

FIRST EDITION / TWO THOUSAND FIFTEEN

FIRST EDITION

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**DESIGN THINKING  
FOR LIBRARIES**

**ACTIVITIES  
WORKBOOK**

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**A TOOLKIT FOR  
PATRON-CENTERED DESIGN**



WWW.DESIGNTHINKINGFORLIBRARIES.COM

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# CHAPTER 1

# Getting Started

The best way to truly learn is by doing, so for every chapter in the toolkit guide, you will see activities associated with the methods outlined in the readings. If you are the team leader, we encourage you to facilitate these activities with your team, assembling materials from the list below before your next meeting. The times noted for each activity are simply an estimate, so it may take your team more or less the times mentioned here. Take note of how your pacing feels against these estimates, and plan meeting times accordingly.

## MATERIALS NEEDED

- Print copy of the toolkit (1 per person)
- Blank paper or notebooks
- Thick pens, or equivalent
- Sticky notes, or equivalent

### ACTIVITY 1

#### INTRODUCTIONS *pg. 4*

15 minutes

### ACTIVITY 2

#### ICEBREAKER: VISUAL TELEPHONE *pg. 5*

15 minutes

### ACTIVITY 3

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15 minutes

### ACTIVITY 4

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15 minutes

### ACTIVITY 5

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50 minutes

### ACTIVITY 6

#### REFLECT ON DESIGN THINKING *pg. 13*

15 minutes



## ACTIVITY 1

# INTRODUCTIONS

*15 min*

As design thinkers, it's important to embrace your "beginner's mind," to approach problems as a novice even if you already know a lot about them. Your beginner's mind is eager to learn and willing to experiment. Take a few minutes to answer the questions below and then discuss your answers with your team. Be sure to tap into your beginner's mind for the last question below.

What's your name?

Where do you work?

Why were you interested in the toolkit?

What would you like to learn from this toolkit?

What would you like to be doing in five years?

Tell a story about the last activity that you tried for the first time. Was it exciting or scary?  
How did being a beginner help you?



## ACTIVITY 2

# ICE BREAKER: VISUAL TELEPHONE *15 min*

It's important to be visual throughout the design thinking process. Thinking visually can also help you get “unstuck” at key points. This icebreaker exercise will help you get to know your teammates, while practicing the skill of visual interpretation.

**NOTE:** You will need at least three team members for this activity. Each team member will need a blank piece of paper and a pen.

### STEP 1

- Everyone in the group should write one sentence (silly or serious) on the top of your piece of paper
- Fold over the top of the paper to hide the sentence
- Pass your paper to the person on your right

### STEP 2

- Unfold the paper you just received to reveal the sentence
- Draw a picture of what you see
- Fold your paper to hide the sentence at the top, then fold it again to hide the picture below it
- Pass the piece of paper to the right

### STEP 3

- Unfold the paper you just received to reveal only the picture (not the sentence)
- Write a new sentence below the picture, describing what you see
- Fold the paper three times to hide the first sentence, then the picture, then the last sentence
- Pass it to the right

### STEP 4

- Unfold the paper you just received to reveal only the last sentence
- Draw a picture based on what you see.
- Fold the paper four times
- Pass it to the right

***Repeat until your original paper returns to you.  
Unfold it and see how much the story has changed!***



### ACTIVITY 3

# DETERMINE TEAM ROLES

15 min

Page 1 of 3

This activity can help you determine who on your team will be responsible for the various parts of the project. If someone takes on a certain role, this does not mean that another team member cannot help with that responsibility, but it's a good idea to have a general sense of who's in charge of certain tasks.

Use these role cards to help spark a discussion around team roles. Your team may not need or have all of these roles and people may take on more than one role. Follow these steps:

1. Have each team member cut out all the role cards.
2. Individually, read through each card and rank the cards according to how much each role matches your personality, skills, or qualities.

3. Come back together as a team and discuss your card sort results. What did each person rank the highest? Some members will have different perceptions of others and that will help propel a meaningful discussion. Use this time to come to an agreement on team roles.

\* For more on these roles, read *The Ten Faces of Innovation* (see Chapter 1, References section).



## THE SCHEDULER

### RESPONSIBILITIES

The Scheduler may be the same person as the team lead, or someone else on the team. This person is responsible for comparing and managing team schedules, and making sure that the team is progressing through activities on time.

### QUALITIES

You value efficiency and execution of tasks. You love project coordination and keeping the project and team on track. You also have a clear handle on other team members' schedules and time demands so that you can fairly plan for the best times and environments in which to complete the work.

## THE DOCUMENTER

### RESPONSIBILITIES

The Documenter is in charge of capturing the progress of the team at every step. This means everything from ensuring that the members are writing their thoughts down on paper or post-its, to taking photos of interviewees, and blogging about your experience if you choose to do so. This is an absolutely essential role to the team and will help everyone feel much more organized and productive.

### QUALITIES

You are incredibly organized and a dedicated note-taker. Your files and notes are archived in a logical fashion and keeping track of disparate pieces of information from all points of time is your special talent. Additionally, you have an eye for multimedia recording and always have a camera on hand, ready to snap a picture of anything that inspires you.



## ACTIVITY 3

# DETERMINE TEAM ROLES

15 min

Page 2 of 3

### THE CONNECTOR

#### RESPONSIBILITIES

The Connector is a force of momentum during the Inspiration and Iteration phase and a huge asset in recruiting and finding interesting research experiences. This role is about connecting the team to users, experts, and experiences that the team can benefit from by seamlessly tapping into the community at large for insights.

#### QUALITIES

You quickly draw associations between ideas and people and know that the most inspiring experiences come through simple conversations with those in the community. You are the hub of relationships and seem to know almost everyone who comes to your library.

### THE ANTHROPOLOGIST

#### RESPONSIBILITIES

The Anthropologist thrives in the Inspiration phase and propels the team to frame (and reframe) the problem throughout the process. This person helps guide the rest of the team toward the deep insights that drive design forward. Above all, this person constantly looks for ways to inspire the team through their continual curiosity about people.

#### QUALITIES

You connect quickly and innately to the human experience and people often open up to you in a way that they don't with others. You are a highly intuitive thinker who draws energy and enjoyment from observing others interact with products and services both within and outside of the library. Because of this you often "see" things that often go unnoticed and have the insatiable curiosity to keep asking "why?" about the world.

### THE INTERPRETER

#### RESPONSIBILITIES

The Interpreter is closely related to the Anthropologist in that this person helps guide the findings from the Inspiration phase into insights that generate ideas. The Interpreter translates research into questions and themes that will feed design. The Interpreter especially helps keep the team from immediately jumping from an insight to a solution and instead encourages the team to contemplate patterns and contradictions in the research.

#### QUALITIES

A cross-pollinator, you are able to draw connections between disparate ideas and people. Against the face of ambiguity, you find unforeseen links between ideas and often think in metaphors. You are very open-minded and love to dwell within the space of open and intellectual inquiry.

