Co/Act: Human Centered Design for Activists

Facilitators Guide

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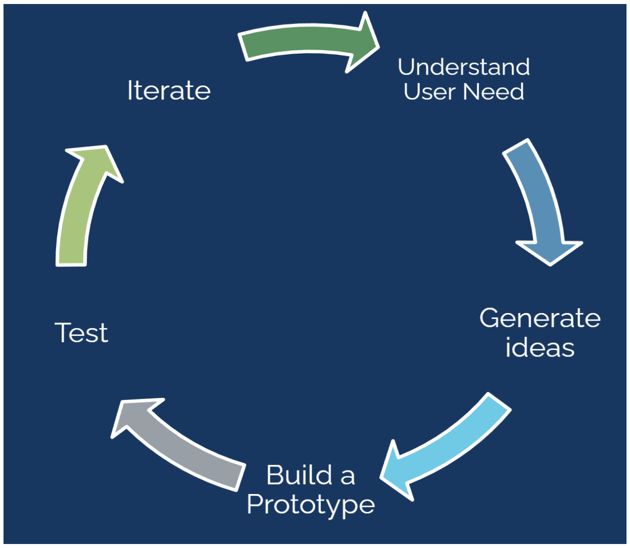


HCD is a cyclical process.

What is human-centered design? How can it help activists be more effective?

Today, technology products and services surround us-in our pockets, homes, kitchens, workplaces and public spaces. Human-centered design is the approach that ensures these products and services are accessible, intuitive, and easy to use. It is an approach focused on solving complex problems using empathy and other techniques that understand user needs to design digital products that both look nice AND are easy to use by all different communities Activists who are trying to affect social change will benefit from adopting a human-centered design framework: how can your message reach the right group of people in the modern marketplace using the tools they interact with every day?

Human-centered design is a cyclical and iterative process that starts with a few key questions: who a digital product, service, or campaign is meant for, what are that audience's needs and wants, how can this project support those needs and how can you reach them? These user insights generate new ideas, which are quickly built into a prototype (or simple, first iteration) and put in the hands of users to gather feedback, iterating based on that feedback.This framework helps teams create products, services, and campaigns that meet people where they are and speak to them in words they can understand. Human-centered products are more accessible and usable, and as a result more likely to have a greater impact in the world, especially related to software and technology. Whether you're studying the role of social media and hate speech in India, fighting internet shutdowns in Cameroon, or building advocacy campaigns for marginalized groups in Colombia, understanding what makes products and services successful can be transformative.

So even if you are not a designer by trade, you can use the lessons of human-centered design in your writing, research and advocacy work- it's applicable in so many practices! The activities outlined in this Co/Act toolkit blend human-centered design with principles of inclusion, activism, and community organizing. Co/Act will help you design more powerful products, services, and campaigns by centering them on your community, stakeholders, and colleagues - ensuring that the end result is more inclusive and therefore democratic.

Ready to get started? If you are facilitating your team's human-centered design experience, begin your journey with our facilitator's guide. If you are a participant, take a look at our participant guide.

How to be a Co/Act Facilitator

So you are ready to design your next product, service, or campaign. How do you facilitate a Co/Act experience for your team? First, here's a little information about the structure of the toolkit.

Toolkit Guidance

The Co/Act Toolkit consists of seven modules, and each Co/Act module includes key concepts and terms, an activity (or activities), and tips and tricks that are key in developing user-centered products, services, or campaigns. Modules can be done over the course of a few days or over a period of months. While Co/Act gives you the flexibility to pick and choose your modules, later modules build on the insights from previous ones. You should engage with all modules in the following order for the most holistic experience:

1. Ecosystem Mapping
2. Identifying a Target Audience
3. User Research & User Personas
4. Revisiting the Question: Assumption Testing
5. Brainstorming & Ideation
6. Rapid Prototyping & Usability Testing
7. Sustainably Building your Product, Service or Campaign

The toolkit is divided into a facilitator's guide and a participant guide. The participant guide includes key concepts and terms, information on each module, and tips for participants as they complete the activity. The facilitator's guide includes more information on how to run each activity and tips for facilitation. As the facilitator, you should feel free to reference both guides.

The Role of the Facilitator

As a facilitator, you will be administering and guiding the process of Co/Act across all of the modules. Don't worry, you don't have to be an expert on design thinking or have any training as a facilitator to *be* the facilitator. You just need to feel comfortable keeping time and encouraging your collaborators throughout the Co/Act process.

If you are new to human-centered design, you can view a quick introduction video here: https://www.youtube.com/watch?v=mlOQ-p3vHeo

Your biggest job as the facilitator is to create an open and friendly environment for participants to come together and discuss new ideas. As the facilitator, you will serve as a kind, but firm moderator - reminding participants to focus on the discussion at hand and manage time.

The following resources on facilitation are useful to review as you create a safe and collaborative space:

- The Identity Wheel exercise (pg 55) by the CGIAR Research Program on Climate Change, Agriculture and Food Security (CCAFS) can help you explore your own positionality and how it can affect your reach and relations to the other Co/Act participants.
- Training for Change has many tools and resources for online and in-person facilitation.
- NDI's Men, Power, and Politics Guidance has more information on gender-inclusive facilitation.

Some General Tips and Tricks:

Engaging with Participants During the Exercises:
Human-centered design activities are meant to be interactive and fun. As you go through the toolkit, remind your participants to share openly any possible ideas and not to overthink their answers. We're all here to learn from each other!

Timekeeping:
A primary task as facilitator is managing the time. Each module will include information on how long an activity should take, but you don't have to be strict with timekeeping. If you notice everyone is finishing the task early, you can decide to end the exercise slightly early. If people need more time, feel free to give them more time.

Image of group discussion

Encouraging Participant Participation:
Sharing back (or giving a readout post-activity) is key to all exercises. Sometimes participants can feel shy and that's normal! We suggest letting people know when it's time to share back that everyone will need to share. As the facilitator, you can select the first person and create a 'line up' around the room so people know when they should share back. Meaning, if everyone is at a table, you can select one person and then say 'we're going around the room clockwise, starting with our colleague, Alex, right here. Sam [who is next to Alex], you'll be next and so on." This let's participants know when their turn is so there's no confusion, and it can help quicken the shareback process. But you can also pick any one to engage in the share back process.

Sharing Back Encouragement:
We've found with facilitation that it's extremely helpful to say encouraging remarks after each person share's back, and to offer a point of feedback. You can and should also ask other participants to share their thoughts. You could say "Great job, Alex. Does anyone have something related? What spoke to you about Alex's points? Is there a counter-point we should consider?" These small prompts can help get the conversation going with participants.

