THE POLICY CHALLENGE

Reflections on and Lessons Learned from Designing and Conducting a Participatory Platform with a Public Intent
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**Overview**

The Policy Challenge was a national administrative policy proposal competition designed and executed by the Arizona State University (ASU) School of Public Affairs and 16 partner institutions in response to the White House Startup America Policy Challenge from January 30 to May 21, 2012. Through a network of schools and organizations, The Policy Challenge asked students, faculty, practitioners, and the general public to propose innovative, viable, and actionable plans for administrative change that would best enable the use of new technologies in education, clean energy, and healthcare through the U.S. Department of Education, U.S. Department of Energy, and U.S. Department of Health and Human Services, respectively.

The Policy Challenge was designed to improve the quality of contributions, instead of simply filtering them, by scaffolding participation across two stages of competition and a Finale event. The first stage was launched on January 30 and was “open to the American public,” as long as they were not registered lobbyists or had any other significant conflict of interest. Individuals and small teams submitted a two-page short-form proposal by April 2. These proposals were blinded and reviewed by short-form judges, and the top three finalist teams for each content area – education, energy, and healthcare – were invited to participate in the second stage.

In the second stage, the finalist teams were asked to develop a 15-page long-form proposal that elaborated on their initial idea in consultation with content experts from April 17 to May 11. The competition culminated in The Policy Challenge Finale on May 21, generously hosted by partner institution, The George Washington University’s Trachtenberg School of Public Policy and Public Administration. At the Finale, the finalist teams presented their proposals to a panel of expert long-form judges and the winners were announced. The finalists’ proposals were shared with high-level representatives of the federal agencies. The Finale was followed on May 22 by an all-day workshop on Participatory Platforms with a Public Intent: Critical Reflections and Future Practices, funded by the National Science Foundation, in which many of The Policy Challenge participants attended and shared their experiences.

**WHAT ARE PARTICIPATORY PLATFORMS WITH A PUBLIC INTENT?**

The Policy Challenge is an example of a participatory platform with a public intent – an emerging approach to democratic governance that seeks to increase the legitimacy, effectiveness, and efficiency of the public policy development and implementation process in an increasingly complex, networked, and resource-constrained governance environment. It seeks to give voice to, tap into, empower, and focus the vast array of expertise, experience, entrepreneurial enthusiasm, and democratic surplus possessed by diverse individuals throughout the nation in the governance process to develop innovative and practical solutions to address shared public challenges. However, as an emerging governance tool and new field of inquiry and practice, there is much to be learned about how to successfully design and execute participatory platforms such that they are useful and valuable to the organizations that use them, the participants that compete in them, and the greater social good that they are advancing.
Outcomes

**Extensive and Diverse Network of Participants.** The Policy Challenge successfully resulted in engendering an extensive and diverse interdisciplinary and cross-sector network of participants that collectively worked towards developing innovative and viable administrative policy proposals. The Acknowledgements section provides a comprehensive list of the partners and capacity builders. The finalist team members are noted within the Outcomes: Innovative Finalist Team Proposals section.

16 network partners comprised of 11 schools and 5 national organizations associated with public policy and administration from 9 states whose membership spanned the country.

27 capacity builders (18 served as short-form judges, 14 as content experts, and 8 as long-form judges) comprised of academics, practitioners, and non-federal public servants with significant expertise and experience in public policy and administration, technology and innovation, as well as education, energy, and healthcare from 13 states.

40 stage one teams and short-form proposal submissions (17 in education, 9 in energy, and 14 in healthcare) comprised of 85 individuals of which about 57% were students, 7% were faculty and academic researchers, and 36% were practitioners who were primarily small business entrepreneurs from nearly half of the states.

8 finalists teams and long-form proposals (3 in education, 2 in energy, and 3 in healthcare) comprised of 25 individuals that included 14 students, 2 assistant professors, and 9 practitioners.

**Innovative Proposals.** The Policy Challenge resulted in eight finalist teams who developed highly innovative long-form federal administrative policy proposals with the feedback provided by the short-form judges and in consultation with the content experts.

**Education** proposals focused on (1) developing innovative student achievement assessment technology through a competitive crowd-sourcing platform; (2) removing the “intent to return” visa policy clause to encourage foreign students to apply to U.S. universities and work in the U.S. science, technology, engineering, and medicine (STEM) sector; and (3) expanding federally-funded youth training programs to engage high school students in composting and urban community farming.

