



HUMAN CENTERED DESIGN

FIELD GUIDE

INTRO:

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
- Worksheet: Group Interview Guide
- Worksheet: Individual Interview Guide

» FAMILIARIZE YOURSELF WITH:

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

» BRING WITH YOU:

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

RECRUITING

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:
Model Farmer
Average Farmer
Poor Farmer
Large family with farming land far from home
Female headed household

Participant types:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

RESEARCH

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**

Example:
7 June / 8:00 - 10:00 (including setup)

» **ACTIVITY**

Village 1 Group Meeting

» **TEAM LEADS**

2 Teams: Kan & Kimsan

» **DETAILS**

2 groups of 10 farmers / mixed gender

TIPS:

OBSERVATION

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

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”**

TIPS:

CONVERSATION

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 farming family for a few days.
- » Help a farmer bring his or her product to market.



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**

TIPS:

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, 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**

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?

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 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.

NOTES

interpretations,
questions to follow up
& key words

NOTES

interpretations,
questions to follow up
& keywords

WORKSHEET:

HIGHLIGHTS

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: Group Interview In-Context Immersion
 Individual Interview

» 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:

Highlight Capture Worksheet



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

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

EXERCISE:

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:**

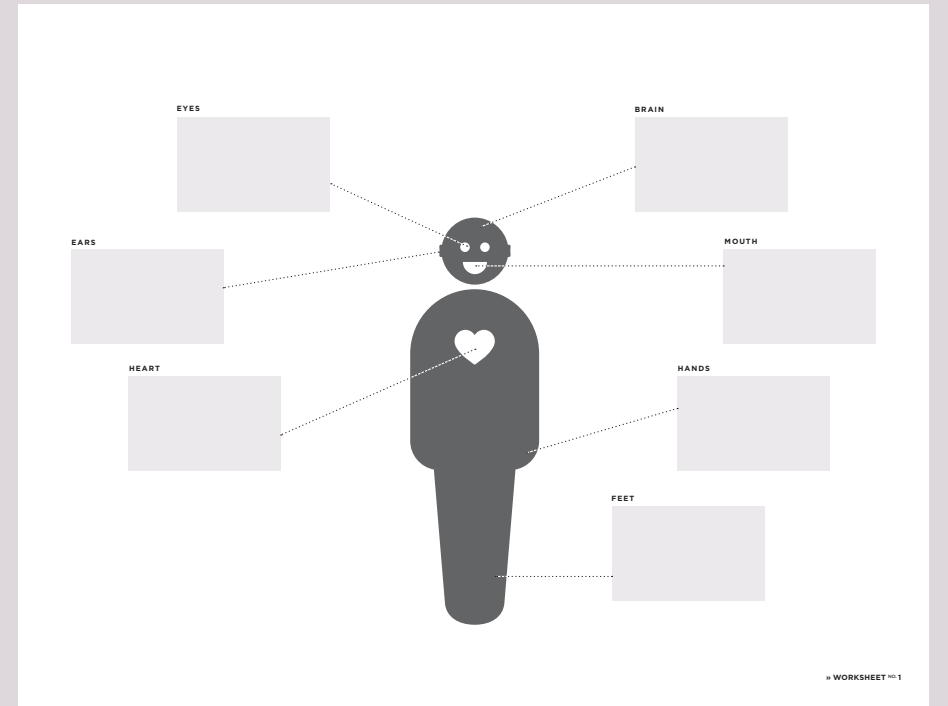
Ask the group to identify a specific person who represents the **eyes & ears** of the community. You might need to qualify this with a definition (i.e. someone who is always looking outward beyond the community for new ideas to bring into the community). People may be reluctant to call out individuals, 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



