CLEAR Method Cards

A Design Toolkit to aid local authorities in place branding
Eric Thompson 2014

CONTENTS

1.0 ABSTRACT

This design research investigates the development of a co-creative public/community design process facilitated by a bespoke toolkit. The toolkit design is informed by existing method cards and toolkit designs used by large international agencies such as IDEO and Frog Design.

The need for the toolkit was prompted by my experience working on the place branding of Helensville, Matakana Coast & Country and Wellsford. I realised the place brand redesign was not well articulated because there was no early engagement with the local New Zealand community. This research project aimed to design a process that was affordable, flexible, inclusive and replicable, as well as one that provoked discussion around the social and economic impact of place branding in order to respond to the diverse nature of local communities.

After reflecting on the positives and negatives gained from the three local place brands I have been involved with, and considering my research into existing method cards and toolkits, I have designed a series of cards and posters. The proposed toolkit enables the local authority to first focus on the place brand challenge, and then engage with the wider community via a community event, which occurs at an early stage in the design process. This toolkit encourages the local community to be actively involved in the process.

This design-led Master of Design project has progressed using research methods associated with participatory design, co-creation and ethnographic fieldwork. The three methods are similar in that, "There is a recognition that people such as end users hold expertise about their needs and dreams and that their contributions are essential for finding and implementing solutions to problems" (Sanders and Stappers, 2012, p. 30).

2.0 INTRODUCTION

I have been a practicing designer working across a number of disciplines for nineteen years, and my interest in the area of place branding for local regions, or authorities, was piqued when working on a rebrand for the Helensville District in 2010 and 2011. It was a great journey of discovery, especially learning that many of the approaches used in traditional branding (based on products) did not necessary translate to that of place branding. After the Helensville District project was finished, I read in the nationally published *New Zealand Herald*, a piece by travel editor Winston Aldworth, "If a regional rebrand is mishandled then you're not just dealing with a failed re-launch and no improvement fiscally, or emotionally, to the area, you are affecting peoples' lives and their livelihoods. I don't envy the people charged with coming up with town slogans. It's not your standard corporate gig; these are places where people live. Get it wrong, and you've wronged them" (Aldworth, September 18, 2012).

This statement came back to me in November 2012 when I was approached, on the basis of my work for Helensville, to kickstart a stalled Matakana Coast & County place brand project and prepare it for launch for early 2013. The pitfalls and failures I learned along the way with the Helensville project, and Aldworth's comment, prompted me to research more into the field of place branding and the processes used. In my early research of place branding, as opposed to product branding, I was reading Simon Anholt's *Brand New Justice* in which he championed the idea that a region is not a product. While there is huge potential in the enlightened, imaginative and responsible application of product marketing to places, it is certainly not the case that countries, or regions, may be dealt with as if they were soap powder (Anholt, 2005).

> " **If a regional rebrand is mishandled then you're not just dealing with a failed re-launch and no improvement fiscally, or emotionally, to the area, you are affecting peoples' lives and their livelihoods.**
>
> *Winston Aldworth*

Further research into place branding led me to the Kent County Council in England, a community that realised in 2007 they had to create an innovative approach to meeting the increasing challenges of responding to the needs of their residents. They established the Social Innovation Lab for Kent (SILK) which, in conjunction with leading service design consultancy and specialists in customer experiences the Engine Group, developed a project management process and supporting toolkit to kick start and nurture innovative thinking within the council's bureaucracy.

Discovering how the method cards enabled the council staff to better understand the wants and needs of the local community prompted me to focus my research in this area as a starting point for designing my own card-based method. At the same time, after reading in the local news magazine (*Mahurangi Matters*) that local Rodney District town Wellsford was looking to reinvigorate their place brand, I made contact to offer my help (Fig 01). I realised this would be a good opportunity to gain valuable insight and user experience during the early development of the method card's design.

It was during the Wellsford project I devised and implemented what I called a Listening Event. I organised a day-long interaction with the local community in a pop-up shop on the High Street where local residents, and visitors were able to engage with over 300 images I had taken of the town and region. Participants chose an image and posted it on a wall commenting on what it represented to them about the town and region. I discuss the Listening Event further in Chapter 4.3 and describe the entire day in Appendix A.

Fig 01_*Mahurangi Matters* article.

While my project rings true of the quote, "Design Methods are like toothbrushes. Everyone uses them, but no one likes to use someone else's" (Wölfel and Merritt, 2013, p. 1), I would prefer to think of my design as more of a 'dental care' approach for local region place branding, rather than just 'cleaning up' of a local authorities place brand. I feel there is a need for a method card system that has been designed primarily with local regions in mind. I am also aware of the particular uniqueness of New Zealand. New Zealand towns and cities are becoming more culturally diverse as they move further into the 21st Century compared to the 20th century as indicated by the recent immigration statistics (Immigration New Zealand, 2013). Also, all aspects of New Zealand are touched by the cultural influence of Maori, who would have a part to play in any design process for local communities.

This exegesis does not attempt to deal with the entire design process from the initial question of a need to place brand through to implementation and roll out. It concentrates on what I consider the most important stages of a design process — that of a co-creative approach starting at a local council level leading into an early engagement with all the stakeholders of the local region through the means of a community event. The design development of this aspect will in turn help focus on what is important to the community, and help align the needs of the local council and those of the wider community.

The challenges that face local authorities and how to create added value to their offerings to the local community are more difficult now than ever before. Therefore, a different approach is required. This research project attempts to find an adaptive design process by "standing on the shoulders of giants" (Newton, 1675).

Chapter Three deals with the history of branding and,

in particular, place branding and its importance in the social and economic growth of a region. Co-creation is then discussed and how it adds value to the design process when dealing with local communities. This is followed by case studies of the Helensville and Matakana Coast & Country place brand design projects and how they influenced and impacted on my approach to the Wellsford project.

In Chapter Five, I explore existing method cards and toolkits and how they compared to each other and their worth in helping shape my project. The physical construction and design of the cards and posters, testing and feedback are then discussed in Chapter Six. The conclusion reflects on the project, how it was received and what the future might hold for further development and scalability.

3.0 BRANDING

Before I begin discussing how this project came about, it is important to identify what a brand is. The Oxford Dictionary, in 1980, stated; "Brand (noun): a trademark, goods of a particular make: a mark of identification made with a hot iron (Fig 02), the iron used for this: a piece of burning or charred wood, (verb): to mark with a hot iron, or to label with a trademark" (Interbrand, 2004, p. 1). Twenty seven years later the American Marketing Association describes a brand as, "[a] name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers" (www.ama.org, 2014) In the space of just over a quarter of a century the main use of the word 'brand' has moved into the commercial arena and away from leaving a 'mark of identification'. However, it is still possible to see that the original, underlying meaning of 'leaving an impression', remains core to the meaning of the word.

The word 'brand' has roots that go back to the Old Norse *brandr*, which meant 'to burn'. By the time the word had made into the Anglo-Saxon language farmers were 'branding' their livestock by searing the animals hide with a hot iron. People soon came to recognise a good piece of meat by it's 'brand' mark from a bad piece, thus giving people the choice of what to buy — an ethos that still remains today when buying a product.

Ancient potters going back to the Greeks and Romans would sometimes mark their wares with symbols, which were recognised by the lawmakers of the time as proof of ownership unless sold. Product branding started to come more mainstream around 1200 when a number of Italians watermarked (Fig 03) their paper (Colapinto, 2011).

As businesses became more proficient at volume manufacturing towards the end of the 17th and into the

Fig 02_Anglo-Saxon farmers began 'branding' their cattle.

Fig 03_One of the first watermarks by Fabriano.

18th century, brands, or trademarks, were becoming more prevalent. Branding really hit its straps in the late 19th and early 20th centuries. The industrial revolution, with its improvements in manufacturing and communications, opened up the western world and allowed the mass marketing of consumer products. Many of today's best-known consumer brands date from this period: Singer, Coca-Cola, Bass beer, Quaker oats, Sunlight soap, Kodak film, American Express and Heinz (Clifton, R. 2009, p. 15).

The features of a good brand should suggest the product's benefits and qualities, should be easy to pronounce, recognise and remember, be distinctive, be extendable (eg. Amazon.com) and should not carry poor meanings in other countries and languages (Kotler, 2001). Today branding is about the quality of the promise a company makes to its consumers, and 20th-century industrialist Henry Ford's selling mantra (although it it has never been proven) that you can a have a car in "any colour you want as long as it's black" (Ford, n.d.) is well past its sell by date (Fig 04). Corporate CEO of Virgin Richard Branson realised, that in order to maximise his company's brand he had to get his staff to be ambassadors for his various businesses and himself. The friendliness and informality of the staff [Virgin Airlines] reflect the personality of Branson himself.

Some of the best and most liked brands have employees who like working for the company, are happy to talk to their customers and are enthusiastic about the product and services they are promoting. In 2014 the number one ranked best company to work for was Google (Fig 05), which is also one of the most recognised brands in the world (www.fortune.com, 2014).
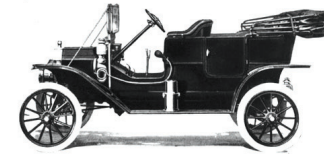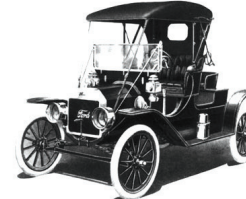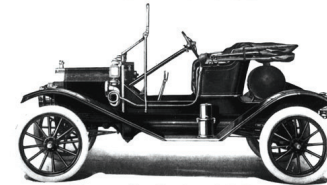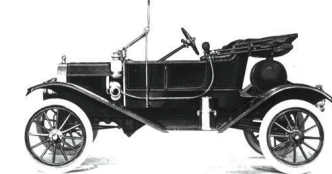
Fig 04_Ford Model T colour range — just black.

Fig 05_Google is one of the most recognised brands in the world.

3.1 PLACE BRANDING

Cities, towns and regional authorities are increasingly looking at place branding as an economic and social driver to keep local residents in the area and attract others to live there. One of the first to discuss the idea of place branding were Gold and Ward in their 1994 publication *Place Promotion: The Use of Publicity and Marketing to Sell Towns and Regions*, which covered examples of place promotions in cities, towns and suburbs from countries as diverse as China, America and Europe.

Ward describes the book as the first coherent and comprehensive story of place selling and introduces the reader to the art of boosterism (Gold and Ward, 1994) — the action or policy of enthusiastically promoting something, as a city, product or way of life, (www.dictionary.reference. com, 2013). He mentions how this term was used in the early 20th century in America in reference to railroad promotion. He goes on to say how it was borrowed and used in the marketing and promotion of boosterism by engaging with branding firms, or creating local government marketing/PR offices, to participate in the selling and promotion of their region (Fig 06).

Regions are complicated and complex and are made up of various elements including people, products and services. A successful place brand seeks to reflect a place's aspirations (Hedberg, 2001) and to link the locality as a whole with common attributes, benefits, relationships, programmes and values attached to various products and services offered within an area (Keller, 1999). It is essential for brand creators to be able to empathise with the people they are attempting to reach (Braune, 2000; Bennett and Savani, 2003).

In my research of some of the respected brand and marketing commentators (Hedberg, 2001, Keller, 1999, Braune, 2000, Bennett and Savani, 2003, Raubo, 2010 et al),

Fig 06_Boom time in California at the beginning of the 20th Century.

I found a number of cases that discussed a decision that had been made at local authority level (to either re-place brand, or create a new place brand), without first getting an idea what the local community thinks of their region and the idea of place branding.

Involving the local community in a discussion around a region's brand repositioning can aid in achieving a common goal, rather than just focussing on what the brand will look like. Regions and places are a collective of the people living there, historic identity, shared values, achievements, attractions and physical position. While it is easy to change an identity — the logo or even the name — it is more difficult to change the audiences' perception of what the region's brand represents.

It is possible the region's existing brand may well have been the critical bottleneck that is at the centre of the region's problems whose removal, or rebrand, is required in order to remove out-dated attitudes and behaviours. Overall, because branding is about creating and sustaining trust, it means delivering on promises. (Olins, 2003). Making promises to the local community and wider audience, and delivering on the promise, establishes a brand as something everyone can trust including the guardians of the brand.

Many a region's brand has come into ridicule because it has been seen as a product rather than a place with people in it (Stoppress, 2010). In these cases, the processes occurred without much consultation with the wider audience — the stakeholders, the residents and business owners — who actually make up the place (Haig, 2003; Haig 2011). This point was reiterated when the Auckland Supercity logo (Fig 07) was launched after a public competition for the logo design. The council said it would continue to ensure that Auckland is a dynamic, exciting and distinctive city, and encourage and provide recreational,

Fig 07_Auckland Supercity logo.

arts, sports and cultural activities including world-class programmes and events (Auckland Council, 2009).

Experienced brand designer and strategist Andrew Jaquet (2010) comments, however, were different: "From the Super City I wanted a logo that expresses the modern, dynamic, diverse, creative, vibrant, commercial city that is Auckland. And I don't get that from this. And why not? It's because there was no process, brief, strategy or vision. Without a proper design process what chance was there? If this is how the Super City is going to operate, I fear for all our services" (Jaquet, 2010).

A region's place brand is influenced by a myriad of factors including organisations, behaviours, attitudes, politics, people, land, culture and the many sub-brands that are part of the area — from the inhabitants, to what they produce, its policies to its practices, all these things impact the perceptions and wellbeing of a region.

> " From the Super City I wanted a logo that expresses the modern, dynamic, diverse, creative, vibrant, commercial city that is Auckland. And I don't get that from this.
>
> *Andrew Jaquet*

3.2 CO-CREATION

The term co-creation and co-design are sometimes used to mean the same thing. For this exegesis I have employed the definition provided by Elizabeth Sanders and Pieter Stappers. As prominent designers who advocate for involving users in the design process , they state that, "Co-creation refers to any act of collective creativity, i.e., creativity that is shared by two or more people.

"Co-creation is a very broad term with applications ranging from the physical to the metaphysical and from the material to the spiritual. By co-design we indicate collective creativity as it is applied across the whole span of a design process. Thus, co-design is a specific instance of co-creation. Co-design refers, for some people, to the collective creativity of collaborating designers. We use co-design in a broader sense to refer to the creativity of designers and people not trained in design working together in the design development process" (Sanders and Stappers, 2008, p. 2).

This description applies to what I am trying to achieve. Like Sanders and Stappers, I am designing for a process of co-creation that happens at the early stage of the design process. This is the stage where the design criteria are explored and ideas are filtered before moving onto the next stage. Sanders and Stappers point out that co-creation practiced at the early front end of the design development process can have an impact with positive, long-range consequences (Sanders and Stappers, 2008).

Bringing co-creation into design practice will cause a number of changes to occur. It will change how we design, what we design, and who designs. It will also affect the tools and methods that the new teams of co-designers will use. Designers will be integral to the creation and exploration of new tools and methods for generative design

thinking (Sanders and Stappers, 2008). As such, the professional designer will always have a role to play in the creative process. To aid and facilitate in this co-creative process between the local council staff and the local community, and bring some structure and design thinking to the process, I designed a series of method cards and posters. These put a frame work around the methodology of getting the council staff to focus on the most important challenge and then how to engage with the local community. The development of this toolkit is discussed in Chapter Six.

4.0 PREVIOUS PLACE BRANDING WORK

This section reviews the re-place branding development I undertook for Helensville, on the Kaipara River north of Auckland, my development of a place brand for the Matakana Coast & Country region (Auckland's northern gateway and its provincial border with Northland) and my early work on the re-place brand of Wellsford (Fig 08).

Each of the projects provided valuable insight on regional branding, and each of them contributed to the development of method cards for early local community engagement. The Matakana Coast & Country place brand in particular, while also being a success, revealed how the lack of early community engagement can cause irritation in some areas of the local community.

Fig 08_Previous place branding work.

4.1 HELENSVILLE

In 2008, I was approached by the then Rodney District Council's Marketing & Major Events Advisor for Economic Development and Strategy & Policy, Charlotte Cuffe, to consider re-place branding the town of Helensville and its environs. The project was overseen by a local regional steering committee consisting of local board members, business leaders, marketers, local business association representatives, Rodney District Council representatives and Cuffe. A number of issues were raised, chief among them, the difficulty of using branding techniques normally used on products for people.

The re-place brand steering committee wanted to highlight and encourage people from outside the region to come and enjoy the cultural experiences it has to offer and generate a sense of pride-of-place in the people of Helensville and its environs (Fig 09). Four months into the project I realised that while trying to keep everyone on the same page, no one had bothered to communicate with the local iwi, who also had a vested interest in the region. Ngati Whatua o Kaipara is the largest represented group. Various meetings were quickly arranged with their representative at a local level. It was interesting to note the local regional iwi were big supporters of the idea of the re-place branding and didn't put up any roadblocks for the development of the place brand (Fig 10).

On reflection, the entire process was disjointed and not very well thought through by either the steering committee, or myself. The biggest issue when engaging with the local community as part of the place brand process was not arranging a conversation with the local iwi. As the designer I should have been more aware of the wider community and not just the wants and needs of the people sitting on the steering committee. It was with this insight that I approached the Matakana Coast & Country place brand project.