**Energy** proposals focused on accelerating the adoption of energy efficient solar photovoltaic (PV) modules by (1) incentivizing local electric utility companies to lease PV modules to businesses and homeowners and (2) developing an online peer-to-peer public platform that centralizes information and resources concerning PV.

**Healthcare** proposals focused on (1) instituting a program that trains discharged veteran medics and corpsmen to serve as healthcare transition coaches for the Medicare community; (2) developing a web-based tool to assist Medicaid patients diagnosed with pre-diabetes or Type 2 diabetes to manage their illness; and (3) investing in educational and preventative medicine programs that reduce the risk of cardiovascular diseases.

**Impact Beyond the Platform.** The Policy Challenge network of participants and finalist teams’ proposals made an impact beyond the life of the platform in several ways.

**Public policy process education**

**Professional networking**

**Local and federal civic engagement**
Reflections and Lessons Learned

This report offers some reflections and lessons learned from designing and executing The Policy Challenge. Below are the high-level recommendations distilled from these reflections to help platform administrators successfully conduct future participatory platforms with a public intent.

**Timeline and Timing.** Allow at least a year to thoroughly plan and develop, engage participants, and execute the platform. Ensure that the timeline for the different participant groups to fulfill their roles is sufficient and does not coincide with general external competing obligations.

**Communication and Understanding.** Develop engagement materials that clearly and concisely communicate the purpose, incentives, roles, structures, processes, and anticipated outcomes of participating in the challenge. Foster a shared understanding within and between the different participant groups about these aspects.

**Feedback and Learning.** Thoughtfully design feedback mechanisms throughout the platform lifecycle that encourage participants to share, learn, grow, and build relationships in a manner that improves the quality and meaningfulness of their contributions.
Methodology

This report is based on the outcomes, best practices, and lessons learned from designing and executing The Policy Challenge gleaned by the ASU School of Public Affairs platform administrators from five sources of information and reflection.

- Experiences and observations of the ASU School of Public Affairs platform administrators from designing and executing the platform.

- Data collected through The Policy Challenge website on website by the platform administrators traffic and team members’ registration profile information, such as their names, titles, organizational affiliations, and degree programs (if applicable).

- Continuous written and verbal feedback provided throughout the platform lifecycle to the platform administrators by the partners, competing team members, short- and long-form judges, content experts, and leaders from the White House Office of Science and Technology Policy, U.S. Department of Education, U.S. Department of Energy, and U.S. Department of Health and Human Services.

- Phone interviews conducted after the platform concluded by the platform administrators in which over three-quarters of the partners, finalist team members, short- and long-form judges, and content experts participated.

- An anonymous online survey conducted after the platform concluded by the platform administrators in which half of the finalists team members, short- and long-form judges, content experts, and partners responded.
Extensive and Diverse Network of Participation

The Policy Challenge served as a platform that engaged a diversity of multi-sector and interdisciplinary participation throughout the United States to perform distinct roles in the challenge that contributed to the development of innovative and feasible federal administrative policy proposals. They comprised of five distinct participant groups – platform initiators, platform administrators, partners, capacity builders, and competing teams.

Platform Initiators

The platform initiators were the federal agencies that prompted the White House Startup America Policy Challenge to which The Policy Challenge responded. They included the White House Office of Science and Technology Policy (OSTP), U.S. Department of Education, U.S. Department of Energy, and U.S. Department of Health and Human Services. The objective was to engage entrepreneurs to propose innovative ideas on how these federal agencies could best enable the use of new technologies in education, energy, and healthcare through Quora, a platform to share ideas directly with the senior administrative officials. In phase one, launched in December 2011, entrepreneurs were invited to post their ideas on the public blog of the respective federal agency. There was a flood of contributions that were thoughtful, creative, diverse, and inspiring. However, these innovative ideas required well-formulated administrative policy proposals before they could be implemented as policy actions.

The second phase of the Startup America Policy Challenge consisted of the White House OSTP and three federal agencies prompting outside organizations to conduct participatory challenge platforms that engaged policy experts, such as students and faculty of public policy and administration, in developing the innovative ideas posted on the blogs by entrepreneurs or their own idea into viable administrative policy proposals. The Policy Challenge was one such platform designed and executed by the ASU School of Public Affairs in response to this second phase of the Startup America Policy Challenge.