GENDER

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

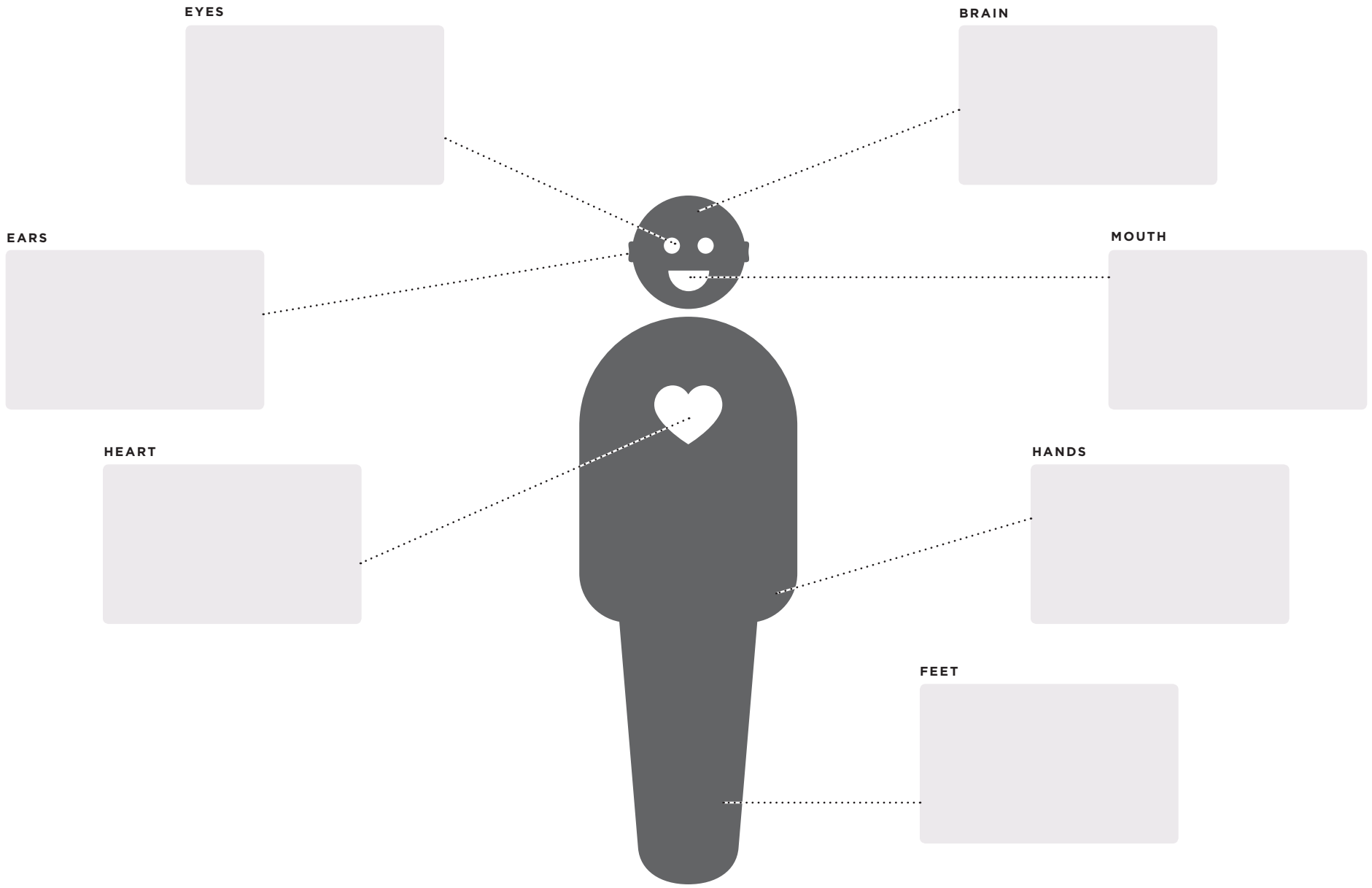
If men are dominating in a mixed group, you may want to ask only the women to identify someone for a given role.



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.



EXERCISE:

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.



» WORKSHEET #02



GENDER

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.



» WORKSHEET #02A

Resource Flow Worksheets





EXERCISE:

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:

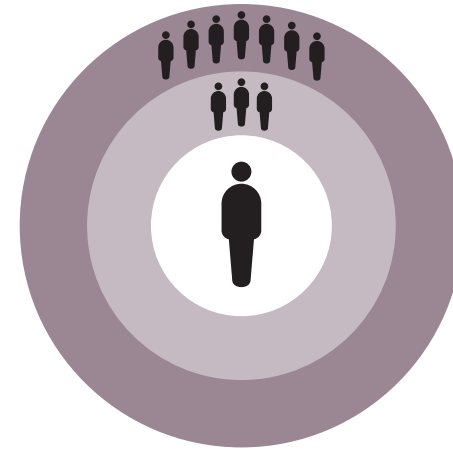
- » The innermost circle is the person and his/her family
- » The second circle is their community
- » The third circle is their country and the world

» **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.