### THE HURDLER

#### RESPONSIBILITIES

The Hurdler clears obstacles in the path of the project in order to empower the team as much as possible. This role is key in negotiating with stakeholders, leadership, or working within a bureaucracy to help the team stay productive. The Hurdler fights for time, resources, and budget for the design project, often thinking of creative paths to do so.

#### QUALITIES

You are a relentless problem-solver and you love tackling challenges in uncharted territory. No issue is too small or too big for you to handle, you are always thinking about what's possible instead of dwelling on constraints. People are drawn to you for your immense optimism and pull within your organization.



## ACTIVITY 3

# DETERMINE TEAM ROLES

15 min

Page 3 of 3



### THE STORYTELLER

#### RESPONSIBILITIES

The Storyteller captures the imagination of your team and helps to develop distinct and generative narratives around your chosen design challenge. The Storyteller weaves together emotion and inspiration to create a compelling story about your project. This role is critical in helping to communicate your project to the outside world, whether through spoken word, video, photography, or other mediums.

#### QUALITIES

You know that the best way to communicate with people is to tell a good story. You are able to boil down several ideas and concepts into a succinct story that makes others sit up and listen. People look to you to help translate, articulate, and express ideas in a way that is truly authentic and empathic.





## ACTIVITY 4

# HABITS & LOGISTICS

15 min

The team leader should guide this discussion. As a group, discuss each guideline around habits and logistics, determine if there will be any problems, and map out potential solutions.

### TIME

With each chapter, the set of activities is expected to take at least two to three hours. You'll have about one to two hours of readings in advance of each meeting. Keep in mind there will be additional time needed outside of meeting times for research and experimentation during later phases.

### CALENDAR

Plot regular meeting times on a calendar. Mark dates that members might miss and plan accordingly or reschedule.

### SPACE

Secure a meeting space for the full duration of the project. Can you hold workshops at someone's house, your school, office, church?

### LEADERSHIP

At meetings, your team leader will lead the discussion and facilitate the various activities. They are also responsible for coordinating with team members to bring required supplies.

### SET GROUND RULES

We recommend that your team takes a moment to set a few rules or norms for how you would like meetings to function. Here are some questions to get you going:

- How can you structure the meetings and project space to ensure that an environment of mutual trust and respect is created?
- How should feedback (both positive and negative) be communicated so that each individual and the group gets the most out of it?
- Are there other rules that you can think of that will make the meetings run more smoothly?

### SUPPLIES

Each team member should print out the toolkit and bring it to each meeting.

The team leader will be responsible for organizing with the team to provide:

- Pens, pencils, markers, blank paper.
- Post-it notes if they're available; if not, cut scrap paper into squares and bring tape to stick them on the wall.

During the Ideation phase, your team will need to gather and bring prototyping supplies to the meeting. You'll get more details on this later.

### DOCUMENTATION

It's important to take photos of the process: of boards of post-its, of research visits, of observations, and of yourselves! These visuals will elevate your story as you share your progress and successes with a larger audience. We also hope you will share your story with us, so we can continue to make this toolkit better!

### WRITE YOUR TEAM NAME

Your team should select a name. Have fun with it and choose something that is distinctive and represents your team or challenge.





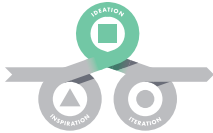
## ACTIVITY 5

# WARM UP EXERCISE

50 min

DESIGNING A BETTER COMMUTE. continued...

Page 2 of 3



### INTERPRETING NEEDS: 5 MINUTES

Take five minutes to read over your notes from the interview with your partner. Write down answers to the questions below.

**WHAT ARE THREE UNIQUE ASPECTS OF YOUR PARTNER'S COMMUTE?**

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**WHAT ARE THREE NEEDS THAT YOUR PARTNER FACES EACH MORNING?**

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### BRAINSTORM: 10 MINUTES

Now is your chance to imagine some new solutions that might address your partner's needs. Work with your partner and sketch four to six radical new ways to improve the commute. You should focus on ideas for your partner and your partner should focus on ideas for you. However, work collaboratively and try to come up with a few ideas that might improve the commute for both of you. Don't worry about being perfect, draw your ideas quickly to capture them. Use more paper if you need it!



## ACTIVITY 5

# WARM UP EXERCISE

50 min

DESIGNING A BETTER COMMUTE. continued...

Page 3 of 3



### PROTOTYPE: 10 MINUTES

Okay, time to get tangible. Making something visual or physical will help you better imagine the possibilities and the pitfalls of your solution, as well as explain it more easily to others. Your prototype can be a model, a diagram, or a more detailed drawing. It's great to grab some scissors, construction paper, tape, and markers (or anything else around you) and make that idea visual.

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### FEEDBACK: 5 MINUTES

Share your favorite ideas with another team. Get feedback from them. Don't sell your ideas; explain them simply, and find out what they really think. What excites them about your ideas? How would they change or improve them?



## ACTIVITY 6

# REFLECT ON DESIGN THINKING *15 min*

Congratulations on completing your first foray into design thinking! Usually you would repeat the Ideation and Iteration phases and continue to build on your idea based on additional feedback. But because your time is valuable, let's just take a few minutes to reflect on what you've learned about the design thinking process.

### REFLECT

Take five minutes to individually reflect on the following questions. Write your responses down quickly in your notebook or on some post-its.

- What did you learn through the experience of prototyping during this mini design challenge?
- Were there certain parts of the process that were particularly surprising or helpful, or struck you as an “aha moment”? “Ahas” can be key takeaways, new perspectives on an issue, memorable comments or questions, surprises, challenges, or parting thoughts from this workshop.
- What are parts of the design thinking process that you think are particularly useful or insightful for tackling challenges in the library?

### SHARE

Now come together with your full team group:

- Share your prototype with the group. Do you have ideas for further refining your idea based upon the feedback you received?
- Share and discuss your “Ahas” with the group. Were there similar or different takeaways?

# CHAPTER 1

## THINGS LEARNED

# *Checklist*

### CONGRATULATIONS ON FINISHING THE FIRST STEP IN THE DESIGN THINKING APPROACH!

Hopefully this section gave you some understanding on how design thinking might help you with your everyday challenges at the library. We hope you're looking forward to putting the process into action over the next several chapters.

At the end of each chapter we will provide a checklist that summarizes the steps and activities associated with each phase of the approach. Feel free to use this list as another checkpoint to make sure that you and your team are ready to move on to the next phase.

By now, you should have completed the following:

- Formed your design team
- Informed leadership and other stakeholders that you are learning design thinking
- Practiced visual thinking with an icebreaker
- Determined team roles
- Discussed habits, logistics, and timeline with your team
- Completed the Warm Up: Design a Better Commute
- Reflected on design thinking as a team

# CHAPTER 2

# *Inspiration*

## MATERIALS NEEDED

- Print copy of the toolkit (1 per person)
- Blank paper or notebooks
- Sharpie pens, or equivalent
- Post-it notes, or equivalent
- Camera

## ACTIVITY 1

### DEFINE A DESIGN CHALLENGE *pg. 16*

2 hours

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## ACTIVITY 2

### EXPLORE RESEARCH METHODS *pg. 20*

1 - 2 hours

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## ACTIVITY 3

### EXTREME RESEARCH EXERCISE *pg. 21*

15 minutes

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## ACTIVITY 4

### ANALOGOUS RESEARCH EXERCISE *pg. 22*

15 minutes

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## ACTIVITY 5

### PLAN AND CONDUCT RESEARCH *pg. 23*

To Be Determined by your team, as it will happen over the course of several days

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## ACTIVITY 6

### DOCUMENT DURING RESEARCH *pg. 25*

15 minutes after each interview or observation



## ACTIVITY 1

# DEFINE A DESIGN CHALLENGE *2 hours*

*Before selecting one challenge, explore 2-3 options to find the right type of project. Page 1 of 4*



### PROJECT OPTION 1

Who is the user group?