The White House OSTP and three federal agencies provided guidance and support to the platform administrators at the ASU School of Public Affairs in designing and executing The Policy Challenge. Additionally, high-level representatives at each agency received and reviewed the finalist team member’s proposals as well as attended the Finale to listen to the finalists’ presentations, give keynote remarks, and network with the participants. Keynote remarks were given by:

**Aneesh Chopra**, former U.S. Chief Technology Officer and Associate Director for Technology at the White House OSTP

**Carmel Martin**, Assistant Secretary for Planning, Evaluation and Policy Development at the U.S. Department of Education

**Richard Kauffman**, Senior Advisor to Secretary Chu at the U.S. Department of Energy

**Farzad Mostashari**, MD, ScM, National Coordinator for Health Information Technology at the U.S. Department of Health and Human Services
Platform Administrators

The ASU School of Public Affairs served as platform administrators who developed The Policy Challenge in response to the second phase of the White House Startup America Policy Challenge. The platform administration team consisted of the director of the school (Dr. Jonathan Koppell), two faculty members (Dr. Erik Johnston & Dr. Spiro Maroulis), one graduate research associate (Chase Treisman), a consultant website development company, and two in-house media developers. They were in charge of designing and executing the platform from start to finish in consultation with the platform initiators. They served as the central coordinator and point of contact for the platform initiators, partners, capacity builders, and competing teams by receiving, responding to, and providing feedback that improved the platform and participants’ contributions.

Partners

Partner organizations served as a conduit for circulating information to their membership, actively engaging participation, identifying capacity builders, providing logistical support for the Finale and workshop, and offering financial support for the Finale. They consisted of a network of 11 schools and five national organizations associated with public policy and administration whose membership spanned the United States, including Washington, California, Arizona, Wisconsin, Indiana, New York, Maryland, Virginia, and Washington, DC. The Acknowledgements section provides a comprehensive list of all partners.

Capacity Builders

Capacity builders consisted of short-form judges, content experts, and long-form judges. The short-form judges evaluated and provided written feedback on the blinded two-page short-form proposals submitted by the teams in the first stage. The top three proposals with the highest aggregate scores within each content area were selected as finalist teams. The content experts served as a resource for the finalist teams. They made themselves available to review the finalists’ proposals and offer constructive guidance on how to best develop their ideas into 15-page long-form proposals. The long-form judges evaluated and offered written and verbal feedback on the finalists’ long-form proposals and presentations, determining the winner for each content area at the Finale.

Overall, the capacity builders included 27 academics, practitioners, and non-federal public servants from 13 states – Alabama, Arizona, Delaware, Georgia, Indiana, Maryland, Michigan, Missouri, Nevada, New York, Virginia, Washington, and Washington, DC – with considerable expertise and experience as a generalist in public policy and administration and technology and innovation, and as a specialist in education, energy, and healthcare. Capacity builders could serve in one or two roles. The Acknowledgements section provides a comprehensive list of all capacity builders.

There were 18 short-form judges divided such that there were six reviewers for all of the proposals submitted in each content area. For education, there were five specialists and one generalist; for energy, there were three specialists and three generalists; for healthcare, there were four specialists and two generalists. The specialists were weighted to the number of proposals received for each content area. The short-form judges consisted of five practitioners of state and national organizations and a state government official. Although the remaining 12 short-form judges were currently holding academic positions, nearly half of them had significant practitioner experience. There were 14 content experts of which there were four specialists in education, three in energy, and two in health. There were five generalists, four academics and one practitioner, who made themselves available to all of the finalist teams. The eight long-form judges primarily consisted of high-profile individuals with significant expertise and experience as generalists in public policy and administration and technology and innovation (photos on the right). There were three academics, four practitioners from federal government, academia, research and small business, and one state senator.
Competing Teams

Participating teams consisted of individuals or small groups of students, faculty, and practitioners who competed in The Policy Challenge by submitting administrative policy proposals. The first stage of the competition was “open to the American public,” as long as they were not registered lobbyists or had any other significant conflict of interest. The first stage resulted in 71 registered teams comprised of 129 individuals. Of the registered teams, 40 teams comprised of 85 individuals submitted short-form two-page proposals – 17 in education, nine in energy, and 14 in healthcare.