Fig 09_Local authority wanted to portray the good things in Helensville.

Fig 10_Final Helensville brand device.

4.2 MATAKANA COAST & COUNTRY

At the beginning of 2013 I was approached by the Matakana brand steering committee to create a place brand for Matakana Coast & Country region (Fig 11). The place brand organising committee were under a great deal of pressure to get a logo developed for the region. Although I said I would have liked to engage on a more personal level with the local community, I was told a launch date had been set and to use the data already collected in the New Zealand Tourism Research Institute report (www.nztri.org).

With what little time I did have available, I decided to spend time talking to the organising committee and getting them to participate in brain storming and discussions around what the place brand should look and feel like. I used suggestion posters and Post-it notes to facilitate this process. I did this in an effort to get them to focus on a common goal for the place brand, which helped as part of the overall process.

The place brand logotype (Fig 12) was well received by the 200+ people who attended the official launch at the end of September 2013. Numerous attendees spoke to me afterwards about how the brand encapsulated the region. However, there were a number of letters written to the editor of the *Mahurangi Matters* fortnightly newspaper (October, 2013) that express dislike and distrust of a logo "that had been forced on them" and that it didn't "represent the region" (Mahurangi Matters, 2013).

Due to time constraints imposed on me by the steering committee and the Rodney District Council (amalgamated into the Auckland Supercity November, 2010) I was unable to fully explore involving the local community early in the design process. On reflection, the comments reinforced my view that more could have been done to involve the people who live and work in the region at a very early stage in the design process. People in the region should be given

the opportunity to express their thoughts, histories, likes, dislikes, passions, hates, needs, wants, desires and recommendations. I was soon given the opportunity to put what I had again learned into practice at an event organised for the place branding of Wellsford.

Fig 11_Brand committee wanted to portray both coast and country.

Fig 12_Final Matakana Coast & Country brand device.

4.3 WELLSFORD

I was reading an article in the locally owned and operated (northern Rodney) news magazine, (*Mahurangi Matters*, July 2013) about Wellsford and its ambition to stimulate growth and breathe new life into the region. I contacted Cathy Roche, the chair of the steering committee for the place brand of Wellsford, and told her I had worked on the rebrand of Helensville and Matakana Coast & Country and that I would like to help. She invited me along to the first meeting of the steering committee to pitch my idea.

There was a little resistance to start with, but soon the room had split into groups and everyone was writing down their thoughts and suggestions, which were then grouped into categories and priorities. This enabled the group to focus on a single challenge for getting a robust place brand for the town. At the second meeting I suggested the next step would be to get the local community involved.

Some of the local residents at the first two meetings had bought along pictures of Wellsford as part of their contribution to the process of trying to establish what Wellsford meant to them. Having a visual reference of what Wellsford meant to some residents made me think about publications like *A Day in the Life of California* (Smolan & Cohen, 1989) and *A Day in the Life of Australia* (Smolan, 1982). After looking through these, I decided to head to Wellsford and spent an eight-hour day walking around the town taking 300-plus pictures (Fig 13) of as many different things as possible avoiding any of my own personal influences as much as possible.

Professor Sarah Pink is a leading proponent in the field of visual anthropology and in her book *Doing Visual Ethnography* she wrote, "While images should not necessarily replace words as the dominant mode of research or representation, they should be regarded as an equally meaningful element of ethnographic work. In some projects the visual may become more important than the spoken or written word, in others it will not" (Pink, 2007, p. 6).

With this project I feel the visual images of Wellsford formed an important starting point for the discussion around who and what Wellsford was at that moment. It formed a visual snapshot that would allow people to remember things they had forgotten, to reinforce the good, to illuminate the bad and most important of all — the images, along with the method cards, could be used to start a discussion.

I sourced a vacant shop in the middle of the High Street (State Highway 1) next to the popular Peppers Cafe to use as a pop-up shop for a Listening Event (Fig 14) where anyone could come along and place any number of images on a blank wall, post comments or bring their own images, protests or future visions to put up on the wall. (There is a fuller account of the day in Appendix A, which explains how the day was structured and how it was run).

Reflecting on the single-day event I came to realise that after a slow start the local community was soon into the swing of things. Although I had a number of prompts to get things started, I again realised, as with my initial contact with the Wellsford place brand steering committee, that I needed to refine the process and design something more efficient and engaging with both the local body and the local community to aid in discovering the right direction for a place brand for the town. While the rudimentary method cards, signs and poster worked to a certain degree, the next iteration, as discussed in Chapter Six, incorporated the learning from the Wellsford Listening Event.

Fig 13_A day in the life of Wellsford.

Fig 14_Wellsford Listening Event.

5.0 EXISTING PROCESSES

There are numerous re-branding products and services many of which are used for regional branding. These are heavily based on the branding processes applied for product development. Of the fifty design processes (Fig 15) I identified in my precedent research (thirty four specified for regional branding and 16 specified for product branding) more than twenty five were similar in nature and, those designed for regional branding use much of the same process as that for product branding, as was my early attempt (Fig 16). While looking through the various matrixes I came across the IDEO Human Centred Design toolkit, which in turn made me re-look at the IDEO Method Cards. This prompted me to focus my furtherresearch on method cards.

Fig 15_Many of the product branding services are used for regional place branding.

Gamification can help internal/external branding

- Make them feel good – it's fun
- People grow up playing games – still do – angry birds/solitaire/snood etc
- Deliver a need – in this case understanding process – making transparent
- Games are social and spark conversation – help each other
- Increases internal feedback and everyone benefits – how to play the game better to get a higher score – improve experience
- Encourages players think about decision making and it will impact on bigger picture – learn to understand strategy for long term gain – not short term gratification.
- Gaming is the opposite of work

Domination
- Winning
- Power
- Beating others

Playing
Brand Gamification

Results
- move up levels
- Rewards
- Acknowledge

Players

- meeting others
- common ground
- Discussion

Social

- Exploration
- Discovery
- Early adopter
- surprise

Curious

Engagement

MAIN QUESTIONS TO ASK
- Why gamify the process?
- How will the user benefit?
- Will they enjoy it?

It's nice
It's unusual
It's different

ALSO LOOK AT
- What are the business goals?
- How to get users to fulfill?
- What actions are users to take?
- What are the risks?

Process

Region local authority | Professional Design | Causes Influences

Acknowledge need to change

Organise
- Understand what needs to be done
- define responsibilities
- look at big picture
- communicate to everyone
- proper controls – be proactive

open discussion with rebrand professionals who understand project and gather info

Need to change position. Attract new business/people

governmental influence

make this chart part of game – or turn into big "road map" you put on ground and "walk" your way to success

Review plan and people involved – establish final team

Ask questions
- Do we need to rebrand?
- Are we suitable for rebrand?
Yes NO (end)

Plan approval

PLAN
Existing Direction Definition History/ownership | Management Competitors Position People | Vision Culture Personality Name

Existing audit of design
Business plans
marketing plans
Interviews – stakeholders
Interviews – residents

Analysis
Associations
h/5/10 year plan
Current attitudes

Industry
Regulations – resource consents
Sustainability
Local iwi

Design

Region local authority | Professional Design | Causes Influences

Approve Plan

Naming phase tag line/mission statement

Consultation with client

Design exploration

Presentation and further design direction

Refinement Colour Type

Final presentation discussion

Design approval Brand approval!

Intellectual property search

Stakeholder testing

Implementation/planning

Technical impact
PR
Advertising
Businesses

Rollout

5.1 METHOD CARD RESEARCH

There are a number of existing method cards available to help in the co-creative design process. I analysed eight examples to evaluate how they could be of benefit to designers, local authority staff and the local community. Existing method cards chosen were IDEO's *Method Cards*, *Oblique Strategies*, *Bootcamp Bootleg*, *Collective Action Toolkit*, JAMK *Service Design Toolkit*, *SILK Method Deck*, Namhan Flanders *Service Design Toolkit* and *Transferable Research Method* (Fig 17-24).

The criteria for selection was to sample different approaches from simple cards with just suggestions on them like Oblique Strategies, through method cards devised for local communities and others that were a mix of cards and posters. I have based some of my evaluations on a study of *Method Card Design Dimensions: A survey of card-based design tools* by Christiane Wolfel and Timothy Merritt (2008), but have replaced their criteria with ones more specific to my project (Fig 25). The physical nature of cards has been popular in the design world because they are simple, tangible and easy to manipulate. They make the design process visible and less abstract and serve as creative tools for interaction between users and designers (Wolfel and Merritt, 2008).

Two of the better known method card systems, Brian Eno's *Oblique Strategies* and IDEO's *Method Cards* help users explore different models of idea generation and are in the main used for sparking inspiration for possible ideation. IDEO's *Method Cards* are arranged into four categories while *Oblique Strategies* are a set of cards in no particular order. They are designed to provide general support to the overall design process rather than address a specific project (Golembewski and Selby, 2010).

Fig 17_IDEO Method Cards.

Fig 18_Oblique Strategies.

These two card systems have no real start, middle and end to their process and nor were they designed to have that sort of structure. By examining the cards it's apparent that the decks are not aimed at one particular level of design processing. The cards aren't so much a single method of design processing but relate to various techniques like blue-sky thinking, brainstorming, mind mapping, mood boards, Disney Imagineering, role playing, random input and oblique strategies. I find these types of cards are a good resource for people interested in finding new ways of thinking and brainstorming solutions.

As more cards are engaged with it is possible for ideas to become more focused and refined, generating practical ideas as a sound base in moving towards a design solution to a given problem. However, a user must have some method available to capture what comes out of any exercise with the cards, such as a poster, as there is no avenue in the pack to record various experiences and outcomes. I found the cards good to gain perspective, inspire teamwork, encourage new approaches and help users develop their own methods. The cards help spark design thinking, but are not designed to be used in a linear, step-by-step method.

Three of the method card systems, Frog Design's *Collective Action Toolkit (CAT),* the Namahn Flanders *Service Design Toolkit* and the Engine Group's Social Innovation Lab for Kent *(SILK) Method Cards* are of particular interest to this research project, as they are based on a process of solving community-based problems. They develop and test a structured co-creative approach to project work supported by a set of creative techniques. This was expanded to provide a platform for solving complex problems by inviting people from different work departments to focus on people's needs and to collaborate and demonstrate the value of engaging citizens at all stages of project work.
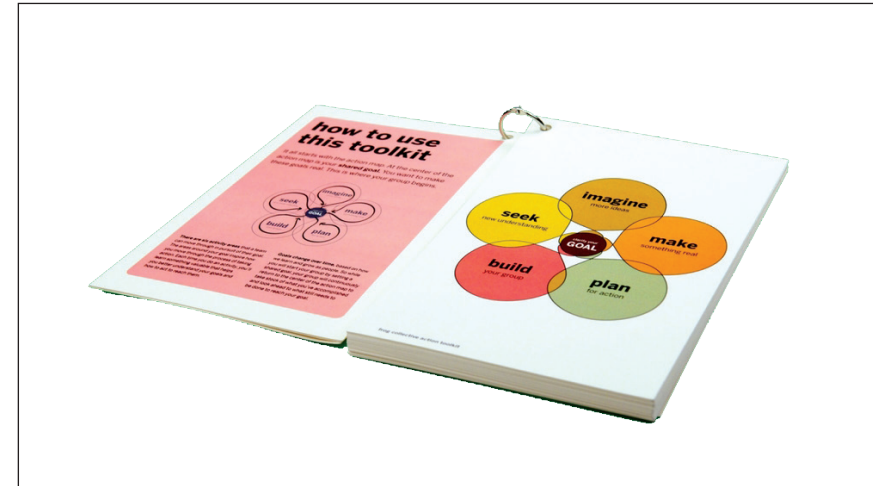

Fig 19_Collective Action Toolkit

Fig 20_SILK Method Deck.

Namahn and Design Flanders, in particular, collaborated to produce the *Service Design Toolkit* in an effort to introduce a service design methodology for local authorities. The outcome is a simple, practical do-it-yourself, easy to follow guide for local authorities that enables them to provide a better quality service to their end users including local residents.

By listening to communities and their stories, along with getting them to generate ideas and collect knowledge, Frog Design, the Engine Group and Namahn and Design Flanders achieved their goal of creating a step-by-step process that helps solve a range of various challenges and the possibility of creating real change and make design thinking universal. "Most importantly, the people for whom the design team works must be represented on the design team itself. Without the help of the end user, no socially acceptable design can be done" (Papanek, 1985, p. 304).

Two other method card systems; *Service Design Toolkit* (*SDT*) by JAMK University of Applied Science and Stanford University Institute of Design's (d.school) *Bootcamp Bootleg* are underpinned in the same way in that they embrace human centred design principles from the very onset of their respective method card processes. These method card systems all follow a path that begins with a wide scope based on learning, thinking, experimenting, modifying and then refining.

These two method card systems are for users who have a design background; to a non-designer some of the terminology and working practices would be confusing. However, with the guidance of a design facilitator, it would not be long before most people would be comfortable engaging with the processes and the information it contains would helps to explain the ins-and-outs of design thinking and practice.
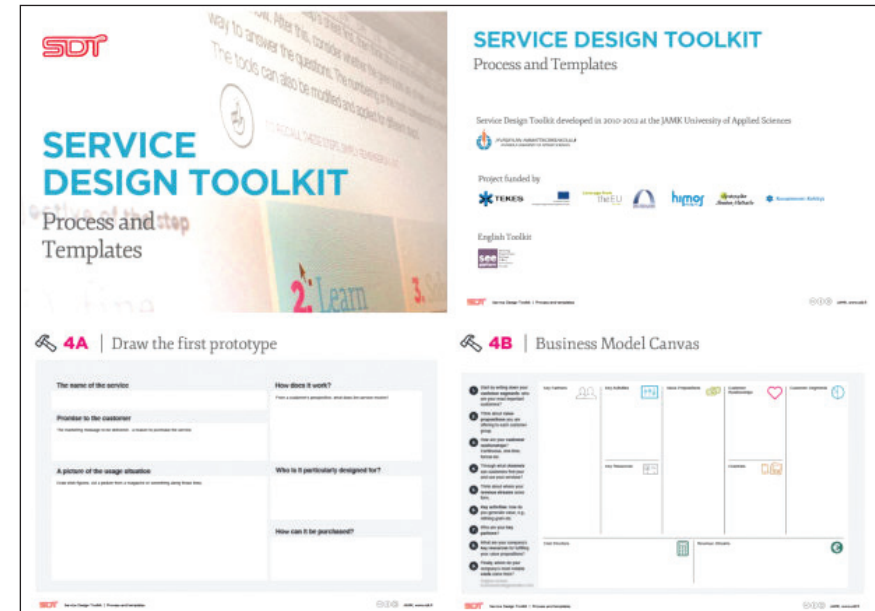

Fig 21_JAMK Service Design Toolkit.

Fig 22_Bootcamp Bootleg.

Despite my aim to concentrate on method card systems, I decided to research at least one design process system that did not involve method cards for comparison. Because it has been used for many years and is still very popular, I chose Matt Cooke's *Transferable Research Method* because it was designed "specifically to help tackle such social problems" (Visual Research, 2005, p. 30) — in this case, a UK cancer awareness charity. Cooke wanted to prove that having an organised approach to the design process wouldn't hamper the creative process and could improve the eventual design outcome. While his solution was not strictly a toolkit comprising a set of cards, his four-part process has distinct stages.

Cooke's system instils a sense of confidence that allows things to happen quickly and with understanding. Visually the process looks restrictive and alludes to the fact everything has to fit into a 'box' and there are only 'yes' and 'no' answers suggesting a lack of wiggle room that might lead to new solutions. However, Cooke's process is designed to streamline any given project and allow for consistency effectively across a broad range of social agendas for graphic design (Visual Research, 2005).

Only two of the method card systems — *Bootleg Bootcamp* and *Transferable Research Method* — have a focus and filtering point for design iteration at an early stage of the process (Fig 25). This fact proved to open up a gap for my research project; I realised that these two systems enabled and supported my original finding around the value of early engagement with the local community.

Fig 23_Namhan and Flanders Service Design Toolkit.

Fig 24_Matt Cooke's Transferable Research Method.