What are the problems they struggle with that you could solve?

Is there the potential to explore multiple solutions?

Is it feasible to complete in a 5-6 week timeline?

### RATE EACH DESIGN CHALLENGE, THEN ADD UP YOUR SCORE

*Considering the project with the highest score is a dimension that can help you select your project.*

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| Instinctively, how excited are you about this design challenge?              | 1     | 2 | 3 | 4 | 5    |
| What potential for impact in your community does this design challenge have? | 1     | 2 | 3 | 4 | 5    |
| How feasible is it to tackle this challenge over the next 5-6 weeks?         | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**





## ACTIVITY 1

# DEFINE A DESIGN CHALLENGE *2 hours*

*Before selecting one challenge, explore 2-3 options to find the right type of project. Page 2 of 4*



### PROJECT OPTION 2

Who is the user group?

What are the problems they struggle with that you could solve?

Is there the potential to explore multiple solutions?

Is it feasible to complete in a 5-6 week timeline?

### RATE EACH DESIGN CHALLENGE, THEN ADD UP YOUR SCORE

*Considering the project with the highest score is a dimension that can help you select your project.*

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| Instinctively, how excited are you about this design challenge?              | 1     | 2 | 3 | 4 | 5    |
| What potential for impact in your community does this design challenge have? | 1     | 2 | 3 | 4 | 5    |
| How feasible is it to tackle this challenge over the next 5-6 weeks?         | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**



## ACTIVITY 1

# DEFINE A DESIGN CHALLENGE *2 hours*

*Before selecting one challenge, explore 2-3 options to find the right type of project. Page 3 of 4*



### PROJECT OPTION 3

Who is the user group?

What are the problems they struggle with that you could solve?

Is there the potential to explore multiple solutions?

Is it feasible to complete in a 5-6 week timeline?

### RATE EACH DESIGN CHALLENGE, THEN ADD UP YOUR SCORE

*Considering the project with the highest score is a dimension that can help you select your project.*

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| Instinctively, how excited are you about this design challenge?              | 1     | 2 | 3 | 4 | 5    |
| What potential for impact in your community does this design challenge have? | 1     | 2 | 3 | 4 | 5    |
| How feasible is it to tackle this challenge over the next 5-6 weeks?         | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**



## ACTIVITY 1

# DEFINE A DESIGN CHALLENGE *2 hours*

*Once you select the project option with the highest score, you will write a design question to help you contain the scope. Write two How Might We questions:*

**Page 4 of 4**

1. How might we...

2. How might we...

*For each one assess, is it: Too broad? Too narrow? Just right?*

## ASSUMPTIONS & ASPIRATIONS

*Take five minutes to answer the questions below yourself and then five minutes to discuss your answers with your team. If it's helpful, use Post-it notes to organize your thoughts and look for unique perspectives as well as overlaps in your team's knowledge base.*

What are the aspects of the challenge that you already know a lot about? What are your assumptions?

Where are the aspects of the design challenge where you need to learn more? What don't you know?

What does success look like for you on this project?



## ACTIVITY 2

# EXPLORE RESEARCH METHODS *1-2 hours*

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We recommend trying as many of these research methods as you can. You aren't required to do them in any particular order, but as general rule your user interviews and observations will likely be most impactful in your research, and thus be high priority for your team to arrange. With limited time, what research experiences do you most want

to try? Think about extreme users when you think about who you might want to interview and observe.

To help you get started, come up with some ideas for research participants or experiences here, and be prepared to share your ideas with your team.

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### WHICH PATRONS WILL YOU INTERVIEW?

*(We recommend starting with 4-5 user interviews.)*

### WHICH EXPERTS WILL YOU SPEAK TO?

*(We recommend starting with 1-3 expert interviews.)*

### WHERE WILL YOU TO DO OBSERVATIONS?

*(We recommending trying at least one observation session.)*

### WHAT IMMERSIVE EXPERIENCES WILL YOU PLAN?

*(We recommend at least one immersive experience that will help you empathize with your users.)*

### WHAT ANALOGUES CAN YOU EXPLORE?

*(Try to identify and explore at least one instance of analogous inspiration. The next pages offer additional exercises on brainstorming other experiences.)*

### DO YOU WANT TO USE ANY OF THE ADDITIONAL RESEARCH METHODS?



### ACTIVITY 3

# EXTREME RESEARCH EXERCISE

15 min



Typically, organizations design for who they see as their main customer, but identifying and interviewing individuals who are extremely familiar or completely unfamiliar with a product or service will often highlight key issues of the design challenge. These “extreme users” provide valuable insight and a fresh perspective on your design challenge.

## WRITE YOUR DESIGN CHALLENGE

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## WHO MIGHT BE YOUR TYPICAL USER?

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## IMAGINE WHO EXTREME USER MIGHT BE Consider physical, cognitive, social, and cultural factors.

Someone who is completely unfamiliar with this service.

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Someone who is extremely familiar with this service.

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Someone who wouldn't care about this service at all.

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Someone who has highly refined and particular needs.

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Someone who would intentionally choose not to use this service.

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Someone who demonstrates radical behaviors related to this service.

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## ACTIVITY 4

# ANALOGOUS RESEARCH EXERCISE *15 min*

One of the best ways to innovate is to look for inspiration from different fields. The simple act of looking for ideas in a different context can bring to mind lots of new ideas. For example, a surgeon can get insights about organizing his or her medical supplies by visiting a hardware store; an airline employee might get ideas about check-in by observing a hotel front desk.

To identify inspirational analogous settings, list all the distinct activities (verbs) or emotions (nouns) you can think of for that setting. In a car wash, for example, activities include waiting in line, washing, drying, and paying. Good analogous settings would include some or all of those activities—for example, getting a haircut or going to a laundromat. Take a moment to brainstorm several analogous research possibilities below. We've provided examples in grey to jog your thinking.

