Planning how we will engage people in the design process is in itself a design process. There are three parts to planning design research (the Explore Phase):

1. Identifying **What** you want to investigate and why,

2. Identifying **Who** you need to engage and any considerations for how to best enable those people to participate.

3. Identifying **How** you will engage people, which methods, techniques and question are most useful, effective and appropriate.

The following questions are intended to help you think through each of these aspects and brainstorm as team how you might involve and engage with stakeholders in the explore phase of the design process.

1. WHAT & WHY : What do we want to explore and why?

What are the key areas and sub areas we want to learn about and unpack?

Brainstorm and group these - give them headings. Discuss why these are important.

Write these just like learning objectives and "topic" areas for now. Craft the actual research questions and methods later.

1a. What assumptions might we have?

It's important to name our assumptions and make them explicit. Keeping these unstated runs the risk of us being narrow and less open to ideas without realising it. Naming assumings helps us track the things we might want to validate and test as we go through.

Assumptions might be about the problem itself, the cause of the problem, as well as what we think we know about people's experiences, needs or wants.

Brainstorm - what assumptions or hypothesis do we hold that need testing or further investigation?

2. WHO: Who do we want to explore this with?

List out the people or groups of people that need to be involved and prioritise:

2a. CONSIDERATIONS : To best enable participation what might we need to consider? Some of the things that might shape our approach...

Consent: Are there specific considerations, protocols or legal requirements around consent, for example working with minors, or using audio, video or photographs.

Culture: Are their cultural factors or social practices that influence or impact who, how or where people might participate? For example power relationships or cultural protocols.

Capacity/Relationship to Topic: What capacity are people participating in (personal or professional) and does this effect their availability, motivation, autonomy, incentives etc. What is people's relationship to the topic - high awareness or interest? Low awareness or interest? This may impact on how we need to engage people and how the project is framed.

Topic/Disclosure: Is the topic potentially personal, private or sensitive? This may also effect how the project is framed or how data is used and shared. Support may be needed if there is potential to trigger distress or negative experiences. Might people disclose illegal behaviour? We may need to consider activities that keep participants and design researchers safe whilst still enabling people to share experiences.

Capability/Ability: Are there constraints on time, mobility, geography or language that may need to be considered? Might people need particular kinds of support to participate e,g, special access, a carer or translator?

2b. ETHICS

The basics of ethics includes: consent, consideration of harm and risk, duty of care, confidentiality/anonymity. Ethics also includes:

• Who participates (and who doesn't)

• How people participate

• How their data is used and represented

• What happens as a result of their participation

• How much influence they have over decisions

• And who decides all of the above.

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3. How might learn and explore with people?

Different methods will enable different kinds of participation. They will also enable different kinds of experiences, information and ideas to be surfaced, expressed and shared. Often we may use a combination of methods to help us explore different angles.

INTERVIEWS

+ With individuals or small groups, in context (e.g.,home or business) or in set location. A way to explore people's thoughts or feelings and experiences more deeply.

- Relies on recall and ability to verbalise, only allows access to what people say not on what they do.

WORKSHOPS

+ Groups of people can explore ideas and issues quickly together. Enables different perspectives to come together to generate and test ideas.

- Can be harder for introverts, can be subject to group dynamics.

INTERCEPTS

+ Short interviews on the street or in public spaces, where people are asked on the spot to participate or give their feedback. Allows fast in-situ access to people.

- Less control over who you end up engaging with, and likely to be less in-depth.

OBSERVATIONS

+ Watching or visiting specific locations and observing who is there, people's behaviour, patterns over time. Or watching people perform specific tasks. Able to see what people actually do.

- May not be able to ask "why" behind behaviour.

Online Community

+ Can be anonymous and allows asynchronous interaction across a range of locations. Can be useful for sensitive and personal topics.

- Requires specific software and technology confidence, better for those with strong written communication skills.

VISUAL DIARIES

+ People track their own activities, feelings and experiences through different activities over time. Helps show what people actually do and provide an in-depth view into daily life.

- Is reliant on what people choose to self-report. Time consuming for participants.

3a. Where & When

We might invite people to come to us - or we might visit people in their homes, schools or workplaces. We need to think about or ask where people feel most comfortable or safe. For example in a local cafe or park. Walking interviews around someones neighbourhood can be a great way to have a conversation. Sometimes working with people in groups will enable better conversations. Sometimes a "lunch invitation" to just share food and coffee can be the best way to initiate a relationship and have a chat about what is going on for people.
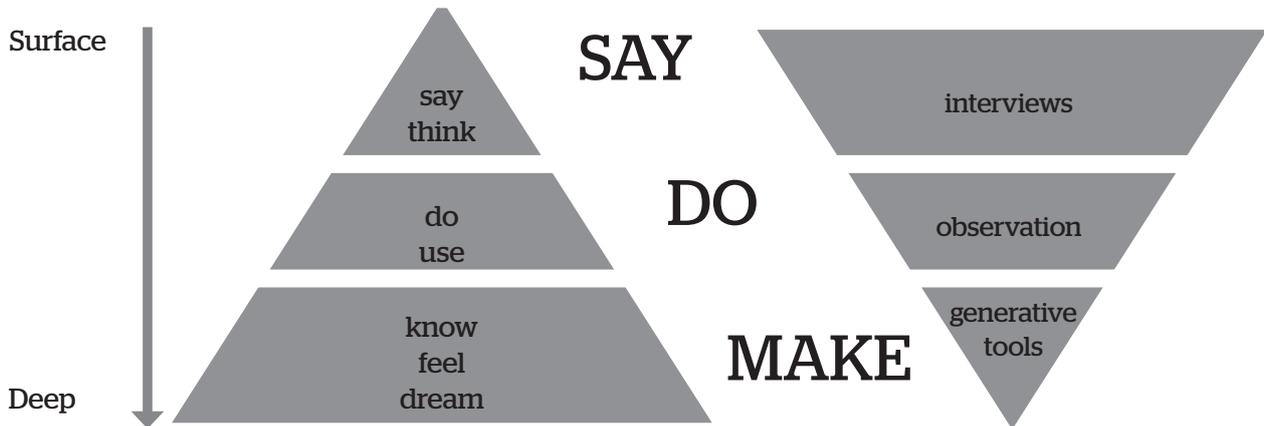
Sometimes safe or appropriate places might be where people already gather, such as part of existing events or programmes, through churches, clubs or marae.

3a. Recruiting

We might find and recruit people through existing networks, online via facebook or other tools, as well as through existing programmes. We might also work with clubs and schools or use market research style recruitment. People are most often acknowledge for their time through lunch, costs covered or koha.

Why use different methods or combinations?

Liz Sanders (of maketools.com) distinguishes between different methods and the kinds of information they enable us to access in the following ways.

Surface

SAY

say
think

interviews

DO

do
use

observation

know
feel
dream

MAKE

generative
tools

Deep

Adapted from: From User-Centred to Participatory Design Approaches Elizabeth B.N Sanders. Sonic Rim 1999

Methods such as interviews (think / say) tend to enable us to access surface level information, opinions or attitudes that people can easily access or express. Using tools like diaries and user journey maps can also help sensitise people to habits, attitudes, behaviours and experiences that they might not have otherwise been aware of, which better enables them to express their own thoughts and feelings.

Observing people in their day to day environment, through methods such as observations and diaries (Do) allow us to understand and see what people actually do and use in context, not just what they say they do. It doesn't however tell us why they are doing that, unless we combine it with other methods and techniques.

To get beyond the surface of people's feelings and emotions, we might need to work with people in different ways, for example creating collage, images or prototypes (Make).