



HUMAN CENTERED DESIGN

FIELD GUIDE

2ND EDITION

FIELD CHECKLIST

This Field Guide brings together the tools you'll need to lead successful group meetings and individual interviews.

Included in the Guide are exercises to complete before going into the field, tips for successful interviews, and a place to capture highlights from the interviews while they are still fresh in your mind.

» COMPLETE THE FOLLOWING:

- Worksheet: Recruiting Plan
- Worksheet: Research Schedule
- Worksheet: Identity, Power & Politics

» FAMILIARIZE YOURSELF WITH:

- Tips: Observation
- Tips: Conversation
- Tips: Discussion Guide
- Tips: Documentation
- Exercise: Community Characters
- Exercise: Resource Flow
- Exercise: Factors & Forces
- Exercise: Journey Of An Offering
- Exercise: Aspirations

» BRING WITH YOU:

- Camera
- Video Camera (optional)
- Pens & Markers
- Gifts for participants (optional)

» TO DEBRIEF, FILL OUT:

- Highlights
- Notes

RECRUITING PLAN

Recruiting the right participants is critical to success. Remember to recruit extremes and balance ethnic, class, and gender considerations.

Keeping track of the people you speak with can also be challenging. Use the worksheets to help keep a list of who you have spoken with and who you plan to speak with next.



For female participants, interviewers may need permission from male family members or community leaders.

» GROUP MEETING LOCATIONS

Example Group Meeting Location:
 Village 1: Ansoung Commune of Kg Trabek District
 Unique Characteristic: Seasonal Flooding

Village 1: _____

Unique Characteristic: _____

Village 2: _____

Unique Characteristic: _____

Village 3: _____

Unique Characteristic: _____

» INDIVIDUAL PARTICIPANT TYPES:

Example Participant Types:
 Successful Villager
 Person struggling to survive
 Large family with relatives in the city
 Female headed household

Participant types:

RESEARCH SCHEDULE

There are many things to juggle when you're out in the field. The more you plan ahead of time, the more smoothly the process will go. However, be prepared to adjust quickly; for example, you might need to increase the number of facilitators if you show up and the group is twice as large as expected.

» DATE	» ACTIVITY	» TEAM LEADS	» DETAILS
Example: 7 June / 8:00 - 10:00 (including setup)	Village 1 Group Meeting	2 Teams: Asha & Anand	2 groups of 10 participants / mixed gender

IDENTITY, POWER & POLITICS

Research with communities and individuals often involves issues of identity, power, and politics. To help think through these issues, answer the following questions:

» RACE & ETHNICITY

Are ethnic, racial, and/or tribal distinctions important in this community?

How might these issues affect the research and design challenge?

How will you deal with these issues in research?

» GENDER

Do women and men have unequal status in this context?

What activities within and outside the household do men and women do differently?

How might gender inequality affect the research and design challenge?

How will you deal with these issues in research?

» CLASS & INCOME

Are communities divided along class or income lines?

How might income and class divisions affect the research and design challenge?

How will you deal with these issues in research?

» THE DISEMPOWERED

Are any groups of people disempowered in this community (i.e. landless, children, disabled, etc)?

How might the perspectives of these groups affect the research and design challenge?

How might the research take into account the perspectives of the disempowered?

» THE ELITE

Who are the political or economic elites in this context?

How might their influence affect the research or design challenge?

How will you mitigate the influence of elites in research?

OBSERVATION

The things people say and what they actually do are often not the same thing. In-context observations are often useful for getting beyond what people say to understand what people do and feel.

In-context means being with people in their real settings, doing the things they normally do.

The stories that emerge from these encounters in the field show us new opportunities and inspire new solutions.

It is often very powerful to experience a process first-hand. Whenever possible, put yourself in the shoes of a customer and experience their activities directly.

For example:

- » Work with a farmer for a day in his or her field.
- » Live with a family for a few days.
- » Go with a sick person to seek medical care.



TIP

During observations, look for:

- » **Things that prompt shifts in behavior**
- » **Work-arounds and adaptations**
- » **Body language**
- » **Things people care about**
- » **Anything that surprises you**
- » **Anything that questions your assumptions about how the world works**
- » **Anything that you find “irrational”**

CONVERSATION

The in-context interview is a lengthy conversation (often 1.5+ hours) that explores the values, desires, frustrations, and aspirations of your interviewee. The conversation should:

Be long enough to make your interviewee feel like they are really being heard, and that allows them to go past their rehearsed “script”

Be focused enough so that you feel you are getting useful information to address your design challenge

Be general enough so that it feels like an open-ended conversation that can lead to unexpected insights

Generate a true back-and-forth so that it feels like a conversation and puts the interviewee at ease

Make the interviewee feel that the conversation is about them, not about the product, service, or organization you are representing



TIP

- » Ask open-ended questions, or questions that require a longer explanation than one word.
- » Listen and be attentive, even if taking notes at the same time
- » Have a dynamic conversation, don't interview from a script
- » Allow long pauses
- » Ask naïve questions (even if you're the expert) to hear the explanation in their words
- » Don't correct people; understand their perceptions and why they may perceive things differently than you
- » Remember: the participant is the expert!

DISCUSSION GUIDE FOR FARMING

» OPEN SPECIFIC

Start the conversation with simple and specific questions your participants will feel comfortable answering. You may want to begin with a compliment and short introduction and then move on to questions about the participant's current life. This is your chance to build rapport with the person you are interviewing and to ask basic questions that will help you understand their overall life situation, the make-up of their household, and their farming activities.

» GO BROAD

Prompt bigger more general topics that ask the participant to think about life, business, and the future. Ask about their hopes and dreams for the future, as well as the barriers to achieving their goals. This is the chance to understand how they want to change their lives, what is standing in their way, and what they perceive the real paths to a better future might be.

» PROBE DEEP

Ask deeper questions about the design challenge at hand & prompt with 'what if' scenarios. The last half of the interview is the time to ask questions that are focused on your design challenge. Make sure to ask concrete questions of the participant that will help you define what is and is not desirable to this person.

» OPEN SPECIFIC

1. Farm demographics
How many people live on your farm?
Can you give me a tour of your farm?
2. Stories of recent past
How did this year's harvest compare to last year's?
Do you expect next year to be better or worse?
3. What do different members of the household do?
What activities do women & men do differently?

» GO BROAD

4. Aspirations for the future - use Aspiration Cards
Choose 3 cards that represent what you hope for your future.
What did you choose and why?
5. System-based questions - use Factors & Forces worksheet
The innermost circle represents your household.
The middle circle your community.
The outermost circle the nation and the world.
What factors in each of these circles affect your prosperity?
6. Household (or Community) Resource Flow -- use the worksheets to illustrate or write household revenues and expenditures.
7. Who do you turn to for information on farming and marketing your products? In your community? Outside the community?
Who do you trust the most? Who gives you the best information?

» PROBE DEEP

8. Questions specific to innovation challenge (i.e Perceptions of Credit and Risk) Under what circumstances do people in your community take credit or loans? Have you ever taken credit? What for or why not?
What was a recent, significant purchase? - Journey of an Offering Worksheet
If you were offered a loan of \$500, what would you do?
9. Sacrificial Concepts
Create 1 possible future product, service or agreement options for them to react to. It's good to be provocative.

DISCUSSION GUIDE FOR HEALTH

» OPEN SPECIFIC

Start the conversation with simple and specific questions your participants will feel comfortable answering. You may want to begin with a compliment and short introduction and then move on to questions about the participant's current life. This is your chance to build rapport with the person you are interviewing and to ask basic questions that will help you understand their overall life situation, the make-up of their household, and their farming activities.

» GO BROAD

Prompt bigger more general topics that ask the participant to think about life, business, and the future. Ask about their hopes and dreams for the future, as well as the barriers to achieving their goals. This is the chance to understand how they want to change their lives, what is standing in their way, and what they perceive the real paths to a better future might be.

» PROBE DEEP

Ask deeper questions about the design challenge at hand & prompt with 'what if' scenarios. The last half of the interview is the time to ask questions that are focused on your design challenge. Make sure to ask concrete questions of the participant that will help you define what is and is not desirable to this person.

EXAMPLE INTERVIEW GUIDE

» OPEN SPECIFIC

1. Home Setup
How many people live in your home?
What do different members of your household do?
2. Home activities
What is a day like in your home?
What kind of things do adults and children do differently? Women and men?
3. Context, values
How is life for you/your family/your community the same or different than it was last year?

