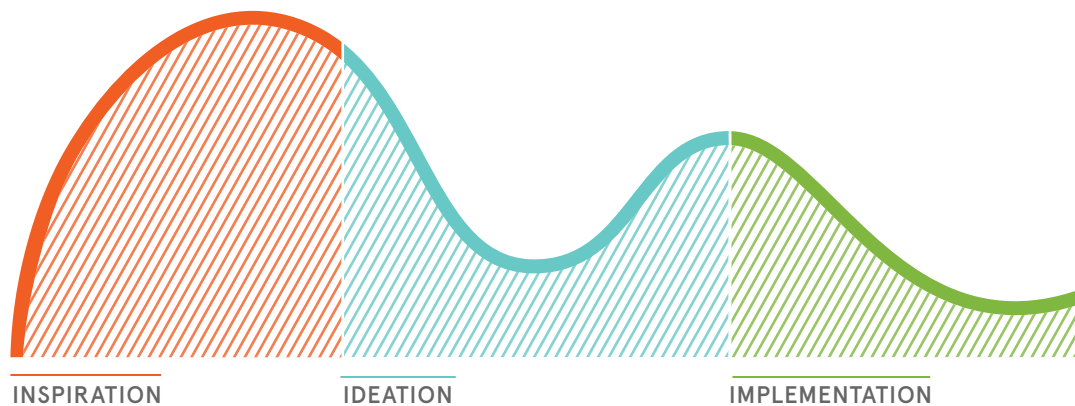


2

Workshop Guide



The Design Process

Table of Contents

The Class 2 Workshop involves getting out into the community for your field research and does take some time, so we've budgeted two weeks to complete it. Spend the first week planning your research (Activities 01-05) and the second week conducting your research (Activity 06). Whether you complete all of Activity 06 in one day or spread it out over a few days, we highly recommend you go beyond the minimum two hours for this piece.

Class Leader's Guide Before the Class 2 Workshop

Activities & Discussions

01 Questions, Comments, & Takeaways—10 mins // 30 mins

02 Choose Your Design Challenge—15 mins // 3 hours

03 Team Knowledge & Assumptions—10 mins // 20 mins

04 Plan Your Research—1+ hours // 2+ hours

05 Build an Interview Guide—1+ hours // 2+ hours

06 Conduct Your Research—*To Be Determined by Your Team*

Class Leader's Guide

As your team completes Activities 01–05 during the first week, you will begin to understand how long Activity 06 might take during the second week. Some teams prefer completing field research as a whole group, while others find it best to split up into two groups for conducting interviews. If you do divide into smaller teams, we recommend you check in as a group either in person or over Skype sometime during that second week to debrief and determine if there are gaps in your research. If needed, modify your Research Plan or add/subtract questions from your Interview Guide.

Before the Class 2 Workshop

Find a Meeting Space

Confirm with your team that you have a space for your workshop activities.

Plan, if Possible, to Hold the Workshop During the Day on a Weekend

For the second week of the Class 2 Workshop, we recommend scheduling a full day on the weekend to conduct research. If that is not possible, your team may conduct a few interviews or observations here and there throughout the week. It is important that your team build agreements around how much research you plan to complete and who will execute each task. As Class Leader, ensure your teammates are aware of and comfortable with their assignments before jumping into research.

Print Out Class 2 Workshop Guide

To save paper, it is not required to print the Class 2 Readings. Check with your team members and encourage them to print the Class 2 Workshop Guide.

Coordinate With Your Team to Bring Supplies

A notebook for blank paper, pens, felt markers or Sharpies, Post-it notes (or their equivalent), and printed Class 2 Workshop Guide should be sufficient.

Lead the Workshop

This guide will walk you through facilitating the activities, discussions, and assignments for Class 2. If your team does not come back together after you've begun conducting your research as part of Activity 06, please make sure the group takes a few minutes to discuss the Class 3 prep work before departing.

01

Questions, Comments & Takeaways

Precrafted design challenge—10 minutes // Personal design challenge—30 minutes

Congratulations! You've completed Class 1, which introduced you to the human-centered design process. You've also read more in depth about the first phase of the design process in the Class 2 Inspiration phase Readings. The activity below is a way for you to reflect on what you've learned, and help clarify questions you might have. Take a few minutes to reflect on the questions below and then discuss your answers with your group.

1) What were your big takeaways about the Class 2 Inspiration phase Readings?

2) Do you have questions about the readings?

3) Which research methods are you excited to try and why?