### SAMPLE DESIGN CHALLENGE

#### HOW MIGHT WE IMPROVE THE EXPERIENCE OF CHECKING IN AT THE AIRPORT?

##### WHAT ACTIVITIES & EMOTIONS COMPRISE THIS EXPERIENCE?

*arriving*

*waiting in line*

*feeling anxious*

##### BRAINSTORM OTHER SITUATIONS WHICH INCORPORATE SIMILAR ACTIVITIES.

*hotels*

*movie theaters*

*dentists' office*

### YOUR DESIGN CHALLENGE

#### HOW MIGHT WE...?

##### WHAT ACTIVITIES & EMOTIONS COMPRISE THIS EXPERIENCE?

##### BRAINSTORM OTHER SITUATIONS WHICH INCORPORATE SIMILAR ACTIVITIES.



## ACTIVITY 5

# PLAN AND CONDUCT RESEARCH

Page 1 of 2

*time to be determined by your team*



### WRITE YOUR WISH LIST

Who or what is at the top of your research wish list? Knowing that you can't get to all interviews, write down your ideal plan up on a board with your team, and organize the experiences or people by method.

### RECRUIT PARTICIPANTS AND ARRANGE EXPERIENCES

Once you have identified who you'd like to talk to and what you'd like to see, you will need to create a plan for outreach. Recruit participants by approaching people in the library, reaching out to your facebook network, sending out emails, or making phone calls to coordinate scheduling. Recruiting takes some time, so it is best to get interviews started right away and continue recruiting as you go.

### WHAT IS YOUR PLAN FOR RECRUITING PARTICIPANTS?

WHO

ORGANIZATION

CONTACT INFO

WHO ON TEAM WILL RECRUIT?

|  |  |  |  |
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### WHAT IS YOUR PLAN FOR ARRANGING IMMERSIVE OR ANALOGOUS EXPERIENCES?

WHERE

ORGANIZATION

CONTACT INFO

WHO ON TEAM WILL ARRANGE?

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## ACTIVITY 5

# PLAN AND CONDUCT RESEARCH

Page 2 of 2

*time to be determined by your team*

### PREPARE FOR INTERVIEWS

Now it's time to create a discussion guide to prepare for your interviews. It's best to create your question guide in teams of two or three people. You'll likely need more space than this worksheet, so use your notebook to write down additional questions. Start building questions following the structure below. For a 30 minute interview, we recommend writing at least 20 questions. You may not ask them all, especially because you will ask follow-up questions and have a conversation, but just in case the interviewees are shy, it helps to have extra questions.

### TIP!

**What demographic information might you need from your interviewee?** Perhaps you want to know where they are from or how many children they have. Be sure to ask these questions in a friendly and non-judgmental way.

**What are some specific questions you can ask to open the conversation and help people feel comfortable?** Start with easy, broad questions. Remember to keep your questions open ended.

**Then dig deeper.** Now write at least 10 more questions that will help you to dig deeper and get a better understanding of this person's hopes, fears, and ambitions:

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### EXAMPLE OF A DISCUSSION GUIDE

This Discussion Guide was for a project about how to create better programs for teenagers at the library. The goal of the interviews was to learn more about how teenagers spend their time and their aspirations.

#### ***Teen's view on libraries***

- Tell us about what you think of libraries.
- What have you learned at your school library?
- What have you read lately?
- What are some things you don't like about the library?
- What are some things you wish you could do in the library?

#### ***Activities outside school***

- Tell us about what you do after school.
- What are your favorite activities to do at home?
- What other places do you go for fun? For learning? To be with your friends? What do you like about these places?
- Tell us about what you do on weekends.

#### ***Aspirations for the future***

- What do you wish you could do at school?
- What is the best part of your school day?
- What are your plans after high school?
- What are your career aspirations? What do you dream you will do?

### SELECT ROLES

Designate one person to lead the interview. This person will do almost all of the question-asking, which simplifies the conversation for the participant. Select someone else to take notes during the interview. If you have a third team member present, he or she can focus on observing your interview subject and the surrounding environment. We would advise against having more than three members present, as more people may overwhelm your interviewee. Each member of the team should practice different roles with different interviewees, so feel free to trade off these roles in different interviews.

#### ***Who will:***

Conduct the interview?

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Take notes?

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Take photos/video

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## ACTIVITY 6

# DOCUMENT YOUR RESEARCH *15 min*

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### CAPTURE YOUR RESEARCH TOP 5

Take a few minutes after each interview or observation to debrief with your teammates and start capturing what you've learned. You can do this debrief virtually anywhere, but it should immediately follow the interview. Try capturing your top five takeaways after every session. This will help you remember insights as you move into the Ideation phase. Write each of your Research Top 5 on a separate post it note (or equivalent), and place them in a room or on a board that you can use for storytelling during your next meeting.

***Where will you keep your Research Top 5 post it notes? How will you organize them?***

### TIP!

### ARCHIVE AND ORGANIZE

After each interview in addition to your *Research Top 5*, it is a great to develop the habit of archiving and organizing your photos. We make a folder for each participant on our computer and select our favorite most inspiring or informative images. These you can share with your team during the Ideation phase.

***Who will be in charge of organizing, selecting and printing photos?***

# CHAPTER 2

## THINGS LEARNED

# Checklist

### CONGRATULATIONS ON WORKING THROUGH THE INSPIRATION PHASE!

This is one of the most rewarding phases, as you begin to see your library users in new ways and understand their needs and desires more deeply.

By now, you should have completed the following:

- Defined a design challenge
- Explored research methods
- Conducted several user interviews
- Conducted several other research methods as a mix of expert interviews, observation, analogous and immersive experiences, and others
- Documented and organized your research, including notes and photos
- Shared initial impressions with your team

# CHAPTER 3

# *Ideation*

## MATERIALS NEEDED

- Print copy of the toolkit (1 per person)
- Blank paper or notebooks
- Thick pens, or equivalent
- Sticky notes, or equivalent
- Camera
- Snacks for brainstorming and prototyping session
- Ample meeting space for brainstorm and prototyping session
- Prototyping supplies

### ACTIVITY 1

**REFLECT ON RESEARCH** *pg. 28*  
30 minutes

### ACTIVITY 2

**SHARE STORIES** *pg. 29*  
2+ hours

### ACTIVITY 3

**IDENTIFY PATTERNS** *pg. 30*  
30 minutes

### ACTIVITY 4

**TURN THEMES INTO INSIGHTS** *pg. 31*  
1 - 2 hours

### ACTIVITY 5

**FORM HOW MIGHT WE QUESTIONS** *pg. 32*  
30 minutes

### ACTIVITY 6

**BRAINSTORM** *pg. 33*  
1 hour

### ACTIVITY 7

**CREATE A CONCEPT MAP** *pg. 34*  
2 hours

### ACTIVITY 8

**CREATE A PROTOTYPING GAME PLAN** *pg. 38*  
1 hour

### ACTIVITY 9

**PLAN A MAKE DAY** *pg. 39*  
4+ hours



## ACTIVITY 1

# REFLECT ON RESEARCH

*30 min*

Congratulations on completing your research from the Inspiration phase!

You have also learned about the second phase of the process, Ideation. There are a lot of ideas in this chapter

in particular, so plan to reflect on what you have learned so far with your team. You will have time to dissect and synthesize the research itself in the next steps, so focus now on simply being reflective of the process. Discuss the following questions:

---

What was most surprising or difficult as part of the Ideation phase?

What are your big takeaways after reading the Ideation chapter? What methods are you most wanting to try with your team?