» GO BROAD

4. Aspirations for the future – use Aspiration cards
Choose 3 cards that represent what you hope for your future.
What did you choose and why?
5. Individual (or Household) Health Flow – use the worksheet
Use the worksheet to illustrate or write what contributes to or takes away from that person's health.
6. System-based questions – use Factors and Forces worksheet
The innermost circle represents your household.
The middle circle your community.
The outer circle, the nation and the world.
What factors in each of these circles affect your health?
7. Who is the healthiest person/household in your community? Why?
Who is the least healthy? What can/should be done for them to be more healthy? When you have questions about health, how do you find the answer? Where do you find the best information?

» PROBE DEEP

8. Questions specific to the innovation challenge, e.g. perceptions of vaccines, choices around cost/value of doctor visits for different ailments.
Has anyone in your household needed to see a doctor recently?
9. Sacrificial concepts
Create possible future product, service, or agreement options for them to react to. Use your assumptions and questions to generate sacrificial ideas. Keep it simple; the more it's just about one idea the better.

DOCUMENTATION

Capture everything you see, hear, smell, feel, and taste during the observation. It's important to capture the experience to bring back with you to the office and to share with team members who were not present.

Document the conversation with notes, photos, and/or recordings. In addition to your Field Guide, bring a digital camera and, if possible, a video camera or voice recorder.

Write down first interpretations of what's going on at the moment it happened; this critical information is often lost and difficult to remember later.

Immediately after the interview (or within 24 hours), jot down immediate big picture takeaways from the conversation using the Highlights page. The longer you wait, the more details and specifics may be lost.

It's often helpful to work with a partner—one person responsible for leading the interview while the other is capturing and documenting. Compare the experiences, perceptions, and interpretations of the two people, and feel free to switch roles every day or so.



TIP

When documenting capture:

- » **Personal details (family size, acreage, crops, diet, location)**
- » **Direct, unfiltered quotes (and your immediate interpretations)**
- » **The expressions and feelings of the person, not just their words**
- » **Ways they interacted with others and things in the environment**
- » **Things they care about most**
- » **Moments or things that elicited emotional responses, positive or negative**

COMMUNITY CHARACTERS

This exercise is good for:

- » Group interviews
- » Warming up the participants
- » Identifying individuals you want to follow up with after the session (often the eyes, ears or mouth of the community)

» **STEP 1:**

Begin by saying you'd like to get to know the community better by understanding the different roles people in the community play.

» **STEP 2:**

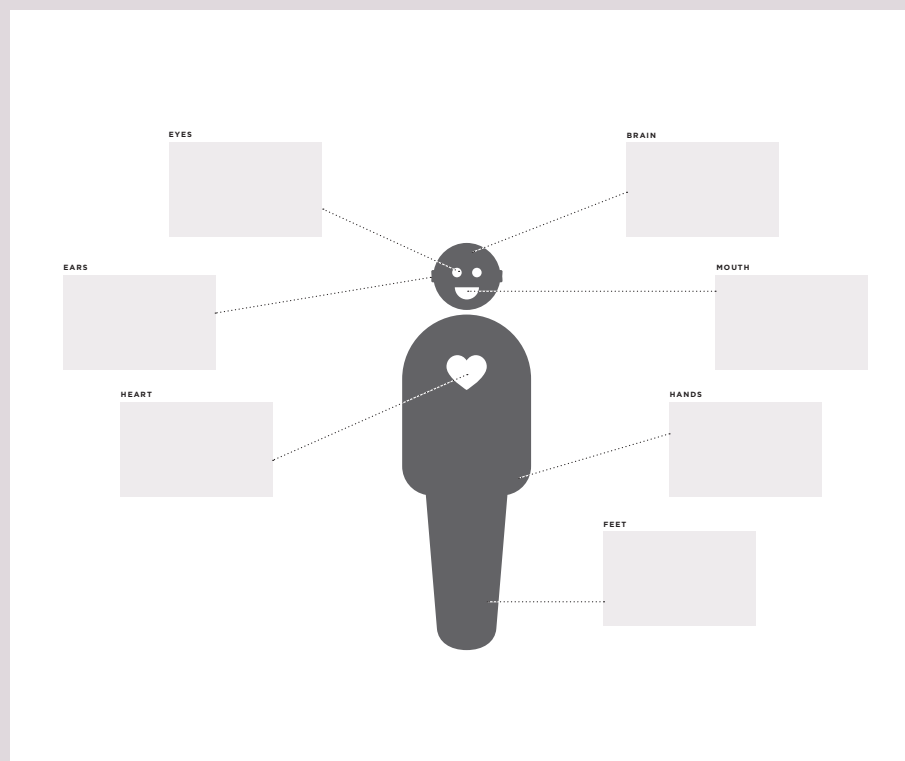
Ask the group to identify a specific person who represents the **eyes & ears** of the community. You might need to qualify this with a definition (i.e. someone who is always looking outward beyond the community for new ideas to bring into the community). People may be reluctant to call out individuals, so remind them that there are many who play this role and you are simply looking for one example.

» **STEP 3:**

Ask the group to explain why this person is the **eyes & ears**. If possible, ask for a specific story that happened in the last month when the person played that role. Take notes in the appropriate box.

» **STEP 4:**

Repeat for **mouth, brain, heart** or whichever feel most relevant.



Community Characters Worksheet



This activity works differently with mixed-gender, men-only or a women-only group.

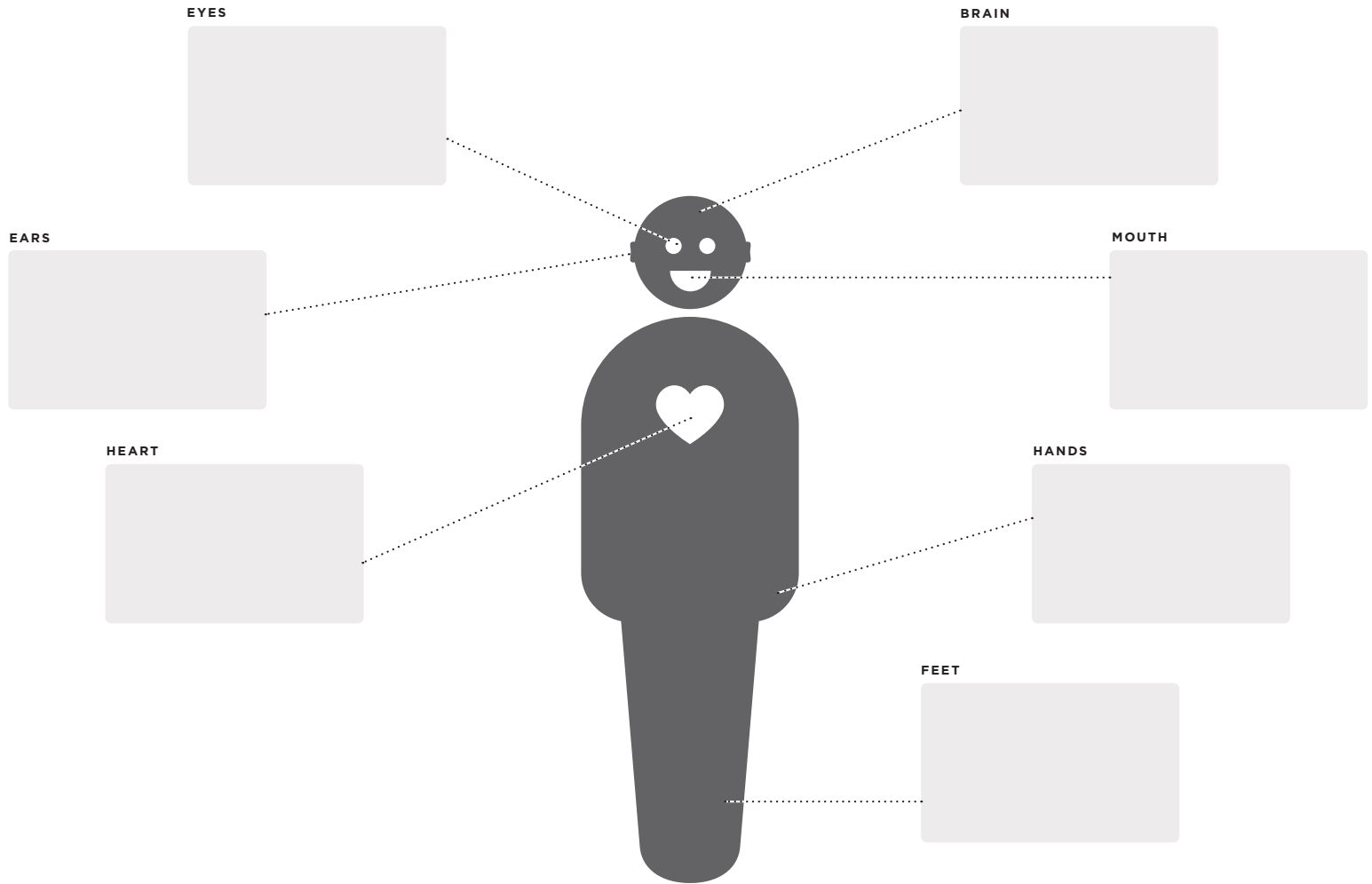
If men are dominating in a mixed group, you may want to ask only the women to identify someone for a given role.

