ESKEW+DUMEZ+RIPPLE

A CARD DECK OF
ENGAGEMENT
METHODS

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This deck is intended to help design teams identify methods for engaging stakeholders based on an individual project and its context. Selecting methods early in the project provides more opportunities to involve stakeholders in meaningful ways.

The methods in this deck are organized into 3 categories:

INFORMATION GATHERING METHODS
Solicit information from stakeholders

OUTREACH METHODS
Engage stakeholders in concept experimentation or build support

SYNTHESIS METHODS
Translate the data gathered into findings that impact design

The methods in this deck are only a small selection of those available. Designing your engagement process is just as important as designing the project itself. Below are a few tips that will help you design and implement an engagement process; for more detailed information, read the 'A Pocket Guide to Engagement Design.'

- Be iterative
- Establish a shared understanding
- Set boundaries
- Build capacity to participate
- Identify risks
- Provide enough time and be flexible

KJ METHOD

Works towards group consensus in an innovative meeting format. The method asks all participants to be active in their engagement of the issue, and to record down any thoughts, concerns, questions, or appreciations they might have on any issue. Comments collected allow for insightful patterns to emerge from the participants.

Stakeholders Design team, client, users, organized groups, community

Level of Engagement

Expected Outcome Synthesize information to achieve group consensus in support of a common path forward.

Pairings Works well with information gathering techniques such as community meetings and online forums.

More Info User Interface Engineering: http://www.uie.com/articles/kj_technique/

Universal Methods of Design, pg. 104

KJ METHOD

Example Eskew+Dumez+Ripple Community Engagement Lunch & Learn

How To

1. Frame the issue.
2. Gather everyone together.
3. Record individual ideas.
4. Place notes on the wall.
5. Group emergent patterns.
6. Name the groups.
7. Vote on what is more important.
8. Rank top issues to address.

AEIOU

An organizational framework for guiding and coding observations according to a taxonomy of **activities, environments, interactions, objects, and users**. This helps the researcher attend to key details when using ethnographic or observation research techniques.

Stakeholders Design team

Level of Engagement

Expected Outcome Categorize observations into strategic design arguments.

Pairings Useful tool for synthesizing information collected through observation.

More Info Worksheets: http://www.drawingideasbook.com/ images/AEIOU_worksheets.pdf Universal Methods of Design, pg. 10

AEIOU

The AEIOU framework was used in a design thinking workshop to guide field observations and visualization techniques. Individual worksheets for Activities, Environments, Interactions, Objects, and Users, were used to document research, and then converge onto a large team worksheet for synthesis and design ideation.
        - Universal Methods of Design

Example Design thinking workshops

How To

1. Obtain information.

2. Categorize information according to the category they best exemplify: activities, environments, interactions, objects, or users.

3. Draw conclusions from these observations about the topic you are investigating.

ELITO METHOD

A method to capture design research observations and rapidly bridge those observations into core concepts to facilitate a direction amongst design teams. Brings together multidisciplinary teams shortly after research has been conducted to externalize observations into logical design arguments.

Stakeholders   Design team

Level of Engagement

Expected Outcome   Quickly synthesize design observations into strategic design arguments.

Pairings   Useful tool for synthesizing information collected through observation.

More Info   Methods Journal wiki: http://methods-journal.wikia.com/wiki/Elito
Universal Methods of Design, pg. 70

ELITO METHOD

Example Workshop to link business logic to design insights

How To

1. List the observations: What did you see, read, or hear?

2. Make a judgement: What is your opinion about that observation?

3. Understand the value: What values are ultimately at work?

4. Diagram it: What can the design team do to solve this problem?

5. Identify a key metaphor: What is the hook for this story?

6. Connect arguments into observation based themes

PERSONAS

Used to consolidate descriptions of behavior patterns into representative profiles to humanize the design focus, test scenarios, and aid design communication. A unique aspect of this method is that you do not look at the entire person, but use an area of focus as a lens to highlight the relevant attitudes within a specific context.

Stakeholders Design team, client, users

Level of Engagement

Expected Outcome Put a face to the issues at hand and provide scenarios within a context.

Pairings Observation techniques and surveys may be useful methods to collect information for your personas.

More Info Interaction Design Foundation: https://www.interaction-design.org/encyclopedia/personas.html
Universal Methods of Design, pg. 132

PERSONAS

Example Youth Rebuilding New Orleans
Eskew+Dumez+Ripple Day of Service

How To

1. Collect data on several users through field research.

2. Look for patterns and themes.

3. Consolidate similarities into aggregated archetypes.

4. Present each persona description in one page or less including a name, a sketch, and a narrative story describing key aspects of their behaviors relevant to the design inquiry.

PROTOTYPING

A prototype is the physical translation of stakeholder research that can be used to further review and refine proposed concepts. Creating tangible artifacts at various levels of refinement and scale helps communicate design information and enables stakeholders to participate in the development and testing of ideas.