## ACTIVITY 2

# SHARE STORIES

2+ hours

*This activity is about telling stories with the rest of your team so you can begin the Ideation process.*



### 1. MAKE A LIST

Start by making a list of everyone your team spoke with and the places you each visited as part of your research.

### 2. IDENTIFY ANY HOLES

Identify the types of research that your group was and was not able to conduct over the last class. Do you still have obvious holes in your research? Do you have a plan for trying to fill those holes?

### 3. SHARE STORIES

Now it is time to share stories about the people that you spoke with and the places that your team visited. Start at the top of the list you made. Spend about 10 minutes on each person or place.

### TIP!

If you took pictures and have access to a printer, print a few of the best photos from each interview or location and hang them on the wall as you go through your list. This will help your team organize your thoughts and remember details as you begin making your thoughts visual.

Here is a rough outline for what you should try to share about each person you spoke with:

- Personal details: who did you meet?  
(*name, profession, age, location, etc.*)
- Interesting stories: what was the most memorable and surprising story he or she told?
- Motivations: what did this person care about most?  
What motivates him or her?
- Barriers: what frustrated him or her?
- Interactions: what was interesting about the way he or she interacted with the environment?
- Remaining Questions: what questions would you like to explore if you had another conversation with this person?

### 4. CAPTURE WHAT EVERYONE IS SAYING

While you are listening to your teammates tell their stories, write down notes and observations about what they are saying. Use concise and complete sentences that everyone on your team can easily understand. Try capturing quotes. They are a powerful way of representing the voice of a participant. Jot one observation per sticky note to make sorting and clustering easy. Make sure you write large enough (and neat enough!) so that everyone can read your notes. Also, be as visual as possible!

### 5. HANG YOUR NOTES ON THE WALL

When you are done talking about a particular person you interviewed, hang the sticky notes on the wall underneath that person's photo (if you have one); if you do not have a photo, write the person's name on a note up top. There should be a separate section on the wall for each person that your team interviewed. When possible, keep quotes and images together in order to paint a rich story.



## ACTIVITY 3

# IDENTIFY PATTERNS

30 min

*In this activity, you will identify patterns in your research and cluster information into actionable themes.*



### 1. FIND THE “GEMS”

From the sticky notes that your team just hung on the walls, every team member should choose the five notes that they find most interesting or insightful. Remove these sticky notes from the group and put them in a new blank area with lots of empty space around them. Let's call these sticky notes your “gems”.

### 2. AS A GROUP, CLUSTER INFORMATION INTO THEMES

Review the “gems” that your team has selected and try to organize them into similar groups or categories. These are called “clusters.” Did many people mention the same thing? Are there behaviors you saw repeatedly? Which issues were obvious? Did you hear conflicting statements? Is there an explanation for this conflict?

### 3. FIND SUPPORTING EVIDENCE

Quickly review the rest of your sticky notes on the wall (the “non-gems”). Find additional notes that support the clusters you have created. Can you include some photographs or visual observations that substantiate the categories your group has created?

### 4. REFINE YOUR CLUSTERS

Create a minimum of three and a maximum of five clusters. Do not be afraid to re-group information if there are other clusters that make more sense to you and your team. Is there a new cluster that you might need to create? Could two existing clusters be combined?

### 5. WRITE ACTIONABLE HEADLINES

For each of the clusters that you have created, create a title for the cluster, such as “Importance of proximity of library” or “Opportunities around daily commute.”



## ACTIVITY 4

# TURN THEMES INTO INSIGHTS *1-2 hours*

Now it is time to turn your themes into insights. Great insights drive great design, so it is important not to rush through this part of the process. In this activity, you will practice interpretation, so it is important to look at your research information in a non-literal way and try to

discern the “why” behind the themes that have emerged. Try to avoid the temptation to immediately think of solutions to issues and problems that have bubbled up in your research, and instead think deeply about the many reasons why these problems exist.

### 1. REFERENCE YOUR DESIGN CHALLENGE

Ensure that your design challenge is written large and visible to the entire team during this process. Being able to quickly reference your challenge will make this exercise easier because it will help you connect your insights back to the question you are ultimately trying to answer.

### 2. MAKE YOUR THEME STATEMENT ACTIONABLE

Look back at the titles of your themes. For each theme, draft concise sentences that explain why the theme you have identified describes a challenge for the people in the community that you spoke with. Remember that an insight combines observation and inference, so you will need to interpret beyond the theme in order to form insights. Feel free to work individually or as a group.

### EXAMPLE

**Theme:** Importance of proximity to the library

**Insight format:** People need/want/have \_\_\_\_\_, but/despite/because of \_\_\_\_\_.

**Possible insights:**

- People want to participate in central library events, but feel intimidated by having to plan a trip into the city to do so
- Many people only interact with the closest library to their home, despite the fact that there are other libraries that may meet their needs close to work and school
- If people live far away from the library, they tend to go less frequently, but they spend a longer period of time browsing and asking questions in order to get the most out of the visit

*(These are complete fabricated insights and should not sway your own process of developing insights!)*

### 3. REFINE AND REVISE

Once you have a few sentences for each theme, work with your full design team to revise and rewrite your insight statements until the group has captured the most unique and compelling insights related to each theme. Look back at your design challenge. What are the top 3-5 insights that best address your challenge?

### 4. GET A SECOND OPINION

Ask someone from outside of your core team to take a look at the insights you have created to see which ones feel fresh and meaningful. Remember that good insights are: intuitive, not obvious, generative, and sticky.



## ACTIVITY 5

# FORM HOW MIGHT WE QUESTIONS 30 min

*Think of this round of How Might We questions as a launchpad for ideation. You will select your three favorite insight statements from the last activity and transform them into a generative brainstorm prompt.*



### 1. SELECT INSIGHTS

As a team, choose 3 favorite insight statements—hopefully these relate to three different themes and groups of information. This will lend more variety to the HMW questions you ultimately create. Additionally, make an effort to select statements that convey a new perspective or sense of possibility. Write down these insights.

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### 2. DRAFT HMW QUESTIONS

Work individually for a few minutes to try turning the selected insight statements into HMW questions. Be sure to read the tips in the readings and pay close attention to our examples to understand what is too broad and what is too narrow.

**Too broad:** HMW redesign dessert?

**Too narrow:** HMW create a cone to eat ice cream without dripping?

**Just right:** HMW redesign ice cream to be more portable?

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### 3. REFINE HMW QUESTIONS

Share your HMW questions with the group. Then work as a group to refine your HMW questions until they feel like strong questions that you are excited to answer as part of your brainstorm. Remember, they should be neither too broad, nor too narrow.

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## ACTIVITY 6

# BRAINSTORM

1 hour

Now that you have created a few good How Might We questions for your design challenge, you are ready to start generating ideas! Leverage the creative power of a group by setting up a brainstorm with 6-8 people and following the steps in this activity.

### 1. CHOOSE HMW QUESTIONS

Select 3 HMW questions that feel exciting and make you think of ideas right away.

#### TIP!

The most important part of making brainstorms successful is preparing good HMW questions. Remember to select questions that are important to address, even if they sound difficult to solve for.