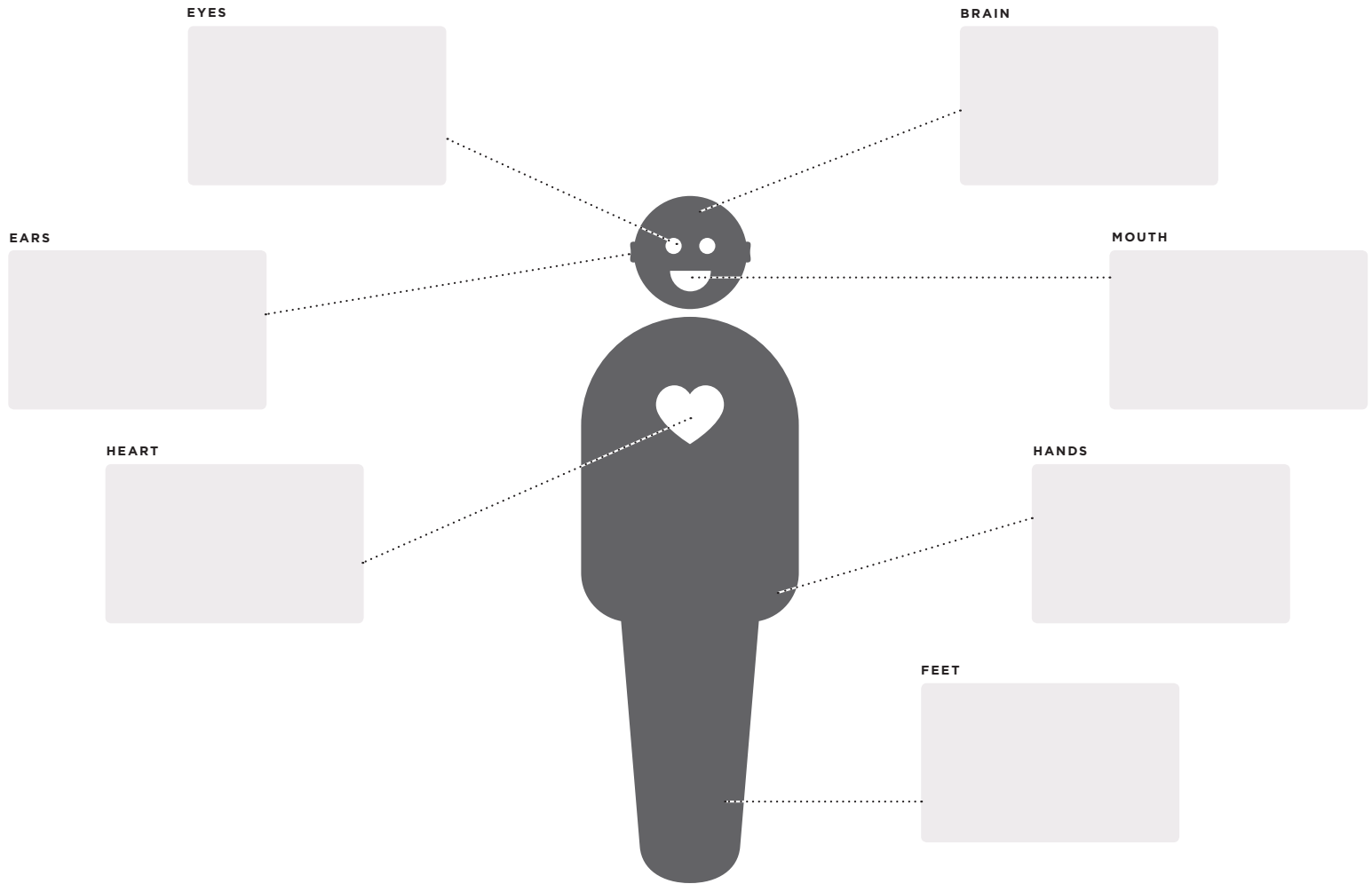
TIP

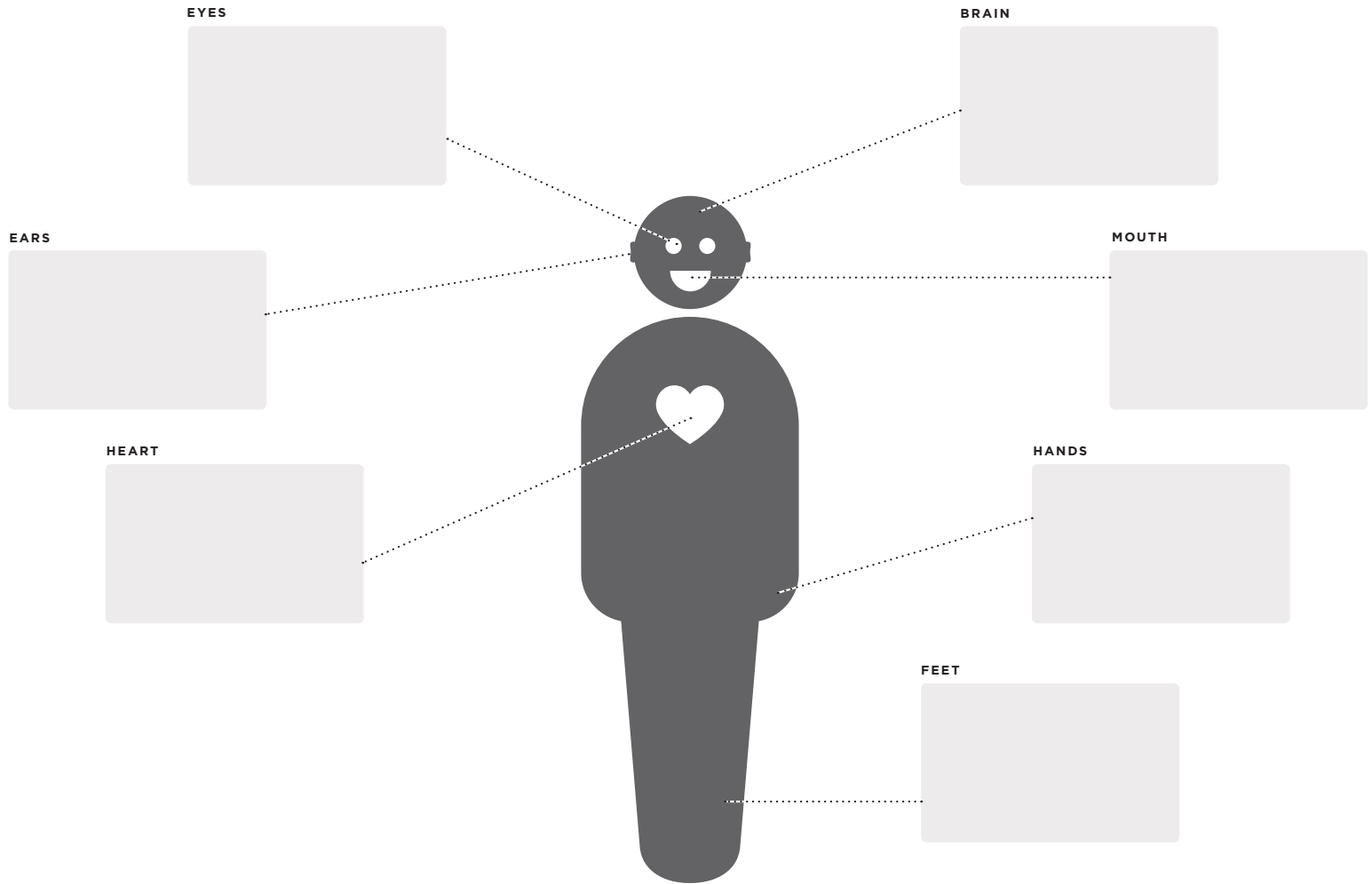


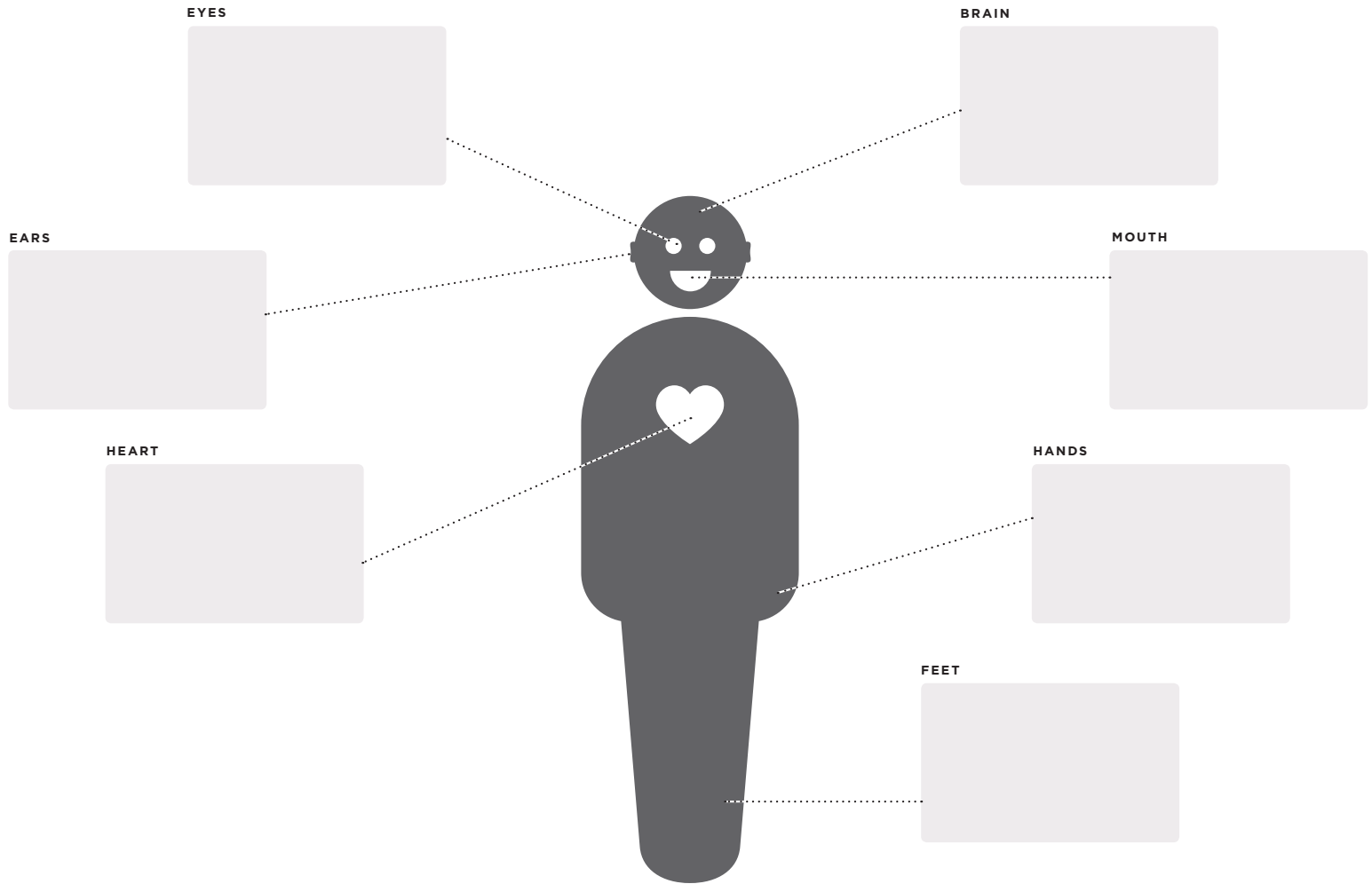
This can sometimes be a highly political activity, especially if there are community or government leaders present.

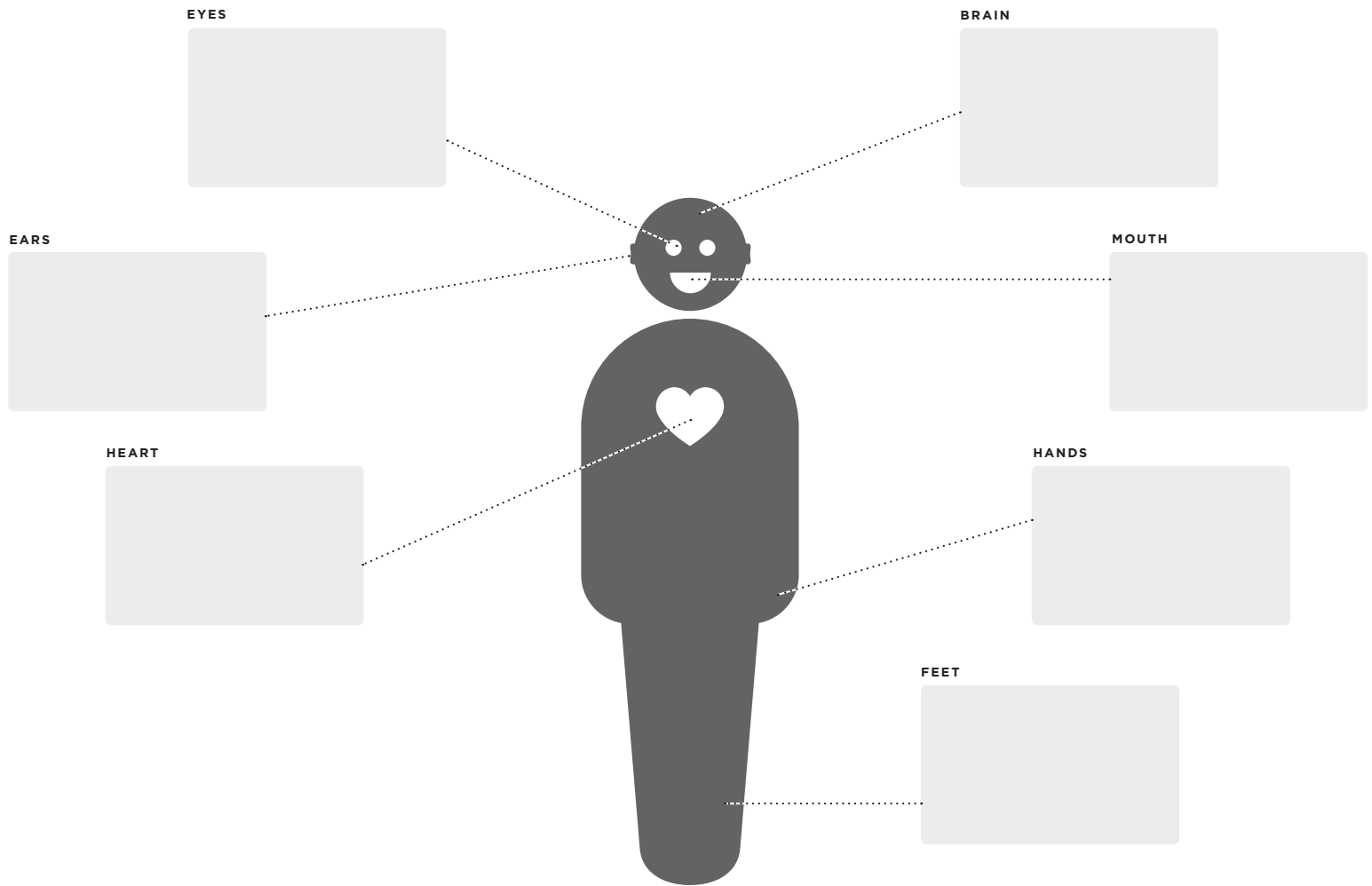
It's fine to abandon the exercise if the political environment is making this activity difficult.











RESOURCE FLOW

This exercise is good for:

- » Group interviews
- » Individual interviews

» **FOR INDIVIDUAL INTERVIEWS:**

Use Worksheet No. 2

» **STEP 1:**

Ask if your participant or one of their children likes to draw. If not, it's fine for the participant or the interview leader to write.

» **STEP 2:**

Ask the participant to list everything that brings money INTO the household on the left side of the page. (This might include various crops, livestock, labor, etc)

» **STEP 3:**

Ask the participant to list everything that takes money OUT of the household on the right side of the page. (This might include seed, technology, education, medical expenses, etc)

» **STEP 4:**

Ask the participant to circle the item on the page that provides the largest income and the largest cost. Alternatively, you can ask them to rank order all the items listed.

» **STEP 5:**

Ask which items listed are controlled by the women and which are controlled by the men. Note this information down on the worksheet.

» **FOR GROUP INTERVIEWS:**

Use Worksheet No. 2A

» **STEP 1:**

Ask if anyone in the group likes to draw (often a teenager will volunteer). If no one volunteers, the interviewer can make notes based on what people say.

» **STEP 2:**

If someone volunteered to draw, ask that person to work with the group to draw representations of everything that bring money INTO the community on the left side of the page. (These means of income might include various crops, livestock, labor, etc)

» **STEP 3:**

Next, ask them to draw or say everything that takes money OUT of the community on the right side of the page. (These expenditures might include seed inputs, water technology, education, medical expenses, etc)

» **STEP 4:**

Ask them to circle the items on the page that provide the largest income and the largest cost.