Stakeholders Design team, client, users, organized groups, community

Level of Engagement

Expected Outcome Test design concepts and facilitate deeper design discussions with stakeholders.

Pairings Methods that empower stakeholders' design literacy will help build capacity to participate in prototypes.

More Info Universal Methods of Design, pg. 139
The Community Planning Handbook, pg. 100

PROTOTYPING

Example Hester Street Collaborative's Waterfront on Wheels

How To

1. Convey design concepts in a physical form with enough flexibility to allow for stakeholder feedback through manipulation of the prototype.

2. Flexibility should be built into the specific elements being tested by the prototype.

3. Document engagement results and refine design accordingly.

ONLINE PLATFORM

Online platforms provide a convenient venue for communication between stakeholders and the project team. Visitors to the project's page are able to access project information, leave comments, and participate in surveys or interactive mapping. This also provides a way for stakeholders to keep up to date on project progress.

Stakeholders Client, users, organized groups, community

Level of Engagement

Expected Outcome Collect detailed data from those who are not normally accessible and share project information.

Pairings Can be used to build an audience for deeper engagement methods such as community workshops and meetings.

More Info MindMixer: http://www.mindmixer.com/
CoUrbanize: http://www.courbanize.com/

ONLINE PLATFORM

Example Johnson County Library used
MindMixer to understand the library's
place in the digital world.

How To

1. Decide how much and what kind of
feedback you are seeking.

2. Provide accurate information about the
project to allow stakeholders to make
their own judgements.

3. Utilize built in tools such as surveys and
asset mapping to solicit feedback from
stakeholders.

4. Be clear about your objectives and time
frames.

5. Demonstrate you are listening and
share project progress.

OPEN HOUSE

An event to showcase project partners, share information, and/or celebrate project milestones. This is a good opportunity to build and maintain new avenues for communication among the design team and stakeholders throughout the project. This can be an important step in building trust and social capital with project stakeholders.

Stakeholders   Client, users, organized groups, community

Level of Engagement

Expected Outcome   Foster avenues for communication and get a large infusion of information in a lively atmosphere.

Pairings   A good ice breaker before a more intensive workshop series or a tool to keep stakeholders engaged after intensive work is complete.

OPEN HOUSE

Example Community organizations often have open houses for people to learn about their programs.

POP-UP STALL

Interactive displays that allow you to bring your questions to the street to reach a wider and more diverse audience. Pop-up stalls can activate a space and provoke interaction with people who may not otherwise engage in the project. They may also draw attention to your project or help advertise for future engagement events.

Stakeholders Users, community

Level of Engagement

Expected Outcome Gain a greater understanding of the community context in relation to your questions and reveal spatial patterns of stakeholders.

Pairings Tools such as the KJ and Elito Methods may be useful in synthesizing information collected.

More Info The Community Planning Handbook, pg. 138

POP-UP STALL

Example Tulane City Center Park(ing) Day installation

How To

1. Identify what you want to investigate and design the question(s).

2. Design an eye-catching way to activate a space and ask your question(s).

3. Capture how people interact with your installation and answer your question(s).

COMMUNITY AMBASSADORS

Community members are trained and empowered to deliver project information. They also can collect additional information from stakeholders outside of formal events. The commitment can precede a project and last after its completion to maintain continuity. Ambassadors may be paid or volunteers.

Stakeholders Users, organized groups, community

Level of Engagement

Expected Outcome Builds support for the project, dispel rumors before they start, and provides insight into community opinions.

Pairings Ambassadors could help promote other meetings.

COMMUNITY AMBASSADORS

Example Incourage Community Foundation's Tribune Building with Concordia

How To

1. Work with known community leaders to identify ambassadors.

2. Provide ambassadors with project information and key topics to be aware of.

3. Identify the benefit of their participation.

4. Establish a communication framework for ambassadors to receive additional project information and share what they are learning in the community.

COMPLIMENTARY PROGRAMMING

Coordinate with programs in the community that are related to the project. This helps align efforts and support the desired outcomes of the project and for the community. This strategy can help build allies and identify benefits of the project to the larger community.

Stakeholders   Organized groups

Level of Engagement   3   4

Expected Outcome   Infuse community expertise and leverage project effectiveness.

Pairings   Building relationships through community ambassadors and block parties can help identify complimentary programs.

STRENGTHENING NEIGHBORHOODS: DOING CIVIC WORK TOGETHER

Example New Orleans' Neighborhood Engagement Office provides resources for active groups.

How To

1. Build relationships with community leaders.

2. Work with them to identify programs that align with your project goals.

3. Work with stakeholders to identify opportunities to integrate complimentary programs into the project program.

PUBLIC WORKSHOP

A highly interactive meeting focused on completing a specific task related to developing or ranking spatial implications of design priorities. They are especially useful for complex design issues because they provide time for detailed consideration and a high level of interaction between stakeholders and the design team.

Stakeholders Client, users, organized groups

Level of Engagement

Expected Outcome Achieve consensus between several stakeholder- and designer- generated options.