02

Choose Your Design Challenge

Precrafted design challenge—15 minutes // Personal design challenge—3+ hours

Human-centered design requires practice, practice, and more practice. Because of this, this course is structured through the lens of a design challenge. You and your team have two options, you can select a precrafted design challenge or you may choose to scope your own design challenge. If your team will be taking on a precrafted challenge, spend some time here in Activity 02 to select from the following, which have been prevetted to be good, collaborative challenges for the given time frame. If your team has decided to go with your own personal design challenge, please see the note below and refer to the How to Frame Your Own Design Challenge materials provided on NovoEd.

To Select a Precrafted Design Challenge:

Individually read through and rate each design challenge.

The following pages describe three different design challenges. Read through each challenge and then rate it. Add up the score you've given to each challenge and write that score in the box provided. The design challenge that you've given the highest score may help you align quickly around the challenge you would like to pursue. However, *this score does not have to determine* how you select your challenge. The score is just a jumping off point for your team to discuss.

As a group review the scores given to each challenge.

Compare the scores that the members of your team have given to each challenge. Which challenge resonates most with people? Where did you agree and where did you not agree? Ask each other questions about why you rated each challenge a particular way and discover what previous experience people have with the challenge subject. Remember, it's often most effective to learn the human-centered design process via a design challenge that you don't know much about.

Select one design challenge.

Since collaboration and teamwork are critical to the human-centered design process, decide on a single shared challenge. Use this exercise as a chance to begin to understand the personalities and work styles in your group. How will you hear each other out? What is the best way to express your opinions? What does each person excel at? How will you nurture your talents and highlight those of your peers throughout this course? Most importantly, how will you reach a consensus?

To Try a Personal Challenge:

First, consider the following.

Your personal design challenge will require significantly more time and investment over the next several weeks. We will include personal design challenge time estimates at the top of each activity page, however, we know these timelines will vary project to project. To standardize things a bit, all time

suggestions indicated for the personal challenge are based on a three-month project timeline. If your project is less or more time than that, you may need to adjust accordingly.

Then, take a look at How to Frame Your Own Design Challenge.

These materials can be found in the Classes section on the course

platform. Figuring out the right "size" of a challenge is critical to the success of a project: too big, and you'll never make headway; too small, and your impact will be negligible.

Return to this Class 2 Workshop.

Once your team decides on the appropriate challenge, move on to Activity 03 of this Workshop.

02

Choose Your Design Challenge

Precrafted design challenge—15 minutes // Personal design challenge—3+ hours

Challenge

1

How Might We Enable More Young People to Become Social Entrepreneurs?

While more and more youth are interested in social entrepreneurship as a means for tackling some of the world’s toughest challenges, many aspiring social entrepreneurs fail to move beyond the initial idea phase because the infrastructure to support them is lacking. Some are unable to gain access to networks or mentors that could provide the knowledge and experience to confront major decisions, while others lack the capital they need to start their venture.

As part of this design challenge, you’ll work with your team to design new systems or strengthen existing programs that cultivate and support social entrepreneurship as a viable career path.

Rate the design challenge, then add up your score.

	Least				Most
Instinctively, how excited are you about this design challenge?	1	2	3	4	5
What potential for impact in your community does this design challenge have?	1	2	3	4	5
How feasible is it to tackle this challenge over the next three classes of the course?	1	2	3	4	5

Total =

02

Choose Your Design Challenge

Precrafted design challenge—15 minutes // Personal design challenge—3+ hours

Challenge

2

How Might We Provide Healthier Food Options for People in Need?

In many neighborhoods, there is little infrastructure for the distribution and preservation of food. Food is often spoiled or lost during distribution. In other places, healthy food options are simply unavailable or community members lack the knowledge to make healthy food choices. Another constraint is access to capital, both for small businesses providing healthy food as well as potential customers.

As part of this design challenge, you and your team will design solutions for providing healthier food options, which might include providing people with better food choices, the skills to cook healthier food, or the knowledge to make healthier food choices.

Rate the design challenge, then add up your score.

	Least				Most
Instinctively, how excited are you about this design challenge?	1	2	3	4	5
What potential for impact in your community does this design challenge have?	1	2	3	4	5
How feasible is it to tackle this challenge over the next three classes of the course?	1	2	3	4	5

Total =

02

Choose Your Design Challenge

Precrafted design challenge—15 minutes // Personal design challenge—3+ hours

Challenge

AMPLIFY

3

How Might We Improve Educational Experiences for New Immigrants?

Immigration is a reality for millions of people around the world. Life in a new country comes with many challenges: uncertainty, language barriers, resource constraints, and new job markets—just to name a few. How do newcomers acquire skills and information to adapt to their environments? How might we improve these educational experiences?