The other method card systems I studied have their filtering points imbedded further into the process, focusing more on the interaction with staff and end users to gather as much research information as possible to allow for actual design output at a later stage, which in some of the cases isn't well articulated. For my project I wanted to develop a process that has its focus and filter points for the regional bodies first, to establish a clear challenge and then move into engaging with the local community at an early stage, once the regional body has focused on a clear challenge. See Appendix B for a more in-depth research of the method card and toolkits discussed above.
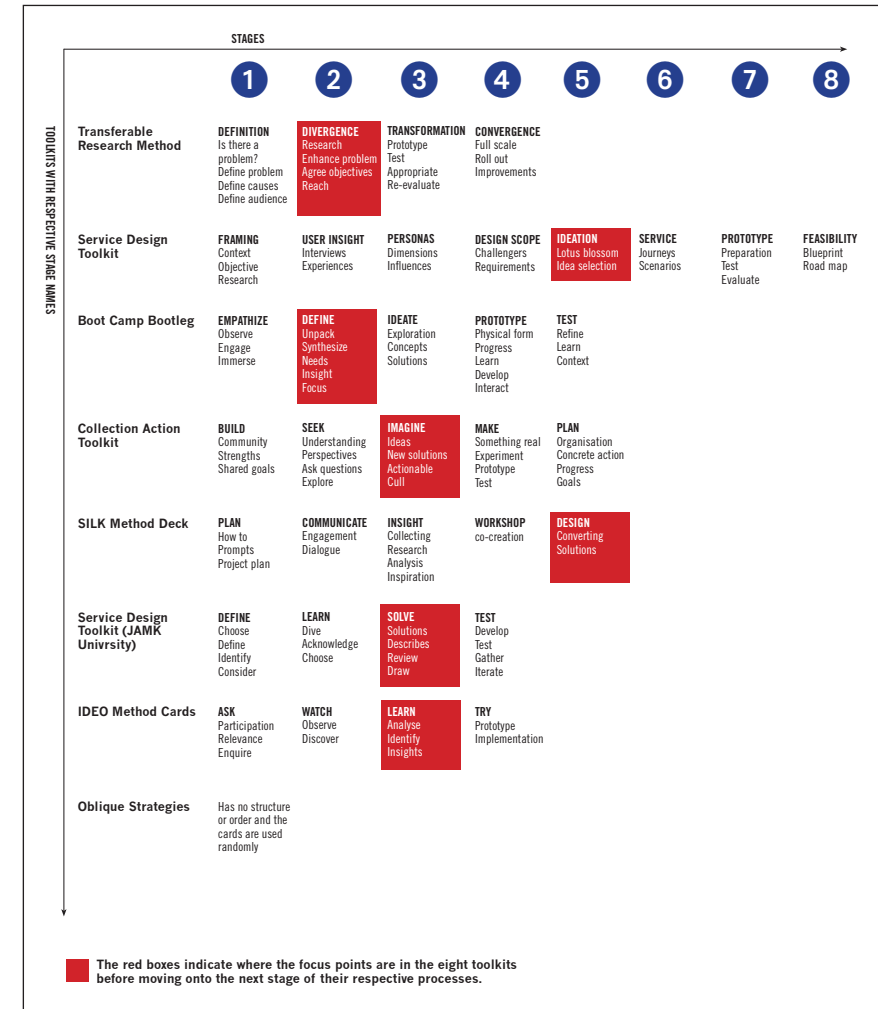
STAGES

TOOLKITS WITH RESPECTIVE STAGE NAMES

Toolkit	1	2	3	4	5	6	7	8
Transferable Research Method	DEFINITION / Is there a problem? / Define problem / Define causes / Define audience	DIVERGENCE (red) / Research / Enhance problem / Agree objectives / Reach	TRANSFORMATION / Prototype / Test / Appropriate / Re-evaluate	CONVERGENCE / Full scale / Roll out / Improvements				
Service Design Toolkit	FRAMING / Context / Objective / Research	USER INSIGHT / Interviews / Experiences	PERSONAS / Dimensions / Influences	DESIGN SCOPE / Challengers / Requirements	IDEATION (red) / Lotus blossom / Idea selection	SERVICE / Journeys / Scenarios	PROTOTYPE / Preparation / Test / Evaluate	FEASIBILITY / Blueprint / Road map
Boot Camp Bootleg	EMPATHIZE / Observe / Engage / Immerse	DEFINE (red) / Unpack / Synthesize / Needs / Insight / Focus	IDEATE / Exploration / Concepts / Solutions	PROTOTYPE / Physical form / Progress / Learn / Develop / Interact	TEST / Refine / Learn / Context			
Collection Action Toolkit	BUILD / Community / Strengths / Shared goals	SEEK / Understanding / Perspectives / Ask questions / Explore	IMAGINE (red) / Ideas / New solutions / Actionable / Cull	MAKE / Something real / Experiment / Prototype / Test	PLAN / Organisation / Concrete action / Progress / Goals			
SILK Method Deck	PLAN / How to / Prompts / Project plan	COMMUNICATE / Engagement / Dialogue	INSIGHT / Collecting / Research / Analysis / Inspiration	WORKSHOP / co-creation	DESIGN (red) / Converting / Solutions			
Service Design Toolkit (JAMK Univrsity)	DEFINE / Choose / Define / Identify / Consider	LEARN / Dive / Acknowledge / Choose	SOLVE (red) / Solutions / Describes / Review / Draw	TEST / Develop / Test / Gather / Iterate				
IDEO Method Cards	ASK / Participation / Relevance / Enquire	WATCH / Observe / Discover	LEARN (red) / Analyse / Identify / Insights	TRY / Prototype / Implementation				
Oblique Strategies	Has no structure or order and the cards are used randomly							

The red boxes indicate where the focus points are in the eight toolkits before moving onto the next stage of their respective processes.

Fig 25_Comparison chart of toolkits researched.

6.0 METHOD CARD TOOLKIT

In this chapter I would like to talk about the development of my method cards, the process associated with them and critical reflection on their use. The process for selecting the final card shape and design involved iterative testing of early card shape over three weeks. Further development was done through rapid prototyping using different groups of people over another two weeks.

There are a number of card-based toolkits currently available, some of which have been discussed earlier. In the main they had their focus points further into the process than I feel is needed for engaging with local authorities. I wanted the focus point on defining the challenge for the local region to be at an early stage to ensure the local authority was clear on what challenge and direction it wanted to take, especially in the area of place branding, before engaging with the local community. Also, a number of the method cards and toolkits studied and observed where more ad hoc with little or no structure to their process and also lacked a place to record outcomes. They were more idea generative than a structured focus allowing users to focus on a main challenge.

I chose to design method cards as part of a toolkit as, "Toolkits exemplify a new form of visual literacy that is legible by all" (Sanders & Stappers, 2013, p. 162) and the card is a powerful agent with its size, its two sides, its play aspect and its mobility. Users are able to take cards away and keep for future reference; prompt, remind, or they can remain part of the overall pack and toolkit.

The idea for designing a tangible card-based toolkit was to bring a step-by-step process, that was replicable, to enable local authority bodies to engage in divergent thinking, and then filter down and focus on what the core challenge was to branding the local region. Once a central challenge was

established, the second set of cards guide the local authority on how to launch a Listening Event to engage with the local community at an early stage in the design process. For the last 10 years this beginning stage, or Fuzzy Front End (Fig 26), has played an increasing role in the early part of the design process. It is a large, messy place to start made up of many activities that all go to inform and inspire possible solutions (Sanders & Stappers, 2012). It is here the method cards begin to bring focus and help determine what is most relevant to the project, and, if a re-brand is in fact necessary. I also took further inspiration from the way the method cards and toolkits analysed were using co-design to help and contribute in the overall design process.
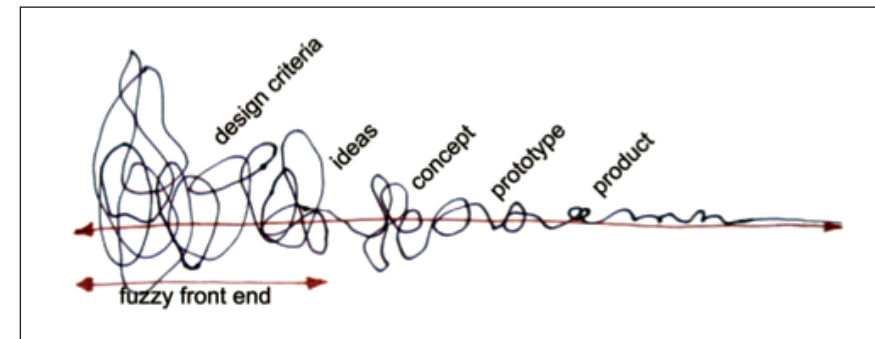

Fig 26_Sanders & Stappers Fuzzy Front End.

6.1 METHOD CARD DEVELOPMENT

A number of the existing card toolkits analysed were touch-points for creative and imaginative thinking, but don't help in focusing on an important challenge facing the local authority at an early stage. Also, there was nowhere easily accessible to record the outcomes after using the method cards. There were, however, two toolkits (JAMK *SDT* and the Namahn Flanders *Service Design Toolkit*) I analysed that included posters for recording outcomes, which I found helpful in developing my toolkit (Fig 27-28). These toolkits helped in shaping the design and content of my method card toolkit.

Feedback from the method cards used during the physical design of the card was vital, as they are intended for use primarily by non-designers, so had to make sense to diverse group of users. Other than the physical attributes, which I discuss later in the chapter, the key feedback points were to keep the language simple, not to use design-specific speak and not over design the cards and posters. Other considerations in the design of the card included;

- Size
- Card stock
- Layout
- Typography
- Colour
- Ordering and finish.

For this Masters' project the cards designed cover the first two stages of a place branding design project — Concern and Listening — and both sets have been constructed with the same design architecture to ensure they are seen as being related.

Fig 27_Namhan Flanders toolkit includes poster to record outcomes.

1. Define   THE DEVELOPMENT CHALLENGE

What is the target of the development?

❯

☐ New service:

☐ Existing service:

Tools
1A: Draw the service pathway

What are the objectives of the development? Why do you want to improve your service?

❯

What do you want to achieve? What is the problem to be solved? E.g., increasing online reservations, increasing the value of one-off purchases, encouraging your customers to stay longer, gaining new customers, getting customers to recommend your service etc.

How will success be measured?

❯

€ **Business** metrics for measuring success.
E.g., 10% increase in online reservations, 5% increase in sales.

♡ **Customer experience** metrics for measuring success.
E.g., increased recommendations, increased regular customers.

Who are your service's customers and how can they be reached?

❯

Think about what customers you are particularly targeting. If you're looking to gain customers who do not yet use your service, think about how they can be reached. E.g., other locations, events, online forums etc.

What do you not yet know about your service's customers?

❯

Think about research questions that could help you improve your service. What would you like to learn?
How do your customers use your service? What would you like to understand about your customers' purchase behavior?

Tools
1B: Research questions and methods

Move on to step **2** to examine your customers.

Service Design Toolkit | Process and templates

JAMK, www.sdt.fi

Fig 28_Example of JAMK Service Design Toolkit poster.

55

6.2 METHOD CARD CONSTRUCTION

I began by looking at existing method cards already available (Fig 29) and comparing their physical properties (size, shape, paper stock weight, single-sided or double-sided), their relationship with other material as part of a toolkit and their look and feel (imagery, typography, colour handling and layout). The majority of the cards researched as part of this project were double sided, had an image with little text on one side and 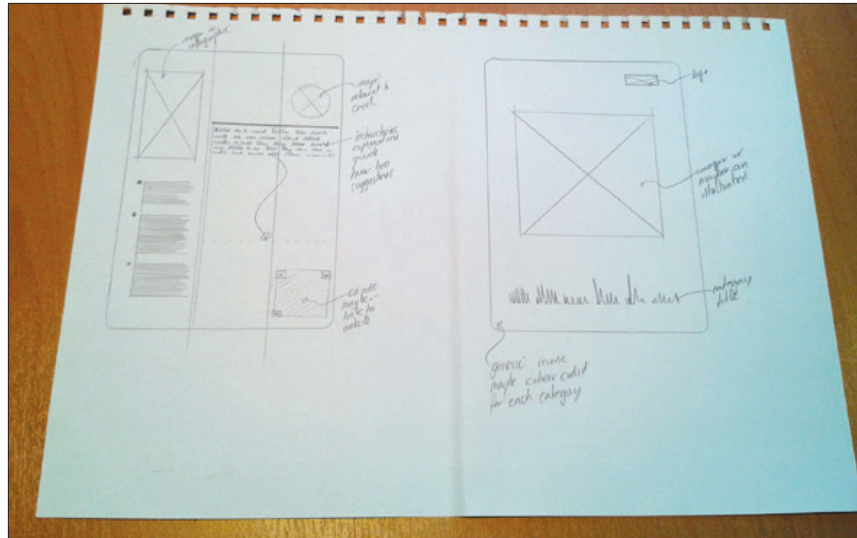text on the reverse. Using images on early versions of the method cards were found to be ambiguous and distracting and some of the feedback suggested they would date the toolkit quickly. During further development it was decided to use as little text as possible on the cards as they are meant to be prompts only. It was also suggested by early users that I adopt a colour coding system so the cards could be quickly put back into their relative sections.

Fig 29_Various method card designs.

57
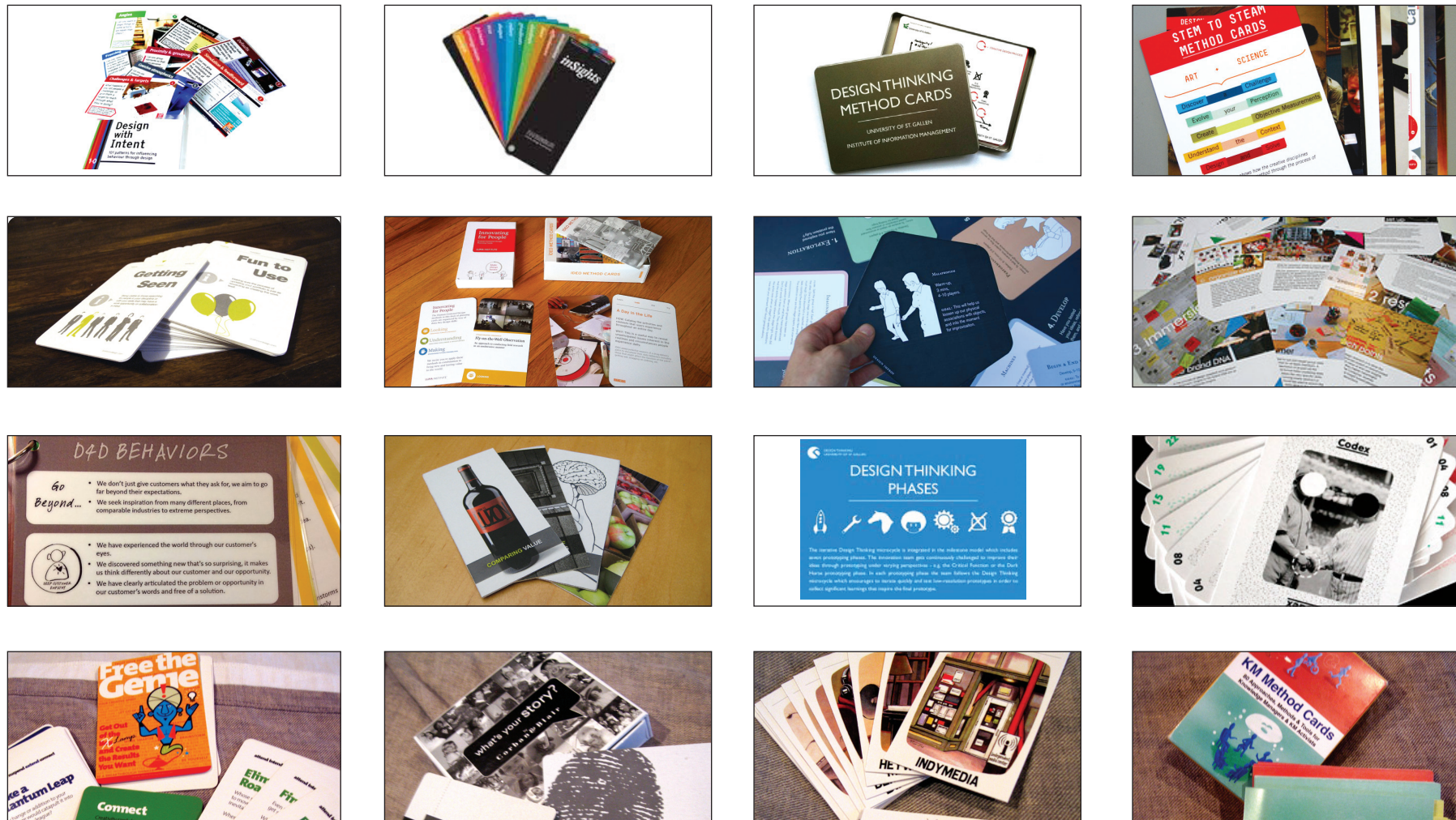
6.2.1 PHYSICAL CARD

The first stage of the design of the method cards was to research playing cards for their size and shape, as they are familiar to most people. Sketches (Fig 30) were used to scale up the dimensions to make card larger allowing for a larger design working area. A number of different shapes were also introduced.
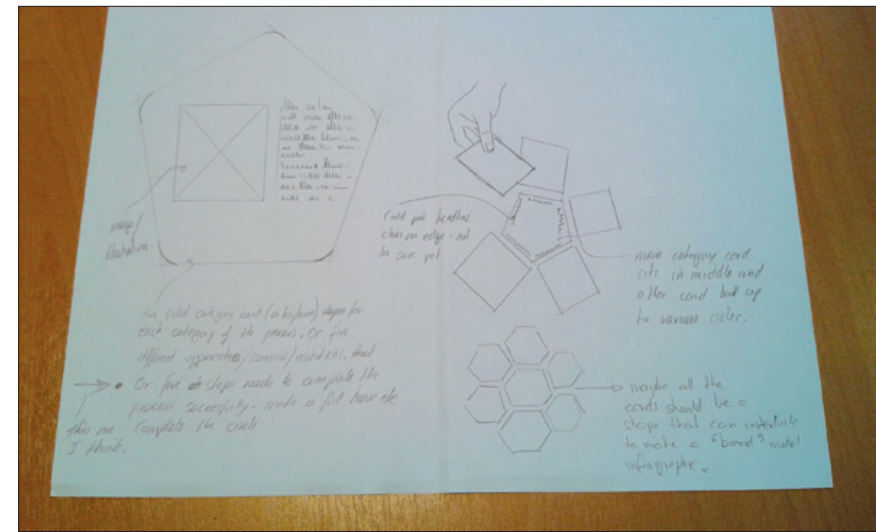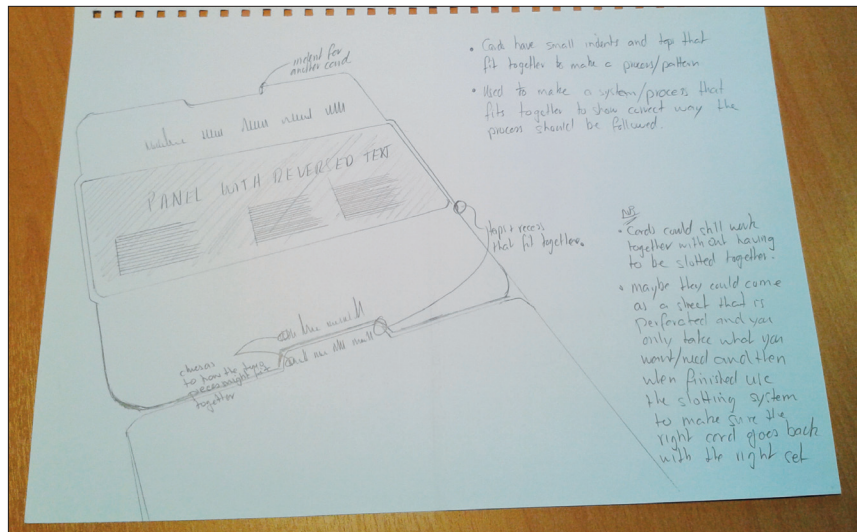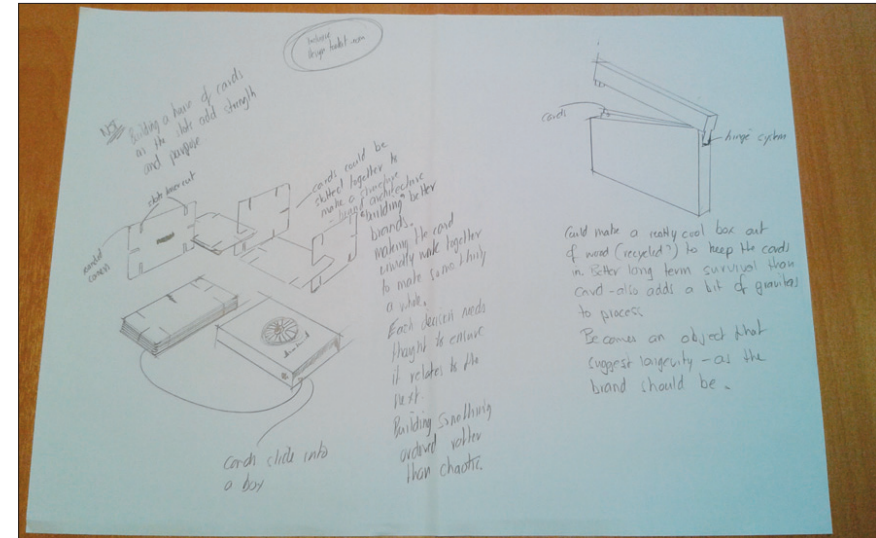

Fig 30_Sketch development.

6.3 MOCK-UPS

Blank prototypes were made to test how users engaged with them ergonomically. The shapes were produced with a laser cutter to ensure the dimension and edge finish were as accurate as possible (Fig 31). The observations were:-

- The cards with sharp (90 degree or pointed) corners were found to be more uncomfortable in the hand than rounded corners
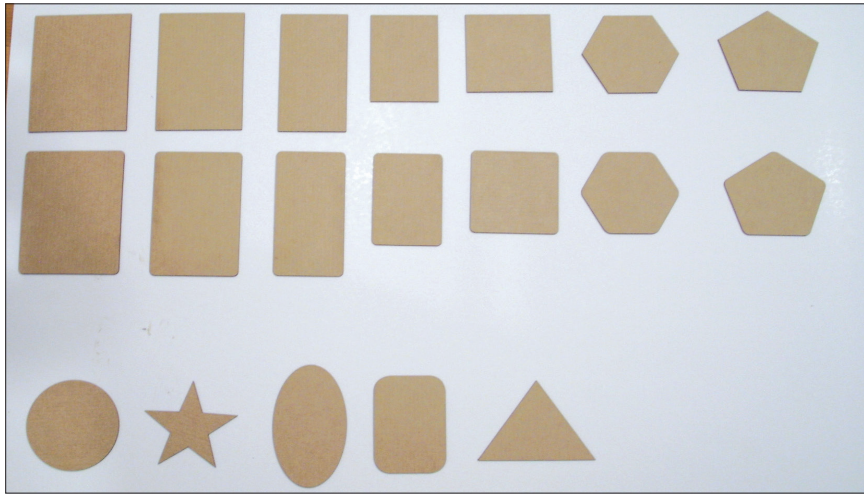
- The smaller cards were held sideways rather than upright as intended (although if text was on the cards this would facilitate in the card's orientation)
- The bigger cards were popular as they kept the fingers away from the surface of the card therefore making any text more readable (Fig 32).

Fig 31_Above: Shape development.

Fig 32_Right: Examples how the shape fitted in the hand.

6.3.1 IDEATION

Once a size had been settled on, different materials (Fig 33) were used in an exercise in tactility. This was done primarily for research, as the cost of some of the materials would be prohibitive. Three further observations were found:-
- The same shape as in initial testing was picked
- The heavier material was considered too bulky
- The card made from reinforced board was felt to be the most comfortable by the majority of the users tested.

Fig 33_Material testing. From left MDF, Perspex, Foamboard, Vinyl, Card 350gsm.

6.4 FINAL CARD

The card with the dimensions 77.5mm wide and 110mm tall — 25% increase on playing card dimensions (Fig 34) — was chosen with a board weight of 350gsm and a matt finish to avoid reflection when reading the text. I also decided to laminate the card to give it extra strength and a wipeable finish. The laminate helped the cards slide together when being collected for putting back in the wallet.

The size and shape was found to be comfortable for male and female teenagers and adults alike. Users said it wasn't too big to feel uncomfortable for those with smaller hands, and those with larger than average hands didn't get the impression the cards were undersized.

Fig 34_Final card shape and size.

6.4.1 CARD LAYOUT

As the card was only 77.5mm wide, and being influenced by the existing method cards previously studied, a single column layout was settled on with 7mm margin (Fig 35).

Header

Tae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Tae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt.
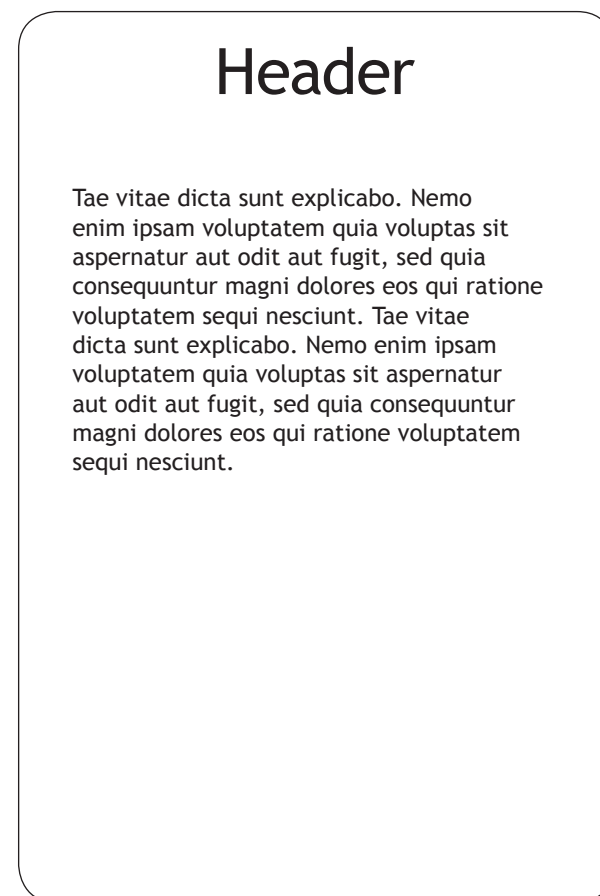
Fig 35_Sample layout.

6.4.2 TYPEFACE

Adopting best practice for dyslexic readers has the advantage of making documents easier on the eye for everyone (www.bdadyslexia.org.uk, 2014). The agency suggests Verdana, Tahoma, Century Gothic, and Trebuchet are the best suited. For this project I used Trebuchet (see left) as it is also regarded as one the safe fonts (legibility) for use on websites and other digital media (web.mit.edu/jmorzins/www/fonts.html, 2014), thus future-proofing the font if the method cards develop a digital presence. There were no spontaneous comments from users, which I took as positive, in that the typeface wasn't distracting from the primary use of the method cards. When asked what they thought users said the text was easy to read even though for some it may have been on the small side.

ABCDEFGHIJKLMNOPQRSTUVW
abcdefghijklmnopqrstuvwxyz
0123456789

Trebuchet Regular

ABCDEFGHIJKLMNOPQRSTUVW
abcdefghijklmnopqrstuvwxyz
0123456789

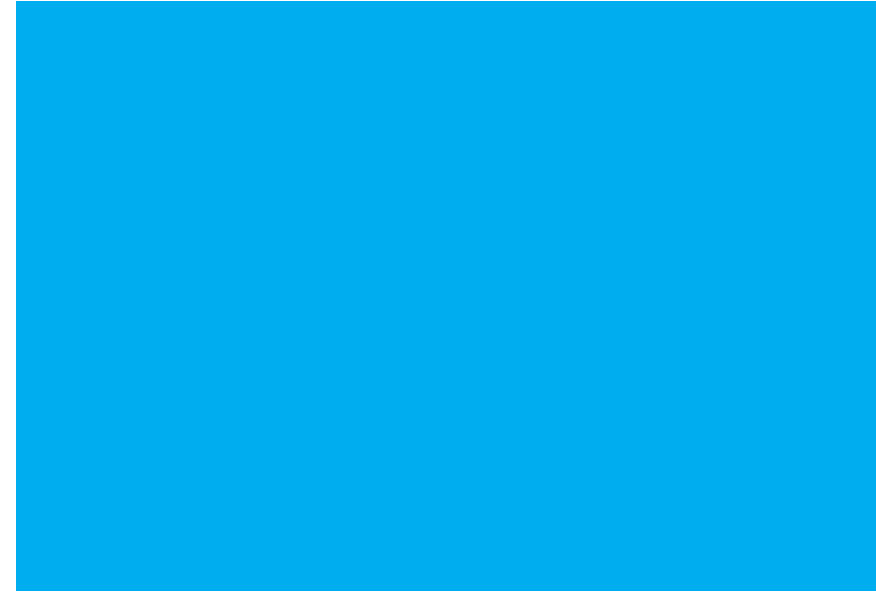*Trebuchet Regular Italic*

ABCDEFGHIJKLMNOPQRSTUVW
abcdefghijklmnopqrstuvwxyz
0123456789

Trebuchet Bold

ABCDEFGHIJKLMNOPQRSTUVW
abcdefghijklmnopqrstuvwxyz
0123456789

Trebuchet Bold Italic

6.4.3 COLOUR

Each card section will be colour specific as user feedback indicated it made it easier to order the cards when the session was over. The colour palette has been chosen bearing in mind some users may suffer from mild to serious colour blindness. According to a number of websites on colour blindness (www.colourblindawareness.org, www.edwardtufte.com et el) contrasting colours are best so blue and orange have been chosen for the method card backgrounds. Also, blue is often associated with depth and stability. It symbolizes trust, loyalty, wisdom, confidence, intelligence, faith, truth, and heaven. Orange represents enthusiasm, fascination, happiness, creativity, determination, attraction, success, encouragement, and stimulation (www.color-wheel-pro.com, 2014). Users liked the bright, cheerfulness of the colours used and found the contrast was helpful in distinguishing the two stages.

Blue: C 100 M0 C0 K0

Orange: C0 M53 Y100 K0

01

Current Situation

01

Problems
List the issues making up the problems.

↓

Issues
What has caused the problems?

↓

Prioritise
Pick one challenge to solve.

↓

Record
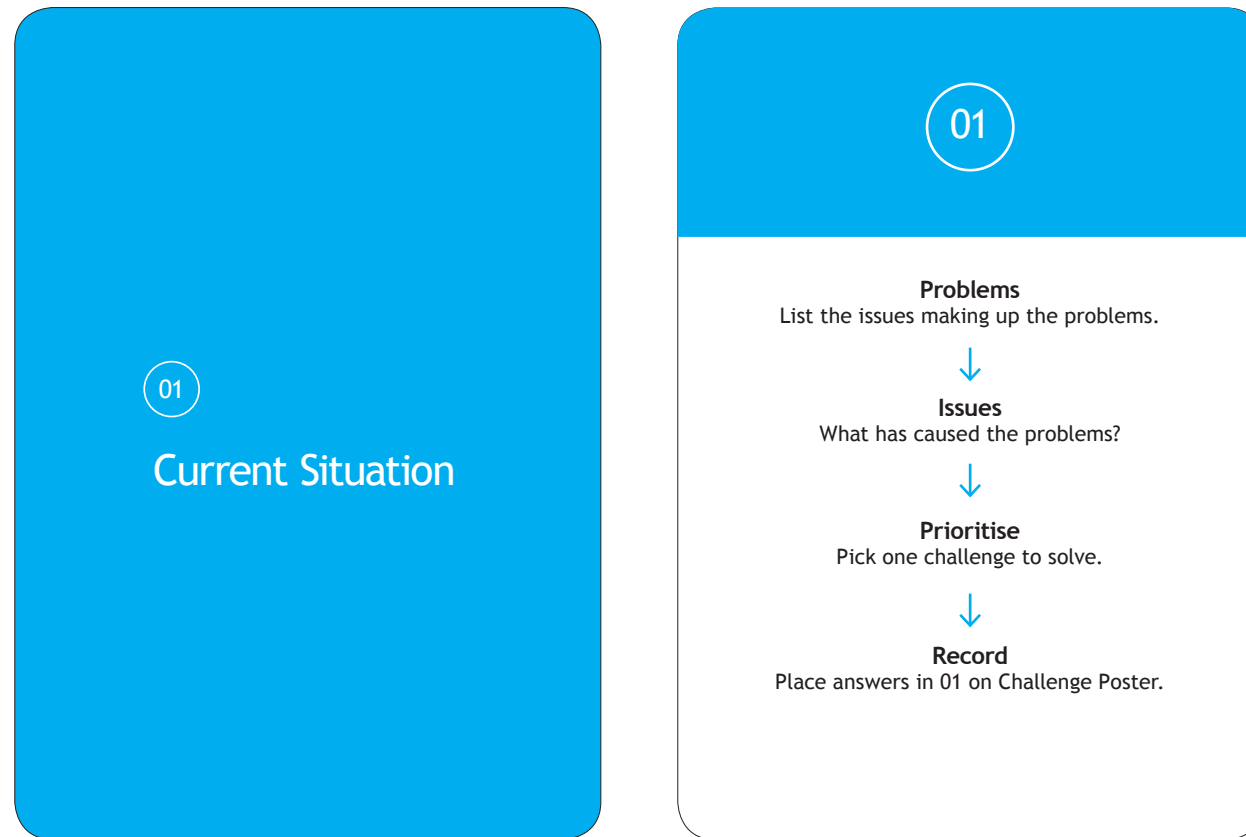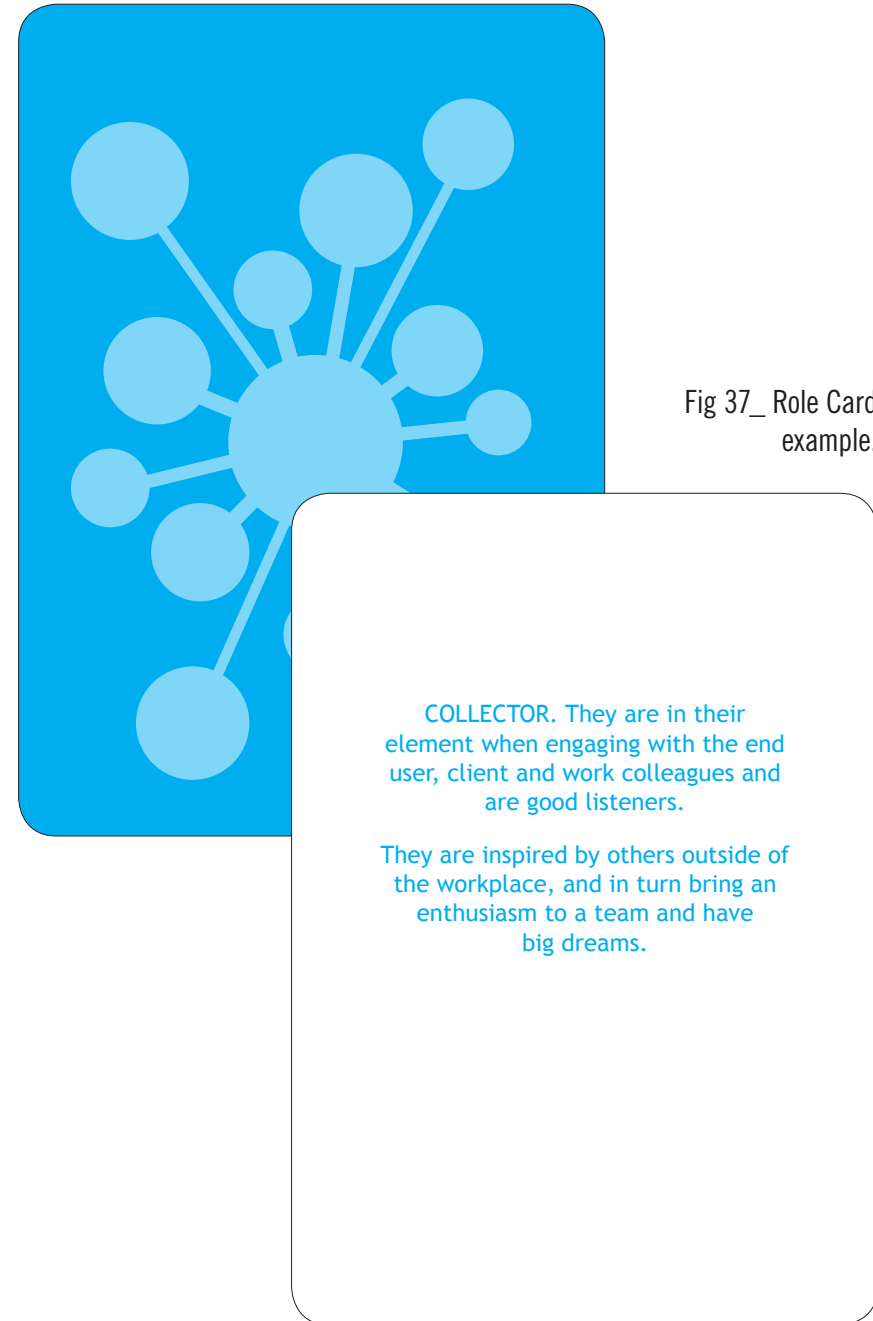Place answers in 01 on Challenge Poster.

Fig 36_ Final card design example.

6.6 ROLE CARDS

During the testing of the cards it became apparent the user group were unsure about who had to be responsible for what part of the discussion and felt there needed to be a leader, or at least someone to make decisions to keep the workshop moving. Further observation revealed the need for a number of the participants to take on other roles to ensure the most useful information could be mined from the workshops. The well-regarded Myers Briggs MBTI formula was researched and discarded as being too complex while the more concise Five Personalities compiled by Art Markman, PhD, professor of Psychology and Marketing at the University of Texas suited this project better. I adapted his five personality types — Extroversion, Agreeableness, Conscientiousness, Openness to Experience and Emotional Stability (www.fastcompany.com, 2014) — into four personality types more suited for this project with its bias towards local authorities.

- **Anchor** — very organised and good at planning.
- **Connector** — manages the flow of information gathering and dissemination.
- **Navigator** —finds different environments inspiring and instructive.
- **Collector** — engages with everyone and is a good listener (Fig 37).

Role-playing is the practice of group physical and spatial pretend where individuals deliberately assume a character role in a constructed scene with, or without, props. It's an individual and group state that enables vivid and focused exploration of the situations (Simsarian, 2003). Users of the role cards have so far tended to gravitate towards who they think they are, or simulate the position they hold in the office. Future development of the use of the role cards will be towards participants picking the cards blind and challenging them to think from another perspective.

Fig 37_ Role Card example.

COLLECTOR. They are in their element when engaging with the end user, client and work colleagues and are good listeners.

They are inspired by others outside of the workplace, and in turn bring an enthusiasm to a team and have big dreams.

6.7 REFLECTION

The method cards contribute to idea generation at an early stage in the design process as well providing structure and a system of progress to keep the process of defining a challenge moving forward. The method cards helped prompt the user to look at the wider issues and then focus on the most important challenge. This enables them to move into the next stage of engaging with the local community with a clear idea of what they want to discuss. The cards served as important touch-points and prompts early in the co-creative process and helped users express their ideas.

The minimalistic design of cards (Fig 38) was a positive, as they did not distract users from the task at hand and were used as sparks for the conversation, while at the same time keeping users on track focusing on the required goal of finding a key challenge. The card technique described here is deliberately basic to allow a wide variety of users to take part from different social, economic, education and cultural backgrounds. There is no set hierarchy in who should go first when using the cards and participants often engaged in conversation as a result of the prompt on the card, which again broadened the discussion even more. And because the method cards contained prompts, it became apparent users who seemed uncomfortable to say much at the start soon used the methods cards as a means to contribute to the conversation.

Fig 38_ Final design

6.8 METHOD CARD POSTERS

In four of the method card toolkits researched there was no place to record the outcomes of using the cards. I felt there was a need to design a series of posters (Fig 38-42) to be used to record the information prompted by the use of the method cards. This aided in the filtering and focusing on ideas generated into a challenge that can be agreed on before moving into the next stage — the Listening Event. The posters are able be placed on an office wall, whiteboard or any flat surface and responses to the method cards can either be written straight onto the poster, or on Post-it notes which are then affixed to the poster.

The possibility of using a laminated, wipeable material was explored, but due to handling, folding, packaging and the cost of the material, it was decided to print onto matt 16Ogsm poster paper stock. However, at one of the last test sessions, it was found the first poster (A0) in the series (Fig 38) 'Defining the Challenge' needed to have a wipeable surface. This was due to participants using too large text, not thinking where to place their comments and making mistakes. Therefore a wipeable surface allowed for re-writes and re-postioning of responses.

The remaining posters are paper as they are smaller (A2) as participants will have become more familiar with the process (Fig 39-41). The banner for the Listening Event is five metres long (Fig 42) and is affixed to the wall of the venue holding the Listening Event. In this iteration I have placed four categories for participants to place images and comments under as I found after the Wellsford Listening Event the jumble of images and comments on the wall (Fig 14) made interpreting the research very hard. There are no lines segmenting the categories on the wall to allow participants to place images across two categories.

The layout of the posters takes influence from a number of existing design toolkits including IDEO, Nesta, the Namahn Flanders Service Design Toolkit and JAMK SDT with the addition of areas of response specific to local authorities and communities. The same typographic rules and colour palette choices were used as per the method cards.

Watching users interact with early poster designs it became apparent the posters needed to be bigger to allow for up to three users to add their thoughts at the same time. The posters add structure to the toolkit where users had a place to record ideas prompted by the method cards and to systematically move through first stage of the design challenge. The method cards are core to the toolkit and the posters play a backup role where they provide a central place to record responses to the method cards.

Using the same design criteria as for the method cards, the posters use minimal text and have been constructed as a recording device rather than a design object. The decision to keep it simple and clean was validated by users not commenting on the look and feel of the posters, unless prompted, and then the feedback was very neutral. They are in the toolkit to play a supporting role to the cards and as part of the toolkit are easily accessible to record outcomes.

Design's role in this toolkit is to facilitate the framework in which other people can co-create. The design is purposefully minimal where it steps back and lets other people be involved in the process. "The onus is on designers to explore the potential of generative tools and bring the languages of co-designing into their practice" (Sanders & Stappers, 2008, p. 12). They also talk about providing scaffolds and clean slates to help people be creative in their right (Sanders & Stappers, 2008).

Defining the Challenge

This tool helps helps you look at the challenge from different angles and appreciate the wider impact it has. A diverse group of participants will result in a wider understanding of the issues.

01

Key issues

Most important

02

Who is it a problem for?

03

Factors contributing to the problem

Social

Economic

Cultural

04

Why is it worth fixing?

Social

Economic

Cultural

Fig 39_ Challenge poster.

Causes and Symptoms

This tool helps you break down the causes of the challenge and how it influences the region and the local community as it stands now.
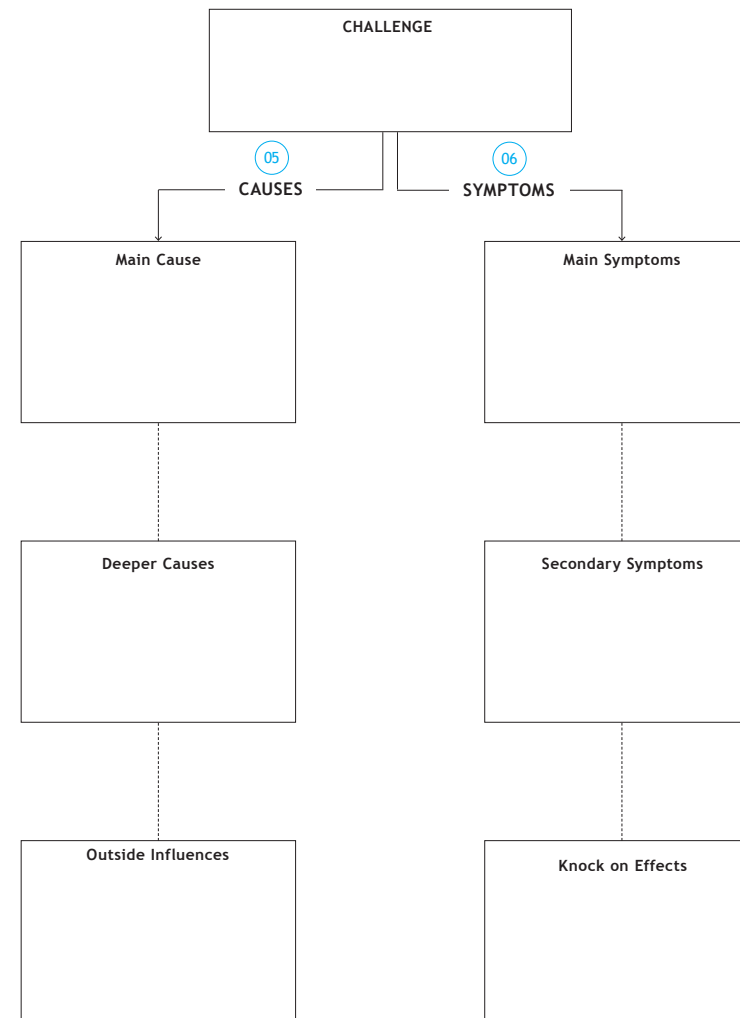
CHALLENGE

05 CAUSES

06 SYMPTOMS

Main Cause

Main Symptoms

Deeper Causes

Secondary Symptoms

Outside Influences

Knock on Effects

Fig 40_ Causes and Symptoms poster.

Filter

The Filter tool helps you decide what is worth recycling to keep, replace entirely, cut back on or re-energise with new additions. Don't forget how your decisions might impact on the local community. Who benefits and who suffers?
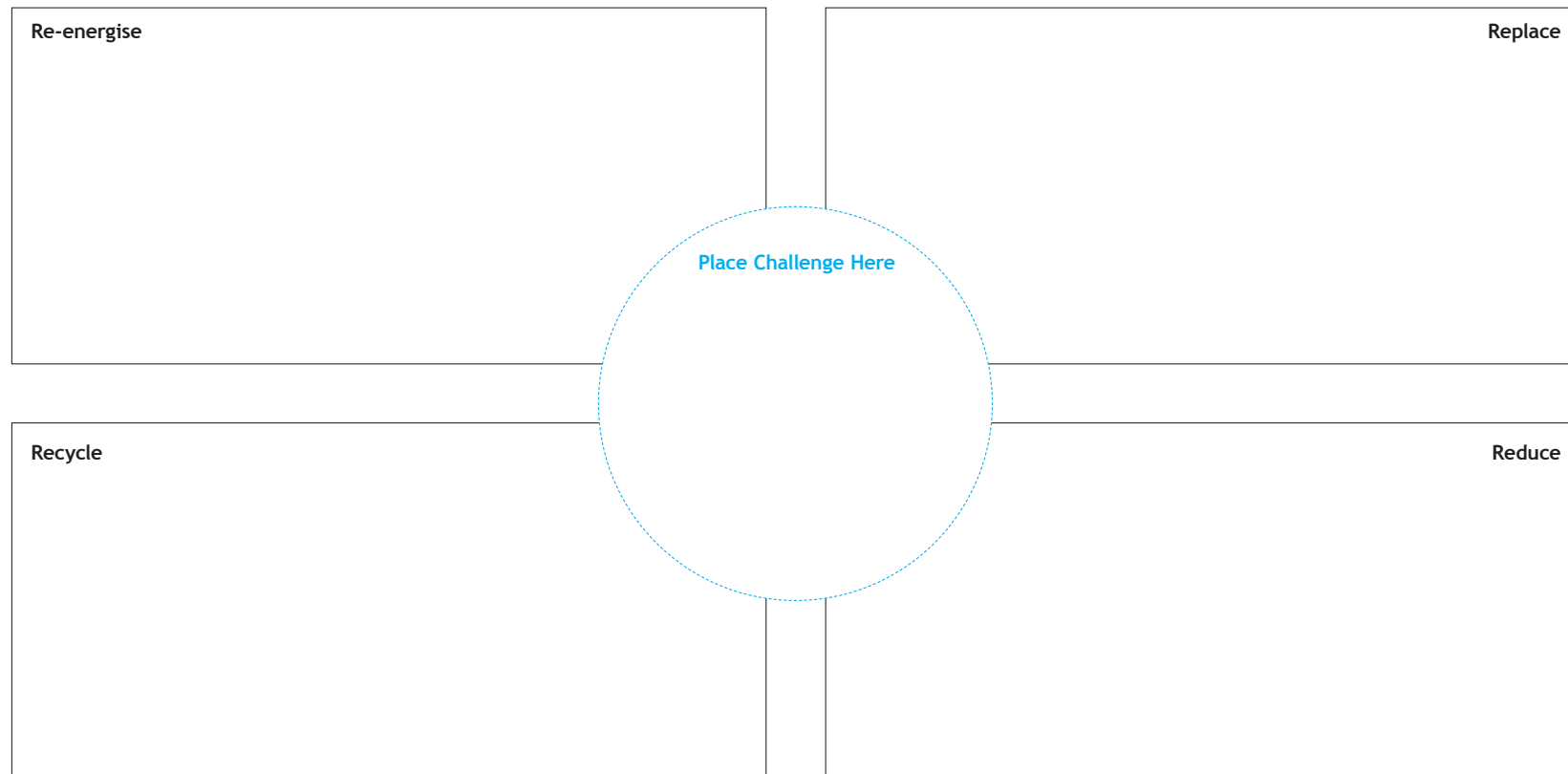
Re-energise

Replace

Place Challenge Here

Recycle

Reduce

Fig 41_ Filter Poster.

Listening Event

This tool helps to keep you focused on the bigger
picture. It is a quick and cncise view of the whole
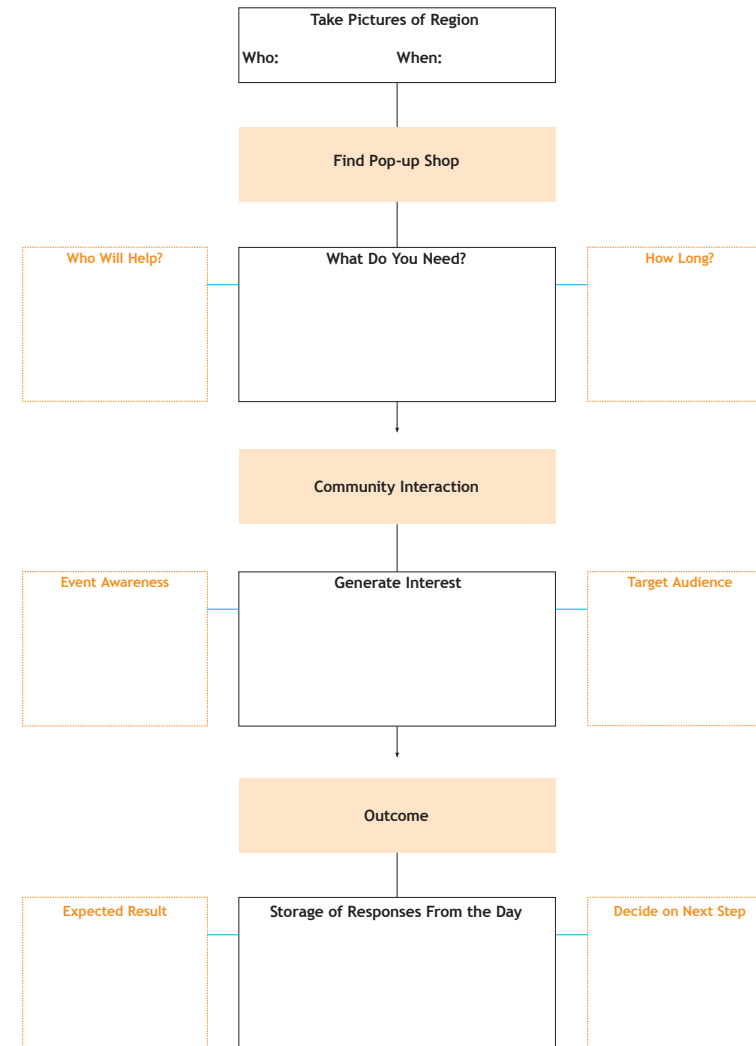day with important milestones highlighted.

Take Pictures of Region

Who: When:

Find Pop-up Shop

Who Will Help?   **What Do You Need?**   How Long?

Community Interaction

Event Awareness   **Generate Interest**   Target Audience

Outcome

Expected Result   **Storage of Responses From the Day**   Decide on Next Step

Fig 42_ Listening Event poster.

Your Region — Your Say

What do you value the most? | What do you value the least? | What needs to be fixed? | Your images/protests/suggestions

What do you value the most?
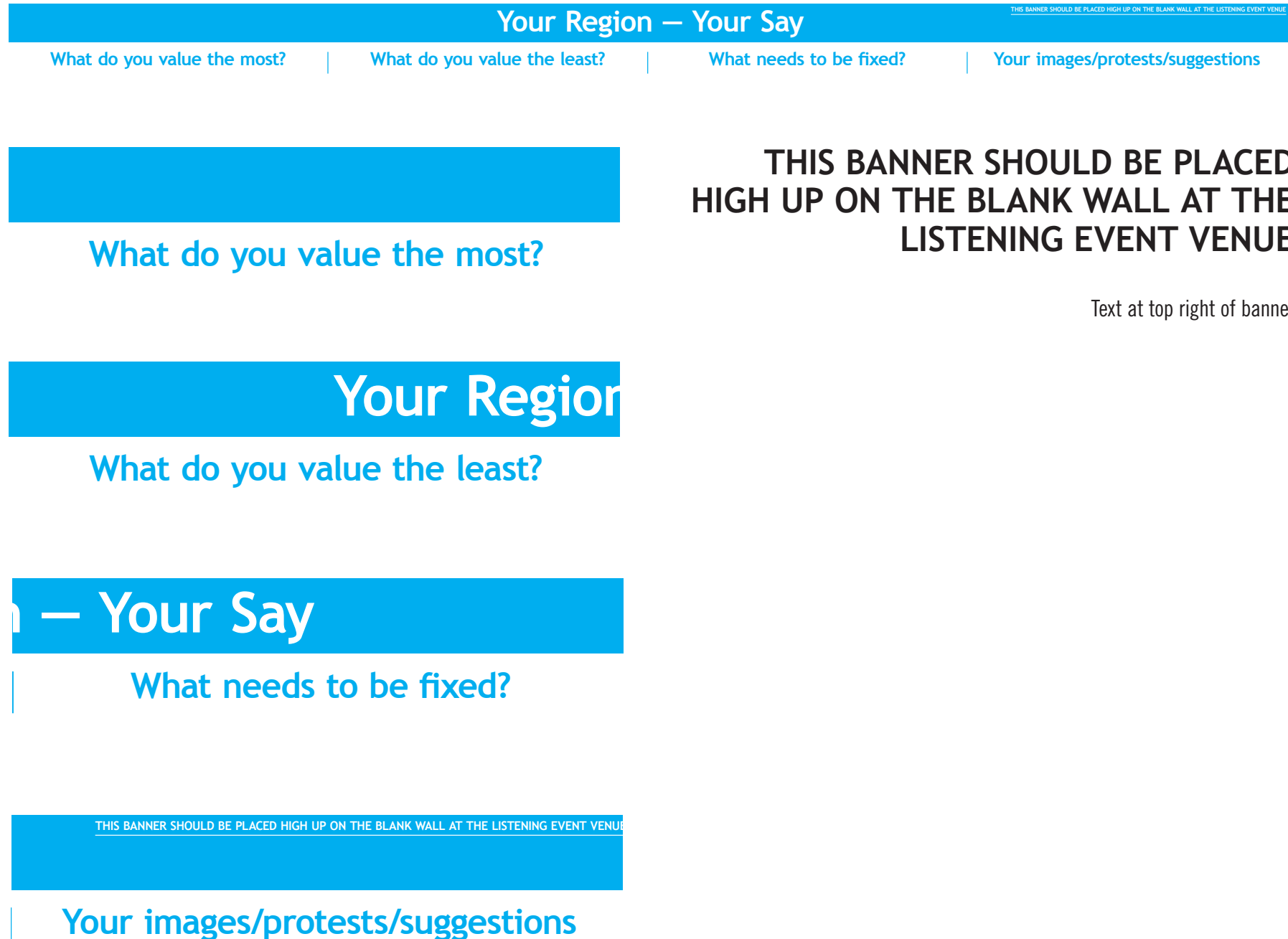
THIS BANNER SHOULD BE PLACED HIGH UP ON THE BLANK WALL AT THE LISTENING EVENT VENUE

Text at top right of banner

Your Region

What do you value the least?

n — Your Say

What needs to be fixed?

THIS BANNER SHOULD BE PLACED HIGH UP ON THE BLANK WALL AT THE LISTENING EVENT VENUE

Your images/protests/suggestions

Four categories

Fig 43_ Listening Event banner.

6.9 CLEAR METHOD CARD

The name I have decided on for the method cards and posters is *CLEAR Method Cards*. The name is an acronym formed by Concern, Listen, Engage, Action and Respond. In the future I hope to be able to continue the development of this project into a complete design process for local regions with three further stages. For this project I decided to concentrate on what I think, having worked with three local regions in the past, is the most important part of the design process for local regions.

Clarifying and focusing on what the clearly defined challenge is, and then early engagement with the local community, will underpin and provide a robust design and brand architecture on which a region's visual communication design can be built on and implemented. The acronym also implies the consultation process is transparent and open, especially in the second stage, to anyone who wants to take part. It also suggests the process has a clear path to follow, and with minimal text is clearly understood.

The finished toolkit consists of cards and posters making a handy and conveniently packaged toolkit that is informative, guiding, inspirational and easy to use. There is no instruction booklet as the information on how to use the toolkit is incorporated on the tools themselves. Users found this helpful as there was no instruction booklet to lose. It is aimed at assisting local authority staff to focus and discover the important challenge in place branding a region. Stage Two guides users in how to organise a Listening Event for the local community, schedule the day, and aid in filtering the information from the day. "All people have ideas and can contribute to design processes that aim to improve their lives as well as the lives of others" (Sanders & Stappers, 2012, p. 8).

CLEAR
Method Cards

7.0 CONCLUSION

The aim of this design research project was to design a method card toolkit specifically to enable local regional authorities and town local bodies to begin an exploration of place branding relative to their local region. The *CLEAR Method Cards* toolkit has two stages entitled Concern and Listen, which are supported by a number of posters to record workshop outcomes.

This Master of Design project has bore out numerous findings and discoveries along the journey.

1) While concentrating on regional place branding and building on my own experiences of working on three local regional place brands, I became aware of a number of instances where the local community had not been part of the initial creative process. This neglect had led to a lack of buy-in by the community when the final visual communication design was implemented. Cities, towns and regional authorities are increasingly looking at place branding as an economic and social driver for the overall wellbeing of its staff and residents. In the three regional branding projects I have been involved in, I found the respective local authorities were becoming aware of the importance of early engagement with the local community.

2) As a designer I found that a collaborative approach to improving the wellbeing of a local region could also be used in developing a place brand. Co-creation is playing an increasing important part in the process of engaging with local authorities and communities that gives all stakeholders an opportunity to contribute to the design process. I discovered that when a structure-less format was applied to meetings with local authorities, personal agendas came to the fore. Method cards provided a framework to move discussions and workshops in a clear and coherent direction towards finding a clear challenge. This

finding reinforced evidence found in the research of how method cards aid in the creative process of community projects.

3) The development of a set of method cards to aid the conversation with the local body during the Wellsford project inspired me to think of a different way to consult with the local community. Focusing on the word 'conversation', I realised the art of good conversation is the ability to also listen. Survey forms can be time consuming, so the idea of a Listening Event using visual prompts as touch-points to start a conversation was developed and implemented. While creating a snap shot of a 'day in the life' of a town is not a new concept, using the images of the local community to spark a conversation about what local residents think of the region was an innovative approach. The day was more successful than I could have hoped; it produced a wealth of information to spur this research project along. It was an inspiring day where just listening to what residents had to say about living and working in the region gave a deeper meaning and understanding of how the local community interacted with the physical attributes of the region. These people loved living in the area, but thought it was becoming run down. The Listening Event helped them realise what the region meant to them on a deeper personal level.

4) As a result of the on-going Wellsford project I realised that by spending more time on framing the challenge for the local authority, and then listening to what the local community has to say, it's possible to gain valuable information and background knowledge before responding with any visual communication design output and implementation. Being able to frame a design problem properly by listening to the concerns and wishes of the stakeholders can assist in finding a solution that works for all

parties involved. This is especially true in the early design stages when decisions are being made about what the primary focus or key challenge is.

5) As the design of *CLEAR Method Cards* took shape, feedback from focus groups revealed that the a card-based toolkit helped with user collaboration, communication, setting a common challenge and establishing a collective vision before moving into the second phase — the Listening Event. Rapid iteration and prototyping of the cards and supporting posters through practical use had the benefit of instant feedback on their usability. Future development and improvements will come with further use of the methods cards, and over time, will allow for a more in-depth analysis of the toolkit's design and usability.

6) I found that by using a collaborative, co-creative method in the early stage of the place branding process was a way for design to have an early, and important role in helping local residents become involved in place branding in the local community. In future Listening Events I would, after gaining permission, video record the day to study and assess the interaction of the participants with the toolkit as a whole. The feedback received on the day of the Wellsford Listening Event was positive and the local residents who participated appreciated being able to have their say and felt inclusive being part of the initial place brand design process.

The *CLEAR Method Cards* toolkit discussed in this exegesis should be regarded as a prototype that requires further refining to be a more effective and efficient tool in the co-creative design process occurring between local bodies and the local community. Further validation of the *CLEAR Method Cards* toolkit would have to be sort through formal interviews with a broader church of fellow designers and regional authorities. As the development of the *CLEAR*

Method Cards continues outside of the scope of this Master of Design project, I will be looking at the possibilities of adapting the toolkit for other social, cultural and economic challenges that face local authorities and local communities.

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9.0 APPENDIX A
9.1 WELLSFORD LISTENING EVENT

I presented the concept of a Listening Event for Wellsford, along with examples of the pictures and a mock up of the event in a vacant shop, at a meeting of the brand steering committe in September. Getting the local community involved at the onset of the branding process could offset any later comments on 'why weren't we involved in the process'. This would be valuable in moving the project forward. After suitable empty shop was found in the middle of the high street next to the popular Peppers cafe, which had a good deal of foot traffic outside its door. On contacting the real estate agent (Ray White) who put me in touch with the owner Patrick Daly who agreed to it being used as long as the shop was left in the same condition as it was found.

I canvased a number of business owners on either side of the shop to be used for the Listening Event, and the concept was met with universal approval. A number of the shop owners asked me to email them details and offered to have flyers and posters in their respective shops to advertise the event. The shop was a good-sized simple rectangle (16 metres long by six metres wide) with a glass frontage and door. It had a wall running the length of one side painted white with no fixtures that were perfect for use as a blank canvas for attaching anything relevant. There was a desk already in situ at the far end of the shop near a curtained door that leads to a stripped out kitchen and a toilet.

At the October meeting of the rebranding steering committee it was agreed that Saturday, October 12 (9am-5pm) would be the date of the Listening Event. I made contact with the local publications in the area — *Rodney Times, Mangawhai Memo* and the *Mahurangi Matters* — to let them know of the Listening Event. I also suggested the local schools in the area should be informed — Rodney College, Wellsford School, Tomarata Primary, Tapora Primary, Tauhoa School and Mangawhai School — and the Te Hana Te Ao Marama Maori Cultural Centre (situated just outside Wellsford in Te Hana). I designed a flyer that outlined what the day was about and one of the branding committee members, Karen Lenon, offered to print it and take it around to all the business owners. Also, Cathy Roach emailed all members of the Wellsford Business Association to ensure they would all take part on the day.

I suggested as part of the event process that anyone coming along should bring any visual aids or comments they thought encapsulated their thoughts and feelings of the region and they too could be added to the wall. I also made sure it was clear that at the end of the day, after a photographic record had been taken, they were free to take their personal item away again. The overarching object for the day was to encourage people to put on the wall images, comments, posters, words, or anything else that helped articulate and illustrated any thoughts they might have about Wellsford and its environs.

The existing desk at the back of the shop was used as my work/observation post for the day. I also installed a couple of trestle tables where Post-it notes, sticky tape and other stationery aids were placed. These were used during the day to adhere pictures, comments, posters and sheets of paper to the wall. On the window facing the street there was a poster informing people what was happening during the day and an invitation to take part. An overarching question, "What do you think Wellsford is?" was positioned on the wall using repositioning tape to avoid any damage, to facilitate in starting the process one of the walls. All images taken on the digital camera were printed out in colour on 80gsm stock and laid out on the floor of the shop to enable people

to walk along an pick any image that sparked a thought in them.

Participants had the use of tape supplied to adhere the picture to the wall, and if they felt the need, post a comment on the picture itself or use a supplied post-it note for their comment. I did not want too many instructions on what was expected from visitors to the Listening Event as the idea was to let them make their own decisions and try and articulate their own thoughts and feelings about the town and its environs. However, I had a small leaflet explaining why the event was happening and the value they are adding to the development of the town's brand. Also, I was on hand to answer any questions. At this event I did not want any digital component as I wanted the people to come and engage with the project on a tactile, interactive, physical and community basis to spark dialogue among themselves while immersed in the Listening Event. (I will however, at a later date, evaluate if there should be a digital/social media presence where people can visit a website to see what came out of the Listening Event and post their own comments and images in a digital environment.)

If people were struggling to pick a picture or post a comment, I had the following prompts: -
- Just go for it, it's your town. Pick a picture that tells the story
- What do you they think the situation is at the moment?
- What are the biggest challenges for Wellsford?
- What would you keep as it is in Wellsford?
- What keeps you living in Wellsford?
- If you could change anything, what would it be?

I did not have any desire to structure the day, or split it into various workshops, as I wanted it to be one big workshop that allowed people to turn up when they wanted and for as long or as short a time they wanted.

I opened the doors to the shop on the day of the Listening Event, Saturday, October 12, 2013 at 9am. It got off to a slow start and it wasn't until 9.45am that the first four of people came in the door and started to look at the pictures. Despite a poster explaining what they could do — pick an image, place it on the wall and post a comment — they still asked what to do. Shortly after 10am, I noticed three people looking in through the window and then moving on. This prompted me to go outside and look into the shop from their perspective and realised, although there were posters on the window saying what the event was, there were no instructions on what to do to engage with the project. I then placed a spare poster with the suggestions on how to use pictures and how to comment. From that moment on people who looked through the window could read both posters and then came inside.

By midday 21 people had been through and posted their pictures and comments on the wall. Also, a pair advocating the saving of the green spaces in Wellsford had put their own protest board on the wall, which also attracted a number of comments during the day. Mid afternoon proved to be the most popular time with up 12 people engaging in the exercise at any one time. As the day wore on my participation in getting the conversation going became less and less.

People started their own discussions and the process grew organically to the stage were strangers were talking each other. The collection of images appeared to bring back many memories for the town's residents and reminded them of the good things Wellsford had to offer and what an interesting and eclectic place it really was. Towards the end of the afternoon, more and more people calling in to place

their own ideas, concepts and images on the wall.

This added to potpourri of thoughts, impressions and comments, both visually and written, on the wall as part of the overall vista of what people thought of Wellsford. A number of visitors to the area and some who had just stopped for a coffee, also made the effort of participating in the event.

The last of the participants left at 5.30pm. At the end of the day 63 people (Wellsford population 1698 as of the 2013 Census) had taken part having access to 374 images of which 116 were physically place on wall prompting 123 comments. Those taking part in the day's exercise bought in seven protest boards, and five visions of a future Wellsford were also placed on the wall. During the day I noted at least 16 conversations were generated between unrelated participants.

From my own personal perspective, one conversation I had with an elderly gentleman had with me made the day worthwhile and reiterated the fact that I was on the right track. The bloke in question came up to me asked if I "was a bloody politician" coming to Wellsford to tell him what his town should be like. I said, "No." He then asked if I was "some bloody Auckland ponce who was going come up with fancy new logo" to which again I said, "No." He told me he had lived and worked in Wellsford for 74 years and nobody new it better than he did.

This gave me the opportunity to explain what the day was about and it was his chance to make a comment on what he thought of his town and that he could be part of the process of creating a place brand for it. He remained in the shop for another 45 minutes and made his own contribution to the wall. A couple who had overheard the conversation approached me and said what a great idea the Listening

Event. They were gong to tell all their friends that had had a say in the process of place branding of Wellsford right at the beginning and they thanked me the opportunity of being able to take part. This sentiment was repeated to me on a number of occasions towards the end of the day.
Based on the feedback from the Wellsford rebranding steering committee, participants and visitors, the day and process involved in getting the Listening event up and running can be regarded as a success. "I was surprised by the number of people who came along and took part," said Wellsford Promotionn Association secretary Kathy Roche.

Another participant, Wellsford Lotto retailer Karen Lennon said, "It was a great day and the response has been really good. A lot of people have made an effort to have a say" (Roche & Lennon, 2013).

Others who took part felt they had been part of the place branding process and felt more at ease with the branding project as a whole now that they had been consulted and had a practical input to the process.

9.2 APPENDIX B
BOOTCAMP BOOTLEG — STANFORD UNIVERSITY INSTITUTE OF DESIGN (D.SCHOOL)

The Hasso Plattner Stanford Institute of Design at Stanford University, or d.school as it is more commonly know, is not a college people can enrol in per se, it's where students and staff in engineering, medicine, business, law, the humanities, sciences, and education can collaborate to look at various problems using human values as a core. "We support "students" of design thinking who range from kindergarteners to senior executives. Our deliberate mash-up of industry, academia and the big world beyond campus is a key to our continuing evolution" (d.school, 2014).

Over five years the d.school put together a series of methods (Bootleg) based on their workshops (Bootcamp) into a free downloadable publication called *Bootcamp Bootleg* (http://dschool.stanford.edu/wp-content/uploads/2011/03/BootcampBootleg2010v2SLIM.pdf). The toolkit is not meant to be simply read, it has been developed as an active process to be constantly used by design professionals in conjunction with end users. It is underpinned by a human centred design approach, which looks at all forms of possible input to the design process, even some that initially may seem at odds to each other.

By using the d.school design process toolkit, participants from all aspects of the project, both for and against, can take part and contribute. Like the other design process methods discussed in this report, the d.school toolkit follows a path that begins with a wide scope that is filtered and focused down before moving on to more iterative exploration. Silje Kamille Friis, associate professor at the Kolding School of Design, says that, "Design processes are full of contradictions. They require the ability to open projects up by generating ideas and engaging in abstract thinking as well as the ability to close them down by

evaluating and selecting the most promising solutions (Mind-set, 2013)."

Before users get to start the actual d.school process they have an overview of seven mindsets (with short explanations in the booklet), which users should always be aware of when participating and should underpin everything when using the toolkit — Show Don't Tell, Focus on Human Values, Craft Clarity. Embrace Experimentation, Be Mindful of Process, Bias Toward Action and Radical Collaboration — and are regarded by d.school as "vital attitudes for a design thinker to hold" (Bootleg Bootcamp, 2010 p.2).

Once users have engaged with the human centred ethos of the toolkit they can move into the first of the five steps of the actual design process — Empathize, Define, Ideate, Prototype and Test. What makes the *Bootcamp Bootleg* method slightly different to other methods is each step in the process is called a 'mode' rather than a stage. The d.school rationale for not calling them stages, is that their *Bootcamp Bootleg* process has not been designed to be a linear process, rather something that an be can be malleable allowing it to adapt to any given project. This is evident by the varied projects the toolkit has been used for including; Visa, White Mountain Apache Tribe, Gates Foundation, Google and the Girl Scouts.

> **Emphasise**: Empathy is the core of human-centred design process and this where users observe, engage and immerse.
> **Define**: Unpack and synthesize the finding from the empathy mode to find a specific and meaningful challenge.
> **Ideate:** Focus on idea generation and explore a solution space

Prototype: Getting ideas and possible solutions into the physical world and engage in end user feedback **Test:** The chance to refine solutions and make them better.

Along with five modes and their explanations, which the booklet goes into deeper detail, there is a set of 38 method cards that help put the user in various spaces to help with the design process. These cards have detailed descriptions and have been road-tested over the years by the Hasso Plattner Stanford Institute of Design and include explanations of many design thinking and action methods. Examples are how to 'assume a beginner's mindset', 'interview preparation', 'story share and capture, ' 'empathy map', 'bodystorming' (a particular favourite where users physically experience a situation) and 'user-driven prototyping' t0 name but a few.

As with the design methods discussed in this report the thread among them is one of engaging with a wider community from the beginning of the process and developing a relationship with all those involved including the designers. Gone are the days where a designer sat in a room on their own and created the solutions. Individuals can't gain a wider perspective on their own. It is better to work in a social environment when trying to design for a community and make the process a collaborative affair (Wenger, 1999). In the *Bootcamp Bootleg* process it's the second mode, Define, where the filtering or focus of the process begins to take place.

The aim here is to find an actionable, or clearly definable problem, to focus on before engaging with the Ideate mode where the process flares out again into idea generation. It's at this part of the process that insights and needs of the end users should become apparent after looking through all the data gathered in the Empathise mode. "Two goals

of the define mode are to develop a deep understanding of your users and the design space and, based on that understanding, to come up with an actionable problem statement. Your point of view should be a guiding statement that focuses on specific users, and insights and needs that you uncovered during the empathize mode (Bootleg Bootcamp, 2010 p. 6)."

The 'point of view;' should not just define the problem, but is the design solution pathway based on what the designer found after analyzing the work done in the Empathize mode. The good thing about the d.school toolkit are the 38 method cards it contains to suggest a myriad of different ways of finding the core issues, filtering it down and suggesting ways of finding a solution best suited for the end user, with the end user's help and feedback.

The cards have been developed and tried and tested over the past seven years the d.school has been in existence, and have also been influenced by the IDEO Method Deck, which has been around for much longer, and others some of which have been discussed in this report. The *Bootcamp Bootleg* toolkit isn't for users who have no design background as some of the terminology and working practices would be confusing. However, with the guidance of design facilitator it would not be long before most people would be comfortable engaging with the toolkit and the information it contains would go someway to explaining the ins-and-outs of design thinking and practice.

9.1.1 COLLECTIVE ACTION TOOLKIT — FROG DESIGN

In 2011 and 2012, American company Frog Design was working on a project (with the Nike Foundation) involving young women in the third world and how to get them to contribute to solving local community problems. During the project Frog realised they had to rethink how to communicate design thinking.

The goal was to inspire design thinking outside of the design world (Frog Design, 2014). During the period of the project Frog discovered they had to find a way of making the design process something the young women cared about and was useful to their lives first and the ultimate design outcomes a secondary feature. *The Collective Action Toolkit* (CAT) was developed over six months as a resource to "help people accomplish tangible outcomes through a set of guided, non-linear collaboration activities" and with a goal of "helping communities generate solutions, connect to resources, and pool knowledge to solve a wide range of challenges and create real change" (Frog Design, 2013).

Frog established a design process that focused on knowledge sharing for communities and skill improvement rather than designer orientated concepts and then realised they had a vehicle to help people, in any situation, problem solve by listening to their own stories and others. Such was the success of the CAT toolkit that despite getting its start in Africa, its guide to developing skills for community stakeholders to solve problems has made it one of the most successful open source toolkits freely available. It has been downloaded by over 10,000 people and used by non-profit organisation, governments and NGOs.

Internationally recognised speaker and consultant on education, strategy, innovation and engagement Dr Mark Strom is a keen advocate in the power of conversations and the importance of engaging with the end user of any service or product. In his recent book *Lead With Wisdom*, he suggests research done with surveys is not the most effective way to gain the best information, as the questions may be wrong. Strom is an advocate of getting inside the end user, or potential customers, and hearing the stories of their experience of products and services, and to be patient and curious and listen to people's stories (Strom, 2014).

By listening to communities and their stories, along with getting them to generate ideas and collect knowledge Frog achieved their goal of creating a process that helps solve a range of various challenges and the possibility of creating real change and make design thinking universal.

The *CAT* process starts with an action map, at the centre of which is a shared goal — where the problem is agreed and what is to be achieved. There are a series of cards for recording what is raised, discussed and agreed on as well as cards for guiding the process. Once a goal has been settled on a five-stage process then begins — Build, Seek, Imagine, Make and Plan.

Build: Bring together representatives of the community who are committed to the cause.
Seek: Listen to the community and their stories and issues and learn how to live in their shoes and ask the right questions.
Imagine: Get the group to think of other problems that might be apparent and make some more action able than others.
Make: Ensures the idea will work by prototyping and testing and experimenting with a focused set of ideas.
Plan: Helps the group to generate solid, implementable actions in the final stage heading towards achieving set goals.

Build new skills: Gain important life skills with your group and understand how to best put them to use.

For example: critical thinking, listening to others, asking better questions, generating ideas, active collaboration, creating better stories, and inspiring and sustaining collective action.

Gain knowledge: By pooling what you know and whom you know, you can better support each other in your group and beyond. For example: with your group, you can gain per-spective on a community problem or need, as well as reach out to more people that could support those solutions. *"The Collective Action Toolkit* (CAT) is a package of resources and activities that enable groups of people anywhere to organize, build trust, and collaboratively create solutions for problems impacting their community. The toolkit provides a dynamic framework that integrates knowledge and action to solve challenges. Designed to harness the benefits of group action and the power of open sharing, the activities draw on each participant's strengths and perspectives as the group works to accomplish a common goal.

CAT can be downloaded from the Frog Design website (http://www.frogdesign.com/work/frog-collective-action-toolkit.html) as a 72-page booklet or can be turned into a series of A5 cards that are easily portable and useable in most community situations. It uses a simple, clear and effective design and layout, using colour coding to differentiate the different stages of the process and relies on simple, descriptive vocabulary explaining how to build teams, gather information and develop desired outcomes. It uses simple black and white illustrations that are cultural neutral for use in type of community. It is not a step-by-step guide and it is possible to start at any of the stages, which in my mind could confuse someone new to this type of

process and would there require someone familiar to design processes being available to facilitate and guide new users of *CAT*. Each activity is short and self-contained and always recommends users to go back and redefine the original goal focusing down on what is manageable.

This filtering process is done at the Imagine stage where the aim is to distil all information from the quantity to quality, where all possibilities have been looked at, discussed and combined to see if any new possible outcomes can be generated. It is then time to look at all the ideas and begin to cull them down into those, which might be workable and can be made into something real for the right reasons. When the potential ideas have been settled on the next stage (Making Something) is enacted where the ideas are made into something real to see how robust they are in the working world.

9.1.2 IDEO METHOD CARDS

The IDEO *Method Cards* are one of the most well known toolkits for inspiring the design process and were first produced in 2002 and went on to win an IDEA Silver Award from IDSA and *Business Week*. Keeping in touch with digital age, IDEO launched the cards as an iPhone app in 2010. The company has been involved in the development of the Apple mouse, Prada's flagship Manhattan store and the stand up toothpaste tube. Their approach to designing is to focus on keeping people at the centre of the design process. More recently they have been involved in Human Centred Design working with social enterprises and NGOs worldwide. For the purpose of this project I will be concentrating on their *Method Cards*.

The 51 cards, the same as a traditional playing deck, were created in response to requests from clients, colleagues, students, and teachers. The *Method Cards* are intended as inspiration for practicing and aspiring designers, as well as those seeking a creative spark in their work. It's a design tool meant to help you explore new approaches and develop your own. Use the deck to take a new view, to inspire creativity, to communicate with your team, or to turn a corner (www.ideo.com, 2013).

The inspiration for the cards came from the design practices IDEO already undertook and were part of. Some of the images on the cards are from actual projects the various IDEO teams worked on in the past, and methods tried and used before. Depending on what users want to achieve from using the cards, they can either get inspiration from the image on one side or flip the card over and try the actions described on the other side. Each card describes one method and includes a brief story about how and when to use it. The cards are organised into four suits (not unlike a regular playing deck) — Ask, Look, Learn, Try.

Ask: Enlist people's participation to elicit information relevant to your project.
Watch: Observe people to discover what they do rather than what they say they do.
Learn: Analyse the information you've collected to identify patterns and insights.
Try: Create simulations to help empathize with people and to evaluate proposed designs.

On the reverse of the working cards (there are 10 cards explaining how they are to be used) are two statements sub headed How and Why, to aid in the design process. For example; on the reverse of the card with a picture of a mobile phone on it (part of the Try suit), the headline is Empathy Tools and the How statement reads, "Use tools like clouded glasses and weighted gloves to experience processes as though you yourself have the abilities of different users" (IDEO Method Cards, 2003).

The Why statement reads, "This is an easy way to prompt an empathic understanding for users with disabilities or special conditions" (IDEO Method Cards, 2003). These statements are particular to each card.

As it's a deck of cards it is easy for the user to mix and match any number of cards to any particular design problem. By working through the cards it's apparent IDEO have not aimed the deck at one particular level of design processing, rather everything from paper design to new technology that is used interactively.The cards aren't so much a single method of design processing but relate to various techniques like blue-sky thinking, ,brainstorming, mind mapping, mood boards, Disney Imagineering, role playing, random input and oblique strategies. The cards also come with a booklet that explains how the cards came about and how IDEO have used them in the past. There is also under the four stages, a list of activities that can be

used to stimulate a verbal, visual or active conversation. The cards are a good resource for people interested in finding new ways of thinking and brainstorming solutions. As more cards are worked through it is possible for ideas to become more focused and refined generating practical ideas as a sound base in moving towards a design solution to a given problem. However, users must have some method handy to capture what comes out of any exercise with the cards, as there is no avenue in the pack to record various experiences and outcomes.

The IDEO *Method Cards* pack is very much a design research tool for designers and their clients using an empathic method, which in turn can spark a specific design initiative. They can be used in a variety of ways including browsing, pinned up (although damage to card has to be taken into consideration), spread out, or sorted into groups and as a search tool.

Over the years it has been noted the cards have been used to gain perspective, inspire teamwork, encourage new approaches and help users develop their own methods. The cards help spark design thinking but are loose on any specific methodology and don't help in moving towards any sort of filtering or iteration stage. The cards are great for brainstorming, but at nearly $60 a pack is at the expensive end of the scale if you're to use them with clients all the time, or leave them with potential clients helping them to start the design thinking process.

The IDEO *Method Cards* is a quick and innovative way of getting ideas out in the open quickly and effectively and it's success comes somewhat from the mobility inherent in a deck of cards based on the look and feel of a traditional playing deck — they can be used anywhere, by anyone. The deck will be most useful to design professional who can create a methodology to harness the useful

information gained from engaging with the cards. However, there's no way to gauge when using the pack if an idea generated is viable, useable or practical. Although there is suite, or stage, in the deck (Try) where 'simulations' can be tried to empathize with users and evaluate proposed designs, there is no real structure as to how the four stages fit together to form a coherent process to move into a further stage of iteration.

9.1.3 SDT — SERVICE DESIGN TOOLKIT WITH JAMK UNIVERSITY OF APPLIED SCIENCE

The *Service Design Toolkit* was produced after collaboration between the Finnish university, JAMK University of Applied Science and Finish service design agency Palmu Inc., between 2010 and 2012. The cornerstone of their thinking was to try new ideas on their end users as soon as possible before any great investment in time and money was made, and to involve the end users during the process.

The creators of the *SDT Toolkit* want users to learn about design through practice and the thinking is based on learning, thinking, experimenting, modifying and then refining. The tools in the kit are not based on any card system as with others, but do have four stages of a design process to help guide the process along and keep it focused on developing an idea and staying in contact with the end user.

The SDT method involves asking questions along the way and presents means of analyzing the thoughts and answers these questions produce. The toolkit has four charts or posters representing the four stages of its process — Define, Learn, Solve and Test — that pose various questions with boxes for the answers to be written.

Define: What the challenge is and what its objective is along with who the end user will be.
Learn: The end user's point of view and identify the problem to be solved.
Solve: Begin forming solutions and generate ideas the prioritise the best.
Test: Evaluate in practice and gather feedback for further improvement.

For each of the above stages, the toolkit includes further prompt pages that are linked to the individual stages by a number and a hammer icon, to help engage with the end user. These tips and suggestion help elicit information that would be relevant to that particular stage of the process. In relationship to my project, the focus point of the *SDT Toolkit* is Solve at stage three of the four. It is here the process begins to filter and focus on forming solutions to the design problem after gathering all the relevant information. In this stage users are required to come up with solutions to the challenges they have identified, describe development ideas with words and pictures, review and prioritise the best solutions and then sketch and prototype the best solutions. When this stage is complete the process moves into the final stage where a plan is developed to test the prototype.

A drawback with this overall process is users have to physically fill out each stage, and if enough time has not been allocated the answers could be rushed. Just filling in the various boxes without pondering the questions and using the prompt tools, will not be of any value. Spending time thinking about possible responses, with the help of the prompt tools at the back of the document will enable users to better understand how the four stages work together to create the bigger picture and provide a more robust outcome.