Don't worry if these points change the line up or list of people sharing back. You can still go in order and remind participants it's okay to repeat themselves (if they spoke up and already shared their points), because we want to ensure everyone gets a chance to speak and share their points.

Ready to start? Turn to the "Ecosystem Mapping" module to start your Co/Act journey.

Module: Ecosystem Mapping

CO/ACT

Module Goals

The first module that begins your HCD journey is Ecosystem Mapping: think of this as a landscape analysis AND a project kickoff for your team. The goal of Ecosystem Mapping is to see where the team diverges on key issues, what misconceptions, misalignments, and confusion the team may potentially have, and use the exercises as a project kick off meeting to ensure everyone understands the project, deliverables and focus areas. For example, your team may have different conceptualizations of the issue you are addressing; even the tightest team with a hyper focused question can still come at a problem from different angles, and have different stakeholders, desires, or issues that they feel like are important to highlight. This is normal in a collaboration process, and ecosystem mapping can help get everyone aligned early on. Your job as the facilitator is to help create a space where people can share all of their different viewpoints about the project and help guide the participants towards cohesion of ideas, focuses, and outputs.

Note: There are two versions of Ecosystem Mapping: the condensed version and the full version. The goal and framing of the ecosystem modules is directly relevant to both versions. The only difference is that the condensed version has one exercise versus three exercises. As the facilitator, you should decide which version is most appropriate to your team. Has the team done a landscape or stakeholder analysis related to the potential issue area previously? If so, the condensed version might be a better fit. The full version is more appropriate for teams who are exploring new issue areas or are interested in a deeper dive into their local context. Below, you will see the full version and the condensed version exercises, which are separated out. The facilitator prompts are helpful regardless of which version you decide to run.

The "Full" Version Exercises

Exercise 1: What are you solving for? What is your problem statement?
This activity will help you focus on the overarching social issue that you wish to address through your product, service, or campaign.

- Time: ~ 1 hour
- Needs: different color markers, a poster size piece of paper
- Facilitator: Remember to track time!
    - (~10 minutes) Give each participant a marker and ask them to write down the problem they are interested in solving. Feel free to reference any materials you've included in previous or related projects, initial research, reports, etc. Some examples include "Preventing internet censorship," "Difficulty in registering to vote," or "Lack of awareness about MPs and how to engage with them." The facilitator should motivate participants to use the time to think deeply and get excited about the issues they wish to address. Don't be afraid to bring in your personal perspectives and experiences to the table during this exercise.
    - Take a break.

Exercise 2: People and the Problem

- Next, take the above but let's complicate it and critique it more. Think about three individuals. These three individuals should be representative of the diverse communities who are affected by the problem you are focusing on. Come up with your own or use our's below:
    - A 20-year old female college student who is blind
    - A 35-year old LGBTQI+ college student
    - A 65-year old man from an ethnic minority community who is retired
- On the same butcher paper, write out in one bullet point how each issue would affect these people. Thinking about the issue from the lens of these different perspectives can highlight the nuances of each topic.
- As a group, take the remaining 30 minutes to discuss the different issues. Think about how they relate to your organization's mission and resources. Take this time to debate and persuade each other on the issue area you feel is most relevant. Use this discussion to identify one issue area that will be the focus of your product, service, or campaign. To focus the discussion, the facilitator can encourage the group to vote on the top three problem statements, excluding their own entries. A strong idea benefits from a variety of perspectives and healthy debate; the facilitator should actively encourage all participants to express themselves. Remember to take a look at the "Need more Help?" or "I'm Stuck" section for assistance if necessary!

Exercise 3: Ecosystem Mapping- Who else is involved?

Once you have identified the issue that will be the focus of your product, service, or campaign, begin your ecosystem map. Your ecosystem map will outline the different power and information dynamics that may affect the feasibility and success of your project. The map will also identify potential partnerships and opportunities for collaboration.

- Time: ~ 30 minutes to 1 hour
- Needs: different color markers, highlighter, post-it (sticky) notes, a single large butcher paper
- Facilitator: Remember to track time! Take a look at the sections below if you get stuck and need additional tips and tricks.
    - Give each participant a marker and ask them to write the actors that influence your issue on the post-it notes (one actor per post-it note). Remember, these can be individuals or groups. Add your post-it notes to the butcher paper. Some questions to consider are:
        - What is your problem statement? What are a few related issues?
        - Who else cares about your problem?
        - Who has power and who doesn't? Who has access or control over resources and who doesn't? What is the extent of that control or access?
        - Who are the organizations working in the same space, both for and against the issue?

        - What communities does the issue affect? Think about the individuals who are involved in providing a particular service (i.e. teachers) as well as beneficiaries (i.e. students).
        - Who might currently be missing from the conversation around your problem?
        - What current research have you done or collected in this space?
        - What do you see missing? And how do you know?
        - What are barriers you could face?
    - For each actor, how does it connect with other actors in this environment? Add bidirectional arrows between the post-it notes.
    - Identify what actors amplify information? In other words, who are the influencers in this space? Highlight those post-it notes.
    - Identify which actors you have access to currently. Mark those sticky notes with a star.

The Condensed Version Exercise

Exercise 1: What Are We Solving For and Who Is Our Audience?
This exercise is designed to further map out your project, problem statement and your focused user group.

If you're here, you've probably already well underway in your project! This condensed module is a great way to help ensure your entire team is on the same page, aligned on your problem statement, project, user groups, and goals. Even if your team has been working together for years or are experts in your project's domain area, it's always good to do a quick exercise to double check everyone understands all of the project's goals, deliverables, timelines and constraints. This condensed module has 1 exercise.

This activity will help you focus on the overarching social issue that you wish to address through your product, service, or campaign.

- Time: ~ 1 hour
- Needs: different color markers, a poster size piece of paper
- Facilitator: Remember to track time!
    - (~10-15 minutes) Give each participant a marker and ask them to write down:
        - the problem statement AND a particular area related to that problem they are focusing on. What's the big issue and 2-3 related smaller issues?
        - How do they know this is a problem? (this answer could be: we've done X research in this space and learned A B C)
        - Who is the target user group? Be as specific as possible.

- What are our methodologies for answering our problem statement/ fulfilling our grant/delivering the project?
- What should be our biggest concern or focus area, and why?
- What barriers are we facing, technically, politically, and legally?
- Who are other actors, researchers, communities or knowledge producers in this area? How does our work compliment, complicate or iterate on this previous knowledge?

