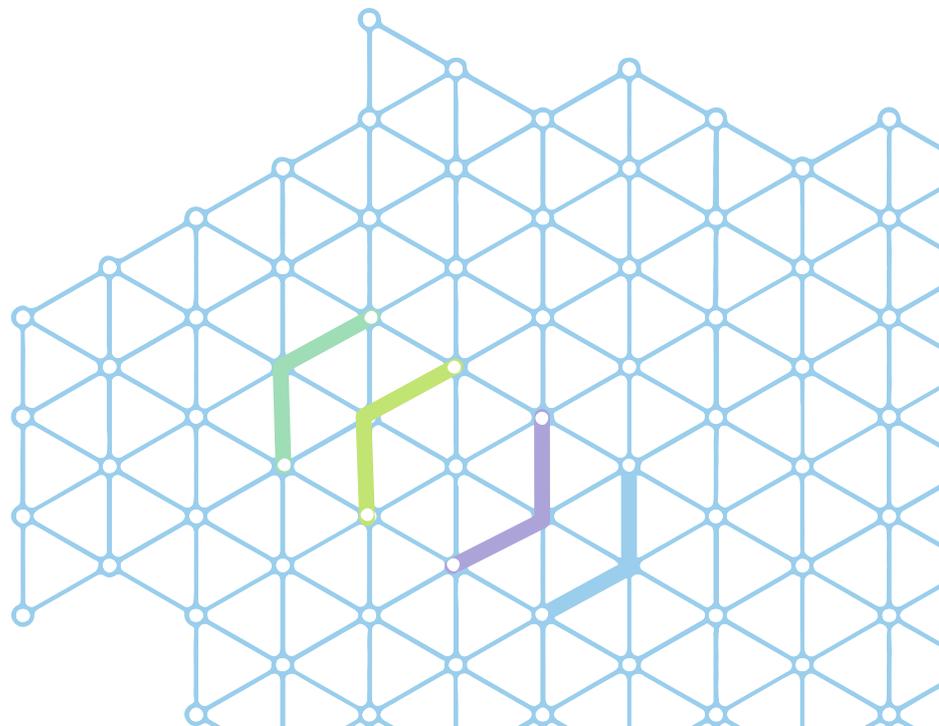




**SOCIETAL
PLATFORM**

WRITING A STRATEGY & APPROACH
DOCUMENT FOR SOCIETAL PLATFORM MISSIONS
how-to guide



CREDITS & ATTRIBUTION

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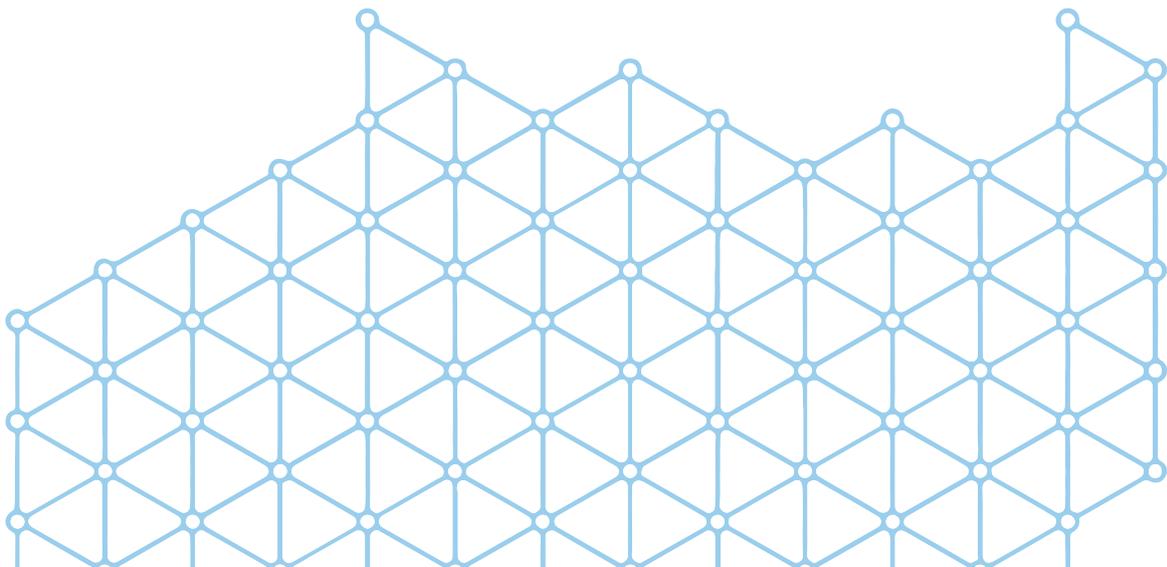
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About the guide

The guide is intended to enable any organisation leading a Societal Platform mission to develop a comprehensive document explaining the strategy and approach of their mission in resolving societal challenges.

Who are the intended users of the guide?

The guide is meant for individuals ranging from technologists to development practitioners to researchers involved in developing strategy and approach documents for Societal Platform missions.

How can the guide help me?

The 'how-to' guide is designed to enable users with a reference process to adopt while developing a strategy and approach document for a Societal Platform mission. The guide provides direction in identifying the sections that need to be covered in the document and in gathering and producing information for each of the sections.