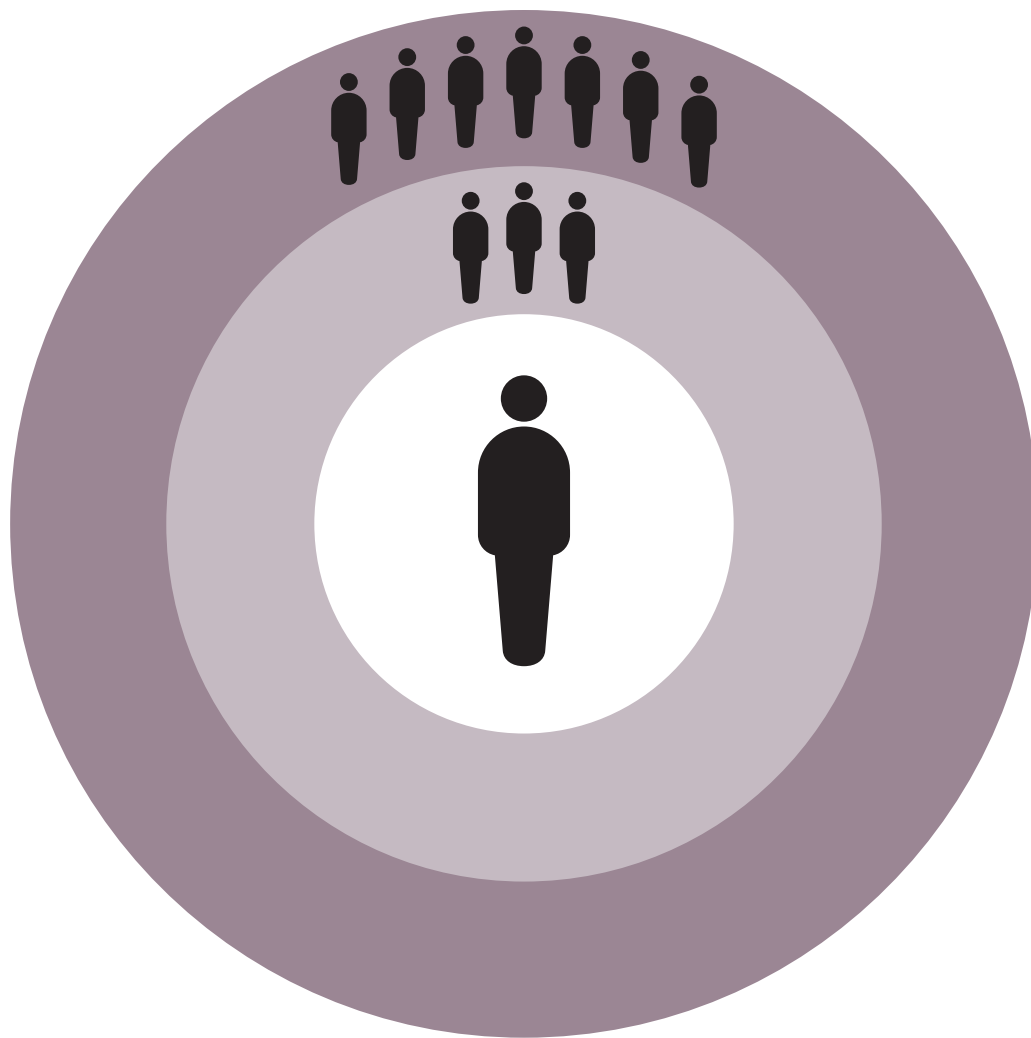
» WORKSHEET 3

Factors & Forces Worksheet



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 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.



EXERCISE:

JOURNEY OF AN OFFERING

This exercise is good for:

- » Individual interviews
- » Understanding the whole process around purchasing a new product or service for the first time.

» **STEP 1:**

Ask the participant how they first heard about the offering (the product or service). Note their response under the first icon.