### 2. SET UP THE BRAINSTORM

Reserve a space with a table and enough seats for everyone. Write your HMW questions large on a wall and ensure that there is enough space on which to populate your ideas. Everyone should have a stack of sticky notes and a marker to write with. As a bonus, you might want to think about bringing snacks or other treats to the brainstorm.

### 3. INTRODUCE THE CHALLENGE

Have the brainstorm facilitator introduce the team project and what the challenge is. Review the brainstorming rules as a group and ask everyone if there are any questions at this point. Set an idea quantity goal if you'd like, to challenge the group to go for as many ideas as possible.

### 4. TURN YOUR ATTENTION TO THE FIRST HMW QUESTION

The facilitator should read the question out loud.

### 5. START THE CLOCK!

Spend about 15 minutes per HMW question, one idea per sticky note, and be visual! Hang the ideas on the wall underneath the first HMW question as your team says them out loud. Make sure that you are listening to others' ideas while also thinking of your next idea. Move on to other HMW questions after the energy dies down, or approximately after 15 minutes.

### 6. CREATE A HEATMAP OF FAVORITE IDEAS

If you have time at the end of the brainstorm, ask your meeting participants to vote on their favorite ideas from the session. Remember to distribute your votes based on ideas that feel the most innovative and most likely to succeed.

### 7. CAPTURE PROMISING IDEAS

In the aftermath of the brainstorm, there are often so many ideas thrown up on a wall. Loosely organize and cluster related ideas to start making sense of it all. Make sure that you keep a memory of your favorite ideas by taking pictures of your HMW questions as well as the most promising ideas/sketches on paper or sticky notes. Archive and organize these photos so that you do not lose the origins of these future concepts.



## ACTIVITY 7

# CREATE A CONCEPT MAP

2 hours

In this activity, you will revisit your top ideas and re-shape them in preparation for prototyping.

Page 1 of 4



## 1. EVALUATE YOUR BEST IDEAS

After a brainstorm, rate the top ideas based on the questions below, which can help you decide which idea to start prototyping.

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| Instinctively, how excited are you about this idea?  | 1     | 2 | 3 | 4 | 5    |
| How innovative and fresh does this idea feel?        | 1     | 2 | 3 | 4 | 5    |
| How practical, realistic, and feasible is this idea? | 1     | 2 | 3 | 4 | 5    |

As a group, compare the scores of your ideas.

The one with the highest score will be the most promising.

**TOTAL=**

## 2A. LOOK BACK AT YOUR SELECTED IDEA

Save the original post-it that describes the idea you'd like to start prototyping. Make sure you annotate it with your design challenge so you know what the original idea was about. Like the example below:

### EXAMPLE





## ACTIVITY 7

# CREATE A CONCEPT MAP

2 hours

*In this activity, you will revisit your top ideas and re-shape them in preparation for prototyping.*

*Page 2 of 4*



## 2B. DISTILL THE IDEA

Use this form, or answer these questions using post-its on a board. Writing answers to these questions will help you and your team align on the purpose and essence of the idea.

### DESIGN CHALLENGE:

.....  
.....  
.....

### HOW MIGHT WE QUESTION:

.....  
.....  
.....

### SELECTED IDEA:

PLACE POST-IT NOTE  
HERE OR REDRAW THE  
IDEA YOURSELF

### DESCRIBE THE IDEA:

.....  
.....  
.....  
.....

### HOW WILL THIS IDEA HAVE IMPACT ON THE CHALLENGE YOU'RE ADDRESSING?

.....  
.....  
.....  
.....  
.....



## ACTIVITY 7

# CREATE A CONCEPT MAP

2 hours

In this activity, you will revisit your top ideas and re-shape them in preparation for prototyping.

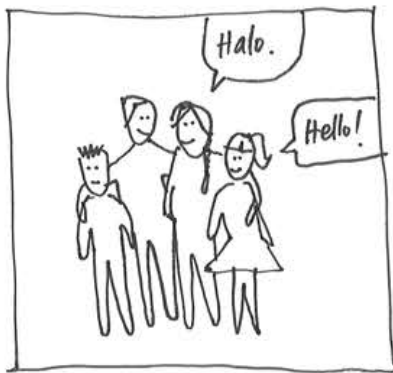
Page 3 of 4

### 3A. BREAK DOWN THE USER EXPERIENCE

Take your top idea and draw out a journey or a series of scenes based on the user experience of this idea. Start with a sketch and a few bullet points on who your ideal user is. Here is the continuation of our example:

#### EXAMPLE

The User:



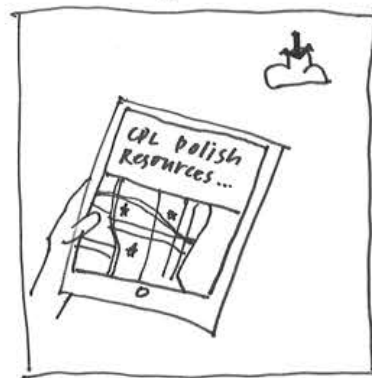
First-generation immigrants w/ English-fluent, US-born children.

Awareness:



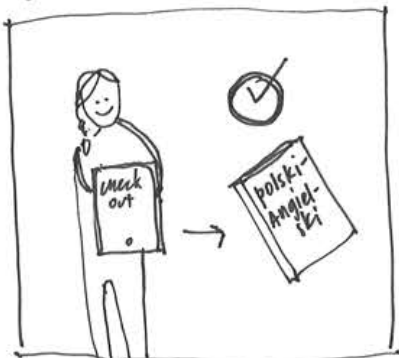
Leverage children as awareness point. Market the English Language Learners App in Schools.

download app + use:



User downloads app and sees where Polish resources are located throughout library system.

Use:



User places hold to check out an English-Polish dictionary through the app.

Use in library:



She then goes to the library and better navigates to her book on hold with bilingual signage.

Advocate:



She receives a free bookmark in the dictionary that encourages her to spread the word. She gives the bookmark with app info to a fellow Polish friend.



## ACTIVITY 7

# CREATE A CONCEPT MAP

2 hours

*In this activity, you will revisit your top ideas and re-shape them in preparation for prototyping.*

*Page 4 of 4*



### 3B. BREAK DOWN THE USER EXPERIENCE

When you break down the user experience through a series of steps, you will begin to realize that your idea is not simply one static idea, but a collection of many components. What begins to emerge is what we call a concept map, which helps you envision the fuller experience and numerous dimensions of a single idea. Make sure you cover the following prompts as you sketch on post-its:

Who is your user? What are his or her defining behaviors and/or characteristics?

How does your user hear about the concept? How do you build awareness?

How does your user actually begin using the concept?

What is happening while your user is experiencing your concept? Who or what else is involved and needed?

After the user experiences the concept, what happens next?

How does the concept help your user in the long-term?

Does your user advocate for the concept and tell others about it?

### TIP!

### POST THE MAP UP ON A WALL

During this activity, make sure you are answering these questions with sticky notes or other sketches and putting them up on a wall. This helps your team as a whole visualize the user experience collaboratively, and it will help you better understand the user journey as a sequence of steps.