As you may notice, the Amplify Challenge is framed differently on the OpenIDEO platform—asking “How might we improve education for people displaced by conflict?” However, we know that many do not encounter a refugee context in their own communities. So to make an attainable challenge for our course community, we’ve reframed just a touch. We have a hunch there are valuable parallels between challenges faced by those displaced by conflict and immigrants more broadly.

Rate the design challenge, then add up your score.

	Least				Most
Instinctively, how excited are you about this design challenge?	1	2	3	4	5
What potential for impact in your community does this design challenge have?	1	2	3	4	5
How feasible is it to tackle this challenge over the next three classes of the course?	1	2	3	4	5

Total =

AMPLIFY



A NOTE ABOUT CHALLENGE 3

As your group is deciding which design challenge you'd like to pursue, please take special note of Challenge 3. This challenge represents a unique collaboration between this course and the IDEO.org Amplify program. What is Amplify? Amplify is a program to make international aid more collaborative and human-centered. Through a series of 10 innovation challenges over five years, human-centered designers from across the globe are encouraged to join the OpenIDEO platform and work together to design a better world. Please find out more at ideo.org/amplify. Then return to this Activity 02 and consider if this is something in which you and your group would like to participate.

What would this mean for our design team?

If your group decides to pursue Challenge 3, it means you have the opportunity to submit the inspiration and ideas that result from this course directly onto the OpenIDEO platform. It means the solutions your group creates at the end of this seven-week course could become tangible solutions out in the world!

Keep a lookout for announcements pertaining to Challenge 3 in the weekly course emails. These will give you special instructions on how to participate on OpenIDEO.

What deadlines would we need to keep in mind?

The Amplify program is launching the first stage of this challenge on **March 30, 2015**, meaning you'll have ample time as you pursue your design challenge to both test and refine your idea before putting it up onto the OpenIDEO platform. The challenge begins with a four-week Research phase followed by a five-week Ideas phase.

Inspiration, insights, and stories from your research will be a valuable addition to this first phase of the challenge, whereas the prototypes and concepts you create at the end of the course

will be a perfect addition to the Ideas phase. When the Ideas phase opens on **April 28, 2015**, you'll be able to post your solution, get feedback from the OpenIDEO community at large, and offer your own voice to help others improve their ideas.

Could my idea be selected?

Yes, if you have joined the OpenIDEO platform and submitted your idea then you are part of the collaborative group of innovative problem solvers working towards this Amplify challenge. If your idea is short listed, you should continue to participate after the course is completed to continue evolving your idea based on input during the Refinement phase. If your idea gets all the way to the final stage, you could be in the running for funding and design support from IDEO.org!

Please note that while Amplify challenges are global in scope and ideas can originate from anyone around the world, this funding and design support are reserved for implementation of ideas in the 28 DFID focus countries. See the full list of countries on ideo.org/amplify_faqs.

03

Team Knowledge & Assumptions

Precrafted design challenge—10 minutes // Personal design challenge—20 minutes

Now that you've selected a design challenge, it's time to figure out what you already know (or believe you know) about the challenge. Take five minutes to answer the questions below yourself and then five minutes to discuss your answers with your team. If it's helpful, use Post-it notes to organize your thoughts and look for unique perspectives as well as overlaps in your team's knowledge base.

What are the aspects of the challenge that you already know a lot about? What are your assumptions?

Examples

- I know it's difficult, if not impossible, to find fresh fruit in my neighborhood.
- I'm under the general assumption that unhealthy options are cheaper than their healthier counterparts.

Where are the aspects of the design challenge where you need to learn more? What don't you know?

Examples

- Do people who need healthier food options want to eat healthier?
- Are healthy food options generally accessible to people? Where do they go to find them?

04

Plan Your Research

Precrafted design challenge—1+ hours // Personal design challenge—2+ hours

The Inspiration phase requires you to get out into the world and learn from people. (We call this research “fieldwork.”) To make the most of your time in the field, you’ll want to plan who to speak with, where you might visit, and the types of research that your team will conduct. A full review of these methods can be found on pages 5-9 of the Class 2 Inspiration Readings.

Review the Inspiration Methods

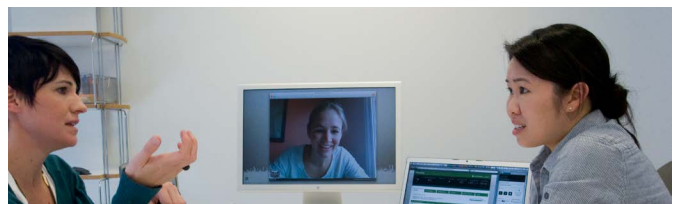
A. Learn from People

Who will you be designing for? Consider both the core user and the extended community. Imagine a map of all the people who might have something to do with your design challenge. Think of characteristics that would make them interesting to meet. Also consider speaking with users who represent extreme (as opposed to mainstream) viewpoints.