What do I need to know before I start with the guide?

The users of the guide are expected to have a reasonable understanding of the Societal Platform mission, in terms of the various aspects of the platform, such as the components of the platform, the challenge it is looking to resolve and the actors expected to be involved in implementing the mission, to name a few.

What are the limitations?

- The guide only suggests a few broad sets of steps in developing a strategy and approach document.
- The guide does not intend to be exhaustive. It is expected to serve only as a starting point for document writers to begin with the document development process.

Strategy and Approach document

What is a strategy and approach document?

The strategy and approach document is a transparent articulation of the intent of a Societal Platform mission to the public. The document explains the strategy and approach to develop and use a Societal Platform in resolving societal challenges. It lays down the implementation outline and the guiding principles for the design and architecture of such a platform and describes how different actors can play a role in developing, extending and leveraging the platform.

Why do I need a strategy and approach document?

A strategy and approach document helps you state the mission and the strategy clearly for all stakeholders. It is intended to align various actors such as government, public and civil society organisations towards a desired approach. Particular benefits of having a strategy and approach document for a Societal Platform mission include:

- Creates legitimacy around the approach
 - » A document with the approval of a relevant government ministry or department can lend political legitimacy to the mission and the strategy. In the case of non-governmental programmes, a document endorsed by different entities (individuals or institutions) can induce social acceptance.
- Articulates the roles of different stakeholders
 - » The document can comprehensively state the roles of different stakeholders and how they can contribute to achieving the mission.

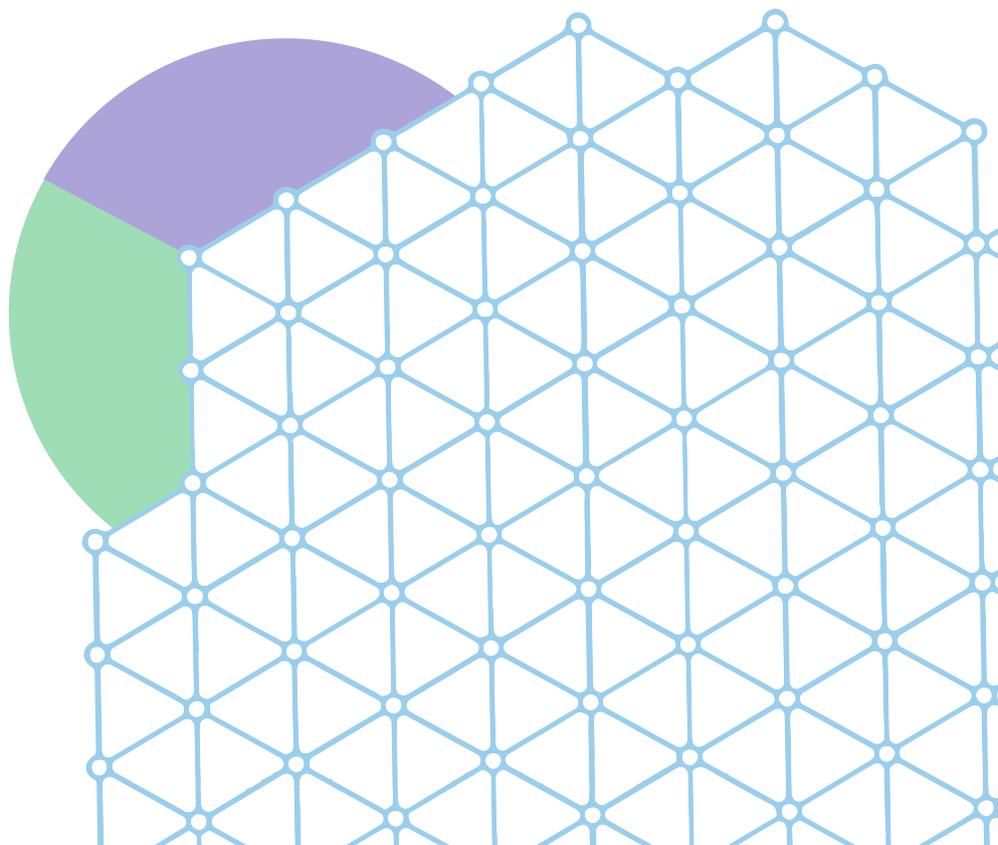
The strategy and approach document is a transparent articulation of the intent of a Societal Platform mission to the public.

When do I write a strategy and approach document?

The document development process can be started once you have a considerable understanding of what the Societal Platform is going to be, and there is a necessity to align different actors. It is also about the need to clearly define the Societal Platform mission for everyone involved.

KEY CONSIDERATION

Set up a drafting team comprising individuals of different expertise such as domain experts, technologists, development practitioners and policy professionals.



Writing a Strategy and Approach document

KEY CONSIDERATION

The inputs in the document are explained in the context of a typical strategy and approach document for Societal Platform missions. Some of the platform 'strategy and approach' documents which are available in the public domain will be used to illustrate the steps suggested in the guide.^{1,2,3}

SECTION 1: How do you identify sections for the document?