## ACTIVITY 8

# CREATE A PROTOTYPING GAME PLAN *1 hour*

*In this activity, you will examine each moment of your concept map and decide which piece to start prototyping.*

### 1. ASK KEY QUESTIONS

For each moment of your concept map, start writing specific questions you'd like to answer connected to each moment of the experience. For example, what are you most curious about in terms of how users will behave? Where do you think the concept might be weakest and what would you want to know to make it better?

Next, think about the most minimal, low-fidelity thing you would need to build in order to answer that specific question. Underneath each concept moment post-it, discuss and write with your team:

What is the most important, key question to answer?

How might we build the most minimal, low-fidelity prototype to test this?

### 2. PRIORITIZE PROTOTYPES

Look back at all the questions you are hoping to answer. Which ones feel the most important and urgent? Rank the pieces of your concept map in order of priority and choose the top 1-2 parts of your concept to prototype.



## ACTIVITY 9

# PLAN A MAKE DAY

*4+ hours*

By now you have not only chosen a favorite concept, but you have narrowed in on a few parts of your concept map that you would like to learn more about. It is time to start making! To start the process and get your feet wet, we recommend setting aside a chunk of time to host a make day with your team. Plan ahead for this event, as it will take a longer span of time, and it demands a lot of energy from your team.

### 1. SET A SCHEDULE AND GOAL FOR THE DAY

Set a goal together to create at least 1-2 prototype parts of a concept together by the end of your make day, and divide up your team into sub-teams if you have enough people to do so.

### 2. GATHER SUPPLIES AND SPACE

Review the supplies list in “A Closer Look: Ways to prototype” and gather as much of these that you can. Reserve a space in your library where you can spread out and get messy.

### 3. PRACTICE SHARING YOUR PROTOTYPE

Make time at the end of the session to have your full team meet and review what you have created. Ask each sub-team or person to explain his/her prototype and walk through it if it is a role-play or performance. Ask questions in the moment to clarify the intent of the prototype.

### 4. DOCUMENT THE PROCESS

If possible, take photos to capture the prototyping process along the way. You will be amazed when you look back at these to see how many things you can create in such a short amount of time, and others outside of your team will be curious about your in-process documentation.

### 5. TOUCH ON WHAT YOU HAVE LEARNED WHILE MAKING

As you show your prototypes to one another, begin to articulate how the idea came to life and the process of making it real. Oftentimes we change things on the fly while we are building because the act of making things tangible reveals better design possibilities. In the next chapter, you will start to think about how you will bring your prototypes into the field and learn even more from real users.

# CHAPTER 3

## THINGS LEARNED

# Checklist

### CONGRATULATIONS ON FINISHING THE IDEATION PHASE!

This is likely the most time-consuming phase, as it is about making sense of all your findings, using the power of interpretation to translate insights into tangible realizations of your idea: prototypes! As you practice more design thinking, creating the bridge between research and thoughtful design will become easier, but for now, it will probably take lots of time and plenty of discussion amongst your team.

By now, you should have completed the following:

- Reflected on your research
- Shared stories with your team from the Inspiration phase
- Identified patterns in your research
- Turned research themes into actionable insights
- Formed How Might We brainstorm prompts
- Held at least one brainstorm
- Created a concept map for your idea
- Created a prototyping game plan
- Made at least one prototype



## CHAPTER 4

# Iteration

### MATERIALS NEEDED

- paper (white and colored)
- tape
- Post-its (or sticky notes)
- markers

#### ACTIVITY 1

**REFLECT ON ITERATION** *pg. 42*  
20 minutes

#### ACTIVITY 2

**PLAN & FACILITATE FEEDBACK  
ON PROTOTYPES** *pg. 43*  
2+ hours

#### ACTIVITY 3

**SYNTHESIZE FEEDBACK** *pg. 45*  
1 hour

#### ACTIVITY 4

**DESIGN A MINI-PILOT** *pg. 46*  
to be determined by team

#### ACTIVITY 5

**RECEIVE & INTEGRATE  
LIVE FEEDBACK** *pg. 49*  
to be determined by team

#### ACTIVITY 6

**RE-EVALUATE YOUR CONCEPT** *pg. 50*



## ACTIVITY 1

# REFLECT ON ITERATION

20 min

Congratulations on creating your first prototype!

You now had the experience of making an idea tangible so that others may react to it, which is one of most important steps in the design thinking approach. But, the design process does not stop there. Now it is time to think about how to iterate, or evolve, your design.

In the readings, we show how your prototypes develop into mini pilots and eventually, as pilots that are implemented within the core services of your library. Take a moment and reflect on the distinctions between the different iterations of your idea by discussing the following questions with your team.

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Why do you think iteration is important?

What are other examples of things (products, services, spaces, or other) at the library that have undergone multiple iterations? What was the starting point, and where did it end up?

Review the difference between the terms prototype, mini-pilot, and pilot.



## ACTIVITY 2

# PLAN & FACILITATE FEEDBACK ON PROTOTYPES

20 min

It is time to test the prototype that you have created with some users. Here are a few guidelines to follow when planning for and facilitating productive feedback. Make sure your team comes to an agreement on the plan for feedback, and try to choose a time when most everyone can participate in the feedback sessions.

Page 1 of 2

### DEFINE WHAT TO TEST

With your team, determine what kind of feedback you are looking for. Re-write the key questions you developed in order before you started prototyping. What are your research goals?

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### SELECT FEEDBACK PARTICIPANTS

Create a wishlist of people from whom you would like to receive feedback. These may include people who have seen the development of your idea over time, or people whom you have never met. Make sure to tap into your social networks to line up a robust list of feedback participants. Ensure that these participants can be present during your scheduled feedback session time and place.

Name of participant:

Why we want this person's feedback:

Who will recruit from the project team:

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Name of participant:

Why we want this person's feedback:

Who will recruit from the project team:

---

Name of participant:

Why we want this person's feedback:

Who will recruit from the project team:

---

Name of participant:

Why we want this person's feedback:

Who will recruit from the project team:

---





**ACTIVITY 2**

# PLAN & FACILITATE FEEDBACK ON PROTOTYPES

*20 min*

*Page 2 of 2*



## PLAN THE FEEDBACK QUESTION GUIDE

Create a question guide that will help structure your feedback conversations. Formulate your questions so that they lead to constructive feedback and encourage participants to build on your idea, such as:

- Can you describe what excites you the most about this idea, and why?"
- If you could change one thing about this prototype, what would it be?
- What would you like to improve about this idea?
- What do you not like about this idea?

Organize your questions according to the following structure:

1. Start with general impressions. Let the participants share their initial thoughts about your concept.
2. Ask for specific feedback about your idea.
3. Open up the discussion and encourage a broader conversation.