Pairings Data collection methods to prepare workshop material and synthesis methods such as AEIOU to help code observations.

PUBLIC WORKSHOP

Example St. Martha Catholic Church

How To

1. Works best with a group of 25 people or fewer.

2. Identify the specific goals of the workshop and develop visual and tactile tools to facilitate discussion.

3. Consider breaking larger groups into small working groups with designated group leaders.

4. Document results from small group discussions and larger group themes to refine design solutions.

PUBLIC MEETING

A large public comment meeting with semi-formal meeting procedures where the audience stays together during the entire meeting and participants make comments to the entire audience. Everyone gets to hear what is said, but some people tend to make speeches rather than discuss an issue.

Stakeholders Organized groups, community

Level of Engagement

Expected Outcome Usually used to collect or distribute information from or to a large group of stakeholders.

Pairings Could be used to distribute results from high engagement level methods to a larger group.

PUBLIC MEETING

Example Neighborhood Participation Program Meetings

How To

1. Get agreement on meeting goals and desired interaction level.

2. Identify how you will use the information you collect.

3. Identify the audience you expect.

4. Select activities for each topic and allocate an appropriate amount of time in a meeting agenda.

5. Determine meeting space and logistical needs.

6. Document meeting activities and information collected.

SURVEY

Method of collecting self-reported information from people about their characteristics, thoughts, feelings, perceptions, behaviors, or attitudes. An efficient tool for collecting large amounts of data quickly, but may not be an accurate reflection of true thoughts, feelings, perceptions, or behaviors.

Stakeholders Client, users, organized groups, community

Level of Engagement

Expected Outcome Collect data about a specific topic from a controlled sample of stakeholders.

Pairings Synthesis methods could help group data into themes and information collected could inform deeper engagement activities.

More Info Survey Monkey
http://help.surveymonkey.com/

SURVEY

AMERICAN CAN RETAIL FACADE IMPROVEMENTS
Community Meeting October 20, 2014

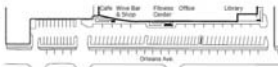**Example** American Can survey at the Neighborhood Participation Program community meeting

How To

1. Define Your Objectives. Focus on the decisions you're trying to make.

2. Work Backwards. Once you've set your objectives, determine the data you need to gather to make your decision.

3. Check for Bias. Make sure you're not asking leading questions.

4. Do a Test Drive. Send your survey to friends and colleagues for a test run. Collect Results and Analyze Data.

PROJECT FLASHCARDS

Small groups are provided cards with best practices for the project type or for a specific topic you are investigating. Groups are asked to prioritize ideas that they think are applicable to the project and discuss why.

Stakeholders   Smaller clusters of clients, users, and organized groups

Level of Engagement

Expected Outcome   Stakeholders learn about best practices while providing the project team with insight into what they value.

Pairings   Tools such as the KJ and Elito Methods may be useful in synthesizing information collected.

PROJECT FLASHCARDS

Example Upper Lawrenceville, evolveEA

How To

1. Develop card decks for the topic you are investigating.

2. Provide a deck to each small group.

3. Ask them to prioritize cards according to what they would like to see the project accomplish.

4. Document stakeholder choices and discussions.

SHADOWING

An observational method that involves tracking someone in his/her role to experience the situations they encounter in daily life. Enables the collection of insights through the detailed nuance of firsthand, real-time exposure. Could be helpful in building a baseline familiarity of the user group and in testing assumptions about behavior.

Stakeholders Client, users, organized groups, community

Level of Engagement

Expected Outcome Gain a deeper understanding of stakeholder behavior and insights into design values.

Pairings Tools such as the KJ and Elito Methods may be useful in synthesizing information collected.

SHADOWING

Example Shadow users of similar spaces you are designing.

How To

1. Identify stakeholders you would like to shadow.
2. Secure permissions as needed.
3. Document observations.

FOCUS GROUPS

Provides a broad view of how a small group of stakeholders see an issue or use a space. Focus groups allow you to hear everyone's voice and provide insight into themes, patterns, and trends. It may be useful to work with the same focus group over time or with multiple focus groups depending on the project scope.

Stakeholders Users, organized groups

Level of Engagement 3 ⟷ 4

Expected Outcome Gather information, give legitimacy to groups with specific views, and provide a forum for constructive conversation.

Pairings Synthesis tools may help refine information collected. Investigate further with one-on-one interviews.

More Info Design Kit:
http://www.designkit.org/methods/20
Universal Methods of Design, pg. 92

FOCUS GROUPS

Example Used often in interface and product design.

How To
1. Identify the group.
2. Convene the group on neutral ground.
3. Prepare a strategy to engage quieter group members.
4. Have a designated facilitator ask questions and guide discussion.
5. Have note takers capturing discussions. Pay special attention to the logic participants use, the stories they tell, and how they describe their experiences.

Stakeholders

Level of Engagement

Expected Outcome

Pairings

More Info

Example

How To

Stakeholders

**Level of
Engagement**

**Expected
Outcome**

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