There was an astounding diversity among the teams who submitted a short-form proposal. The team sizes ranged from one to four people with an average of two members per team. About 57% of the team members were self-identified students (about 15% undergraduates, 33% masters, and 9% PhDs), 7% were faculty members and academic researchers, and 36% were practitioners who were primarily small business executives. The primary expertise of about 39% of the team members was in public policy and administration, 13% in education, 13% in energy, 20% in healthcare, and 13% in other areas such as technology, business, economic and community development, and law. The teams were evenly dispersed across nearly half of the states, including Arizona, California, Colorado, Connecticut, Florida, Georgia, Idaho, Illinois, Louisiana, Maryland, Michigan, Minnesota, Missouri, New Jersey, New York, Ohio, Pennsylvania, Texas, Utah, Virginia, Washington, Washington, DC, and Wisconsin.

For the second stage of the competition, the teams with the top three proposals for education, energy, and healthcare were invited to participate as finalists, working with content experts to develop their idea into 15-page long-form proposals to be presented to and evaluated by the long-form judges at the Finale. Unfortunately, one of the energy finalist teams was unable to participate in the second stage. Overall, the teams were quite diverse. The eight participating finalist team sizes ranged from two to six members for a total of 25 finalist members. The finalist team members included one undergraduate student, 13 master students, two assistant professors, and nine practitioners who small business entrepreneurs and professionals. Three of the teams included only students, two had only practitioners, two had multiple students with one faculty member, and one had multiple practitioners with one student. The teams came from Arizona, Florida, Louisiana, Missouri, New Jersey, New York, Texas, and Wisconsin.

Innovative Finalist Proposals

The proposals for the top three finalists in education, two in energy, and three in healthcare were diverse and innovative.

Education

The winning finalist team included two master’s students in economics and education from Columbia University’s Teacher’s College, David Nitkin and Lauren McDade. They proposed that the U.S. Department of Education invest in conducting a competitive crowd-sourcing platform to develop innovative assessment technology to improve student achievement tests.

The second finalist team included an assistant professor, Heath Brown, and five joint master’s students of public administration and international relations, Paul “Chip” Palamattam, Subarna Saha, Smijai Peter, Alejandro Rodas and David Smith, from Seton Hall University’s College of Arts and Sciences and John C. Whitehead School of Diplomacy and International Relations. They proposed that the U.S. Department of Education help remove the “intent to return” visa policy clause that inhibits foreign students from applying to U.S. universities and working in the U.S. Science, Technology, Engineering, and Mathematics (STEM) sector.
The third finalist team included a senior planner from Alachua Country Growth Management, Kathleen Walston Pagan, a business entrepreneur of Gainesville Compost, Chris Cano, and a master’s student from the University of Florida’s School of Natural Resources and the Environment, Ryan Graunke. They proposed that the U.S. Department of Education create micro-grants to fund the development and spread of a high school initiative called the “Community Compost Collectors” to expand the current work of the “Corps Network” and other similar youth training programs to include food waste composting to restore soil for gardens in urban areas while saving valuable landfill space.

**Energy**

The winning finalist team included two master’s students of public administration from the University of Wisconsin at Madison’s Robert M. La Follette School of Public Affairs, Sam Shannon and Sam Harms. They proposed that the U.S. Department of Energy encourage electric utilities to lease solar photovoltaic modules to businesses and homeowners, thereby promoting the adoption of clean energy technologies that transition away from dependency on fossil fuels.

The second finalist team included an assistant professor of public affairs and mechanical engineering, Varun Rai, master’s student in energy and earth resources, George McGuirk, and undergraduate student in international and global studies, Alaina Heine, from the University of Texas at Austin. They proposed that the U.S. Department of Energy provide a centralized online platform that provides information and resources on photovoltaic and other clean energy options, and facilitates direct peer-to-peer communication among clean energy providers and users to accelerate its adoption.

**Healthcare**

The winning finalist team for healthcare included three practitioners from John C. Lincoln Health Network – senior vice president of the physician network and accountable care, Nathan Anspach, educational and organizational development consultant, Caryn Unterschuetz, and director of network finance, Nancy Sherman. They proposed that the U.S. Department of Health and Human Services institute a program that trains recently discharged veteran medics and corpsmen to be healthcare transition coaches for the Medicare community.

The second team for healthcare included two joint juris doctors and master’s students of public health from the Saint Louis University’s School of Law and School of Public Health, Jamille Fields and Natalie Stoltz. They proposed that the U.S. Department of Health and Human Services adopt a web-based tool to assist Medicaid patients diagnosed with pre-diabetes or Type 2 diabetes to manage their illness.

The third team for healthcare included a team of medical practitioners central to the development of the Sterling Choice Healthy Lifestyle Program – preventative cardiologist, Stanley Wolfe, cardiovascular nurse, Patricia DeGrazia, director of biomedical investigation at St. Johns Hospital and Medical Center, Ruth Savoy-Moore, and exercise physiology specialist, Marlaina Dixson. They proposed that the U.S. Department of Health and Human Services invest in educational and preventative medicine programs that can substantially reduce the risk of developing cardiovascular disease.
Impact Beyond the Platform

The Policy Challenge network of participants and finalist teams' long-form proposals made an impact beyond the life of the platform in several ways.

Public Policy Process Education

Participation in The Policy Challenge exposed teams to the public policy and administration process. Capacity builders were highly motivated and rewarded by the opportunity to extend their expertise and experience to provide feedback to the finalist teams and mentor the next generation of public decision makers. The majority of the finalist team members expressed that they learned a great deal about the public policy and administration process in general and how to best craft a viable federal administrative policy proposal from the capacity builders that will contribute to their ability to affect social change in the future. Echoing the sentiments of many others finalist team members, one commented that:

“The feedback from the capacity builders was amazing!”

Professional Networking

Although the finalist teams’ federal administrative policy proposals did not result in their immediate implementation, their ability to share their ideas and build relationships with a diverse and extensive universe of participants incited conversations that will assist their future professional and proposal trajectory. Several finalist team members stated that they made good connections at the Finale with high-level administrators from the White House OSTP, U.S. Department of Education, and U.S. Department of Energy who said that they were shopping around their proposal. For example, the Seton Hall University teams’ proposal has helped inform recent conversations about federal immigration policy. Several finalist teams claimed that their participation in The Policy Challenge gave them the credibility and momentum to incite conversations and relationships at the local government or community level to identify alternative avenues to best develop and implement their proposal. Another finalist team was inspired to further develop their proposal as their master's thesis. Several finalist team members commented:

“The Policy Challenge was a great experience! It was most rewarding to meeting people from diverse backgrounds.”

“The Finale really pulled together a terrific group of people that provided great networking opportunities! We made valuable connections.”

“We didn’t even win, but we had the opportunity to gain recognition and put our ideas out there for others to think and talk about it.”

“This has opened doors for us!”
Local and Federal Civic Participation

Several finalist team members commented that they felt inspired by their participation in The Policy Challenge to become more actively engaged in local and federal politics. One finalist team member exclaimed:

“I had a ball! I got my feet wet and now I’m ready to be in national politics. This is the first time I have ever had the opportunity to do something like this.”

A majority of the participants also expressed that they had a positive experience in The Policy Challenge and would be interested in participating in a similar challenge platform again. Several finalist team members said:

“I’ve never really heard about this sort of challenge platform. It seems like the first of its kind. I hope to see more of it!”

“If there is a similar opportunity or challenge, I am more likely to participate because of this experience.”

“Gee I’d do it all over again!”
These reflections and lessons learned from designing and executing The Policy Challenge are intended to help platform administrators successfully conduct future similar participatory challenge platforms.

**Timeline and Timing**

*Allow at least a year to thoroughly plan and develop, engage participants, and execute the platform. Ensure that the timeline for the different participant groups to fulfill their roles is sufficient and does not coincide with general external competing obligations.*

It is important to build in adequate time to thoroughly plan, develop, and execute the participatory challenge platform to maximize the quantity and quality of participation and contributions from the different participant groups – platform initiators, platform administrators, partners, capacity builders, and competing teams. At least a year is necessary to allow for 6-9 months to plan, develop, and engage participants in the platform and 3-6 months to execute the platform. Within these timeframes, the timing for the different participant groups to fulfill their roles should be sufficiently long and not coincide with general external obligations that compete with and inhibit them from contributing to the fullest extent desired.

*Allow for at least 6-9 months to plan and develop the platform prior to its execution.* The planning and development stage provides the foundation for the performance of the platform. Platform administrators focus on crafting a strategic plan for the platform, designing the platform architecture, identifying and engaging the different participant groups – platform initiators, partners, capacity builders, and competing teams – and securing financial resources to support the platform.

*Allow for at least 6-9 months prior to the launch of the platform to target and engage the different participant groups.* The focus of the engagement stage is to identify the target participant groups and begin engaging them in understanding the platform and their roles and expectations throughout its lifecycle, and contributing where applicable. At the onset, the platform administrators should work with the platform initiators to clarify the objectives of engaging participation through the platform, identify the different targeted participant groups, develop a strategic plan for engaging participation and executing the platform, and design, build, and queue the structures and processes of the platform to facilitate effective participation during its execution.

*3-6 months prior to the launch of the platform, inclusively engage a diversity of partners in collaboratively supporting the planning, development, and execution of the platform to actively foster the informed participation of their membership and contribute to the platform activities in other meaningful ways. Furthermore, it is critical to identify and engage the capacity builders who provide the platform users with feedback and guidance that increases the quality of their contributions at least 3 months prior to their participation. Finally, it is essential to identify the targeted individuals and teams that will compete in the platform and channels to solicit and secure their engagement 1-2 months prior to the launch of the platform.*

*Allow for at least 3-6 months to execute the platform.* During the execution stage, the platform administrators run the challenge, mobilizing the different participant groups to act and fulfill the objectives of the platform. The emphasis of this stage is connecting the capacity builders with the teams to increase the quantity and quality of their contributions.

*Ensure that the timeline for participant groups to fulfill their roles is sufficient and does not coincide with general external competing obligations.* The timing of the activities required of the different participants groups is critical to the success of the platform. Ensure that participants are given a sufficient amount of time to fulfill their roles and expectations to the fullest extent and that their activities do not coincide with general external events. For example, the first phase of The Policy Challenge was just over two months long, while the second phase, intended for finalist teams to fully develop and present viable proposals with the support of the capacity builders, was less than a month long and coincided with the academic obligations at the end of the spring semester. This may have inhibited the capacity of participants to contribute to the platform to the full extent they desired.
Communication and Understanding

*Develop engagement materials that clearly and concisely communicate the purpose, incentives, roles, structures, processes, and anticipated outcomes of participating in the challenge. Foster a shared understanding within and between the different participant groups about these aspects.*

The success of platforms are contingent on the diverse committed participation of the different target groups – platform initiators, platform administrators, partners, capacity builders, and competing teams. As such, clear and concise marketing materials provide the foundation from which to secure the informed engagement and commitment of the target groups to effectively participate in the platform. Lessons should be heeded from grassroots marketing and community engagement efforts.

**Develop functional, clear, and concise engagement tools, materials, and messaging at least 3-6 months prior to the launch of the platform.** During the engagement phase, platform administrators should target their partners, capacity builders and teams, identify the appropriate channels to solicit their engagement, and develop functional marketing tools and materials with clear and concise messaging from an end-user perspective to disseminate through these channels. The marketing tools, materials, and messaging should explicitly emphasize and engender their early commitment and foster an accurate and shared understanding within and between the different groups concerning the purpose, structures, processes, and outcomes for participating in the platform as well as their respective roles, motivations and incentives, and expected deliverables throughout its lifecycle.

The communication channels occur primarily through the platform architecture and supporting engagement tools, materials, and messaging developed and disseminated by the platform administrators and partners with the support of the platform initiators and capacity builders. Platform administrators should engage and foster a shared understanding among the platform initiators and partners at least 6-9 months prior to the launch of the platform and capacity builders at least 3-6 months prior to the launch of the platform. For contributing teams, this process of engaging and fostering a shared understanding should begin at least 1-2 months prior to the launch of the platform, but may extend throughout its lifecycle.

Reflections on The Policy Challenge revealed that the partners, capacity builders, and finalist team members all felt that they could have better prepared and contributed to the fullest extent if they had been engaged, fully informed, and clearly understood these aspects *prior* to the launch of the platform. Furthermore, any uncertainty and lack of clarity that the partners, capacity builders, and finalist team members had concerning these aspects may have had cascading effects on their commitment to the platform and their capacity to contribute to the fullest extent.

**Develop an elevator pitch to succinctly capture the attention of and inform potential participants.** The elevator pitch is a statement of the fundamental premise for conducting the platform and a call to action for participants. It lies at the heart of all marketing and engagement communication, and serves as the foundation from which to develop a shared understanding among all participant groups about the platform. Specifically, the elevator pitch includes the public challenge to be addressed; the context of the challenge, such as why it exists and whose proposing the platform; who is eligible to participate and in what roles; the general timeline, structures, and processes of participation (e.g., multi-stage competition, ongoing deliberation, etc.); how participation in the platform will engage the problem; the resources available to support participation; the desired outputs and outcomes of participation; and the incentives and value-added of contributing to the platform that satisfies participants’ motivations and addresses the public problem. Platform administrators should devote considerable time and effort to appropriately frame the elevator pitch during the planning and development.
Clearly emphasize the motivations and incentives to participate. Often, participation is neither motivated nor incentivized by monetary reward. As such, participation is largely voluntary, and the motivations of the different groups to participate vary. Since many platforms do not offer a financial reward, it is important to craft, clearly communicate, and follow through on the explicit incentives and outcomes that match the various motivations of different groups for participating. This is the “so what” that engenders committed participation and quality contributions that are meaningful to everyone.

Reflections on The Policy Challenge revealed that all participant groups were at least moderately motivated by their personal sense of civic price and passion for public service, desire to make a real impact on society, and interest in participating in an emerging and innovative avenue for diverse civic engagement and public decision making. In particular, platform initiators were motivated by their desire to foster civic participation in effectively addressing a public issue. Platform administrators were motivated by the desire to apply and advance their professional and academic endeavors. Partners were motivated by their desire to provide their members with a unique outlet through which to contribute their expertise and experience towards improving the social good, as well as to foster meaningful professional relationships. Competing teams were motivated by their desire to refine and advance their idea for social change as well as network and develop professionally. Capacity builders were motivated by their desire to contribute their personal and professional expertise and experience to help educate the next generation of public decision makers and assist platform users develop contributions that can have a real impact on society. Overall, all participant groups were motivated by the initial low-barrier to entry with the prospect of high rewards.

Design a user-friendly platform architecture and supporting communication materials. The platform itself, such as a website, is the central portal for communication. The platform provides the structure, instructive information, and educational resources that facilitate different participant groups’ effective contributions to the platform. It includes the elevator pitch, mechanisms through which participants contribute to fulfilling their roles and expected deliverables, and resources that provide information and support for participants to fully understand and effectively contribute to the platform and public challenge at hand. Effective participation in the platform can be supported by a plethora of other engagement tools and materials, such as flyers, solicitation emails, social media, webinars, organizational meetings, and conferences, among others. All foreseeable details of and resources to support participation should be included in the platform architecture and supporting engagement tools, materials, and messaging prior to the launch of the platform so that participants can best manage their time and efforts.

Foster a shared understanding among participants groups of the platform and their roles. For the different groups of participants to effectively contribute to the platform and address the public challenge at hand, they must have an accurate and shared understanding of both the platform and their particular roles. Platform administrators must engender a shared understanding among all participants about the purpose, incentives, structures, processes, and outcomes for participating through the platform as well as the roles and deliverables for each participant group. As such, platform administrators should develop engagement tools, materials, and messaging that fosters this shared understanding. Marketing flyers, solicitation emails, the platform itself, and webinars, among other engagement tools and messaging should be prepared during the planning and development phase and relied on during the engagement of the different participant groups prior to the launch of the platform. It is only with this shared understanding that the different participant groups can effectively contribute to fulfilling their roles and expectations through the platform.
Feedback and Learning

Thoughtfully design feedback mechanisms throughout the platform lifecycle that encourage participants to share, learn, grow, and build relationships in a manner that improves the quality and meaningfulness of their contributions.

The success of the platform is contingent on the capacity of participant groups to individually and collectively contribute outputs that both fulfill the purpose of the platform and their motivations for participating. As every manager knows, work does not just happen; it is a result of the process and environment of participation. To improve the quality and meaningfulness of contributions, targeted feedback applied at the right time can make all the difference. As such, platform administrators should thoughtfully consider the possible trajectories of participation and design opportunities for feedback, learning, growth, and relationship building throughout the platform lifecycle. This includes providing multiple points of contact and interaction, tools, resources, and attention that bolsters the capacity of participants to contribute to the platform, satisfy their motivations for participating, and build long-term positive relationships.

During the planning and development stage, test out and incorporate structures, processes, tools, and resources into the platform architecture that facilitate participant contributions that fulfill its intended purpose and satisfy participants’ motivations. The technological interface with which participants interact and through which teams compete is critical to the success of the platform. As such, platform administrators should conduct a dry run of the structures, processes, tools, and resources incorporated on the platform architecture before the launch of the platform. This will help test out the assumptions built into the design of the platform architecture to ensure that it facilitates participation and contributions that best fulfill its intended purpose and participants’ motivations.

Before the platform went live, the ASU School of Public Affairs platform administrator worked with a student team from Harvard to identify the trajectory and expectations for participation. The Harvard team tested the process and created a prototype for how to effectively participate. This dry run from a thoughtful team of contributors was essential for not only identifying many of the assumptions that were built into the design of the platform architecture, but in providing a model of participation that other groups could extend upon.

Design ways to scaffold participation during the execution of the platform to inclusively engage a large quantity of participation and develop the quality of their contributions. To scaffold participation is to design the trajectory of participation in a manner that tiers the quantity and quality of participation and contributions. The objective is to provide a low-barrier to entry that inclusively encourages a large diversity of people to participate in the platform and subsequently develops the capacity of all or a select-group of participants to contribute outputs that best fit the intended purpose of the platform and their motivations for participating.

One of the early design choices that the ASU School of Public Affairs platform administrators made was to scaffold the participation of teams in the challenge platform. Requiring a 15-page administrative policy proposal submission from the onset may have inhibited teams from competing in the platform. As such, the first stage was open to the public and requested a two-page submission that lowered the barrier for teams to compete while still capturing the innovativeness and viability of their idea. This resulted in a large quantity of ideas that the short-form judges could easily evaluate and identify the top three proposals with the greatest potential. The second stage was closed to these finalist teams, who were given the opportunity and resources to elaborate on and refine their idea with the support of content experts.
The two-stage scaffolded participation process of The Policy Challenge served as a low cost way of removing the noise created by poor contributions that bog down many challenge platforms of this nature. Furthermore, it provided positive feedback to teams with high quality proposals and incentivized them to dedicate extra effort in developing their full proposal. Finally, by connecting the finalist teams with content experts, providing support and resources to present their ideas at the Finale to a panel of expert long-form judges and high-level representatives from the four federal agencies, they were able to learn about the public policy and administration process in practice, develop their idea into a more viable proposal, and foster professional relationships that extended beyond the life of the platform.

**Foster and capture multi-directional continuous feedback, learning, growth, and relationship building among participants throughout the lifecycle to improve the quality and meaningfulness of their contributions.** Despite the best of intentions, a well formulated plan will encounter the reality of the moment which foresight cannot accurately predict. That is, the experience of individuals navigating the process of participation will expose areas of strengths and weaknesses of the platform that can be enhanced and improved upon throughout its lifecycle. As such, it is imperative that platform administrators provide multi-directional communication mechanisms that allow all participant groups to continuously offer feedback, learn and integrate into practice, increase their capacity to contribute, and foster relationships with other participants. The ability to adapt in response to feedback by enhancing strengths and improving weaknesses will directly impact the quality and meaningfulness of participation and contributions.

Continuous feedback can be fostered through mechanism that track outreach and corresponding response rates; capture data on the relevant demographic, motivational, and output profiles of the different participant groups to assess how they fit with the intention of the platform design; provide educational and human resources to participant groups concerning best practices and evaluation guidelines for their expected contributions; scaffold participation to improve the quality of participants’ contributions; follow up on feedback and outcomes and provide constructive rationales for evaluations; foster open dialogue and collaboration among participants to build a supportive community; and assess participants’ groups perceived challenges and benefits from participating both during and after the platform.

Reflections on The Policy Challenge revealed that the platform initiators needed to remain informed as to the fit of the platform design and participants’ contributions with respect to the platform purpose and intended outcomes. Partners needed to remain informed as to the impact of their efforts to engage participation and support the development and execution of the platform. Competing teams needed to remain informed as to what constitutes quality contributions. Capacity builders needed to remain informed as to the impact of their feedback and guidance on enhancing the quality of the platform users’ contributions. Platform administrators needed to remain informed of all other participant groups’ profiles and satisfaction with and quality of contributions to the platform structures, processes, and resources. Equipped with this information, the different participant groups can continuously adapt to improve the effectiveness of their contributions throughout the platform lifecycle.

**Plan ahead for any post-platform studies or evaluations.** All groups need the ability to reflect on the process after the platform concludes and have this considered in future platform designs. If platform administrators are going to conduct a study at some point during or after the platform, ensure that it is developed and receives the appropriate ethics and administrative approval prior to its desired execution date. Furthermore, be clear as to how that the data collected best fits learning objectives. Finally, have targeted channels to disseminate these best practices and lessons learned so that they can improve the study and practice of future participatory platform design.
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