Co/Act: Human Centered Design for Activists

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. Human-centered design is responsible for a smartphone having only one button or a car having cup holders. 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 starts with a few key questions: who is this meant for, what do they want, and how can you reach them? 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. 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. 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?

How to Use Co/Act

So you're ready to design your next product, service, or campaign. How do you get started with Co/Act?

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.

SUGGESTED MODULE ORDER

1. Ecosystem Mapping
2. Identifying a Target Audience
3. User Personas
4. User Research & Assumption Testing
5. Brainstorming & Ideation
6. Rapid Prototyping & Usability Testing
7. MVP Backlog

Selecting Participants and Facilitators

For human-centered design approaches to be inclusive and their products to work for a wide audience, it is essential that they bring unique and different voices into conversation with one another. The most successful use of Co/Act will include 4-6 (no more than 8) individuals with different perspectives and expertise. Your participant group needs to be gender-balanced and include individuals of different sexual orientations and gender identities, races, age, disabilities, and ethnicities. Your Co/Act participants may include your IT expert, your community outreach and gender or inclusion expert, and the program manager expected to implement your idea. You can also decide the inclusion of organizational leadership and other higher-level stakeholders (such as donors) as core participants based on buy-in, organizational culture, or other relevant factors. Remember, as all modules build on previous work, you want to try to have the same group of people involved in all activities for this process.

As you go through the modules, you will note that some of the activities require a facilitator. While you can certainly hire an external facilitator and/or human-centered design expert to lead these activities, Co/Act has been designed to be used directly by you and your team. For those activities requiring a facilitator, you can designate a member of your team to play that role. It doesn't have to be the same person every 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.

Do No Harm

As you move through the Co/Act toolkit, remember the principle of Do No Harm (DNH). DNH is an analytical and practical approach that helps minimize risk and avoid unintended consequences. DNH does not remove risk, but rather helps identify any potential adverse effects.

Before you begin, consider an initial analysis or assessment to understand your context and any potential unintended harms. Think through how you might mitigate the risks, perhaps through alternative approaches, options, or partnerships. As you design and implement your product, service, or campaign, revisit and update your mitigation strategy to reflect emerging vulnerabilities and risks that may have not existed or were not as high risk initially. Work closely with the communities most impacted to ensure their needs and priorities are properly reflected in the final product and that the result does not cause additional harm or exacerbate existing vulnerabilities.

Don't forget!

Successful products, services and campaigns often take multiple attempts to get right. Human-centered design is grounded in the idea of iteration, constantly adapting and improving based on user feedback. So as you go through the Co/Act Toolkit, remember that the first attempt of your product, service, or campaign will require revision. That is to be expected and all part of the process! As your idea comes to life, completing additional cycles of the Co/Act Toolkit will help you further refine your product, service, or campaign.

A couple final tips before you start:

- Document, document, document! As you go through the exercises, remember to write down key discussions and insights. If you like, you can designate a person to take notes for each activity (remember, it doesn't have to be the same person every time)
- Creativity can be hard. Each Co/Act module has specific suggestions you can use if you get stuck, but also remember to take breaks (stretching, food, music, etc) to keep the energy flowing.

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

Module: Ecosystem Mapping

CO/ACT

Key concepts and terms

Theory of Change: A theory of change is a tool that you can use to clarify your product, service or campaign's overall strategy, articulate why you think it will work, how you will know if it is working, and what you will need to put it in place. Theories of change define how and why a desired change can come about in a particular context. While theories of change aren't commonly used as part of a traditional human-centered design process, they are a time-tested tool in fields like international development and social change activism. Using a theory of change in the design process can help cement what your goals are, why you are doing what you are doing, what you aim to achieve and how you will achieve it.

Ecosystem Mapping: An ecosystem map is a visual representation of a process, flow, or system that highlights relationships in a particular context. Ecosystem mapping can help identify the scope of the project and ensure feasibility of the chosen strategy.

When to use this module

This module should kick start your human-centered design process (or "design sprint"). Ecosystem mapping and principles of 'theory of change' should be guideposts for you, in this module and throughout the design process. This module can be helpful to return to if or when you get stuck in any of the other exercises.