» **STEP 2:**

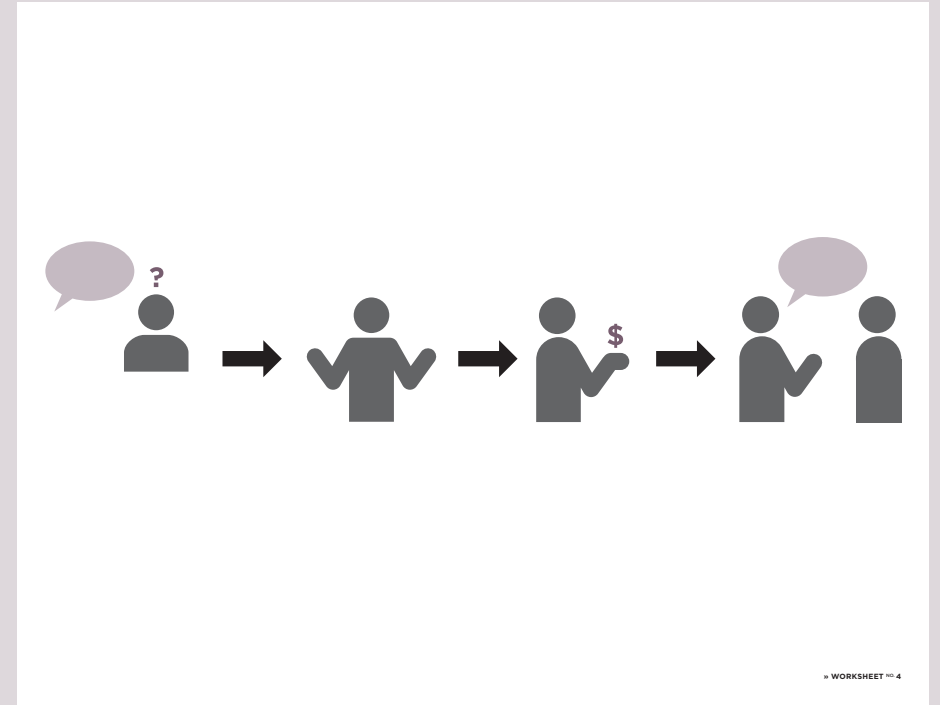
Ask what was the first step they took to learn more about it. What questions did they have about the product or service? Note their response under the second icon.

» **STEP 3:**

Ask what caused them to finally make the decision to purchase. What did they have to forgo or sacrifice in order to purchase it? Note under the third icon.

» **STEP 4:**

Ask what the first use experience was like once they brought it home. Did anything surprise them? Did they wish some aspect were different? Ask if they have told anyone else about it. Note responses under the fourth icon.



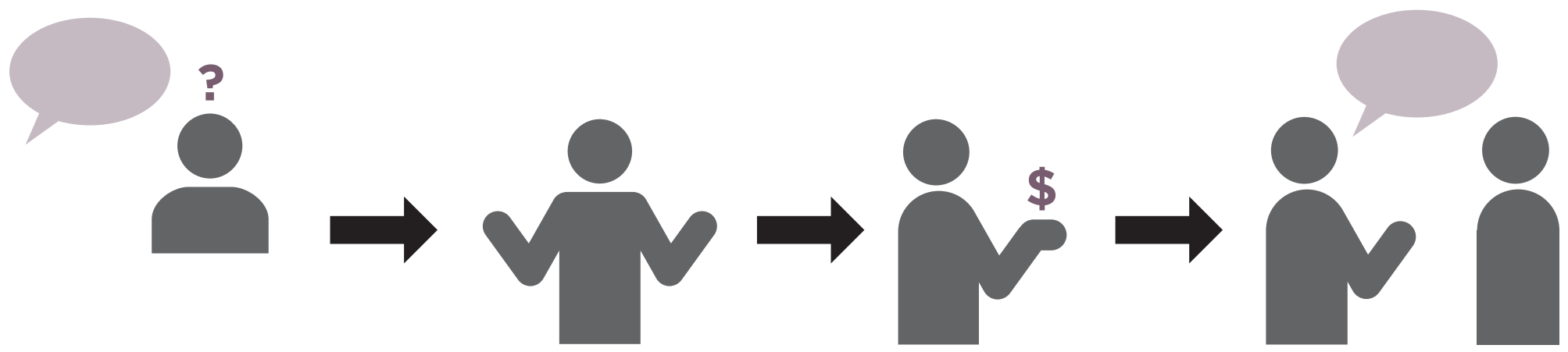
Journey of an Offering Worksheet



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.



INSTRUCTIONS

» 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

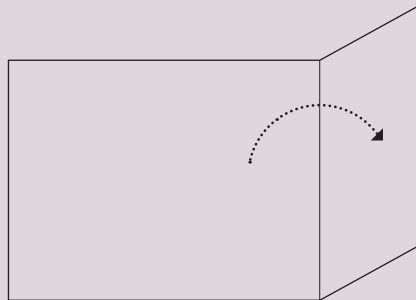
Prompt bigger more general topics that ask the participant to think about life, business, and the future. Ask about their hopes and dreams for the future, as well as the barriers to achieving their goals. This is the chance to understand how they want to change their lives, what is standing in their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

Unfold the flap to the right, and fill out the interview guide before you go out in the field.

When you start your interview, unfold the flap and your interview guide will be visible throughout your session, as you take notes and pull out worksheets for participants.



EXAMPLE INTERVIEW GUIDE

» 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.

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP: