, data/digital literacy skills, open methodologies, facilitation, peer training, and documentation skills.
- **Product Development** – Distributed networks can apply open methods to innovate and transform supporting the digital agenda. Participation activities also show a digital divide in the IFRC network. If we want to transform how we work together as a network, we need to continue to find and support new ways to connect and create across time zones, languages, workstyles, and toolsets.

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Key steps to create your playbook:

1. Individual and team interviews/job shadowing – embed yourself to learn their workflows and culture. Meet users where they are.
2. Identify and foster transformation with your early adopters
3. Change takes time and determination. Always be changing/ engaging – your communications, your content and your calm.
4. Start with a draft table of contents to give a clear and concrete ask for contributors. Get the story right – How to Playbook? Why does this method matter?
5. Setup open processes for people to keep collaborating pending their time. People over tools – be ready to use tools that make it easy for busy people of diverse digital skillset.
6. Be ready to change all the processes and workflows to suit the contributors.
7. Schedule small sessions on narrow topics to make it valuable.
8. Use the session design model to cocreate in iterative ways
9. Be transparent and inclusive in the process
10. Content creation is only the beginning. Design and outreach are huge endeavors.

See our slides on the Data Playbook methodology: Data is a Team Sport.

Creative Spaces

How we connected people

We invited data literacy practitioners from across the IFRC network to join sprint sessions to help us brainstorm and generate content. Many sessions would focus on a module topic. We used the Fabriders session design model which engages online conversations and co-creating. Every session was team discussions and some content writing. We used shared documentation for collaborative and real time editing. For interaction and exchanges, we used Zoom and slack.

A typical sprint session looked like this:

- We'd start by asking participants to share their name and why they came to the session in a 'roll call' section in the shared document.
- We'd then have small group breakouts where participants discussed challenges they faced in the topic.

- We'd then review relevant exercises and content that already existed in the shared document.
- We then asked participants to brainstorm ideas on solutions or exercises for teams to explore the topic more deeply.
- We'd finished by sharing where we were at in the Data Playbook development process and inviting participants to become more deeply involved in reviewing or trialing content.

See the Session Design Canvas to learn how we hosted the discussions

Credit note for Virtual Session Canvas and Participation Guidelines: Fabriders, Creative Commons 4.0

To encourage open collaboration, we shared this guidance

- **Be respectful** – Please follow the instructions and the prompts, be timely. Respect that there are different experiences present and try to listen and understand. Don't rush to solve other people's problems – instead, strive to build solidarity.
- **Be Inclusive** – Speak to the *nth*. The *n* being the number of people in the group. So if there are four people, speak a fourth of the time. Expand all acronyms, be wary of jargon, so everyone can understand. Share resources and URLs, so others can benefit.
- **Be Fully Present** – Ask questions and get the most out of the small group discussions and in the large group. Minimize or close apps that you might find distracting!

Connecting busy people requires incentive and mutual respect on the shared journey. Some considerations:

- The team needs to clarify – **what is in it for the contributors.** The outputs and methods are clear, but 'matter' and 'impact' are married to your success. Every point of engagement must provide them with value, things they can apply right away and directly to their work. Credit is also important, to acknowledge their contributions but also to be able to show them how they were credited
- **Leaders rise.** We had ten modules. Each of those had between one and two module editors and core contributors and reviewers. We called them editors. Contributors (people who came and went throughout the process) often can take on more responsibility once the product is ready for review.
- We attempted to do an informal **Roles and responsibilities** approach to the Playbook. This was due to staffing and budget constraints, but also due to finding a means to keep people engaged. Staff often volunteered their contributions and would often need to prioritize their other work, and the nature of our humanitarian work meant that people would sometimes be deployed to work on emergencies. We communicated often about how we collaborated and were successful, but would recommend a different approach for any other Playbook with a **network manifesto** together to determine ways of working. Technical documentation is the last thing

that gets love and attention. Every open source project can tell you this. So, expect that some people will have to lift up all the missing parts.