Before you get started, remember that your product, service, or campaign is only going to be as accessible, inclusive and representative as the perspectives you integrate. 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.

Ecosystem mapping is a great way to get a snapshot of the environment in which you are operating. Who else is working on your issue? What work are they doing? What are their successes, and what could be improved? Who (LGBTQI+, persons with disabilities, women, ethnic/religious minorities etc.) might be left out of existing solutions or products? Ecosystem mapping can help position your work, and identify ways to improve or differ from similar projects, groups, or movements. In the design world, a key step is noting what is being done both poorly and well, and to take those notes into account to strengthen your product, service, or campaign.

How to use it

This module contains two activities. The first activity will help your group come to a consensus on the overarching social issue you are trying to address; the second activity will help you contextualize this topic within the different power and information dynamics in your context.

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. 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.
    - Next, think about the following three individuals:
        - A 20-year old female college student who is blind
        - A 35-year old gay 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 "I'm Stuck" section for assistance if necessary!

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: ~ 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:
        - 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?
    - 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.

This map will be an important reference point for you to refer to as we go through the rest of the design sprint. Remember to take a picture of your ecosystem map as we will be reusing the post-it notes in the next activity.

I'm stuck...

- If you're having a hard time selecting one issue area out of all the ones you've identified, 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.
- Think about your day-to-day life and all the actors that you may interact with. You can also think about a friend or family member who is completely different, or even a celebrity's experience for inspiration! For each person, ask yourself how you go about your lives in different manners? How do you access information differently? What are your differing wants, hopes and daily tensions?

Don't forget!

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.

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 the sprint. 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

Key concepts and terms

Marginalization: Marginalization is when a group, a demographic, or selection of people are treated as inferior, insignificant or lesser because of their association or identification with that group. Marginalization results from persistent inequality and adversity resulting from discrimination, social stigma, and stereotypes.

Do No Harm: Do No Harm (DNH) is an analytical and practical approach that helps minimize risk and avoid unintended consequences. DNH does not remove risk, but rather helps identify any potential adverse effects of a program or intervention. DNH enables the ability to identify alternative programming options if necessary. DNH requires a strong and nuanced understanding of context and relationships and is an analysis that should be routinely revisited and updated.

When to use this module

This module should be used to define the group of individuals who are the intended recipients of your product, service or campaign. An effective product, service or campaign will cater to a particular segment of society, but keep in mind, there will be many different kinds of users. For a product, service, or campaign to be successful it should be understandable and accessible for a variety of different individuals, with different backgrounds, and experiences. Marginalization is especially important to keep in mind with this module to better understand how a group, because of its race, age, gender, religion, sexual orientation or gender identity, disability or other kind of identity can experience specific harm or generally be left out, from any kind of product, campaign or activist movement.

How to use it

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.

- Exercise:
    - Time: ~1 hour
    - Needs: sticky notes, sharpies, wall space to create [the sample template]
    - Facilitator: Not required
    - Using the sample template, map out each user/user group.
        - Using post-its, capture as many potential user groups as you can.
        - Using the sample template, map out each user/user group.
            - Y-axis is the scale that embodies your theory of change. For example, if your intended long-term social change is increased civic participation, you may define the y-axis scale as:
                - 1. People are informed
                - 2. People give feedback
                - 3. People are involved in decision-making process
                - 4. People collaborate with government on solutions
                - 5. People are empowered to validate/veto government decisions
            - X-axis is based on how reachable, engaged they are in your organization's work

Using the guidelines below, discuss which group(s) would be the ideal consumers of your product, service, or campaign. Vote or come to a consensus on your target audience.

I. Individuals in the first quadrant (reachable and very engaged) may be good supporters and targets for your work. These individuals can help amplify your work.
II. Individuals in the second quadrant (reachable and not as engaged) would be individuals who are potentially new audiences and reasonable to target.
III. Individuals in the third quadrant (not reachable and not engaged) would be often hard to move; however, you would have the most impact moving them along your axes.
IV. Individuals in the fourth quadrant (not reachable and engaged) could be moved out of the quadrant with strategies that help your organization better engage with them (such as coalitions).