The aim is to start the writing process by developing a list of sections that will give a holistic view of the strategy and approach. The following points can serve as prompts to identify the sections you need in the document:

- Answer the 'why, how and what' for the Societal Platform mission.
 - » Why is there a need for a Societal Platform?
 - » How will the mission be achieved?
 - » What are the expected results?
- Identify the different focus areas in the Societal Platform mission journey. For example, aligning with different actors (e.g., how to align, who are the actors, etc.), catalysing networks (e.g., what is the current network and how to improve the network), leveraging data for empowerment, developing reference solutions,⁴ etc.
- Identify the distinct components required to develop the Societal Platform. For example, technology, government partnerships, existing systems and services, etc.

A typical strategy and approach document for a Societal Platform mission will include sections such as:

- Executive Summary
- Introduction
 - » The current state of the system

¹ Ministry of Human Resource Development & National Council for Teacher Education. (2017). National Teacher Platform - Strategy and Approach.

² [National Urban Innovation Stack \(NUIS\)](#)

³ [National Health Stack \(NHS\)](#)

⁴ Reference solutions are solutions (e.g., Public Grievances Redressal system in NUIS) envisaged by the mission leader (organisation leading the Societal Platform mission) to serve as a reference for other actors who will be involved in innovating solutions.

- » Systemic challenges
- » The rationale for developing a Societal Platform
- <Insert name> Platform
 - » Overview
 - » Approach
 - » Design principles
 - » Standards, certifications and specifications
 - » Components of the platform
 - » Programmes and/or solutions
- Benefits of the platform
- Implementation strategy
 - » Role of various stakeholders
 - » Operationalisation plan
 - » Implementation challenges

Output: The output expected out of this section is the 'Table of Contents' for the strategy and approach document.

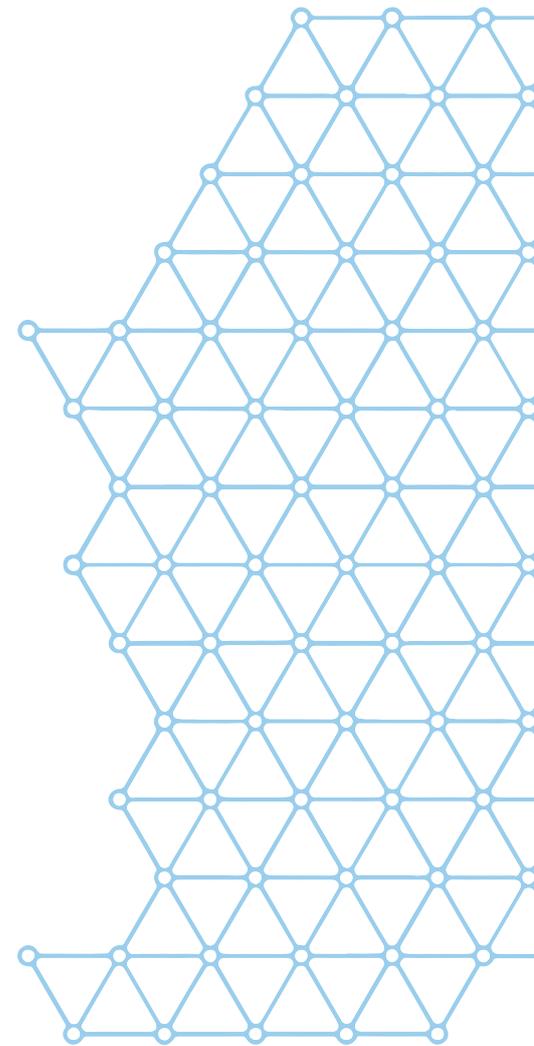
SECTION 2: How do you write each section?

2. 1. Introduction

The introduction primarily focuses on three areas: current state of the system, the desired state and the rationale for developing a Societal Platform.

The current state of the system is about the system in which the societal challenge you want to address is situated (such as the education system and public healthcare system). It involves giving a brief about the system and the issues causing the concerned societal challenge (such as lack of access to learning opportunities in the education system). It is also about providing a landscape of existing systems and services in place to address that particular challenge, along with an explanation of the systemic challenges in addressing the issues using the existing systems.

The desired state of the system is about what needs to change in the system, why does it have to change now, and how will the system work. The desired state and the systemic challenges identified can help us develop the rationale for a Societal Platform approach by explaining how the approach can enable the ecosystem to address these challenges and achieve the desired state.



KEY CONSIDERATION

In case the document is being centred around a particular reference solution(s) (e.g., NTP talks about Open Education Resources (OER) for easy access¹), the introduction will also specifically cover those subjects in terms of its current state and issues.

2. 2. About the platform

2. 2. 1. Overview

The overview of the platform can be about answering the following questions:

- What is the purpose of the Societal Platform mission?
- Who are the participants⁵ and stakeholders?
- At a broad level, how will the platform restore the agency⁶ of the participants?
- What is the scope of the platform?

2. 2. 2. Approach

The approach section will specifically focus on explaining how the platform is going to play a role in achieving the Societal Platform mission.

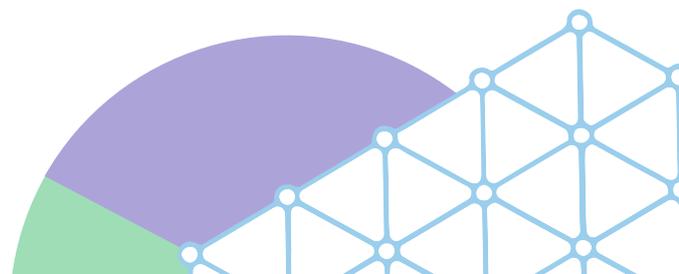
- How will the actors come together to engage in resolving the concerned societal challenges?
- How will the platform distribute the ability to develop solutions?
- How will the platform enable co-creation of solutions?
- How will the platform ensure adoption of solutions across different segments of society?

2. 2. 3. Design Principles

Design principles are the guiding principles for the design and architecture of the platform. The purpose of the principles is to ensure that the approach of the mission can be enabled by the platform, in terms of, say, allowing actors to participate in developing solutions, facilitating interactions between actors, ability to reuse and rebundle innovations and so on.

⁵ Participants, commonly called beneficiaries, are people for whom the impact is intended.

⁶ Agency could be about access (no barriers at the point of entry), affordance (all users can afford the cost (i.e., in terms of distance, time, money, social capital, etc.) of getting to the entry point of service) and acceptability (availability of relevant and acceptable options for various segments of society).



A typical Societal Platform would be designed to strive for the following design principles:

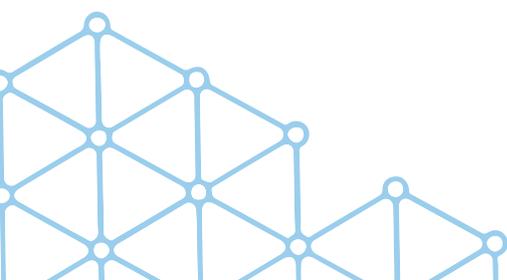
1. **Unbundling:** Unbundling the design of the system into microservices
2. **Extensibility:** Extend an existing system for an emergent need
3. **Configurability:** Use a microservice in diverse contexts
4. **Resilience:** Adopt seamlessly in unexpected scenarios
5. **Interoperability:** Connect with microservices from different actors
6. **Observability:** See, understand and troubleshoot the system
7. **Trust by Design:** Built-in frameworks and patterns to ensure trust
8. **Privacy and Security:** Built-in frameworks and patterns to ensure privacy and security
9. **Scalability:** Respond and evolve at scale
10. **Multitenancy:** Serve different groups of users using a shared instance

2. 2. 4. Standards, specifications and certifications

The section gives an overview of standards, specifications and certifications which would act as guiding mechanisms for the ecosystem to collaborate effectively. “Standards and specifications cover people, processes, data, interfaces and APIs. Certifications act as an effective mechanism to create trust in the system.”²

2. 2. 5. Components of the platform

The shared digital infrastructure of the platform is made up of various components that are required across programmes aimed to achieve the Societal Platform mission. The components are expected to support a Societal Platform approach and enable rapid creation of diverse solutions.



For example, in the National Urban Innovation Stack (NUIS) strategy and approach paper, “the components are discussed with respect to three layers:

1. Core Data Infrastructure layer: Forms the base of the stack and comprises of data services
2. Core Services layer: Houses context-neutral functional services which can be leveraged to build solutions
3. Solutions Platform layer: Provides context-sensitive solutions required to implement large-scale programmes”²

2. 2. 6. Programmes and/or solutions

The section will give an overview of programmes and solutions — either new or existing — which are expected to leverage the platform. These programmes and solutions will help in accelerating the ecosystem for the desired change envisioned by the mission. They will also serve as references for the stakeholders in terms of future possibilities and actions, and guide the initial utilisation of the platform.

The section can also focus on certain platform capabilities with respect to the programmes and solutions mentioned. It can provide a sense of how platforms enable the creation and delivery of programmes and solutions, in practice.

For example, in the National Teacher Platform (NTP)¹ strategy and approach paper, access to curriculum-linked teaching content is described as part of the NTP goals. One of the platform features mentioned is the content authoring tool — to create a variety of content.

2. 3. Benefits of the platform

The section is intended to give an outline of the benefits of the Societal Platform for various entities within and outside the system.

In the case of National Health Stack (NHS), it was about benefits to the public, central government, states and private service providers. One of the benefits stated in the document is, “Increased access and availability of service providers for the beneficiaries through the ‘Faster Adjudication of claims’ feature for service providers, making the program more attractive to them.”³

2. 4. Implementation strategy

The section focuses on providing an overview of the implementation strategy — the process of implementing the Societal Platform. This will be about managing the development

and ensuring relevant usage of the platform. It involves aligning the ecosystem, setting up operations, setting up the infrastructure and developing reference solutions.

For example, in the NTP strategy and approach paper, the implementation strategy is about the following three activities:

- Platform development strategy
- Content strategy
- Solutioning strategy¹

2. 4. 1. Role of various stakeholders

In a Societal Platform approach, the role of various stakeholders needs to be detailed out keeping in mind that the approach intends to bring in different actors together and enable creation of solutions at the local level.

The role of stakeholders needs to be explained with respect to the implementation strategy mentioned in the previous section, to ensure that the implementation is managed responsibly and responsively.

In the National Teacher Platform approach paper, it states that “the Ministry of Human Resource Development (MHRD) will build and launch the NTP.”¹ Another example is that the “States and Institutions may extend and customise the NTP.”¹

2. 4. 2. Operationalisation plan

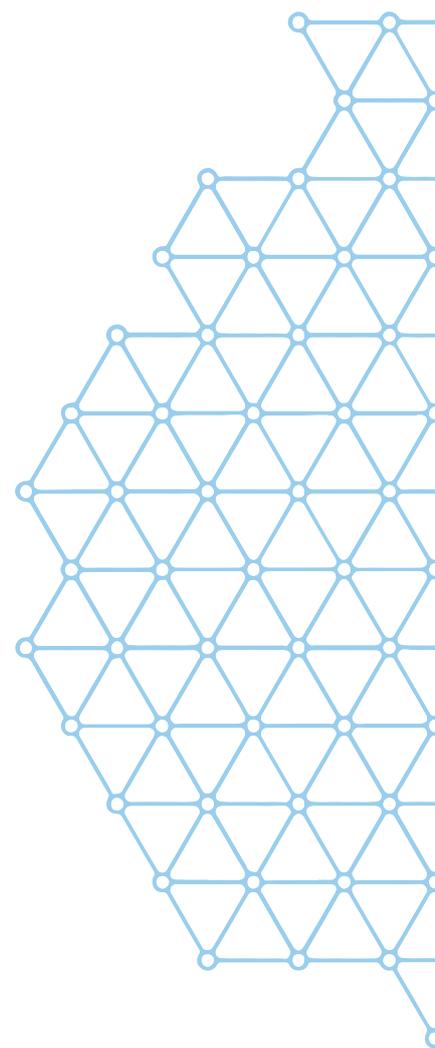
The operationalisation plan will be primarily around driving adoption and relevance of the platform with the ecosystem actors.

For example, the NUIS strategy and approach paper talks about the operationalisation of NUIS in two streams. “The first, focusing on developing the NUIS and making it available for ecosystem actors to adopt and deploy; and the second, focusing on the institutionalization and evolving it to meet the emerging needs of ecosystem actors.”²

2. 4. 3. Implementation challenges

This would be about institutional challenges posed by the system in implementing large-scale technology infrastructure — any challenges with respect to, say, usage of data, and technical challenges in deploying the proposed platform.

Output: The expected result of section 2 (How do you write each section?) would be a draft document with all the identified sections containing detailed information.



SECTION 3: How do you build consensus with stakeholders?

The purpose of a strategy and approach document for Societal Platform missions is primarily to align various stakeholders towards the desired approach. Thus, it is important to build consensus among all the stakeholders with respect to the strategy and the overall content in the document.

1. Identify relevant entities (individuals and institutions) that need to be part of developing the strategy and whose opinions are important.
2. Involve all the identified entities from the early stage of document formulation.
 - » Enable meaningful engagement between actors to co-create the strategy. It can be done through various ways such as workshops, meetings and focus group discussions — depending on the actors involved.
3. Form a core group of individuals and institutions (apart from the document development team) with diverse professional backgrounds (e.g., development practice, technology, public policy, ministry official, etc.) who would be consulted throughout the document formulation process.
4. Ensure a consultation process with formal and informal communication channels that allow stakeholders to continuously give feedback and review content. It also needs to allow the core group to consult other stakeholders whenever required.
5. Public consultation is one of the most important steps in building consensus among different stakeholders, especially the public.⁷ Their input and feedback are vital to any strategy and approach paper. There are various ways (such as public hearing and ‘call for comments’) through which public consultation process can be done, but it needs to ensure the following:
 - » Awareness of the consultation process among the public, especially individuals and institutions who might get affected directly or indirectly by the mission.
 - » Open access to the draft document for all.