» **STEP 5:**

If desired, ask them to rank all the items from most money to least money.



Resource Flow Worksheets



Different cultures will often determine whether the man or the woman is in charge of decision-making and finances in the home. If one person is dominating the conversation, invite the input of the other. Sometimes it is helpful for the design team to split up into two groups—one to interview the husband and one to interview the wife. This enables you to cross-check and compare stories after the interview.























FACTORS & FORCES

This exercise is good for:

- » Group Interviews
- » Individual Interviews
- » Broadening the conversation beyond one's immediate individual needs and circumstances
- » Inviting conflicting opinions from different members of community for rich dialogue

» FOR GROUP INTERVIEWS:

» STEP 1:

Tell the group that you want to understand all the factors and forces that affect their prosperity.

Describe the diagram:

- » The innermost circle is the community
- » The second circle is the nation
- » The third circle is the world

» STEP 2:

Ask what factors in the community, in the nation and in the world BRING prosperity to the community (i.e. health, work ethic, children in school, etc). Start with the community level and build outwards to the world. Take notes in the appropriate circles.

» STEP 3:

Ask what factors in the world, in the nation and in the community take prosperity AWAY from the community (i.e. violence, cost of fuel, legal status, property ownership, climate change, globalization, etc). Take notes in the appropriate circles.

» FOR INDIVIDUAL INTERVIEWS:

» STEP 1:

Tell your participant that you want to understand all the factors and forces that affect their prosperity.

Describe the diagram:

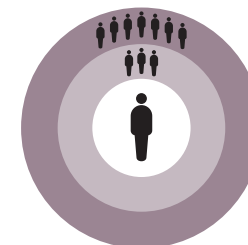
- » The innermost circle is the person and his/her family
- » The second circle is their community and the world

» STEP 2:

Ask what factors in the family, in the community and in the nation BRING prosperity to their family. Start with the household level and build outwards to the nation. Take notes in the appropriate circles.

» STEP 3:

Ask what factors in the nation, in the community and in the household take prosperity AWAY from their family. Take notes in the appropriate circles.