I’m stuck...

1. If you can’t come to a consensus, think about 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. When thinking about your target audience, remember that they are not uniform. Embrace this diversity within and among your target audience and remember that your campaign, product, or service will cater to different individuals that come from different access to resources, information, networks, etc. As you discuss in your group, it can be helpful to think about this diversity (i.e. students include students with disabilities studying science).

Don’t Forget!

Inclusion Tip: What are the groups that are historically underrepresented within your issue area? And of those groups, are there those the face additional forms or marginalization (e.g. women with disabilities, young people from ethnic minority groups, transgender communities, etc.). Make sure to include those communities on your map and consider how your product would look different or be used differently by the diverse members that make up marginalized communities.

As you are doing this activity, note down your assumptions. What guesses are you making about the actors in your ecosystem? Does that affect the selection of the target audience? Think about how you can validate your assumptions.

Deciding which group to work with depends on program objectives, funding, and other factors. Think through those factors when defining your target audience. It can help to put this into a sentence or a story.

What’s next?

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

Module: User Personas

CO/ACT

Key concepts and terms

User: In human-centered design terms, the person you are trying to reach is usually referred to as the "user" - as in the person using the website, accessing the service, or interacting with the product. But in activism your user might also be a person who is engaging with your organization, accessing your information or message, or participating in an event. When you see "user," just think "individual we are connecting with."

User persona: A user persona is a fictional representation of an individual that incorporates the needs, goals, and observed behavior patterns of your target audience.

User flow: The user flow takes the user persona and puts it in an everyday situation or scenario in engaging with a campaign or using a product or service. For example, a user flow could read "Maria, a forty year old mother and teacher, uses X when she does Y and Z." It helps situate and create real cases to help iron out details on building, iterating and creating user engagement.

Intersectionality: Intersectionality is an analytical framework for understanding how aspects of a person's social and political identities combine and interact to create different modes of discrimination and privilege. While members of marginalized groups share common barriers, exclusion is rarely the result of any single identity factor. There are important variations in age, socio-economic status, gender, geography and other factors that impact individuals' experiences. At the same time, individuals exist within a context of interconnected power structures - such as laws, religious institutions, social norms - that shape to what degree their identities exclude them.

When to use this module

This module should be used to develop a richer picture of your target audience. This module is best used once you have identified your target audience and before coming up with product, service, or campaign ideas. If you would like to do user research before developing your persona, proceed to the "non-directive interviewing" section of the "user research & assumption testing" module and then come back to this activity.

A user persona is like a description a novelist would create of a character before writing them into the story. You create a persona that resembles someone you are actually trying to reach in order to help you understand how your product, service, or campaign would fit into their day-to-day life. Basically, a persona is a tool to help you build empathy with your audience. The persona should include things like age, vocation (or lack of one), sexual orientation and gender identity, race, gender, disability, ethnicity, religion, geographic location, education level, and interests. These kinds of demographic information is helpful in creating a fuller picture of the user and to better understand their needs. It's also helpful for you in seeing how different kinds of groups can engage with your product, campaign or service. Once you have made a persona, it can be a useful tool for you throughout the design process. You can refer back to it and say "what would this persona think of this?" Sometimes that simple check and result in insights that change your thinking about your approach or the words or aesthetics you choose.

How to use it

For this module, 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.

Exercise: creating draft personas

Time required: 30 minutes
Supplies: two or more copies of the persona canvas per participant, sharpies.
Facilitator: Not required.
This exercise assumes that you have at least two people participating, but you can also generate personas on your own.

1. Within your team, pair up. 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.
2. As you work with your partner on your personas, ask at each step, "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, each pair should present their personas to the group and the group is invited 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.
    a. Amplification:
        i. What assumptions and unknowns do we have in each persona? How would we research them?
        ii. Are any of these personas groups that we would especially want to target? Are any of them less relevant?
        iii. Returning to our target audience, are the group or groups we identified still correct? Can we subdivide them, make them more specific?
    b. Put the personas up on the wall and use them as reference points throughout your design sprint.

I’m stuck...

- Go interact with potential users! Building in opportunities for interacting with potential users before and after building your user personas can help identify assumptions and make the personas more realistic. The next module will walk you through non-directive interviewing, observing, and other techniques to engage with potential users.

Don’t forget!

Inclusion Tip: Think back to the intersectionality definition above. If you are trying to change the mind of that MP, who is that MP really? What are the other identities that person holds? How do these identities form this MP’s sense of power and how does this direct or indirect influence and privilege impact the way they make decisions or do their job?

User personas can be developed prior to user research in order to help clarify avenues for exploration, or after, in order to memorialize and generalize the findings of the research. In either case, 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?

If you developed your user personas before doing user research, it’s time to move on to the “User Research & Assumption Testing” module to validate and update the user personas. It’s important to make sure the personas pull from research, real user wants and needs and not just assumptions.

If you have already done non-directive interviewing prior to this module, go back to the “assumption testing” section of the “user research & assumption testing” module.

Module: User Research & Assumption Testing

CO/ACT

Key concepts and terms

Theory of Change: A theory of change is a tool that you can use to clarify your organization's overall strategy, articulate why you think it will work, how you will know if it is working, and what you'll need to put it in place. Theories of change define how and why a desired change can come about in a particular context. While theories of change aren't commonly used as part of a traditional human-centered design process, they are a time tested tool in fields like international development and social change activism. Using a theory of change in the design process can help cement what your goals are, why you are doing what you are doing, and what you aim to achieve.

Non-directive Interviewing: Non-directive interviewing is a user research technique in which interviewers gather qualitative insights from individuals who are representative of potential users. In non-directive interviewing, the interviewer does not frame questions in terms of right or wrong answers or limited sets of options and avoids leading the interviewee to answer in particular ways or within particular value systems. Instead, the interviewer uses an open-ended approach to explore the interviewee's thoughts, attitudes, and beliefs. These questions can build on each other and from the user's answers.

When to use this module

By now, you have:

- identified your target audience,
- thought through their intersecting identities,
- and (potentially) developed rich user personas for your product, service or campaign.

Whether you are beginning this module before or after developing your user personas, it is important for us to pause to try and identify our blind spots and confront our own perceptions and misconceptions. How do we know what we know? Is our knowledge based on assumptions or user research? This module will help you answer that question and ensure that you have the facts to brainstorm the most effective tool.

How to use it

This module has exercises that are based on two different interviewing techniques— non-directive interviewing and assumption testing. Non-directive interviewing is ideal for gathering generic information about your target audience, whereas assumption testing is ideal for validating specific hypotheses or guesses you may have made while creating your user personas. You will likely need a combination of both techniques to gather the information you need.

Each exercise will require:

- Time: 1 - 2 hours
- Needs: Pen, Paper, Markers, Post-it notes
- Facilitator guidelines are noted in each section below
- Please note that this is a two part module. The insights from your non-directive interviews will inform your assumption testing!

The Exercises:

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. Take a minute and brainstorm any other educated guesses you've made through the sprint. 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! The group should break 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, 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.

During the interview, remember to actively engage in the conversation - pause, nod, don't interrupt and be patient if the conversation seems to go "off topic." That's often when you learn something unexpected and important! Keep asking "why?", even if it feels repetitive, to get to the interviewee's beliefs and motivations. Remember, we want to understand our users' opinions and emotions, rather than focusing on fact-based responses. Make sure the interviewee feels listened to and always thank them for volunteering their time to support your effort.

If consent is given, try to interview in pairs so that one person can record or take notes. These notes have the insights you've learned from your conversations and will be important as you begin brainstorming your product, service or campaign. Remember to hold a debrief session after each interview to discuss what both team members heard, what seemed interesting, insightful or odd. Think through how you can use each conversation to refine your persona.

At the end of these interviews, you 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.

ASSUMPTION TESTING

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 assumptions you had identified prior to the interviews, craft questions (hopefully in a non-directive style) that can help you 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?

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.

I'm stuck...

- If you can't speak with your 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.
- Stuck on a location for your non-directive interviews? Public spaces (like public libraries, parks, or coffee shops) can be an easy place for you to interact with your target community. Just remember, public locations should be easy to access (geographically and financially) for your target audience and include any necessary accommodations for persons with disabilities.

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.

Non-directive interviewing is a tool you can use throughout the design process. It can be useful early on to try to understand your users and how they think about their lives, needs, and abilities generally. As your product, service, or strategy starts to develop, you can use non-directive interviewing to explore more targeted questions or interests the team might have. For example, if your project related to corruption in the energy sector and your target audience were "low-income citizens living just outside the urban center" early interviews might focus on understanding the role of steady electricity in their day-to-day lives; later interviews might zero-in on more specific topic areas like how and when family members use the Internet or interact with government agencies - all depending on the direction your strategy has developed.

Non-directive interviewing can also be a very useful tool for your team members to use on each other. Sometimes in strategy and brainstorming sessions, it can be much more helpful to ask questions like "could you say more about that?" than "do you mean A, or B?"

What's next?

Now that you've gotten to know your target users really well, it is time to transform these insights into creative solutions! Turn to the "Brainstorming & Ideation" module next.

Module: Brainstorming and Ideation

CO/ACT

Key concepts and terms

Brainstorming: Brainstorming refers to a series of exercises to help see what currently exists, where there are gaps, and how those gaps reflect user needs. Brainstorming (sometimes referred to as product strategy or strategic thinking in the design world) is helpful in figuring out what your audience needs, what has resonated for them previously, or how there isn't a product, campaign, or movement that fits your audience.

Ideate: Ideation is a specific design and technology term that means to build on previously collected research, previous campaigns or movements or products, and push them in a brand new direction. Ideation is the human-centered design way to design with iteration.

When to use this module

By now, you should have completed the ecosystem mapping, identifying a target audience, user personas, and user research and assumption testing modules. If you haven't completed at least three of the above modules, please stop, and do at least three of the previous modules before starting this module. You will need the outputs from the previous modules to complete this one.

At this point, you should have an idea of who your users are, what their needs are, and what currently exists in the technology or product landscape. Ideally, you will also start thinking about what doesn't serve your users.

This module expands on the information you have already gathered. The idea here is to go really wide with ideas: be prepared to throw away ideas or product concepts. Don't be scared of coming up with the wrong idea- you want to build and gain momentum, and work through all possible ideas (even ones that feel not very well thought out) to find the best few ideas for your users. Sometimes, the first idea a group or designer will have for a product may not be the BEST idea for their users, even if they know their user group really well.

We can use a variety of exercises to help think and create these new ideas. The following are suggestions on how to take all of the knowledge gathered from previous modules and start to shape those takeaways and thoughts into strategic products that best serve your users.

How to use it

- Time: about 1-2 hours
- Pens, paper, post it notes, markers
- Facilitator Responsibilities: The facilitator will be in charge of time management for the exercises, following instructions to direct the exercises, sorting the written out ideas that come out of the exercises, and then documenting the exercises (such as taking photos and notes). Note: the facilitator doesn't need a background in design, they just need to be comfortable following instructions to lead the exercises and documenting the group outputs for this module.
- This is a two part module with brainstorming exercises and selecting-the-best-idea, or sorting, exercises. Instructions for each exercise are below.
- Materials: Pens, paper, colored makers and post it-notes.
- This module is about using design thinking exercises to create new ideas. Using one or two or all of the following can be helpful in creating new insights into creating your product, service, or campaign.

HOW MIGHT WE'S:

"How Might We's" are helpful in thinking and creating multiple ideas about one topic. Each participant is given a stack of post it notes and a pen or pencil. For two minutes, each participant has to write as many questions stating "how might we…." about the chosen topic at hand. Then each participant reads their favorite top two, and the exercise starts again. The idea is to drill further and further into a problem.