Post-it wall to understand issue area

- Feel free to reference any materials you've included in previous or related grants, initial research, etc. Some examples include "Preventing internet censorship," "Difficulty in registering to vote," or "Lack of awareness about MPs and how to engage with them." Don't be afraid to bring in your personal perspectives and experiences to the table during this exercise.
- Share back! As a group, take the remaining time to discuss the different issues. Think about how they relate to your organization's mission and resources. Take this time to debate and persuade each other on the issue area you feel is most relevant. Use this discussion to identify one issue area that will be the focus of your product, service, or campaign. To focus the discussion, the facilitator can encourage the group to vote on the top three problem statements, excluding their own entries. A strong idea benefits from a variety of perspectives and healthy debate; feel free to express yourself! Remember to take a look at the "I'm Stuck" section for assistance if necessary!

If the team is stuck...

- If your team is having a hard time selecting one issue area out of all the ones they've identified, prompt them to consider coming up with a priority list. While your organization may want to ultimately focus on all those issue areas, pick one that would be the focus for this particular product, campaign, or service. Which issue needs to be addressed before the others? Which issue is time-sensitive or can have the biggest impact now? What problem would help the most people — or the people you care about — if solved? Remember to save the other ideas for the future.
- Ask them to think about their day-to-day life and all the actors that they may interact with. They can also think about a friend or family member who is completely different, or even a celebrity's experience for inspiration! For each person, remind them to: ask yourself how you go about your lives in different manners? How do you (the participants) access information differently? What are your differing wants, hopes and daily tensions?

Don’t forget!

Inclusion Tip: Who is in the room matters! As you begin your Co/Act design sprint, remember to ensure that diverse perspectives are participating in designing your product, service, or campaign. Is your Co/Act team inclusive of different men, women, and diverse gender identities and sexual orientations, ages, disabilities, ethnicities, etc.? If not, think about how you can incorporate new voices into your participant group. There will be opportunities in later modules to engage with external experts and potential users from diverse backgrounds.

You can do the ecosystem mapping exercise in multiple rounds. After each round, give an opportunity for each participant to critique or add to the group’s contributions. For example, you may find that your aunt accesses information through a different channel than the one currently mentioned. This provides richer data to your map!

Make multiple maps! Use this mapping exercise for all the relevant spheres of influence and engagement you are interested in for your tool. For example, you might be interested in using this module to develop a map of power dynamics between political actors, as well as a map to understand how information flows through the community.

What’s next?

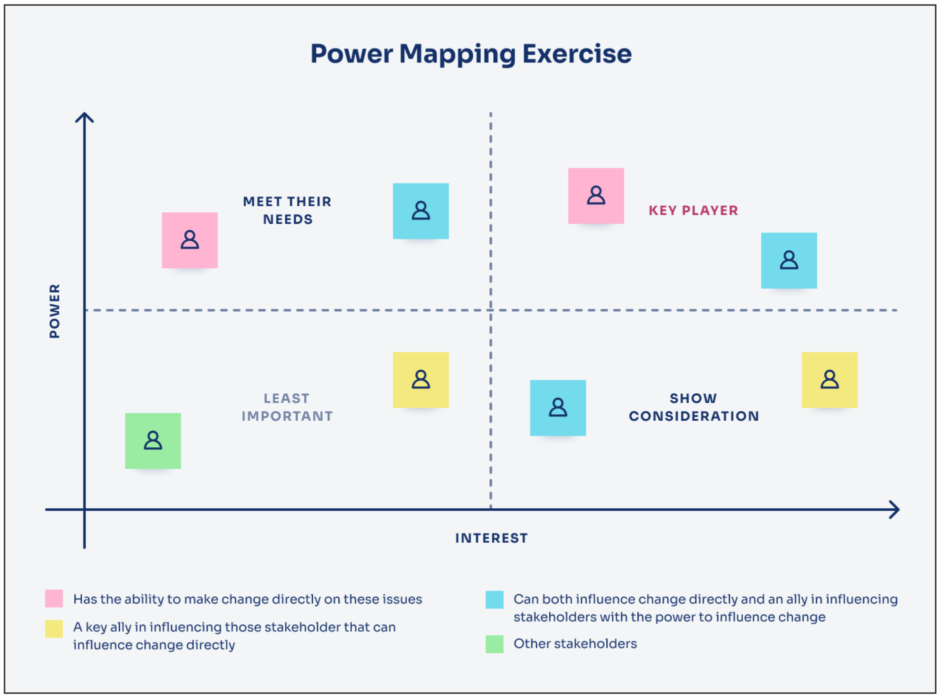
Your ecosystem map will be useful throughout this current project and beyond. For now, move on to the “identifying a target audience” module, but be sure to refer back to your ecosystem map after you develop your user persona and define your product, service, or campaign idea.

Module: Identifying a Target Audience

Module Goals

This module is designed to help your teammates define the group of individuals and communities who are the intended recipients of your product, service, or campaign. Maybe your users have been previously defined, are guided by funding requirements, or you have already been working with a specific community– but like ecosystem mapping, think of this exercise as a way to get all of your teammates on the same page and provide clarity on your intended audience. Remember, even within a single target audience (i.e. political parties), you will have many different subsets of users with different needs and focus points. This module will help you understand this diversity.

The Exercise



Power Mapping Framework from NDI's Citizen Participation & Inclusion team

In the last module, Ecosystem Mapping, you created a map of all the individuals and groups that interacted with the topic you had selected. Take five minutes to review the map and add any additional actors (one per post-it) you may have missed. Remember to document (i.e. take a picture of) your ecosystem map as we will use your actor post-its in this module.

The actors you have identified in your ecosystem map are or represent potential users you can work with to affect change. A successful product, service, or campaign will cater to a specific audience, so in this exercise, you will identify which audience is the right audience for your overall goal. The power mapping exercise is used to analyze each target stakeholders' power and interest. This exercise is especially helpful when your product, service or campaign is intended to have a specific positive social impact or outcome. Stakeholders in the top-right quadrant will be the most important to the ability of your project to reach its intended goal.

- Time: ~1 hour
- Needs: sticky notes, markers, wall space to create the sample template
- Facilitator: Not required
- Using the sample template, map out each user/user group.
    - Write sticky notes with stakeholder names, which can be colored based on how directly each stakeholder can influence the change you seek, as described in the legend in the template:
        - Has the ability to make change directly on these issues
        - A key ally in influencing those stakeholders that can influence change directly
        - Can both influence change directly and an ally in influencing stakeholders with the power to influence change
        - Other stakeholders
    - Place the stickies relative to each other on the grid according to the stakeholder's stakeholders' power to influence the change you seek and interest in realizing that change.
        - The y-axis is the scale that embodies the stakeholder's power to effect change on the topic at issue. The more power a stakeholder has, the farther to the right on the grid they should be placed.
    - The x-axis how much interest each stakeholder has to effect the change you seek. The more interest the stakeholder has, the farther up the grid they should be placed.