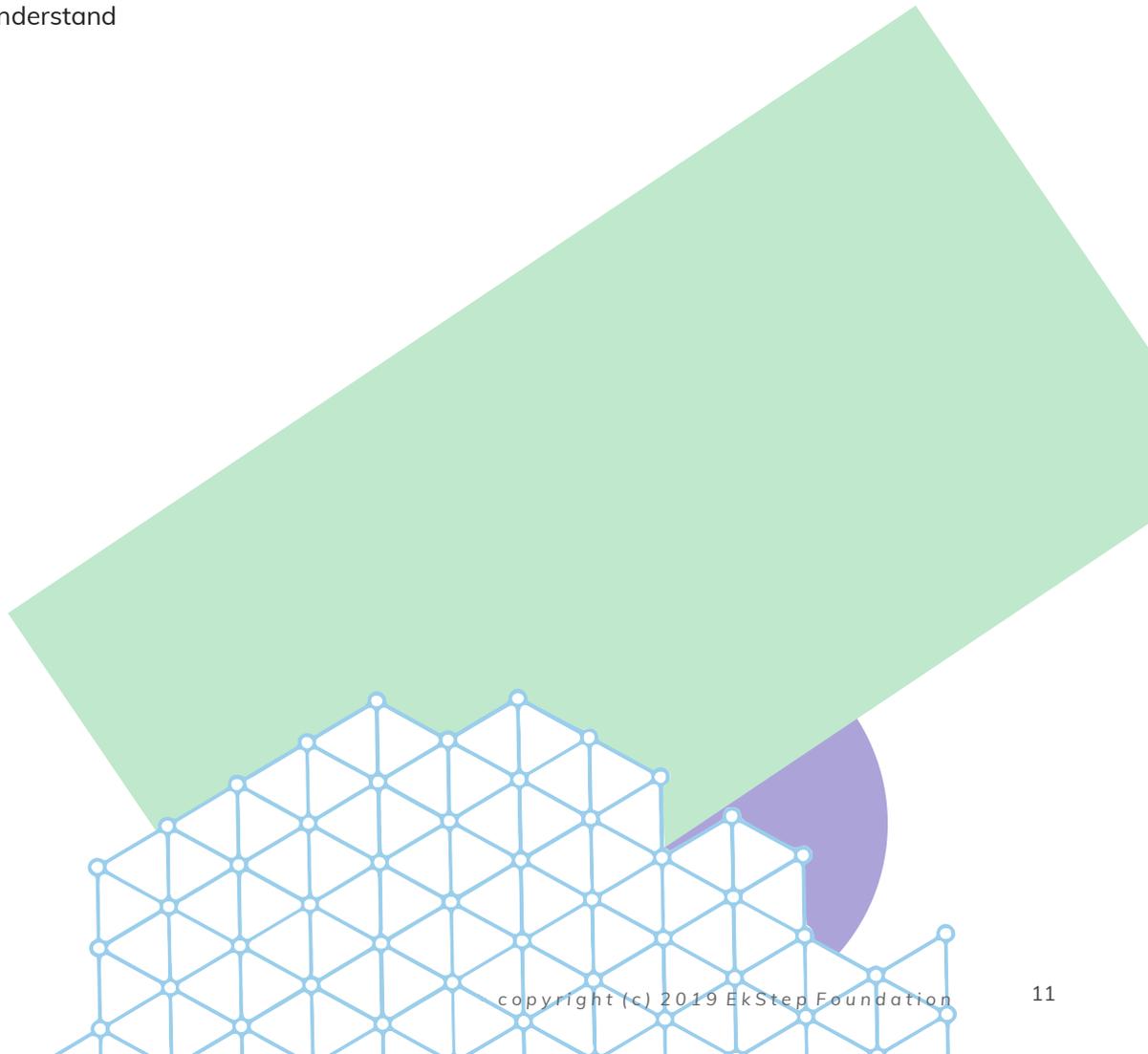
PUBLIC CONSULTATION
is one of the most
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⁷ Public refers to society on the whole but it is critical to involve all individuals and organisations that may experience a difference (positively or negatively) as a result of the actions stated in the document. It is also about actors who have some influence, interest or expertise on the subject.

- ◇ For example, making the document available in all official languages of the country, different mediums such as newspaper, available in relevant government offices, etc.
- » Public participation by having a feedback system (several mediums) where there is no barrier to entry and all can afford the cost of accessing (language, time, distance, etc.).

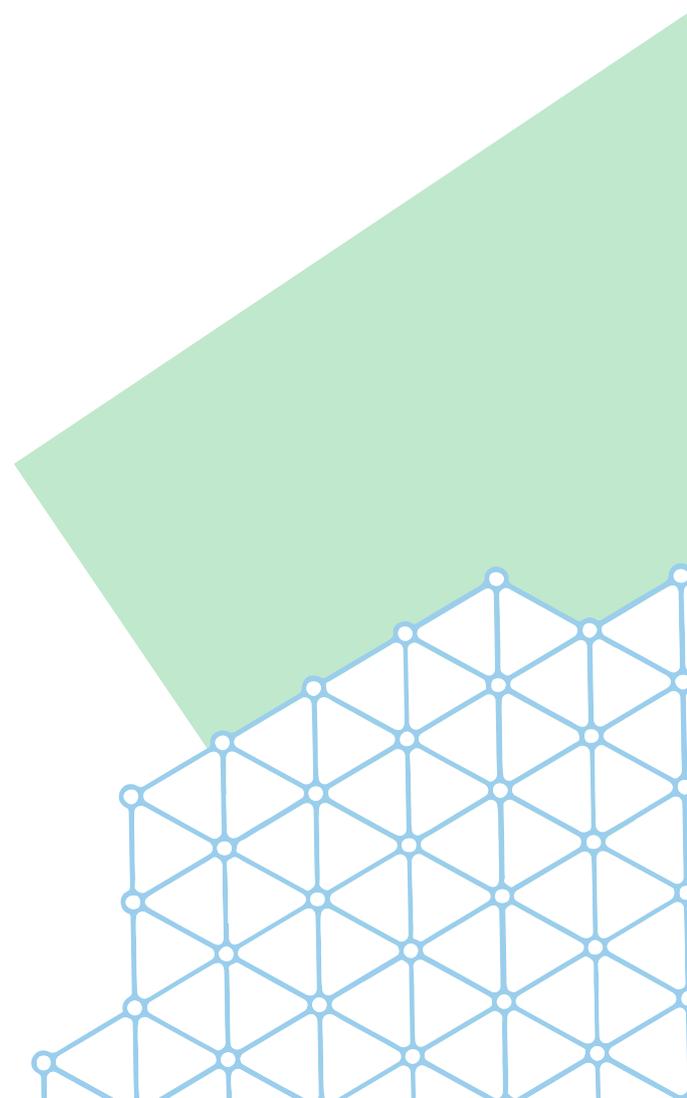
SECTION 4: What are the typical pitfalls in developing a Societal Platform strategy and approach document?