B. Learn from Experts

Who are the inspiring researchers or organizations in the space of your design challenge? Successful members of the target population can also be great experts. A telephone or Skype call with experts who aren't local often works very well.



C. Immerse Yourself in Context

With a curious mindset, inspiration and new perspectives can be found in many places and without much preparation. Sharpen your skills and get started observing the world around you. Plan your observations by choosing places where you can have experiences that are relevant to your challenge.



D. Seek Analogous Inspiration

What are the activities, emotions, and behaviors that make up the experience of your challenge? Now select similar scenarios that you would like to observe in places and situations that are different than your design challenge.



Assignment for Submission

04

Plan Your Research

Precrafted design challenge—1+ hours // Personal design challenge—2+ hours

Work with your design team to write down potential people to speak to and places to visit as part of your research. Remember to choose some research targets that will be feasible to accomplish during the second half of this workshop.

A. People to Learn from
(Prefabricated—3+ individuals // Personal—8+ individuals)

B. Experts to Speak to
(Prefabricated—1+ expert // Personal—3+ experts)

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C. In-Context Immersion Locations
(Prefabricated—2+ locations // Personal—4+ locations)

D. Analogous Inspiration Locations
(Prefabricated—1+ location // Personal—3+ locations)

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Assignment for Submission

05

Build an Interview Guide

Precrafted design challenge—1+ hours // Personal design challenge—2+ hours

Now it's time to create an interview guide to prepare for your conversations. It's best to create your guide in teams of two or three people. You'll likely need more space than this worksheet, so use your notebook to write down additional questions. Start building questions following the structure below.

Open General

What are some broad questions you can ask to open the conversation and warm people up?

Examples

- What do you do for a living?
- Who makes up your family or household?
- Describe your last family meal. Who was there? Where did it take place?

Then Go Deep

What are some questions that can help you start to understand this person's hopes, fears, and ambitions??

Examples

- Draw your dream grocery aisle. What would be on the shelves, the coolers?
- Describe your favorite meal. What do you love about it?
- Imagine you can only eat one meal everyday. What would it be and why?



RESEARCH TIPS

Ask questions that will allow you to learn details related to each of these key categories:

Personal Details

Who are you meeting and what are their demographics (profession, age, location, etc.)?

Motivations

What do people care about the most? What motivates them?

Frustrations

What frustrates them? What needs do they have that aren't being met?

Interactions

What is interesting about the way they interact with their environment?

06

Conduct Your Research

To Be Determined by Your Team

Now it's time to start your research. Conducting thorough research is extremely important because what you learn will create the foundation for your design solution, as well as fuel the next two phases of the human-centered design process.

Getting the Most Out Of Research

Agree on the Length of Your Research

Before you start, spend a few minutes as a team building agreements around how much time you will spend researching and who will complete each task. We highly recommend that you take more than the usual two hours to complete all of your research for this class, but also understand that you have busy lives outside of this course. Try to strike a good balance.

Divide Into Research Teams

If your group is two or three people, you should conduct research as a full team. If your group is four to six people, divide into two research teams.

Select Locations to Visit

Choose where to go and who you can talk to. You can also think about scheduling expert interviews via Skype, phone calls, or in-person meetings.

Select Roles

As part of your field research, you'll designate one person to lead the conversation. This person should not be the note taker. Select someone else to take notes during the interview. If there is a third member of your interview team, they can act as the photographer or focus on observing your interview subject and the surrounding environment. Each member of the team should practice different roles with different interviewees.

Do Quick Debriefs

Don't forget to take a few minutes after each interview or field visit to debrief with your teammates and start capturing what you learned. You can do this debrief virtually anywhere, but it should immediately follow the interview.

If your research team doesn't plan to return to the workshop venue after you've completed field research, take a few minutes to review Prep for Class 3 items on the NovoEd platform so you can be ready for next week.

06

Conduct Your Research

To Be Determined by Your Team

A. Learn from People

Remember to reference the interview guide you created. Depending on who you are talking to, you will want to tailor your questions to address this person specifically. Remember to try and interview extreme users as well.

06

Conduct Your Research

To Be Determined by Your Team

D. Seek Analogous Inspiration

Visit places and situations that are different than your design challenge. These places should approach an angle of your problem in a unique way. For instance, what could you learn from an amusement park about engaging experiences that you could apply to the fruit aisle at a grocery store or waiting in line at a bank to open a new savings account?