Using the guidelines below, discuss which group(s), communities and users you'd like to focus on for your product, service, or campaign. Vote or come to a consensus on your target audience.

1. Stakeholders in the top-right quadrant will be the most important to the success of your project. These key players have both power and interest to influence the change you seek. In some cases, these stakeholders won't exist so don't try to force stakeholders into this quadrant artificially.
2. Stakeholders in the bottom-left quadrant are the least important to the success of your project. They have neither the power to influence change nor the interest to become involved.
3. Stakeholders in the bottom-right quadrant are worth consideration because they are highly interested, but may not have power to directly influence change.
4. Stakeholders in the fourth quadrant have significant power to influence the change you seek, but little interest. Meeting their needs will be important to the success of your project because, despite their lack of interest, they have the ability to either derail or fast-track your project.

If the team is stuck...

1. If the group can't come to a consensus, facilitate a discussion around prioritizing—which group would be most interested in this issue? Most important to get involved in this issue? Is otherwise missing from the discussion on this issue?

2. Deciding which group to work with depends on program objectives, funding, and other factors. Facilitate the team's decision making process by asking them to think through those factors when defining their target audience. It can help to put this into a sentence or a story.

Don't forget!

Inclusion Tip: As you are building your power and influence map, be aware of the power dynamics within your group. Given the size and hierarchy of the group, it may make sense to break the group into two for this exercise (this might be particularly useful if leadership is participating and staff feel uncomfortable disagreeing or expressing a different perspective). If certain participants are capitalizing the discussion, consider posing specific questions to "individuals who haven't had a chance to contribute yet." You may also want to find non-verbal ways for participants to contribute if they are uncomfortable with public speaking.

As you are doing this activity, note down the assumptions that are being made. What guesses is the team making about the actors in your ecosystem? Does that affect the selection of the target audience? Depending on your familiarity with the group and knowledge of the local context, it can be useful to pose questions about probing "why." Also, think about how you and the team can validate some of these assumptions. Depending on the assumptions being made, you may decide that it is necessary to do some additional research or undertake other fact-finding efforts *before* moving on to the next module.

What's Next?

Once you have identified your target audience, use the findings from this module to move on to the "user research and user personas" module.

Module: User Research and User Personas

Module Goals

The goal of this module is two-fold: to ground the participants in some helpful techniques to more deeply understand their target users and to help your team have an easy to access library of representatives of your users; this library is often called 'user personas' in the design world.

In human-centered design, user personas and user research are intertwined. User research is the foundation and body of knowledge to base your personas on. This module will begin with user research and then guide you through the development of user personas. While it might seem long, don't despair! These are useful skills for you and the team in this project and beyond.

User Research:

You and the sprint participants may already be familiar with user research; interviews, focus groups, surveys, and different observation techniques are all ways to better understand your users. The user research approach described in this module is similar, but much more narrowly and hyper focused on your problem at hand.

User research in human centered design practices is often used to help surface particular focus areas in a specific use case related to the project or product at hand. Meaning, if your team is researching how to improve email, for example, your user research interviews would be focused on how users feel about email, what email clients do they use, what are the problems or frictions they have related to email, what do they like about email, what works well for them related to email, etc. This kind of user research has to be built onto pre-existing research of your problem area, which your team has already conducted during the ecosystem mapping module. The most important objective of user research at this stage in the design process is to validate any assumptions made so far.

User Personas:

Using the information or insights gathered in user research, you will guide the participants to develop user personas. Your team should be thinking about all of the different kinds of relevant information about your user groups and your issue areas, like what intersectional harms and human rights harms does your user group face based on their identity? What aspects of where they live and what they work on is related to your project? What are the actual limitations with technology, frictions, and hardships faced by the group? What are the material constraints that need to be considered → that could be web access, technology access, and threats faced to that group. All of this needs to be reflected in the user personas.

As the facilitator, the most important objective of this exercise is to develop representations that are detailed, nuanced, and non-stereotypical.

The Exercises: User Research

This module has exercises that are based on non-directive interviewing.

Each exercise will require 1 - 2 hours. Supplies needed are pen, paper, markers, post-it notes

NON-DIRECTIVE INTERVIEWING

There are many ways for you to learn more about your users—focus groups, surveys, and interviews. Non-directive interviewing is an essential tool when creating a human-centered product, service, or strategy because it creates space for you to listen to your target community. A good non-directive interview will almost always tell you things you didn't know and wouldn't have thought of yourself.

A good example of non-directive interviewing is when a journalist engages in a long-form discussion with a celebrity or politician. By comparison, a good example of directive interviewing is a multiple-choice test. For example, where a directive interviewer might ask "how much of a problem is corruption in your country?" a non-directive interviewer might ask "tell me about your experiences interacting with the government." Non-directive interviewing is a core tool used in ethnographic research.

Please note that this exercise is particularly useful if workshop participants can immediately move from practicing with each other to conducting interviews in the real world with real users. Depending on logistics, it can be helpful to conduct this exercise right before meeting your users face to face.

Develop your questions

Time: 30 minutes

Refer back to the assumptions that you've been noting down as you've completed the previous modules. Ask the participants to take a minute and brainstorm any other educated guesses made through the sprint so far. Now, as a group, try to come up with questions you would like to ask your potential users as you research for this project. Discuss whether the question is directive or non-directive and explore ways to come at the same question non-directively. Remember to use techniques like "could you tell me more about..?" in your questioning. Sometimes a great way to start off questioning is to ask people about their day and or week and go from there.

Non-directive Interview Roleplay

Time: 30 minutes

It is time to practice! Break the group into pairs with one person taking the role of interviewer and the other acting as the interviewee. For the first question, start with a directed question; then ask the same question in a non-directive format. Notice the difference in responses as non-directive questions provide richer details and perspectives.

Then, using the questions you've developed as a group, ask the participants to conduct a short non-directive interview. Interviewees should provide "meta" feedback throughout the process on ways in which questions direct or do not direct them. After 5 minutes of interviewing, participants should take 5 minutes to debrief and note down any necessary edits on a piece of paper. Then individuals should find a new partner and switch roles.

(Facilitator Tip: in order to facilitate finding new partners, have people who were in the interviewer role in round one raise their hands and people who were in the interviewee role pick one of them.) After the second round, debrief as a group and edit your non-directive questions accordingly. You are now ready for some real world interviews!

Interviewing your users

As a group, brainstorm how you will set up your user interviews. Consider the location—where are you most likely to meet your target audience? Is this location accessible? What accommodations do you need to make to ensure that your target audience, including persons with disabilities or those with family or childcare responsibilities, can participate? Plan to budget up to 30 minutes per interview which may mean that you won't be able to ask all your questions. Prioritize the questions that are most critical to your product, campaign, or service. And get ready to interview! Try to do at least 5 user interviews if possible.

At the end of these interviews, the team should have a lot of new ideas and even more new questions! Because non-directive interviewing avoids steering the conversation in a specific way, it almost always expands the number of ideas and avenues for further research rather than helping narrow things down. So if the team feels less clear in some ways about what the project is for.. that is actually good! It means that you've gotten in touch with the full complexity of your users' perspectives, have shed your initial assumptions, and are ready to start creating your human-centered product, service, or campaign.

Make sure that you capture a list of the insights, big and small, that the team has had through this process. You might capture these electronically or on paper, but the important thing is that they are available for everyone to refer to throughout the rest of the design process. Right after conducting the interviews, be sure to record your own thoughts or inspirations that have come out of the interview and conversation. It can be very helpful, as you start to craft your strategy, to refer back to these insights in order to keep yourselves connected to the human beings you spoke with.

If the team is stuck...

- Are they having trouble arranging meetings? If the team can't speak with users in person, consider video-conferencing! Communication platforms, like WhatsApp and Zoom, can be a great way to speak with marginalized members of your target audience who may be hard to reach otherwise! Many platforms include features like captions and subtitles that can make your conversation more accessible.
- Is the team having a hard time interviewing? It can be helpful beforehand to spend an hour or so really thinking about what the team wants to learn and needs to learn from these user interview sessions. Sometimes writing out a lot of questions can be helpful; the team can then edit down or delete some of the non relevant questions.

The Exercises: User Personas

For this activity, you will be creating personas. Each worksheet will represent a single persona. You can create as many as you like and then pick the ones that seem most important to use as you go forward. The recommended time for the activity is 30 minutes and suggested supplies are two or more copies of the persona canvas per participant and pens.

Group discussion

1. Break the group into pairs. Each pair will create two personas based on the target group or groups that you are trying to reach. These two personas must reflect three or four differing identities (i.e. different sexual orientations and gender identities, races, age, disabilities, and ethnicities). Think about how these identities affect their power and privilege. As the facilitator, it is okay to set "requirements" (i.e. both personas should not be of the same gender).

2. During the exercise, prompt the group with the following questions, "how can we make this person more real? What other details can we include about their life and experiences? What are their wants and needs? What are their goals? What barriers do they face? What is their level of access to decision-making authorities? What is their level of access to information?" The goal is that by the time you're done, the persona feels like a real, specific individual, and not just a stereotype or generic example of your target audience.

3. After all pairs have completed their personas, ask each pair to present their personas to the group and invite the team to provide feedback, ask questions, and understand who these personas "are" as people. Edits to the personas through this process are okay. The goal here is to be critical and helpful.

4. When presenting the personas, prompt the group to consider:

    a. Any assumptions or unknowns built into the persona? Do we have the data from the user research exercise to validate those assumptions? If not, how would we validate those assumptions?

    b. Returning to our target audience, are the group or groups we identified still correct? Can we subdivide them, make them more specific?

5. Put the personas up on the wall and use them as reference points throughout your design sprint.

If the team is stuck...

Give them prompting questions:

- What are some of the worries or fears we have for our users or they have?
- What are their top five safety concerns?
- What are ways they usually engage with technology?
- What are things we've learned or surfaced that cannot be changed?

For example, we can't change the internet access in an area, or we can't change the political environment our users exist in. So, personas are a great way to center that in the later research and design process- we can't come up with ideas that are technically infeasible or improbable for our users to actually use. A persona can help ensure that.

Don't forget!

Inclusion Tip: When doing user research, who conducts the interview can play an important role in making the interviewee feel comfortable. Pay attention to who on your team is doing outreach to marginalized communities. If necessary, rely on partners and allies to help create that safe space.

When developing user personas, it is important not to simply generate personas based on your group's assumption. Be sure to explicitly note down the assumptions that came up during the user persona exercise. An important part of the persona development process is identifying assumptions and unknowns about our users and disarming stereotypes.

What's next?

With your user research and user personas done, it's time to move onto the "Assumption Testing: Revisiting Your Question" module. Make sure before you move on that the team has covered **both** user research and user personas, as that knowledge is needed for the future exercises.

Module: Revisiting Our Question - Assumption Testing

CO/ACT

Module Goals

Before we jump into the 'creation' process of building concrete interventions to address our selected issue, it's important to pause and reflect on what you've found and done so far. In this module, we will **revisit the question** and **test assumptions** the team may have at this point in the process.

When starting ideation and validating your assumptions, ask yourself:

- Does it feel like anything is missing?
- Does anything need to be reconsidered, looked at again or seen from a new angle?
- Does there need to be more research or threat modeling?
- Are there additional stakeholders who need to be included?

It's common to continuously stop to identify gaps during the project or process. Fixing those gaps will ensure there aren't blindspots in the future or areas that will impact your desired outcomes.

The Exercises

Exercise 1: Pause and Review
For the first exercise in this module, take a look at the work the team has done so far. Review the ecosystem map, the power and influence map, and the user personas the team developed. As facilitator, you have also been noting assumptions that the team has made throughout these exercises. Taking all this data, facilitate a short discussion (30 minutes to an hour) reviewing:

- What are the assumptions that have surfaced?
- What assumptions have you addressed so far?
- Specifically, what pivoting has the project team done based on the user research? If no changes have been made yet, what pivoting needs to be considered?
- What assumptions still need to be validated?

Exercise 2: Assumption Testing
Based on the discussion from Exercise 1, the team would have identified additional assumptions that need to be validated. The process for assumption testing is similar to that for a non-directive interview. However, instead of asking questions about your users' lifestyle, demographics, or experience, the questions you ask are specifically meant to clarify any outstanding assumptions you have. For each of the unanswered assumptions you had identified in the previous exercise, craft questions (hopefully in a non-directive style) that can help answer the following questions:

- Was your assumption right or validated? Can you refine your user persona to clarify the assumption?

- Was your assumption wrong or invalidated? Can you refine your user persona to clarify the assumption?
- Was your assumption inconclusive? Did you have conflicting information? Can you use this conflicting information to make a more educated guess about how important this assumption is to your target audience? Can you refine your user persona to include this nuance?

Take the time to go back and interview necessary stakeholders or representatives of your target audience if needed. Use the information gathered through your non-directive interviews to edit and update your user personas accordingly. You can do multiple rounds of interviews—so if there is something you want to dig into further or ask more about, you can always schedule another interview. However, there will always be more that you can learn about your users, so when you feel as informed as you can be, move on to the next module. You'll have many opportunities to interact with users and gather feedback in the upcoming activities.

Once you have gathered this data, create a small chart on a piece of paper with 4 squares by folding the paper in half twice to create 4 squares (or draw onto the paper itself). .

- Square 1: what was our original problem statement? Has research complicated or changed it?
- Square 2: what did we find out in assumption testing? Were our assumptions validated? How or how not?
- Square 3: did new assumptions arise out of user testing? For example, perhaps a user mentioned a super specific problem they have, and maybe a team member got an idea for a solution (this solution would be a new assumption to test).
- Square 4: did new solutions come out of user testing? For example, this could be a user specifically saying "I really wish I had X!" or "I wish this specific type of functionality existed." Sometimes users will say exactly what they want in testing. If so, write that down here! We need to collect that information to then see how feasible or possible it is to include that in the project.

Review of information

If the team is stuck..

Refer the team back to your ecosystem map, power and influence map, and user personas. Review the notes from the user research or encourage the team to undertake additional user research. Depending on the space you are in, it can be helpful to put up these maps and documents on the wall for the team to refer to throughout the discussion.

Don't forget!

Inclusion Tip: Remember everyone on your team might have different findings and takeaways based on who they spoke to during non-directive interviews. It's really important to ensure that the perspectives of all the different interviewees are acknowledged and incorporated into the design of your product, service, and campaign. Even if a finding seems small or unpopular, take the time to address it

This module is a critical moment for the team to pause in the design process and ensure alignment on the focus, findings, and expectations of the project. Remember, the team may have different findings and that's okay! The goal here is to use everyone's lists and findings to ensure that the team has shared priorities and knows which research findings, avenues, and directions to go in.

What's Next?

All of the information your colleagues have gathered and generated from these two big exercises will be the basis of the exercises in the next module, "Brainstorming & Ideation."

Module: Brainstorming and Ideation

Module Goals

By now, the participants should have completed the ecosystem mapping, identifying a target audience, user personas and user research, and revisiting the question modules.This module expands on this information the participants have already gathered. The goal of this module is to go really wide with ideas and come up with as many ideas or concepts as possible. Once we have a pool of ideas, we can narrow down to find the really useful and relevant ones.

The Exercises

In this module, there are a variety of exercises to use! **The participants do not have to do all of the exercises, they just need to do one or two!** This module includes many options for you and the participants to select the ones that feel most relevant, applicable and fun. We recommend that you, as the facilitator, first read about all the exercises silently, and work with the participants to decide which are most appropriate.

All of these exercises are timed, and require participant feedback and interaction, so be prepared to keep time, and in the shareback part of the exercises, ask individual participants to share and engage.

User Stories

In this exercise, participants will come together to describe their target audiences and develop stories for what they would want their target group to do on their technology platform. While this exercise can be used for any type of digital tool, it is especially useful to do if the team is considering a website.As it is impossible to write down every scenario that every user has for visiting your website, using the User Stories Worksheet, ask the participants to describe 10 to 20 of the most common reasons that users will have for visiting their product or tasks they users want to do.

Idea Speed Dating

You can either lay out a big piece of paper to cover the table or place large sheets of paper in front of each person, with a piece of paper in the middle displaying the 'topic.' Next, put on music or use a timer and for two minutes, each person writes about the topic at hand. After two minutes, the music stops, and then everyone moves to their right. The music starts again for two minutes, and each person now writes and adds to the previous person's page. This continues a few more iterations.

Crazy 8s

Paper, pens
Crazy 8s is similar to Idea Speed Dating. With Crazy 8s, each participant should fold their sheet of paper in half, and in half again, to create 8 squares.

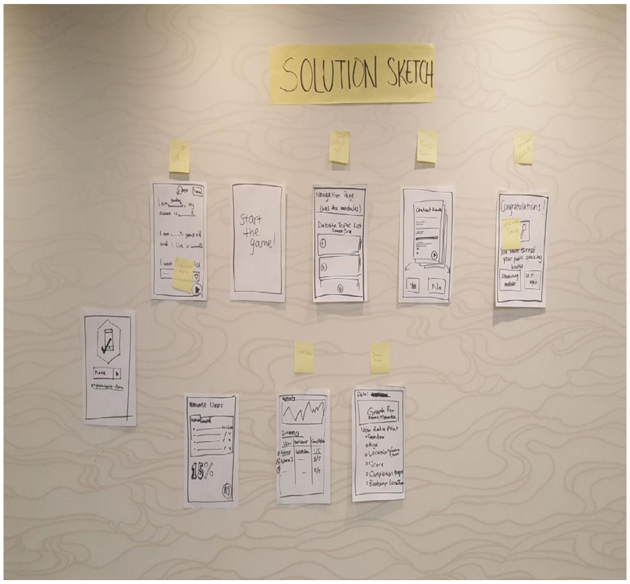
1. The goal is to have each participant draw 8 different product ideas or thoughts into the 8 different squares, ideally spending 1 minute on each idea. This exercise will go fast, but that's okay, because the goal is to get ideas out of our heads onto the piece of paper!

Prioritizing Your Ideas:
Now that the activities and exercises have been done, it's time to sort the results. Each participant gets to select their top 5 choices from the ideation exercises you did (it can be from their own examples or from the general team). Once everyone has made a selection, facilitate a discussion asking:

- Why did you select these 5?
- How would you prioritize these in terms of need and then ease (ease of implementing)?
- Is this an idea for right now?
- What does this idea or product look like in 5-10 years?
- How adaptable is this idea to changes or shifts in society, the political context, and technological changes?

In lieu of the discussion, you can also ask the team to do dot voting to select their favorites from these top ideas. Dot voting is when participants and the facilitator get to write a dot on the ideas they think are best. Each participant will get three votes or "dots." This exercise will help the group get a sense of the most popular ideas, without having to publicly deliberate. This is a great way to make sure everyone's voice is heard.

Once the most popular ideas have been identified, the group can start to debate which ideas they want to focus on moving forward (note: it doesn't have to be the MOST popular idea, but use the questions above to get people to choose and really be concise in their thinking).



Participant drawings of potential solutions

If the team is stuck...

Remind the participants to not be scared about coming up with the wrong idea! That's okay because the goal is to build momentum and work through all potential and possible ideas to find the most suitable one for your user and communities.

When selecting a potential idea, have the participants reflect on the following questions (which is also in their guide):

1. Does this suggestion fit our users' needs?
2. Are we already imagining a finished product? If so, is this product clouding our judgment?
3. Is the product idea grounded in the user research? Am I listening to my users or making assumptions about their needs?

4. What are all of the users' needs, from the most benign to the most extreme?
5. (select a user need) how might we change this or improve it?
6. (take the same user need) what happens if one aspect of our product changes? What does it do to this user need?
7. (take the same user need) If a political situation changes in this user's home country, how does this change the context of them using our product?
8. What are 'edge cases' for our product? Are these edge cases called by a product or a lack of product?
9. Can we map edge cases into a user story?

Don't forget!

Inclusion Tip: As the team goes through the ideation exercises, refer them back to the intersectional user personas they created. How are their ideas going to cater to the needs of individuals with and without disabilities such as people who are blind or have low vision for example?

This module is all about creativity, so feel free to play music, encourage people to move around, use colorful markers, etc. Creating an encouraging environment will foster new and innovative ideas!

Remember, perfection isn't the point of this module, but the goal is to surface a few ideas or areas that everyone can agree on! This is about brainstorming, and also putting together all of the knowledge participants have previously gathered together. In the next few modules, participants can refine, and deepen critique and work on and build out the idea that was created in this module. The goal of this module isn't to get to the finished idea, so, be prepared to throw ideas away. It can often help to put ideas in a "parking lot" — though they may not be appropriate now, the team can review them for another project in the future.

What's next?

Once the participants have selected their top ideas, everyone will move on to the "Rapid Prototyping and Usability Testing" module.

Module: Rapid Prototyping & Usability Testing

CO / ACT

Module Goals

The activities in this module are designed to help quickly evaluate your team's top idea(s), gather feedback, and refine the concept that you would like to invest your resources in. The goal of the modules is to help your team flesh out their concept by developing a prototype and testing this initial idea with users. In this exercise, participants will start imagining: what are we making and how will our communities engage with it 'out in the world'? What are the ideal scenarios, the un-ideal scenarios, what could possibly go wrong and how can we counteract that? The point of this module is to test those hypotheses while also starting to imagine and build what your final project is.

The Exercises

This is a two part activity. In the first part, you will work to bring to life the ideas you identified as most promising in the last module. In the second, you will gather feedback on your prototype.

Prototyping

- Time: ~ 2 hours
- Materials: Pens, Markers, Paper, Post-its, Cardboard, Clay, etc.

It's time to get creative! Using any materials you can find in your surroundings, work together as a group to create a prototype of your top ideas. Prototypes can take many different forms, they can be rough and dirty, or really well polished. For example, a prototype of a new ergonomic chair could be made from clay, a website can be a simple drawing of its home page on a piece of paper, or a campaign could be a mock roleplay simulation. What's great about prototypes is that they should convey your vision, but the vision doesn't have to be finalized. What's important is that you've articulated what you want to say, and now you can test it.

Fast Usability Testing

Once you have built your prototype, bring it to potential users to gather feedback. Using the guidelines on non-directive interviewing shared in the user research exercises, schedule sessions with representatives of your target audience. During these conversations, use non-directive questions to gather feedback on your prototype. Remember, the purpose of these sessions is to get critical feedback that can make your solution better, so remind your users that there is no right or wrong answer. Example questions may include:

- What do you like?
- What would you like to change?
- Is there something missing from this design that you would like to include?
- Would at any time the use of this design further exacerbate exclusion or cause harm?

This is also the perfect opportunity to ask questions related to marketing the product, service, or campaign. For example, if you are debating between two names for your product, service, or campaign, ask your users for their thoughts on which they prefer!

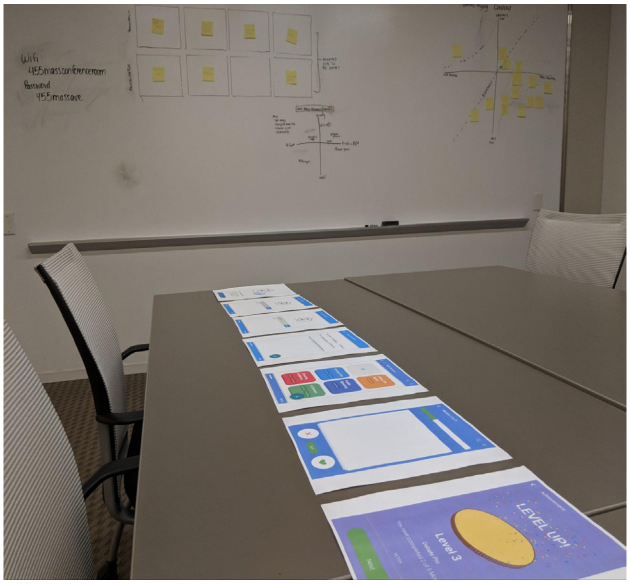
Depending on how realistic and functional your prototype is, you can also ask users to perform tasks on your prototype. For example, for a mobile app prototype that aims to connect citizens to MPs, see if your users can use the functionalities of the app to achieve that goal and engage with disabled persons organizations to test for accessibility; if your prototype is a portion of an advocacy training, see if your users can do the prototype-version of the training and get the skills they need. Remember, if your prototype is in the early stages, these task-based exercises are always something you can incorporate into your user testing at a later stage.

Be sure to document your insights from the conversation. Once you have conducted these feedback sessions (we recommend talking to at least 5 individuals that share key characteristics with your user personas), reconvene as a group to discuss your findings. Questions for discussions may include:

- How can you modify your existing prototype?
- If you are considering multiple options, is there a way you can combine different features together?

Usability testing is an important and diverse area of work with many organizations and individuals specializing specifically on this topic. While the activity above does not capture the full scope or nuances of usability testing, it provides a lightweight start. If you are interested and able to pursue more in-depth usability testing, consider working with experts in your community. For more advanced usability testing guides, take a look at usability.gov's [methods and tools on usability testing] and/or [these tips] from the UX Collective.

As a group, decide on one prototype that you would like to invest time and resources into developing further. Remember, the prototype you chose to move forward with should reflect the user feedback you received.



Example wireframe

If your team is stuck...

- As your team is designing their prototype, remember to refer back to the user personas for inspiration and don't forget intersectionality and accessibility! What types of support would individuals with differing and diverse identities and experiences need to use your product, service, or campaign effectively?
- If you can, consider involving your target users and community in creating a prototype with you. Co-creating with your intended audience can not only bring new ideas, but also help create buy-in

and excitement around your tool! Co-creation also helps identify possible barriers to use and access while ensuring ideas are accessible, inclusive, and do not result in additional harm.