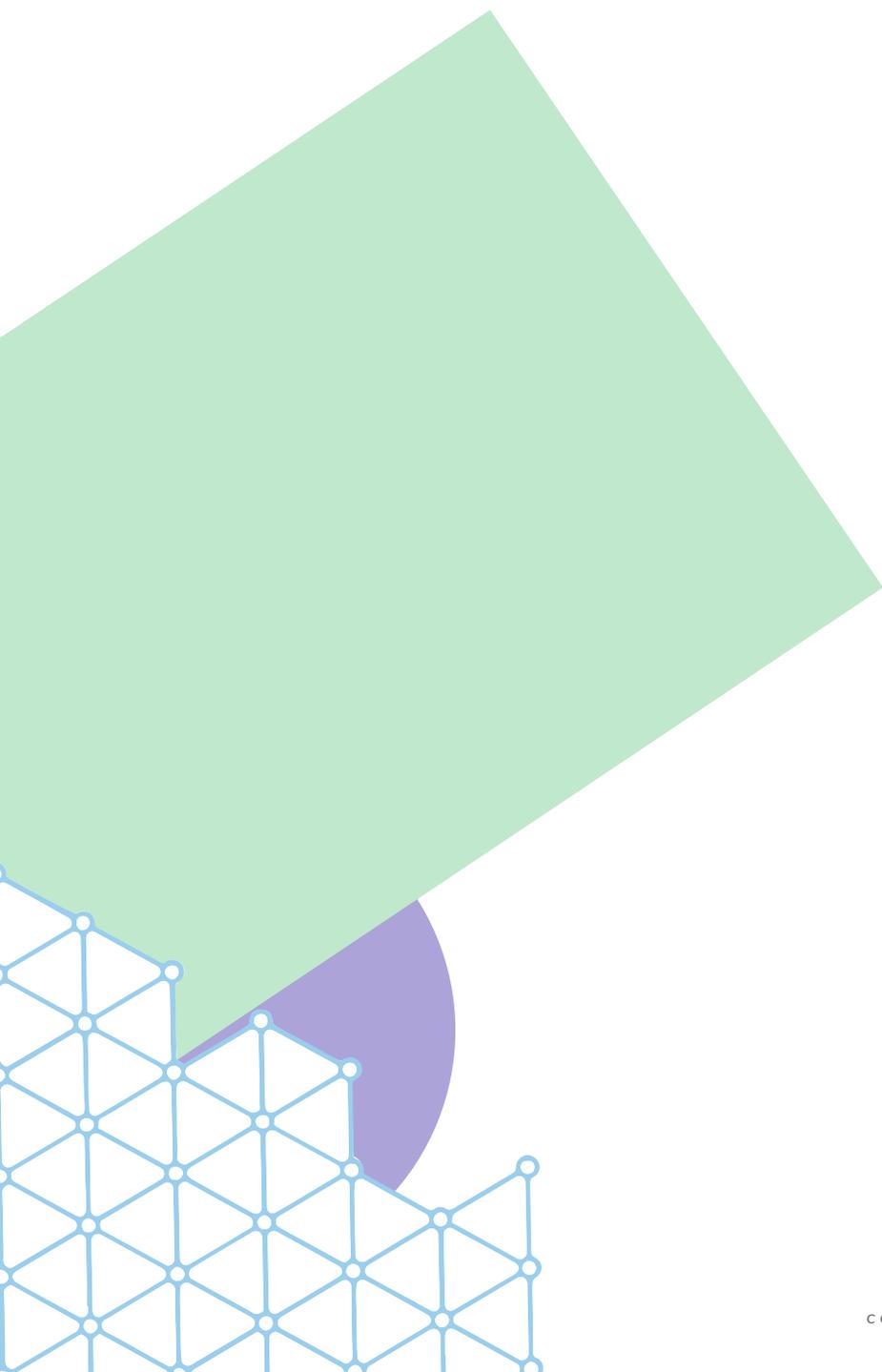
- Lack of subject knowledge could lead to a document with a superficial strategy
- Failure to identify the right experts for each section
- Failure to get consensus from relevant stakeholders may result in difficulties to reach the desired outcome
- Use of abstract and academic language will make it difficult for people to understand



Conclusion

Strategy and approach document plays a vital role in conveying the intent of a Societal Platform mission and in aligning actors towards a desired approach. Careful navigation of the steps described in developing this document — identifying appropriate sections, drafting it with inputs from experts and building consensus with stakeholders — is important to achieve the aforementioned desired outcome.





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Research & Writing

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Design

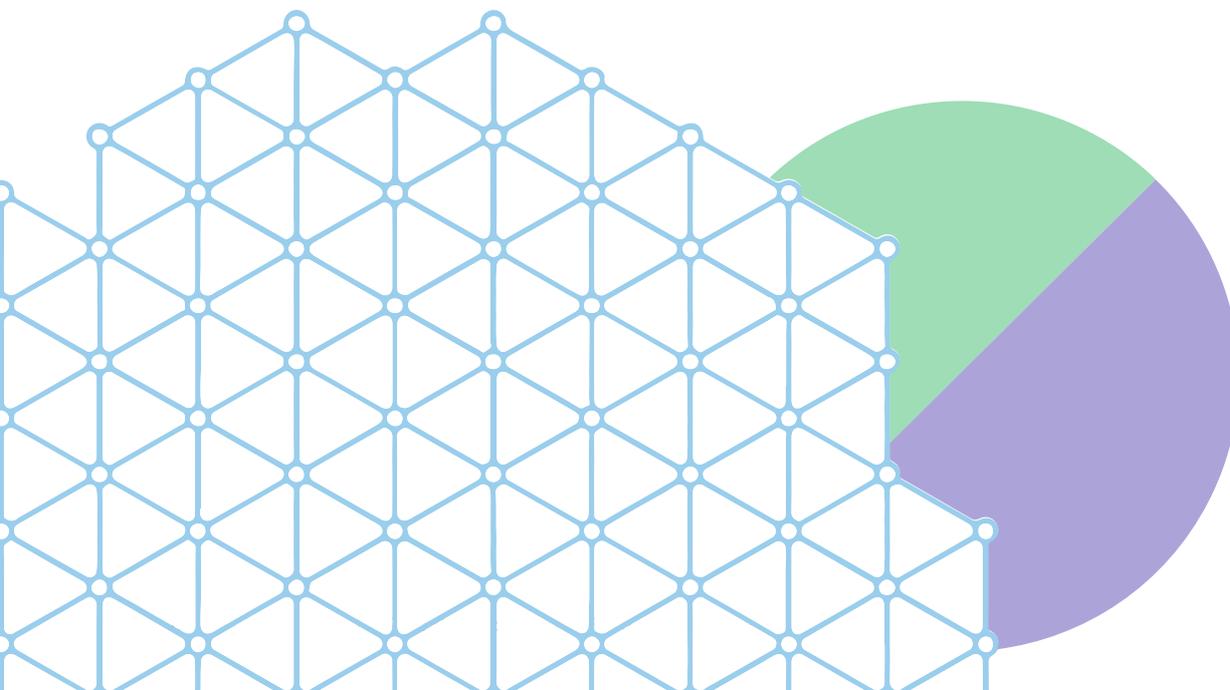
The Other Design Studio

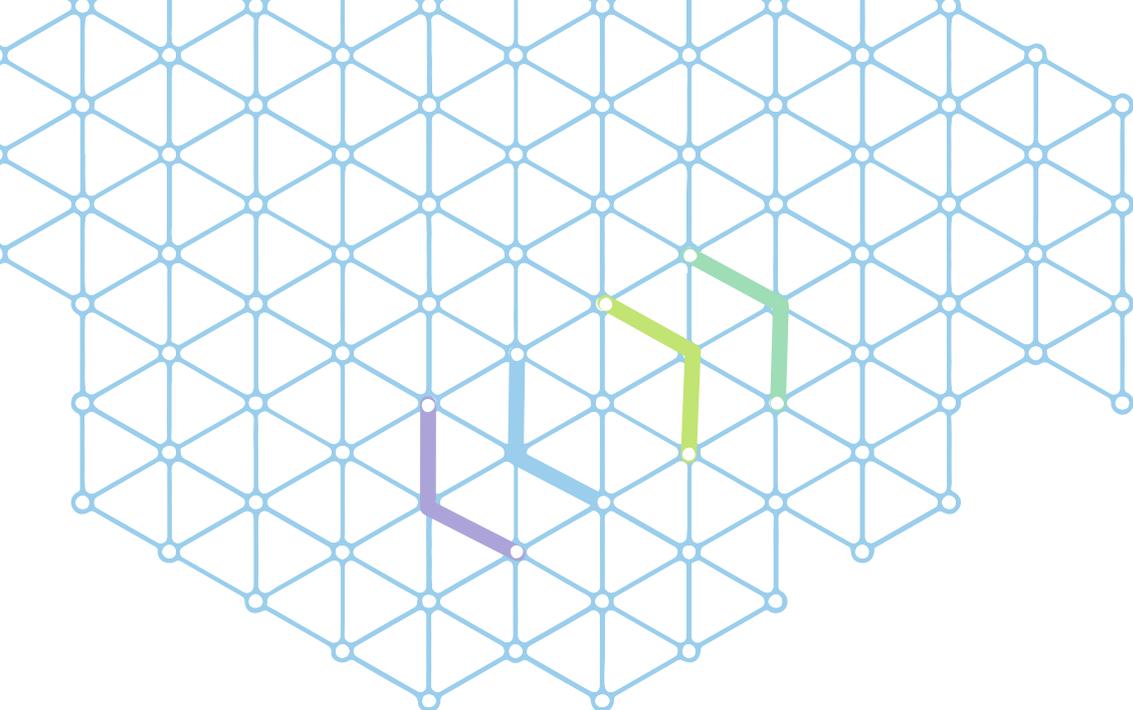
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