The creators of the *SDT Toolkit* suggest users don't have to use all the tools and go so far as to say users are free to modify each tool to better suit their individual needs and or requirements. It is this feature that allows the *SDT Toolkit* to be infinitely adjustable to any design problem, but could also open the door for the system to become biased towards a predetermined outcome.

The overall process also hints strongly that the process of

designing a service or visual outcome may never have a finite finish, and is constantly adapting to the end users' needs with the participation of the end users themselves. There is great value in getting the end user to help design the service you're trying to provide for them.

"Over the past decade, research groups within a number of academic institutions, practitioners in design research consultancies and design research groups within industrial institutes, have all explored co-designing tools and techniques and the processes by which they can be applied (Sanders and Stappers, 2008 p. 9)."

The *SDT Toolkit* consists of a 19-page booklet that is freely available for commercial use from the SDT website. The end user's participation in co-design is important but is not the be all and end all. There will always be a need for professional designers in all the various fields of design practice.

"They need to play a role on the co-designing teams because they provide expert knowledge that the other stakeholders don't have. Designers professionally keep track of existing, new and emerging technologies, have an overview of production processes and business contexts. This knowledge will still be relevant throughout the design development process (Sanders and Stappers, 2008 p. 12)."

The *SDT Toolkit* was used by the Finnish town Rovaniemi, which is the official hometown of Santa Claus, to deepen the understanding of the needs of the customers. The methods that were used in the service design process were new tools in the tourism and experience industry and brought many new insights and inspiration for those who participated in the process.

The hands-on exercises introduced the participating

companies to new and more engaging methods of generating customer understanding. By asking a lot of questions the SDT Toolkit had the ability to steer the user in a direction that may not have evident before starting the process.

9.1.4 NAMHAN FLANDERS SERVICE DESIGN TOOLKIT

Two Belgian design firms, Namahn and Yellow Window collaborated with a public agency that promotes Flemish design (Design Flanders) to create a service design toolkit, which encourages the practice of co-design encompassing user centred thinking. Their process incorporates consumer research, interaction design and ethnography. Their *Service Design Toolkit* contains a manual with a step-by-step guide, posters, templates and charts that illustrate techniques for working with members of the public who will eventually be end users. There is also a series of technique cards (that have to be bought), based on personas to get users to think about who will eventually use the final solution.

Namahn and Design Flanders collaborated to produce the *Service Design Toolkit* in an effort to introduce a service design methodology to local authorities. The outcome is a simple, practical do-it-yourself, easy to follow guide for local authorities that will enable them to provide a better quality service to their end users including local residents.

In their book on design research, authors Christopher Crouch and Jane Pearce talk about "The need for the designer to work alongside the end user is a logical development of the client based work that is the traditional staple of the designer, but in co-design this relationship is much more intense. The focus is on why and how change should be initiated with the associated problem solving shared between the designer and the end user (Crouch and Pearce, 2008 p, 28)."

Namahn's background is in designing digital products and services that require end user interfacing and include self-service kiosks, knowledge bases and e-government projects. They approach every design project from the needs and requirements of the end users and use these as starting points for co-designing a better outcome. They aim to make their outcomes as user-friendly as possible. Design Flanders on the other hand specialises in placing the right service designer, or service coach, to help and facilitate anyone through the service design process. They will find someone to take a local authority through the design briefing, initial meetings, what the job entails and expected outcomes.

Combining the attributes of both agencies they produced a tool kit, which contains a poster, a manual, a set of technique cards, a series of portraits and various workshop materials. It is an eight-stage toolkit — Framing, User Insights, Personas, Design Scope, Ideation, Service Concept, Prototype and Test and Feasibility — all which are serviced by their own set of templates and charts.

Framing: What is already known, what is needed to be known and what is the object of the service.
User Insights: From the parties involved and what are their connections.
Personas: Characteristics of the users and their influences and what their stories are.
Design Scope: Explore what's needed to be improved, what is most important to the user and how will success be measured.
Ideation: Sort through the various ideas/solutions out and find the ones to be developed further.
Service Concept: Ascertain how the end user would interact with filtered potential solution.
Prototype: Make and test prototypes and evaluate the positives and negatives.
Test: In small groups note how the end user interacts with the solution and how it measures against previously stated goals and re-evaluate if necessary.

The tool kit contains a poster that is an overview of the

process and a 'hands on' explanation of each stage and expands on co-creation, touch-point diagrams and how the blueprint works. The manual introduces the design process and a step-by-step plan of how to proceed. The technique cards explain how to use each technique and how touch-points can impact on a service experience. The portraits are personas that can be adopted and used throughout the development process and bring them to life.

The technique cards in the Namahn Flanders *Service Design Toolkit* are not what I want to explore in this project, as they are not too dissimilar to others discussed in this report and function in much the same way. It's the templates, posters and charts that I feel have more relevance to the research for my project. Available are also a series of printed materials that are used to facilitate each stage of the process and help user grasp the important points.

Stage five, Ideation, and in particular the Lotus Blossom phase is used to find inspiration from eight designs requirements and then taking each one of those and 'blossoming' each one out into its particular section where users find examples and write down what makes them so good. While this may appear a to be a random selection of ideas, the underlying grid structure of the poster provides a subliminal organisational system to marshal the ideas into something that be can transferred to the next phase.

The second phase is where the real filtering process starts before moving into stage six and seven — Service Concept and Prototype. There is a grid of four squares into which the ideas from the 'blossom' stage are sorted; 'forget these ideas', 'park these ideas for later', 'standard ideas that can be incorporated' and 'these ideas will make a difference'.
What I like about this process is that, unlike the others,

early in the process at stage ones — it asks how success might be measured and what are the most important results being looked for.

Although the toolkit is capable of being used by staff members with no outside help, Namahn and Design Flanders recommend an external service design consultant is hired to moderate the workshops and guide users through the process. This recommendation is in response to the very real possibility local authorities who use the toolkit may translate the tools in a different way. This is somewhat combated by the very concise instructions that provides a robust framework to avoid any wavering from the process, which has been developed and iterated over a period of time by Namahn and Design Flanders.

As much as Namahn and Design Flanders will try to train and instruct local authorities in the use of their toolkits in the same way each time to get consistent results, human nature is such that, and the subtle differences with each project, it will be difficult to achieve absolute consistency across local authorities. This will be especially true when there are cultural differences in different countries that may use the toolkit. However, Namahn and Design Flanders have stated with their continuing evolving training it will be possible to attain the same service design process over many years.

Trying to improve the services a local authority offers to their end user is not a new approach, but with this toolkit the focus is entirely on what the users want. With this process, solutions aren't driven by internal forces in the design agency, rather collaboration with end users taking focus from their wants, requirements and needs. This thinking is reiterated by the co-founder of the Next Design Leadership Institute, G. K. Van Patter, where he says the "concept of multiple stakeholders and organisations

interacting with multidisciplinary design teams will increasingly become the norm" (Crouch and Pearce, 2008 p, 29). Van Patter also went on to mention this didn't mean the end of traditional design agencies but rather they become part of and help facilitate the bigger picture of where the design process is part of a network of ideas and practices.

The material in the toolkit looks at all aspects and the creation of user-centred services from the viewpoint of a number of design thinking disciplines including interaction design, ethnography, consumer interaction and product design. The toolkit emphasises the importance of co-design and the need to involve the end user in the design process, which will in turn make the end user part of the process and stakeholder in the outcome.

Of all the method/toolkits discussed in this report, I find the Namahn and Design Flanders Service Design Toolkit to have the most relevance to the project I am exploring with the Wellsford town local community.

9.1.5 SILK METHOD DECK

The English county council Kent realised back in 2007 that to meet the increasing challenges of responding to the needs of their residents it required an innovative approach. The council created the Social Innovation Lab for Kent (SILK), which was tasked with bringing, shared community and space challenges together so the Kent Council could be more proactive in connecting resident's lives with policy making and services.

SILK, in conjunction with leading service design consultancy and specialists in customer experiences the Engine Group, developed a project management process and supporting toolkit to kick start and nurture innovative thinking within the council's bureaucracy. The development of the *SILK Method Deck* was organic involving leading stakeholders in the Kent district community along with touch points in the region where residents could access council services. The *Method Deck* has won numerous awards and been mentioned in UK parliamentary commissions.

In its research the Engine Group discovered that no fixed process could encompass all 45,000 Kent Council staff members spread across the entire county. What they did discover was that each project undertaken by Kent had its own individual wants and needs and they, along with the stakeholders of the immediate area, needed to define the process. Which in turn was informed by the wants and needs of the local residents.

The Engine Group developed and tested a structured co-creative approach to project work, supported by a powerful set of creative techniques. This was expanded to provide a platform for solving complex problems by inviting people from different departments, and different

levels, to focus on people's needs and to collaborate and demonstrate the value of engaging citizens at all stages of project work. After the initial

handover to SILK of the tailored toolkit to enable Kent Council to engage more with its residents, the Engine Group remained in a facilitator's role supporting the SILK staff in their on-going practice of being responsive to the needs of the local community.

By beginning the process with people rather than existing services, SILK wanted to make sure all new solutions implemented improved the lives of the residents of Kent. They believe that the best solutions come from the people who are closest to the issue; this could be service users, residents or frontline staff. They decided to go much further than community consultation and believed that people should be actively involved in the design of services that they are going to use or deliver (Social Innovation Lab for Kent, 2009).

Unlike a number of other design process toolkits, the SILK methodology started with asking the question into which category any project they wanted to develop fell into – Strategic/Policy, Service Re-design, or Creating Sustainable Communities. Once the area of the project was identified, it became a four-stage process of development and refinement – Initiate, Create, Test and Define. It is here the *Method Deck* is introduced to help focus down and define possible outcomes of each of the four processes (Initiate, Create, Test and Define).

The *Method Deck* itself consists of 45 cards broken up into five modules and also includes an introduction to methodology, guides, templates, supporting tools and

advice on the management of projects. The overarching premise of the *Method Deck* is to draw on the best of design, business, social science and local experiences and then place the local residents at the centre of everything users of the toolkit want to achieve. While it was initially designed and developed for the Kent Council, its collection has been used by project teams, designers, project managers, social science researchers, community and economic development experts from all walks of life.

There are five stages — Plan, Communicate, Insight, Workshop and Design — with each one espousing on methods useful as guides, prompts and references during each stage of the project process.

Plan: Useful aids at the early stages of a project, providing the team with 'how to' and prompts for building a robust project plan.

Communicate: Complement the Plan cards and provide techniques for communicating with stakeholders throughout the project.

Insight: Techniques for collecting insight either directly or through users or specialist researchers.

Workshop: A generic set of tools useful during co-creation sessions.

Design: Useful once the project has begun and offers ways of converting insights and inspiration into ideas and practical solutions.

The three middle stages prompt interaction with stakeholders, users and suggest a co-creation method of interaction involving all those who will influence and be influenced by the final design. "Most importantly, the people for whom the design team works must be represented on the design team itself. Without the help of the end user, no socially acceptable design can be done (Papanek, 1985 p. 304)."

As can be noted by the Design stage description, this is where the *Method Deck* focuses down on the information collected and where early iteration and exploratory physical design manifestations can begin. Here is where the cards force users to focus on how the design will work in practice, the details around delivery and where the design's strengths and weaknesses lie and if there is need for further consideration. In this stage the cards suggest the use of personas to represent different user types within the target audience to focus on users' state of mind. Many people are reluctant to draw their ideas so the 'touchpoint template' card as part of the Design stage has semi-complete images which users are encouraged to complete and are seen as a good place to prompt users who might struggle to visualise their ideas and can help to bring ideas forward quickly (Introduction to Social Innovation and SILK, 2009).

Other cards that can be used during the Design stage are Post-it note planning, which is a quick and collaborative way to generate resources and spot gaps, the Concept Sketch, which has been discussed previously as a touchpoint template card, a Desktop Walk Through that allows users to consider how the design would actually work, Experience Targets card helps users define what a good service design consists of followed by Cardboard Prototyping towards the end of the design stage where other groups including users can provide additional insights and finally My Metrics where users are interviewed to measure the success of the design. And there is Word of Mouth where informal introductions to the design are passed on from user to user.

The *SILK Method Deck* provides a creative way for a collective responsibility and ownership for project scope, focus, design and resolution.

9.1.6 TRANSFERABLE RESEARCH METHOD

Having researched a number of card and poster design process toolkits, I looked at a more traditional matrix where the stages of the design process were visualised as a flow chart. British designer Matt Cooke's solution to designing for social issues — a UK cancer awareness charity — was to develop a design methodology "specifically to help tackle such social problems" (Visual Research, 2005 p. 30). Cooke moved his focus from creating a series of, visual solutions to developing a more methodological approach. He set out to prove that the "design process can actually be enhanced when working within a structured methodology" (Visual Research, 2005, p.30).

He also wanted to prove that having an organised approach to the design process wouldn't hamper the creative process and could improve the eventual design outcome. Cooke noticed the detailed business review, company analysis and construction of the attention to detail of campaign literature, wasn't applied with the same rigour to the design process or roll out (Visual Research, 2005). The majority of the printed material was public information on cancer to be distributed into doctors' surgeries with little attention shown to the visual communication for the intended audience. Cooke adapted a range of methods used in advertising and marketing, producing a process he tested through focus group feedback and surveys. The result was a process comprising four stages — Definition, Divergence, Transformation and Convergence.

Definition: Where a number of questions are asked which in turn will define the project and the problem to be solved.

Divergence: Where quantitative and qualitative research is undertaken along with gathering information on any existing competition, who the intended audience is and the visual communication design that would be appropriate.

Transformation: Where the project is focused down the potential design solution with a range of iterations and experiments.

Convergence: Where a more practical approach to the process starts to be evident and where cost constraints may come into play around the final design output.

In the first two stages Cooke has attained a body of information that know has to have some focus placed on it in order to proceed towards a design outcome that will suit the end user's needs. A pinch point if you will, where iteration, testing and feedback can be attributed using focus groups for feedback on colour, typography, imagery and legibility. This feedback will contribute to the eventual structure of the final campaign At the Transformation stage Cooke wanted to be able to take the raw material "which when filtered through its collective imagination and honed by design experience, evolves into a set of proposed visual solution" (Visual Research, 2005, p.36).

Stage three is where Cooke is trying to build on the knowledge and information in the first two stages to produce well-thought and precise visual solutions. It is at this stage though, designers have to be careful not to unconsciously place any personal influences on the proposed prototypes, otherwise there is the risk of designs being produced that are foreign to the intended audience, or based on a current, fashionable look and feel.

The 'Transformation' stage in Cooke's process concentrates on visual experiments and feedback from the intended audience in order to suggest a functional solution, which has

been influenced and informed by the brief in stage one and the divergent research in stage two.

Here Cooke's method introduces design prototypes, which are then tested on the intended users. He then askes if the graphics designed are appropriate and if not, indicates doing more prototyping. However, if the early designs are found to be appropriate he suggests the process moves onto testing in a small-scale environment. If successful the process moves onto the final implementation stage and if not, there is an option to re-evaluate the design objectives. While his solution in illustrating his process was not strictly a toolkit comprising a set of cards, his has distinct stages that could be taken as standalone. By using impactful images as backdrops and indicating the stage in question by placing text in a white box, the stage being used stood out from the background.

The rest of the process stages get lost in the visual noise of the background image allowing the user to concentrate on the stage at hand. In this way the process is similar to using a pack of cards where the cards, not required at any one particular point, are not a distraction remaining in the box or stacked elsewhere.

Compared to a number of other design processes mentioned in this project (in particular the IDEO Method Cards), Cooke's system instils a sense of confidence that allows things to happen quickly and with confidence. However, there are a few issues that I think need addressing. In the booklet that contains the four stages and explanation, Cooke has placed full-page images behind the matrix to bring life to the process. However, due to the nature of the background colours, a lot of the text that is not part of the stage in question gets lost. While this may not be a problem when dealing with an individual stage,

it makes referencing back, or forward, to the process as a whole difficult.

Visually the process looks restrictive and alludes to the fact everything has to fit into a 'box' and there are only 'yes' and 'no' answers suggesting a lack of wiggle room that might lead to new solutions. However, as Cooke's process is designed to streamline any given project and allow for consistency across a broad range of social agendas for graphic design (Visual Research, 2005). Cooke appears to have wanted a more holistic approach to the design process, and visually it may have worked better if he'd have used a more rounded construct to the design.

He does, as part of the booklet though, try and illustrate how each independent stage fits into the overall process and are interdependent, but has used a different nomenclature for each stage, which may confuse the user into thinking it's a different process.

Cooke's process is well thought out and on balance works structurally, however, in both its visual look and feel it doesn't invite participation from those who don't have a basic understanding of design research. It would be difficult to get end users (people in the doctors' surgery) to engage with the process.

While Cooke's process does engage with the intended users to a certain degree, it is primarily designed to help the charity who commissioned the project and allow a design team to get a project done quickly and efficiently (Visual Research, 2005).