- When doing the fast usability testing exercise, you can give users a variety of suggestions when asking them about emotions, for example 'what did you think of x? was it fun, confusing, easy to use, difficult, accessible?' These prompts really help your users start to situate and isolate what they are thinking.

Don't forget!

Inclusion Tip: Remember to include individuals from marginalized communities in your usability tests. In particular, asking underrepresented groups "what have I missed with this prototype?" can provide a wealth of additional improvement ideas. And for accessibility, disabled persons organizations are always a great option for testing.

There are a lot of resources available (for purchase or for free) that can help you elevate your prototype and make it look more sophisticated. For example, consider using wireframing tools for website or app development. Popular wireframing tools include: Google's Sketch, Balsamiq, Figma, Sketch, and Adobe Illustrator. If your product is a website or app, you can test for accessibility by using the WAVE Web Accessibility Evaluation Tool. There are also many options to evaluate website and app accessibility for mobile devices.

What's next?

With a concept for your product, service, or campaign, that has already been user-tested, you are ready to move on to the final Co/Act module — "Sustainably Building your Product, Service, or Campaign"

Module: Sustainably building your product, service, or campaign

Module Goals

By now, through the Co/Act framework, the team has:

- Thought about the social issue they wish to address and how it manifests in the community
- Identified their target audience, understood their users' intersecting identities, and developed user personas that strongly reflect your users needs, wants, and pain-points
- Brainstormed a number of creative ideas that were tested with users to select the top one

This module is focused on supporting the technical development of your product, service, or campaign. Through these exercises, the team will think critically about prioritizing their ideas, timelines, and budget and feasibility considerations. Due to resource, time, or other constraints, not all ideas can be acted on for the first iteration of the tool. This module will help you determine the most important features to focus on initially, while creating a guide for future development. The team will also think critically about implementing their idea, considering what external expertise and support is required to make the concept a reality.

Remember: once your tool is built, it doesn't end there. A successful project will keep undergoing the HCD process to update and respond to real time issues, such as better responding to new user needs. An existing project will always need to keep being iterated on.

In this module, you will aks start think about: how to identify new resources you'll need in the future; for example, do you need technical support, like hiring a specific kind of developer to help your team build your project? Do you need support in learning how to hire that developer and project manage a new kind of collaborator? This can be helpful in putting together an RFP (request for proposal) or learning how to write a job role for what you'd be hiring. Even writing an RFP, you may want to consult a technical expert for help.

The Exercises

Exercise 1: Project Planning-Developing your MVP Backlog
Using the feedback you gathered on your prototype, work as a group to brainstorm the different components your product, service, or campaign needs to have in order to address the social problem you identified and incorporate the user feedback you have received so far. Think of this exercise also as a way to create a backlog of future ideas for the project, as well. This list can be super useful in revisiting if you get future funding → try to think of all of the ideas

This list of items is called your backlog and will serve as a roadmap for your solution. The goal here is to start to focus and prioritize your ideas. You can use the Co/Act Backlog spreadsheet during this exercise.

1. First, add all of the components you have identified to column C under the "feature, user story, idea, or research need" heading. Be comprehensive — no idea is too small to be included. Also, remember to make sure that each component is as specific as possible. Include any additional details in the "notes" section.
2. For each component, note its priority. How critical is this component to you addressing the social issue you have identified? How critical is this component to the overall success of your solution? Thinking back to intersectionality, how critical is this component to ensure that users of all kinds can participate and benefit? Note the criticality as 1 for most critical and 3 for least in column B.
3. For each component, note the level of effort required to achieve that component. Is it an easy thing to achieve (for example, print worksheets) or does it require more time, resources, or money (for example, developing a course curriculum). Note the level of effort in column E.
    a. For more technical tasks for software development, work with a developer to estimate the level of effort.
4. Based on the priority, level of effort, financial constraints, and timing constraints, decide as a team which components will be a part of the MVP. But remember to save the 'discarded' or less priority ideas- you may need them for future campaigns or products. You can also mark some ideas as ones to do in the future as a 2.0 version of your project or with new funding.

This spreadsheet is a draft roadmap to implement the team's product, service, or campaign. The next few exercises will assist provide guidance on consulting external experts and planning for future iterations of your solution.

Exercise 2: Consulting with Experts
With your prototype, user feedback, and draft backlog in hand, now is a good time to encourage the project team to consult with technology experts if they haven't already. Some questions to consider at this stage are:

- What external technical support, like hiring a developer, do you need to build your tool?
- Do you need support in learning how to hire that talent and project manage the development?

If you are unsure, consider consulting a civic technologist expert to help discuss a reasonable implementation timeline and approach. An expert can also help you draft a SOW (scope of work) or RFP (request for proposal) and evaluate vendor bids.

For more detailed guidance on working with technical experts and identifying vendors or other external support, refer to pages 36-40 of NDI's Municipal Digital Transformation Guidebook.

Exercise 3: Thinking Towards the Future
Now that you've done your MVP backlog and consulted with experts, take those findings and have the group spend 15 minutes really talking through future iterations of the project. Facilitate a discussion on sustainability and future development with some of the following questions:

- Are some ideas more feasible if you had more money, or more time?
- What would your team want to build in a 2.0 or next iteration of your project?

Using the same backlog spreadsheet, make a duplicate version and highlight which ideas you would want to work on next. Add notes to map out which ones you'd tackle first, what kinds of support or new research or new steps would be needed to achieve that idea. This exercise can become the basis of future work for the project.

If the team is stuck...

While this may seem extremely design focused, it's important to think about what the 'spirit' of these exercises are for. When planning a campaign, you may have a lot of ideas and points you want to get across. What's your big picture? What are the nuances of your idea? How do they fit together? Using these exercises can help organize and then focus your ideas to create a cohesive campaign.

Iteration is key to sustainable development

Don't forget!

Inclusion Tip: As you move into the implementation phase of your product, service, or campaign, think about how you will continue to engage marginalized communities in actually developing your idea. How will they co-create future iterations of your idea?

Remember, creating a list of ideas in terms of importance and feasibility is important, as well as how usable your idea or product is. Does it resonate with your audiences? Will it work? What will it look like? These are all important questions to answer.

What's next? Keep Iterating!

Human-centered design is a continuous cycle of learning and iteration. Next steps may be you're ready to start hiring or really building out your project. Maybe you need to hire technical support to do that. Maybe you have the technical talent in-house and are ready to start developing or maybe you're ready to launch! Whatever the case, as you continue to advance your product, service, or campaign, refer back to these modules to keep learning about your users and their new needs and wants and brainstorming unique solutions.

Acknowledgements

CO/ACT

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