Step-by-step:
1. The facilitator should first give an explanation and prompt by saying "Participants can start by internally asking themselves questions: How might we solve our users' needs? So write out those questions on your paper or post-it notes. But, then go further, how might we solve X (pick one of the things you've already written) and try to write down as many questions as possible related to that, going from the most broad "how might we solve users' poor security" to 'how might we solve issues with connectivity and losing a password.' One is more broad (generally poor security) and one is more narrow (connectivity and losing a password). Remember, don't try to write full paragraphs, just one sentence per idea."
2. Now, set a timer for 2 minutes, and tell everyone they have two minutes to write as many things as possible. Again, go broad and go narrow.
3. Stop! Now give everyone a second, and let them read over. Now, start the timer again for two minutes, and they write more and more ideas.
4. Stop! Now have everyone group their ideas (give them just two minutes) and go around the room and present their two favorite ideas. Now, place those ideas up on a wall.
5. Repeat the exercise one more time.
6. Share back top ideas.
7. Sort ideas into related groups (the participants should sort them and then name those groups). This activity can take anywhere from 5-15 minutes.

Remember, "How Might We's" are designed to take a problem and turn user choices into questions to help problem solve.

Let's work through an example: If we were focusing on voter turnout, a question we can ask is "how might we improve voting with X user group in X area?" If we go narrower, we can ask "how might we better update users about new candidates in their area" or "how might we better reach the public with timely information about elections"? These How Might We's go even deeper than "how might we improve voting."

IDEA SPEED DATING

Paper, pens

Idea speed dating is a fun and quick exercise to think through ideas, as a group.

1. The facilitator 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.'
2. Next, the facilitator puts on music and for two minutes, each person writes about the topic at hand.
3. After two minutes, the music stops, and then everyone moves to their right.
4. The music starts again for two minutes, and each person now writes and adds to the previous person's page.
5. This continues a few more iterations.
6. The goal here is to build off of the previous ideas, so each person should be open and constructive. In this case, let's try to stick to problems that can be relatively solved, but out of the box ideas are also welcomed.

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. Each participant folds their own paper to create 8 squares.
2. The facilitator sets a timer for 8 minutes, and each participant should 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 the participants head and onto the paper. As before, perfection isn't the key here.
3. Time's up! Now, each participant should share their sheet of paper, and receive feedback and questioning from the other participants.

HOW TO SORT THEM:

Now that the activities and exercises have been done, it's time to sort the results. The facilitator will tell everyone it's time to start dot voting.

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.

Questions you can ask to help decide is "is this an idea for right now?" "What does this idea or product look like in 5-10 years? "Should our product last longer than 5 years, what happens if something (society, politics, technology) changes or shifts?"

Once dot voting has commenced, the facilitator can read out all of the ideas that have been voted on, and count what are the most popular ideas. From here, then the group can start to debate around what are the ideas they want to focus on moving forward (note: it doesn't have to be the MOST popular idea, but this is a great to filter thoughts, and get people to think and choose and really be concise in their thinking).

I'm stuck...

Think through the following questions if you need a little inspiration:

1. Does this suggestion fit our users' needs?
2. Are we already imagining a finished product? If so, is this product clouding our judgement?
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 you are ideating, remember that your target audience is not uniform. How is your idea going to cater to the needs of individuals with and without disabilities such as people who are blind or have low vision for example?

Reminder, perfection isn't the point of this module. This module is supposed to be a bit messy, and a little hacky. This is about brainstorming, and also putting together all of the knowledge participants have previously gathered together. Strategic ideation is about prototyping, so 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. This isn't about the finished idea, this module is just the first few ideas. So, be prepared to throw ideas away.

Pens, paper, post it notes, pencils- all things to physically sketch and write out are important.

What's next?

Congratulations on coming up with some great ideas! Now that you've selected your top few, move on to the "Rapid Prototyping and Usability Testing" module.

Module: Rapid Prototyping & Usability Testing

Key concepts and terms

Prototype: A prototype is an early or initial version of a product, service, or campaign that is primarily used to gather feedback from potential users. A prototype allows you to quickly test and evaluate your solution before investing large amounts of time or money into one particular solution. 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.

Usability Testing: Usability testing describes the process of gathering feedback from potential users on a product, service, or campaign. During a usability test, individuals representative of your target audience would be asked to complete tasks related to the purpose of your solution (for example, use the tool to send an email to your MP about issues in your local community) while interviewers observe, listen, and take notes. The information gathered during a usability test can be valuable in understanding how your proposed product, service, or campaign can be used in the real world.

Accessibility: A product that is accessible is one that can be used equally by people of all abilities and disabilities. Accessible tools work for a diverse range of users by addressing barriers and provide a variety of ways for people to engage. For digital tools, accessibility might include fonts that are easily readable, the use of alternate text, and ensure colors for text, graphics, and background have sufficient contrasts.

When to use this module

Congratulations! You have now completed the "Brainstorming & Ideation" module and, through the sorting and dot voting exercise, you have now selected a few interesting and effective ideas you are interested in pursuing! The activities in this module will help quickly evaluate your top ideas, gather feedback, and decide the one idea in which you would like to invest your resources.

How to use it

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.

FAST USABILITY TESTING

Once you have built your prototype, bring it to potential users to gather feedback. Using the guidelines from the "User Research & Assumption Testing" module, 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.

I'm stuck...

- As you're designing your prototype, remember to refer back to your user personas for inspiration and don't forget intersectionality! What would an individual of a different identity need to use your product, service, or campaign effectively?
- If you can, consider involving your target users in creating a prototype with you. Co-creating with your intended audience can not only bring new ideas, but also help create excitement around your tool!
- 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, meh, easy to use, difficult?' 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 — "MVP Backlog"

Module: MVP Backlog

CO/ACT

Key concepts and terms

MVP (Minimum Viable Product): Similar to a prototype, a minimum viable product is the simplest version of an idea that allows you to validate and evaluate your solution. While a prototype is the first draft of the idea and cannot be used as a complete solution to your social problem (for example, you cannot sit on a clay chair), the MVP is a more complete solution that can be used by your target users as is. It may not have all the functionalities that you would like (for example, the chair may not have wheels), but it still addresses the issue at hand (for example, you can sit on the chair). An important reminder- MVPs can also be sent out as the final product. MVPs can exist to be the most pared-down but feasible idea.

Iterative Development: Iterative development emphasizes the need to break your final product, service, or campaign into discrete bite-sized pieces. Particularly relevant for technology products, iteration--or the idea of continuous building, feedback, and modification—is a cornerstone of human-centered design. When envisioning an advocacy workshop series that includes training on topics A to Z, iterative development would recommend building resources for trainings A and B, gathering feedback on them and improving them accordingly. The feedback would also help you decide whether training C and D are necessary or if training F needs to be done first. Iterative development allows you to sustainably grow your solution in the most impactful and cost-effective manner.

Backlog: A user experience (UX) or design backlog is a great way to 'stack' or list features. Think of it as an ordered list- what do you want, what do you need, and who should work on what? Does one feature need to be created to make other features?

User stories:User stories illustrate how a user will use, interact with and respond to your product, campaign, or service. A user story can help you walk through and see how someone would interact with what you are making, and where it would fit in their life.

When to use this module

This is a module about idea prioritization. Due to resource, time, or other constraints, not all ideas can be acted on for the first iteration of your product, service or campaign. This module will help you determine the most important ones to focus on initially, while creating a guide for future development. By now, through the Co/Act framework, you have:

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

Don't be afraid to reference the work you've already done in previous modules! This module will help you move your selected prototype to a minimum viable product that can be used by your target audience to affect social change.

How to use it

- Time: ~ 2 hours
- Materials: See accompanying Co/Act Backlog spreadsheet

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. 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.

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, develop 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.

This spreadsheet documents your product, service, or campaign strategy. As you go through multiple iterations of your solution, use this spreadsheet to track your progress. With the spreadsheet as a guide, begin development of the components that are a part of your MVP. Remember to work closely with any subject matter experts or technical resources you need.

As you go through different versions of your product, remember to always be gathering user feedback! Go back to the “Fast Usability Testing” exercise in the “Rapid Prototyping & Usability Testing” module for

I'm 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.

If you're stuck, try taking some of the ideas, and saying them aloud or acting them out. Do they make sense? Does something feel missing? The goal here is to be succinct but see how the ideas fit together.

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?

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?

Human-centered design is a continuous cycle of learning and iteration. 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.

If you're ready to begin planning the next version of your product, service, or campaign:
- Head to the "Identifying a Target Audience" module to expand your user base or
- Head to the "User Persona" module to update your user personas

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