How we embedded training

Often training sessions use slide decks and have minimal discussion. By creating topical spaces and modeling sessions focused on surfacing the knowledge of the participants, **we knew that the IFRC network contained many smart people who could skillshare, and that we would focus on cross-training these data advocates in virtual online training.** We wanted to explore collaborative workshops and transform how we work as a global distributed network.

Each session had a four part learning by doing training approach:

- **Data and Digital Skills –** Across each of the 50 sessions, we had many data skill topics to explore as teams. For example, we asked in one session – What do people need to know about data quality? Then, the teams would share their experiences, knowledge and, often, very rich examples around data quality needs, planning, and training.
- **Collaboration methods –** We tested ways to help teams better collaborate on complex topics in a fun and inclusive way. We also designed a workflow throughout the sprints and sessions so that anyone could add content and edit during the session and in between sessions. We used a transparent and open approach to encourage collaboration across the various contributors' workstyles. There is a workstyle balance between people who want something nearly finished before sharing for input, versus those who give early drafts for more input/collaboration.
- **Facilitation skills –** We demonstrated virtual facilitation techniques. As the sprints continued, we cross-trained colleagues to design and lead the sessions. Often people focus on the technical content to be trained on, but we wanted to support a data culture shift to share space not just with colleagues who were data ready, but to encourage hands-on learning for any humanitarian. We developed a Facilitators Tips section to the V1 based on this experience.

How we organized ourselves

Every team and organization has their ways of working with tools and processes. There is often a balance of which tools are available, familiar to the team, and what meets the needs of a given activity.

We aimed to make collaborative documentation and communications as frictionless as possible. Our toolset for the Data Playbook was Zoom (live chats, breakouts), Slack (asynchronous chats), email, shared documents and folders, the Solferino Academy website/blog, GDPC website, Github, and Social Media. It is important that the workflows are designed to be seamless and interoperable.

Throughout the project, we created many templates to streamline the documentation, track content, and keep ourselves up to date. One of our partners asked how we coordinated many people and types of content. We had major folders for research, planning, content, workshop, and launch. Collaboration is complex across various organizations/toolsets. There are considerations around ease of use, access controls, business rules, comfort levels/psychological safety, data protection, workstyles, and team culture.

Often, we created workarounds to suit the various communication and documentation needs. We will share some of our templates in the annex and on Github. Every playbook and team will work differently, but it may be a good starting point to see how others organized themselves.

We learned so much about balancing the opportunity of engagement around a network-centric resource with the staffing requirements to deliver the project and eventual product. The chart below is a mix of key tasks and roles that we used for the v1. We had a mix of paid staff/consultants, staff who had this activity as part of their job description, staff who volunteered time, and volunteers/partners.

Role	Team type	Description
Product Lead	Paid	Design content and experiences, Fundraises, recruits, and leads project development and teams throughout the lifecycle
Co-editors	Paid/Consultant/Partner	Design content and experiences, writes, coordinates with
Module Editors	Staff/Volunteers	We had one module editor who was a paid consultant due to the specific topical need – data protection.
Contributors	Staff/Volunteers	For the v1 project, we had some partners join occasionally for the sprint sessions and review stages.
Graphic design	consultant	Design visual story and add graphical images
Video editor	consultant	Creates compelling video
Website (wordpress) editor	consultant	Designs web landing page
Communications and Marketing lead	Staff	Coordinates outreach and communications
Outreach and Social Media	Staff	Plans social media marketing

Example Templates:

We've included some of our templates online. In talking with colleagues, these are the top templates that might help other documentation/playbook projects:

- **Status board.** We had multiple phases of the product development from beta to v1. Due to the ad hoc teams and increase in contributors across multiple organizations, we moved from Trello (which we use on the beta) to a simple document status board. Once we moved from the published contributor-wide sprints, we determined that a more granular project tracker might help us coordination. This was used in conjunction with regular emails and check in calls. The core team sectioned off the V1 project into key stages, key steps and colour coded it to track progress, bottlenecks, etc. This was essential for coeditors and module editors to use the kanban method in a one-look way. Sometimes we celebrated large milestones: a sense of team completion is important.
- **Session templates.** Our core team designed each sprint with a session design template aligned with questions and activities related to each topical session.
- **Content index.** With 120 items, 15 module editors/coeditors and 270 contributors, we needed a way to see and review the Playbook across all the files and folders. We used the color coding system to verify content and signal completion.
- **Module /curriculum templates.** We wanted to have learning outcomes easily surfaced throughout the playbook. Each module and content item needed to answer a data lifecycle question – what problem are we trying to address/discuss?

Sprints and Product Stages

Throughout the sprints we refined our creative space and focused on iterative approaches to connect, organize, and train.

We began the first of a series of five content sprints. Each sprint covered content across the playbook and was scheduled with the module editors. We were joined by volunteers, national societies from around the world, IFRC staff from disciples such as first responders, information management, planning monitoring analysis and reporting (PMER) practitioners, community engagement officers, and legal experts. We heard about how people are currently using the beta version of the Data Playbook, what approaches they currently take to help build key data literacy skills under defined topics (outlined in this blog post). Every session could have between five and 20 participants. We always had

smaller discussion groups to provide a healthy dialogue space and make it productive for the participants.

How to run a Playbook Sprint

- Each of your **sprints may need to be multiple events.** For each of our 'sprints', we dedicated two sessions (at a minimum) per module across two time zones.
- Emphasize that **each sprint is iterative and be ready to shift.** The sprints and your network will force you (gladly) to reshape the method and the content. It was often harsh, but worthwhile because it built confidence, trust and ownership.
- **Types of sprints.** We've been inspired by Jake Knapp and other sprint methods. Each of our sprints were two weeks with between five and ten topical sessions. By using the session design format, we focused on how to foster a collaborative and shared space for all participants. For every sprint and sprint session, we explained the iterative process.
- **Participatory design.** The core team and co-editors met often to uphold our efforts of participatory design with each other and with the wider Playbook contributor network. At a meta level, collaborative methods of open organizations/open source were core to our efforts to be flexible and inclusive to the contributors needs. Our method was participatory design following some of these principles. The people who showed up were the people with the knowledge. We asked about their experiences, problems, and solutions. Every participant makes decisions while in the meeting. They provided us with value, and we also wanted to make sure they got something of value back for their contributions. This is a shift of power for how we collaborate and create. We then verified the content later with them to ensure the content we wrote meets the need.
- The whole project – **all the outputs – is co-creation and collaboration.**
- **Tell the story while you convene and create.** We wrote about our journey as we went. We made the process as open as possible. anyone in the Red Cross and Red Crescent could join. We even had other humanitarians join. The open methodology and collaboration methods were purposeful. We wanted to show how a network could create a product and learn along the way. To say that this was new for IFRC is an understatement. But, the value is again in ownership.

Building on the first sprint, where we got lots of input on a draft table of contents for V1, we were able to draft a vision for new modules and content. During our second sprint we started to get inputs into the new content and we also began recruiting module editors. You can read more about this process here.

For our third sprint, we began to curate the content and feedback we got from interviews, Data and Digital Week, and the 100+ individuals that participated in the first two sprints. We co-designed a module review process with our editors, and we also had some visits from special guests. More detail here.

During our fourth sprint we entered a Design, Pilot and Refine stage working with module teams and contributors, reviewers and participants. During this stage we learned that designing content and curriculum is an actual skill. We learned about teaching methodology, participatory design, and facilitation skills. More here.

For the fifth sprint we wrapped up the design, pilot and refine stage and really focused on finalising the content. We also began looking for further opportunities for testing exercises and content outside of our sprints.

Modules

1. Understanding how Data Matters
2. Nurturing a Data Culture
3. Strengthening Data Teams and Projects
4. Getting the Data We Need
5. Making Data Useful, Useable, and Shareable
6. Understanding and Analyzing Data
7. Responsible Data Practices and Data Protection
8. Presenting and Visualizing Data
9. Making Decisions with Data
10. Data science and Emerging Technologies

Design and Editing

Our goal was to give the Data Playbook v1 a more compelling design with an accompanying communications/marketing package. The original beta design consisted of very lightweight templates. For V1, we requested pdf and editable templates of content, plus three videos to share the story and a web landing page to advertise the content. Making content easy to use and accessible were two priorities on the design journey. Once the content was completed by the editors and handed over to the designer, we were recommended to do the final content review once the design was applied.

The plan to streamline the content into one design format was full of many lessons and tradeoffs. There are unique skill sets and methods to adding graphic design. Collaborative open processes and the creative design processes are often not aligned. It was a large endeavor to join up collaborative pick-and-choose playbook methodology with graphic

design principles, toolsets, and workflows. **We organized this part of the playbook into stages rather than sprints due to the different types of activities required. All in all, this added four more major steps to the Playbook launch. The innovative collaboration pipeline from Playbook v1 content to design to launch was new to our team.** We documented our experiences extensively to help others on their journey.

Once the design was applied, our teams of editors and network of contributors conducted an extensive and fast-paced review process. Change requests were reviewed by the co-editors and provided to the designer. The review process was in two stages. The first stage was with a wider network of contributors and then the second review was done with core team and module editors. The workflows for design, review, and editing were complex, but we managed to deliver a shared review process with the contributors.

Our recommendation is that the design workflows and contributor processes find new ways to align across the skill sets and toolsets. Collaborative design and communications content (eg.videos, landing pages) feedback loops is a growing space. We encourage anyone to really consider team culture and resourcing to make this a sane and useful effort for participants.

Designer's Note

Scope

This was a large design effort to create a Playbook in a collaborative, editable, and professional book format. Some data to help users understand the scope of the content:

- 10 modules
- 102 media (images, infographics, icons...)
- 120 exercises, games, scenarios, check lists, handouts
- 217 Cross-References
- 270 unique contributors (including writing style and content format)
- 289 hyperlinks
- 704 pages
- 473,922 characters
- 76,797 words
- 9,162 paragraphs

A quick note to share how the Data Playbook was designed

- **Hardware:** Apple Mac Mini, keyboard, mouse and external display, chair and table
- **Software:** Adobe Creative Cloud ecosystem (InDesign, InCopy, Illustrator, Acrobat Pro, Recosoft Plugin, DocsFlow plugin, PDF_individuals.jsx export script)
- **Sourcing:** GoogleDocs ecosystem (Google Sheets, Google Docs, Google Slides)
- **Fonts:** Acumin Pro, Diglû (Icons), Chartwell (infographics)
- **Icons:** Creation, Diglû and the Noun Project

Launch and Handover

The IFRC | Solferino Academy led the innovation and launch of the Data Playbook V1. We collaborated with the IFRC Digital Transformation team to handover the product for implementation.

We would have hoped to launch the Data Playbook v1 as soon as possible to keep the momentum with contributors, but a variety of uncontrollable obstacles led to a later launch than we had expected. Due to the co-design process, we still had lots of contributors and supporters who picked it up and started using it when we launched. Once the design was ready, we focused on outreach and launch. This final stage had many iterations to deliver the content plus communications. The team formation was smaller and robust.

Innovation is sustainable with good planning and coordination to iterate and implement beyond the innovation lifecycle. Often, we don't plan to make this shift from an innovation project to full product management, including cross-training and mentoring a new product owner. We also coordinated product management decisions involving senior leaders to ensure a seamless handover. The innovation project launch included a full product handover process that started seven months before V1 launch. By the time of the launch, we had completed our Data Playbook V1 upgrade partnership with IFRC Digital Accelerator team and handed the Playbook over for the next stages. It was agreed that Solferino Academy would be the communications lead for the launch, and that the content would be stored by the Global Disaster Preparedness Centre on behalf of the IFRC network. We put all the beta and v1 content on github for ease of remixing and translation.

As part of our project closure, we did a data protection clean up of all our files, removing all the personal data and archived content. This essential project closure step was to adhere to the IFRC Data Protection policy as well as the GDPR (some European National Societies follow this policy.) We also reorganized and archived content. Then, we determined that some of the methodology would benefit other projects. The requests precipitated

the creation of this methodology report as well as a github account for templates to be used by a wider group.

Videos

1. Meet the Data Playbook: https://youtu.be/WSCyHolD8Dc
2. How to use the Data Playbook: https://youtu.be/1aWPFRQ_LHU
3. Learning about data protection and responsible data: https://www.youtube.com/watch?v=VAmA1Uwxwb8

Web Landing pages

Solferino Academy

GDPC

- Data Playbook beta
- Data Playbook v1

Impact stories/blog posts

- Beta launch (June 2018)
- Beta pilot in Nairobi, Dakkar, Malawi, Syria, and Budapest
- Podcast about the Data Playbook and beta project for Digital Impact (Stanford PACs) (September 2018)
- Impact – Microsoft Excel pilot on Covid19 response (March 2021)
- Data and Digital Week report (May 2021). The 1st ever IFRC Data and Digital week kicked off the Data Playbook v1 participatory events. There were 4,000 registrants, 2,900 participants and 130 sessions.
- Data is a Team Sport: Cocreating the Data Playbook v1 (June 2021)
- Sprint to join a shared learning journey on data literacy (July 2021)
- Evolving and iterating the Data Playbook v1 – 2nd co-creation sprint (August 2021)
- Pilot with us- Data is a Team Sport (September 2021)
- Join Testing the Data Playbook content in October (October 2021)
- We Wrote a Book (November 2021)
- Review your Data Playbook (February 2022)
- V1 Launch – Your Data Playbook is ready (June 2022)
- Podcast about Data literacy and the v1 project (Humanitarian AI) (July 2022)
- Where to start with your team's Data journey (August 2022)
- Being Data Responsible as a Team (September 2022)
- A network centric approach to data literacy blog post with CartONG (September 2022)

Some key lessons from the playbook launch and product handover:

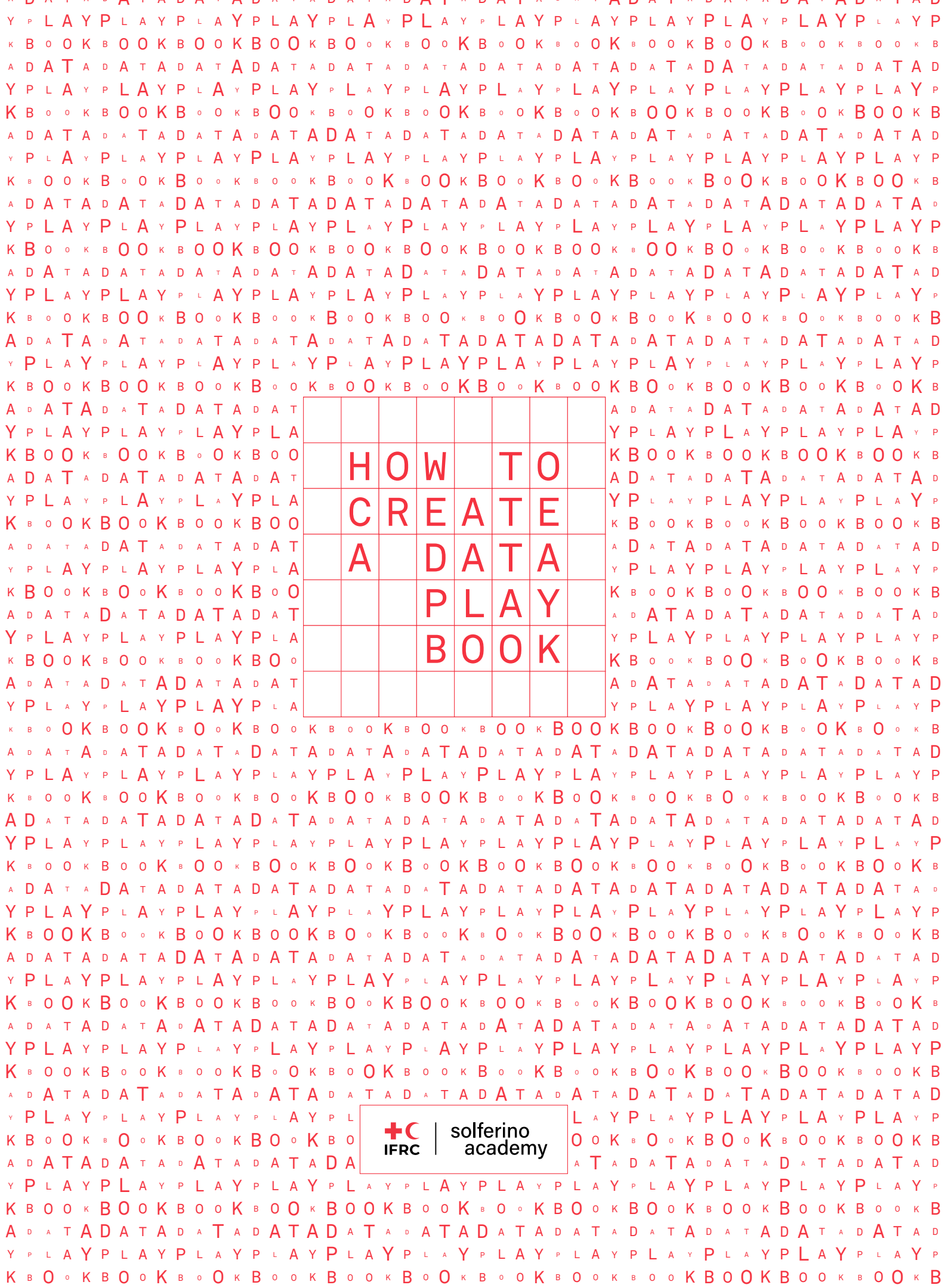
- **Thank you and credit.** We gave every single person a sprint participation certificate. We built a culture of gratitude and focused on engagement as the top priority on the path to shared ownership. Contributor names were also included in the credit pages. Then, with the launch of the Data Playbook v1, we provided all contributors with both a pdf and digital certificate.
- **Product development shifts.** We considered sustainability and network ownership through the whole product development lifecycle. **The theory of change was – if people are contributors will this support meaningful and long term use of the playbook across the world?** We focused on continuous engagement with the IFRC network on implementation and integrating feedback/experiences. Sharing the content in an open source format (through github and via a creative commons license) will allow for ongoing monitoring and sharing of feedback, adaptation, and translation. And, the development is set up for more iterative change based on the next stages of the use.

We've set the product up for success to iterate with the network. There are plans in place to translate and use content for many different parts of the IFRC network. The implementation planning is the next phase of the Data Playbook v1 product. We look forward to supporting as advocates and championing transformation in how we deliver products and services with the network.

Annex 1 – Templates

The following are some templates that we used for the playbook. These are available to download and reuse with a CC by-nc 4.0 license. See all the templates and full descriptions. Contact data.literacy@ifrc.org for more details.

- Data (Documentation) is a Team Sport (slides)
- Playbook Status Board Template
- Playbook Roles Template
- Playbook Content Index Template
- Playbook Session Design Template
- Playbook Session Design Template – Example 1
- Playbook Module Template
- Playbook How to Module Edit Template
- Playbook Curriculum and Workshop Template
- Playbook Handout Template
- Playbook Exercise Template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