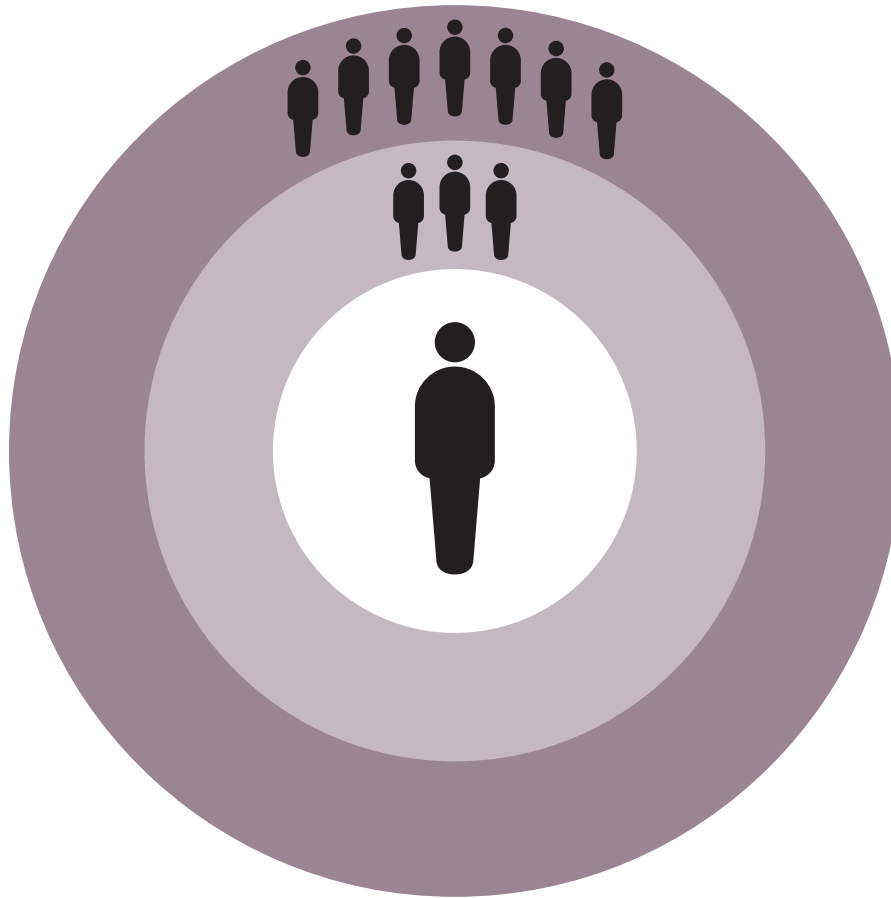
Factors & Forces Worksheet

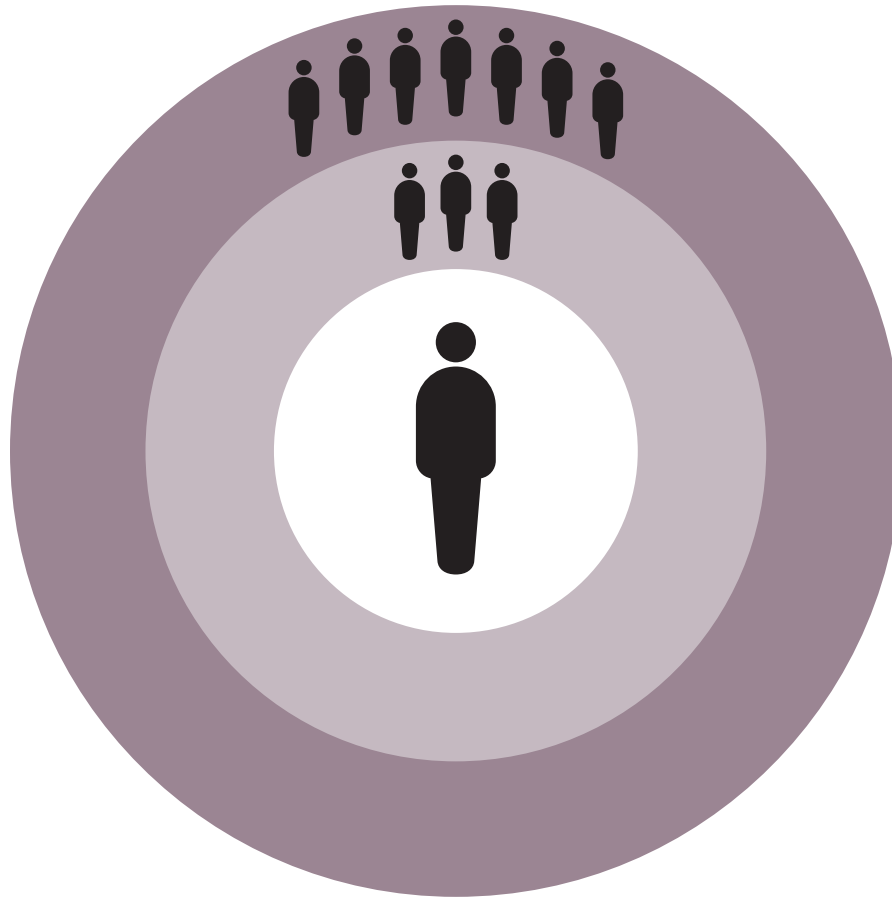


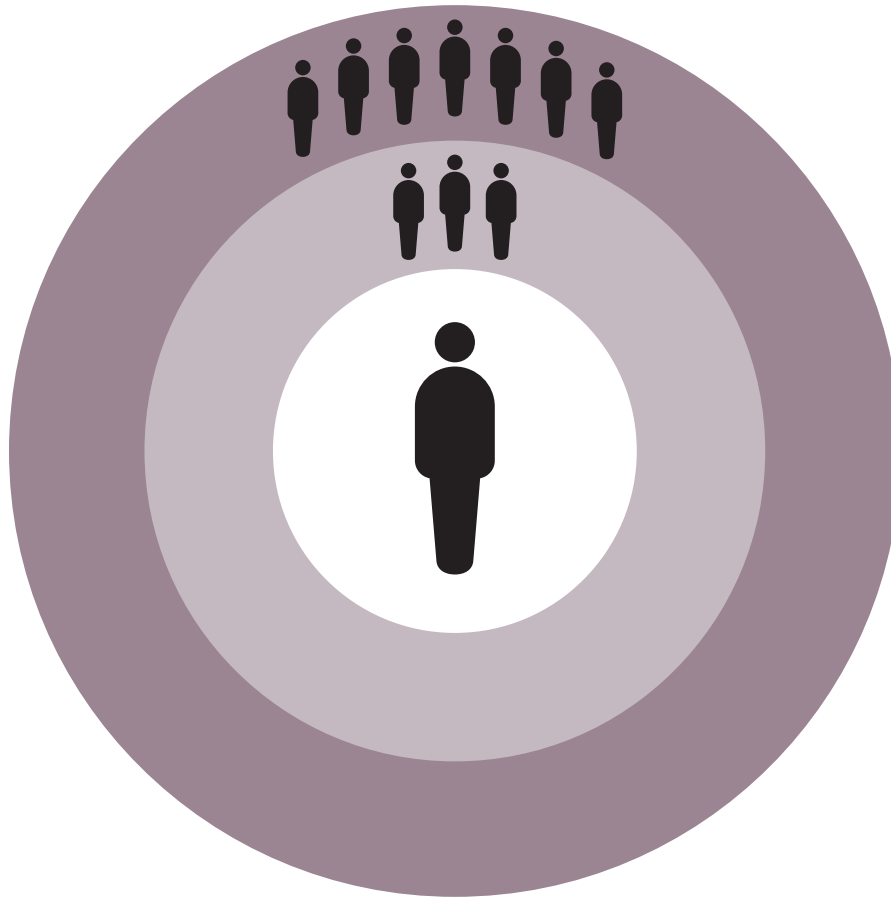
GENDER

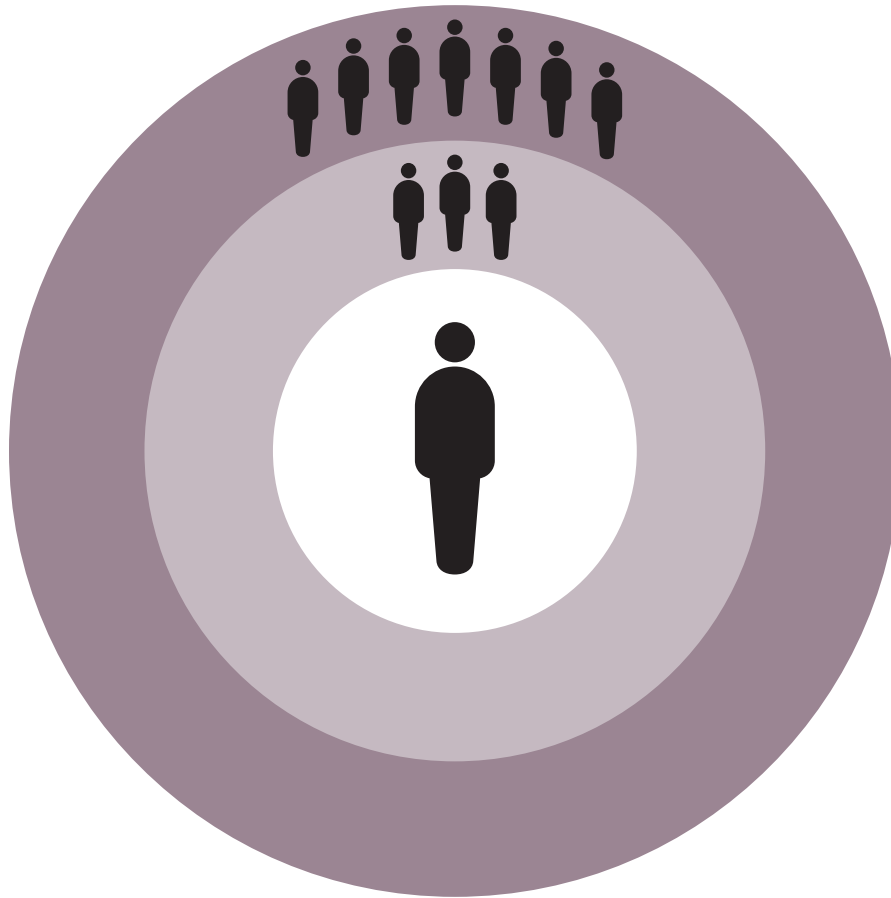
In mixed-gender group sessions, the women will stay quiet in some cultures though they have many ideas to share. When asking for responses to these questions, you might say "I'd like five people to respond to this question" and point to five people who represent a mix of genders.

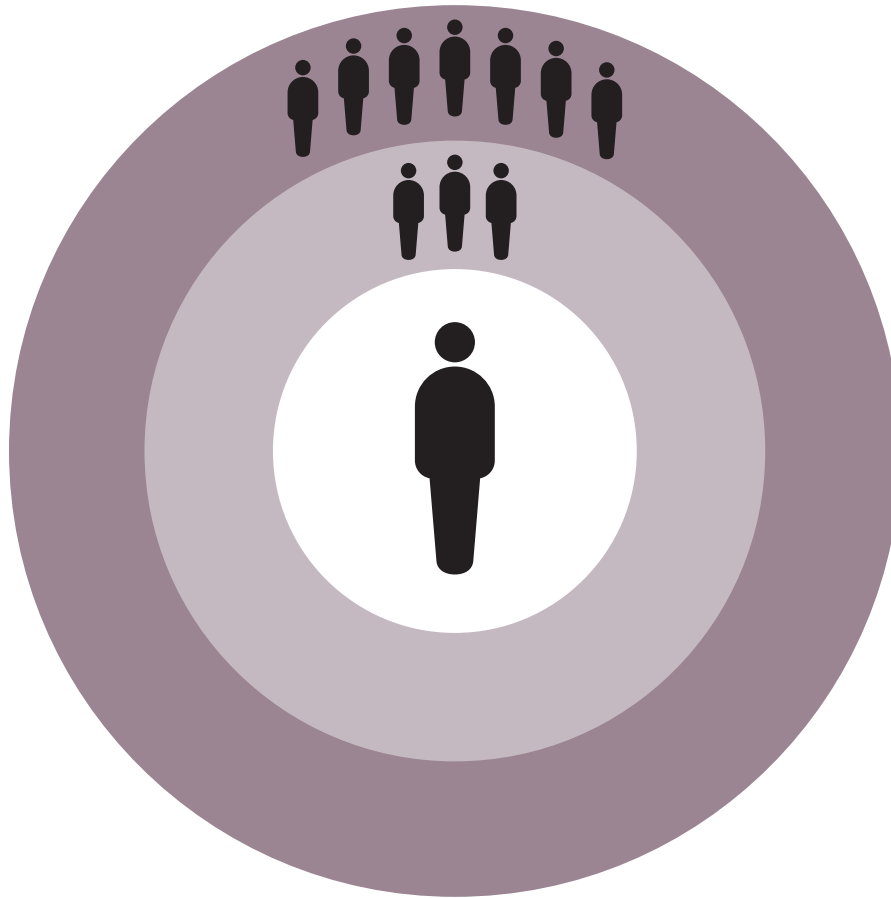
Near the end of the exercise, ask what brings prosperity to the women of the community or household. Note if these factors are different.











JOURNEY OF AN OFFERING

This exercise is good for:

- » Individual interviews
- » Understanding what a person considers when purchasing a new product or service for the first time

» **STEP 1:**

Tell the participant that you want to know what they think about when deciding to make a purchase.

» **STEP 2:**

Ask the participant to think of the last time they bought a new thing or service.

» **STEP 3:**

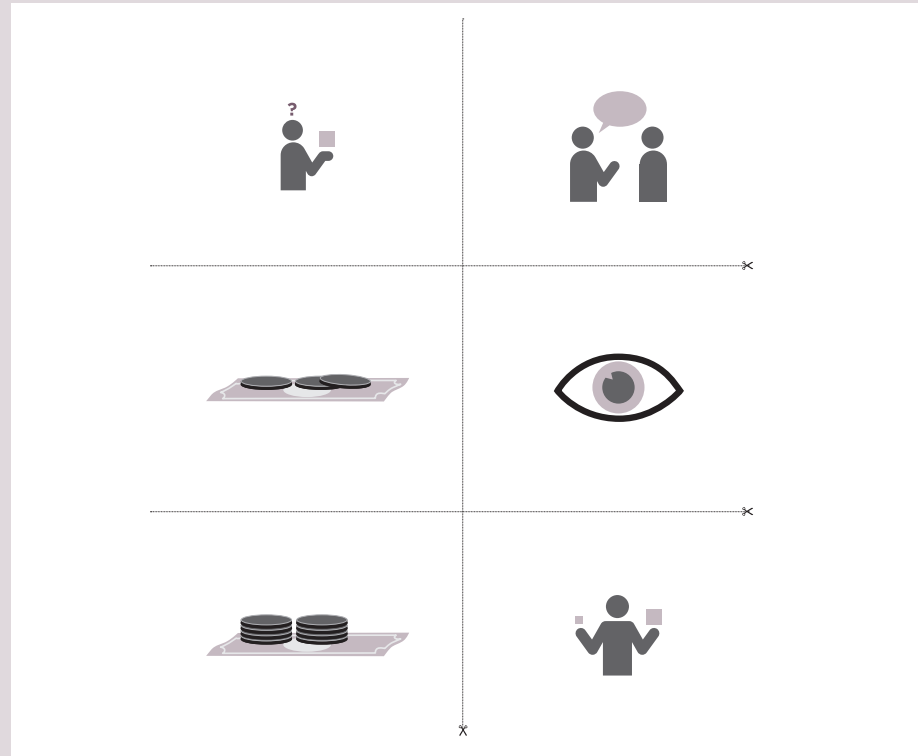
Show the participant the cards: talk, look, compare, try, money. Ask them to tell you how they did these things when making their purchase.

Talk: Did you talk to people about the product or service? Who and why?

What were your questions? Did you talk to anyone about it after you made the purchase?

Look: Where did you see this product or service? What did you think at the time?

Compare: What other options did you consider? What else did you compare this to?



Journey of an Offering Worksheet



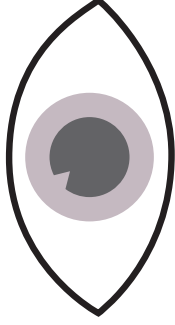
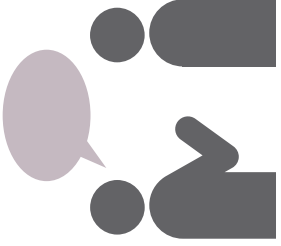
GENDER

Different cultures will often determine whether the man or the woman is in charge of decision-making and finances in the home. If the man is the dominant voice in the conversation, listen to his explanation first, then ask for the woman to describe the journey from her perspective.

Sometimes it is helpful for the design team to split up into two groups—one to interview the husband and one to interview the wife. This enables you to cross-check and compare stories after the interview.



This exercise can also be used to discuss a potential product or service.



TRY

COMPARE

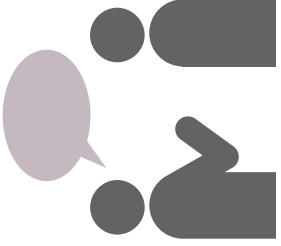
SAVE

LOOK AT MARKET

GET CREDIT

TALK





TRY

COMPARE

SAVE

LOOK AT MARKET

GET CREDIT

TALK



ASPIRATIONS EXERCISE

This exercise is good for:

- » Engaging participants in group and individual interviews
- » Getting people to talk about what they desire for the future
- » Making people feel comfortable talking about broader issues

» **STEP 1:**

Start by saying that you want to know what the participants hope for and desire for the future.

» **STEP 2:**

Tell the participants that you have a set of cards with various pictures on them.

» **STEP 3:**

Ask the participants to look through the cards and choose the three pictures that represent what they hope for in the future.

» **STEP 4:**

If a participant asks, “what is this?” to a picture, tell them that it is anything they think it is, or if the picture doesn’t make sense to them, skip it and move on.

» **STEP 5:**

After the participants have chosen their pictures, ask “Tell me what you chose” and have them describe the picture. Then ask: “Why did you choose this?”. Document both the pictures and explanations.



Journey of an Offering Worksheet



TIP #1

Have the participants explain what the picture is in their own words, do not interpret the pictures for them. Often people will choose something that represents one thing to them, but may represent something different to the researcher.



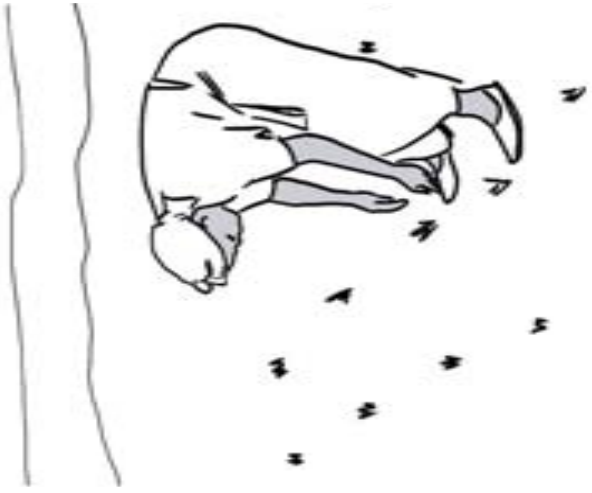
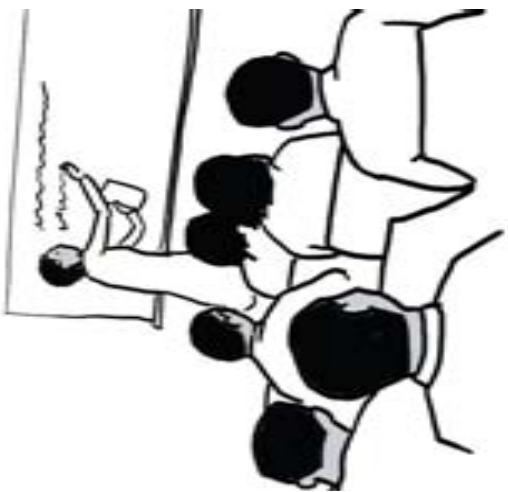
TIP #2

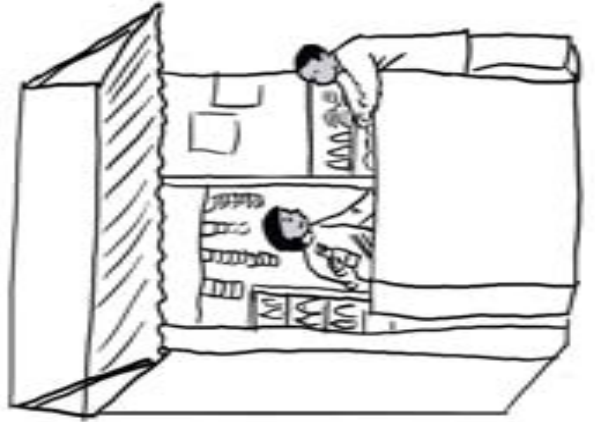
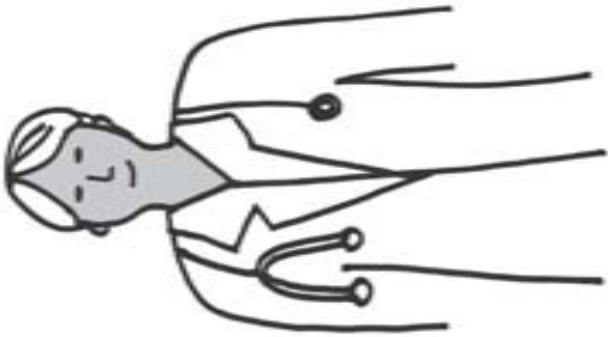
If appropriate, you can ask people to choose the three pictures that represent what they fear in the future after they are finished with the first exercise.

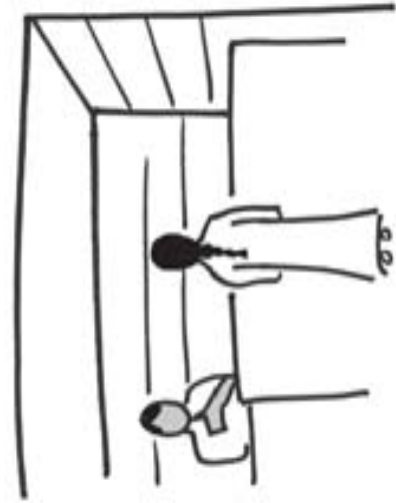
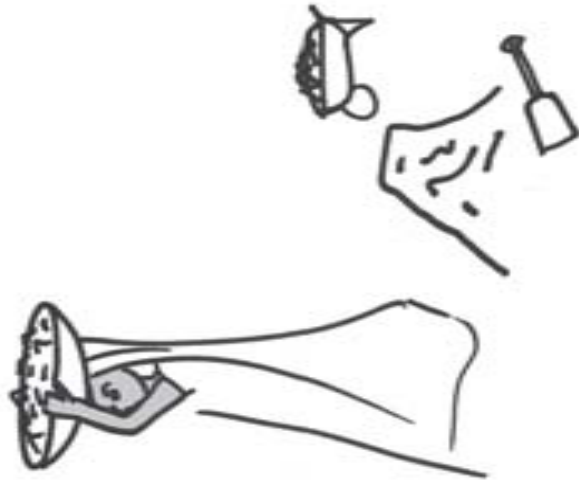


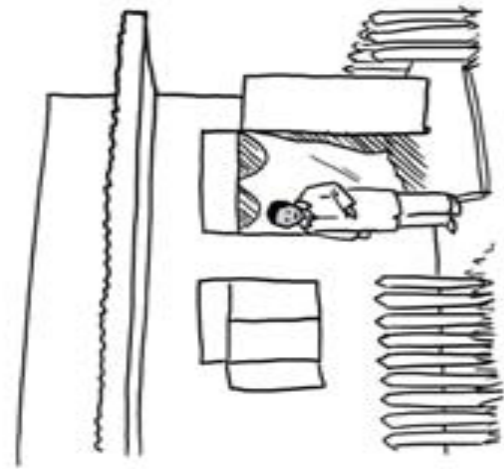
TRY

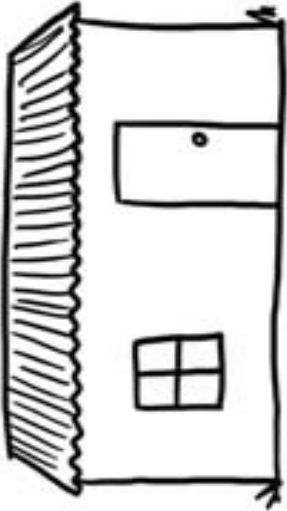
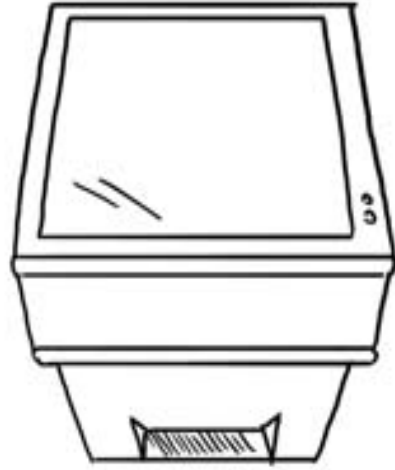
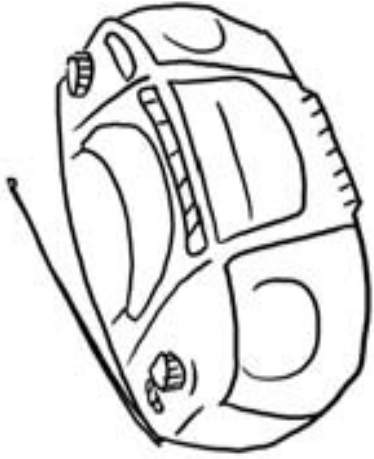
You may find that you need different pictures for your design challenge or the community you are working with. With the help of the internet, find some pictures and print them out to add to this group of pictures.

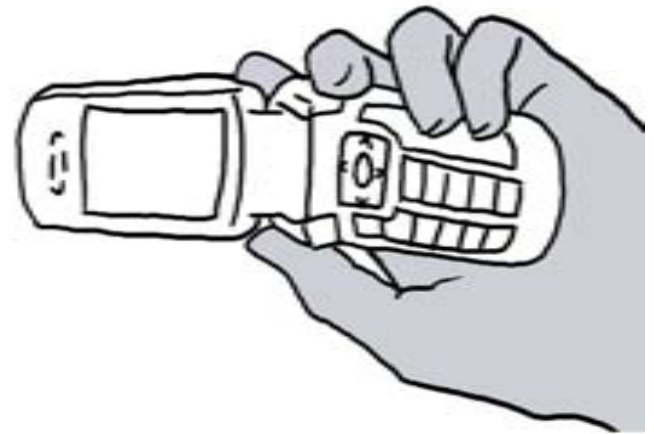
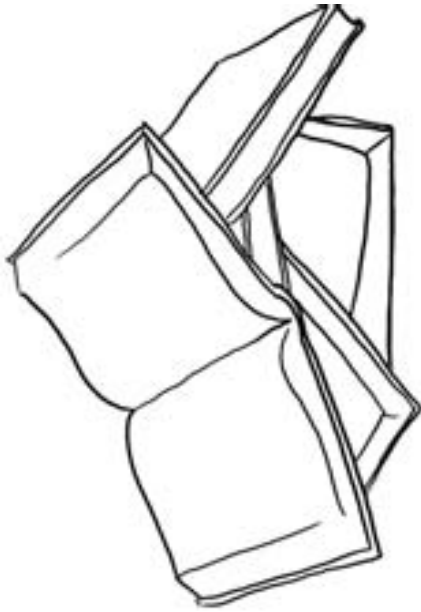


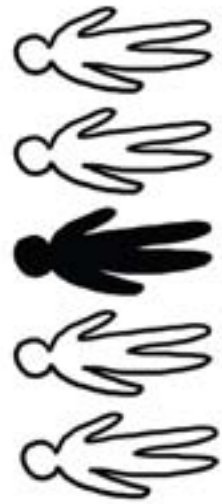
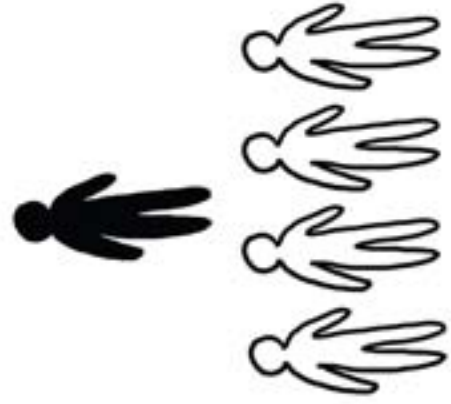
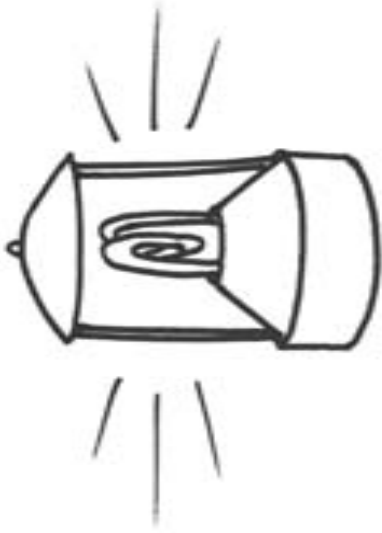


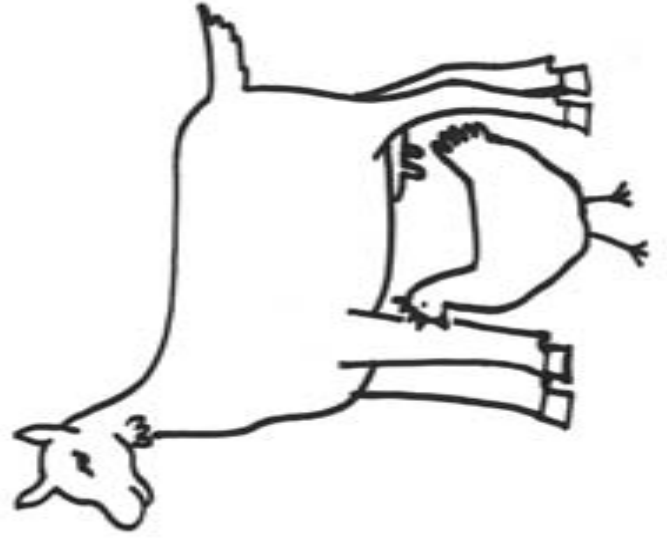












It's a good idea to catalog the details of your research while it is still fresh — a good rule is to reflect upon what you learned at the end of each day in the field. You can complete this activity during a meal, in the car, or before bed.

A sample template is provided here to prompt the capture of the highlights.

NOTES:
HIGHLIGHTS

» DATE: _____	» NAME: _____	» TYPE OF ACTIVITY: <input type="checkbox"/> Group Interview		<input type="checkbox"/> In-Context Immersion
» LOCATION: _____		<input type="checkbox"/> Individual Interview		
THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU OR MOST MEMORABLE QUOTES:		THINGS THAT MATTER MOST TO THE PARTICIPANT(S):		
MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:		NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:		

WORKSHEET:
HIGHLIGHTS

» DATE:

» NAME:

» TYPE OF ACTIVITY: Group Interview

In-Context Immersion

» LOCATION:

Individual Interview

Other

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:

WORKSHEET:
HIGHLIGHTS

» DATE: » NAME:

» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

» LOCATION:

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:

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 Individual Interview Other

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Other

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THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:

NOTES

Everyone has a unique style of notetaking. Here, we provide a column at the right to capture realtime interpretations, questions to follow up on later in the interview and keywords to help you capture your notes later on. This practice is useful in distinguishing between what you hear and what you interpret and facilitates sharing as you solicit other possible interpretations from your team members.

interpretations, questions to follow up & keywords	NOTES
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NOTES

interpretations,
questions to follow up
& keywords

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questions to follow up
& keywords

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questions to follow up
& keywords

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& keywords