## YOUR QUESTION GUIDE:

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**TIP!**

## FACILITATE GOOD FEEDBACK

During your feedback session, refer back to our tips around receiving fruitful feedback:

- |                                |                                 |
|--------------------------------|---------------------------------|
| 1. Invite honesty and openness | 3. Adapt on the fly             |
| 2. Stay neutral                | 4. Capture feedback immediately |



## ACTIVITY 3

# SYNTHESIZE FEEDBACK

1 hour

With your team, reach a collective understanding of what went well and what could be improved in your prototype. Make sure to debrief with your teammates after each testing session so that learnings from your feedback is still fresh and memorable.



### WHO, WHAT, WHERE?

- Where did you test the prototype?
- How did you test it?
- What were you testing for?

### THE GOOD

- What did participants value the most?
- What got them excited?

### THE BAD

- Which parts would participants like to improve?
- What did not work?

### THE UNEXPECTED

- Did anything happen that you did not expect?
- Were there moments that you realized something significant (a “eureka” or “aha” moment)?

### GOING FURTHER

- What would convince them of the idea?
- What needs further investigation?

### CLUSTER THE FEEDBACK

As a team, discuss the reactions you received to your prototypes. Start by sharing the impressions you captured right after your feedback conversations. Take notes on sticky notes. Sort and cluster the feedback: What was positively received? What concerns came up? What suggestions and builds did you find?

### IDENTIFY NEXT STEPS

Take a moment to revisit your concept map. Look at your earlier learnings and ideas. What was your original intent? Does it still hold true, based on the feedback you have received?

What are the next steps you would take to build upon your prototype? List the top three that you feel are the most important to tackle in your next iteration.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_



## ACTIVITY 4

# DESIGN A MINI-PILOT

*time to be  
determined  
by team*

*Page 1 of 3*

By now you have created a series of prototypes and asked users for feedback on those prototypes. Now it is time to design a mini-pilot, which should be able to run in your library setting without much explanation from you. This is an opportunity to observe how users may interact with

your idea in a more natural setting, without you having to explain how it works. Your mini-pilot may integrate several prototypes, but it is still focused on a specific hypothesis with the goal of answering key questions.

### DEVELOP A HYPOTHESIS

What is the ideal scenario? How do you envision the user will interact with your mini-pilot?

Discuss with your team and write down your hypothesis:

### DEVELOP KEY QUESTIONS

Unlike with a prototype, which may be more exploratory in nature, we cannot stress enough that mini-pilots are built around highly specific key questions. Mini-pilots are planned, designed, and carried out based on finding the answers to these questions. Try to think of three key questions that you want to answer. Consider:

- What is most important to learn in order to improve your idea?
- What is the part of the idea that you are most unsure of? How can this be developed into a key question?
- What assumptions are built into your mini-pilot? How can these be turned into questions, so you do not assume anything?

Key questions for our mini-pilot:

1. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## ACTIVITY 4

# DESIGN A MINI-PILOT

*time to be determined by team*

*Page 2 of 3*

### DEFINE CONTEXT AND PLACE

The environment you choose for your mini-pilot gives cues and signals that will help users understand how to engage with your idea. With your team, brainstorm three options for a mini-pilot setting and rate each option based on the following parameters.

**1. Setting Name:** \_\_\_\_\_ (for example, second floor literature section)

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| How relevant is this setting to my target audience?  | 1     | 2 | 3 | 4 | 5    |
| How much control can our team wield in this setting?                                       | 1     | 2 | 3 | 4 | 5    |
| How likely are we to be able to have spontaneous conversations with users in this setting? | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**

**2. Setting Name:** \_\_\_\_\_ (for example, coffee shop across the street from library)

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| How relevant is this setting to my target audience?  | 1     | 2 | 3 | 4 | 5    |
| How much control can our team wield in this setting?                                       | 1     | 2 | 3 | 4 | 5    |
| How likely are we to be able to have spontaneous conversations with users in this setting? | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**

**3. Setting Name:** \_\_\_\_\_ (for example, library entrance lobby)

|  | LEAST |   |   |   | MOST |
|--|-------|---|---|---|------|
| How relevant is this setting to my target audience?  | 1     | 2 | 3 | 4 | 5    |
| How much control can our team wield in this setting?                                       | 1     | 2 | 3 | 4 | 5    |
| How likely are we to be able to have spontaneous conversations with users in this setting? | 1     | 2 | 3 | 4 | 5    |

**TOTAL =**

**Discuss total ratings with your team and use this commentary to align on a setting for your mini-pilot. The higher the total score, the more likely you will have a place that you can productively learn from in your piloting!**



## ACTIVITY 4

# DESIGN A MINI-PILOT

*time to be  
determined  
by team*

*Page 3 of 3*



### IDENTIFY RESOURCES

Your mini-pilot will require resources. As you plan, consider what you will need. There are a lot of components to think about, and you may want to assign tasks to each team member. Make sure to discuss the following:

- Ask for permissions
- Give advance notice and alerts to the appropriate people / staff
- Schedule piloting
- Schedule team members and involvement from any people outside of immediate team
- Get supplies
- Arrange for set-up time

### CREATE A PLAN

Look back to your concept map that you created when you first started prototyping, and build off of this to create your mini-pilot plan. Your mini-pilot should integrate and improve the prototypes you have already made, and you should be exploring how you can build other parts of the map to create a fuller user experience. You may also find it useful to reframe your concept map in other frameworks for mini-pilot design. Look back to the readings for more information. Create your plan with every member of the team and then post it up on a large board in your space.





## ACTIVITY 5

# RECEIVE & INTEGRATE LIVE FEEDBACK

*time to be  
determined  
by team*

Flip back to Activity 2 and go through the same exercise in reviewing the feedback from your mini-pilot. In addition, complete the activities below to build on learnings that you have gleaned from this process. As you continue to pilot over time, you will do this exercise again and again.

### CAPTURE OBSERVATIONS

Discuss with your team if anyone noticed unexpected behaviors or actions from users during the prototype. Observations can include nuances such as walking path, facial expressions, body language, and so on.

### REVIEW YOUR KEY QUESTIONS

Revisit your key questions that you developed as you designed your mini-pilot. What questions have you answered with the mini-pilot, and which ones still remain open questions? What questions may have changed, based on what you have learned so far? What new questions do you have based on your last mini-pilot?

### IDENTIFY NEXT STEPS

Look at your concept map and any frameworks you developed to explore the design of your experiment. Discuss with your team how you would like to move forward for your next iteration. Consider questions like:

What feels desirable, feasible, and viable both for users and the library?

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What parts of the mini-pilot best address the original design challenge?

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What do we still need to solve as a team?

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## ACTIVITY 6

# RE-EVALUATE YOUR CONCEPT

## *Congratulations!*

Your team has successfully experienced the design thinking approach. Give yourselves a pat on the back. You have made great progress toward designing better solutions for users at your library.

We hope you can continue piloting by stepping back and assessing the progress towards your design challenge. The beauty of iteration is that your idea continues to improve over time as you put more and more energy towards the design of better solutions. Sit down with your team and discuss how you would like to move forward with your mini-pilot. Hopefully you are all still passionate about your challenge and would like to see it through by implementing one of your ideas!

### EXAMINE SCOPE

Think about the larger strategy and goals of the library. How does the intent of your experiment align with this strategy? Is implementation possible? Is it resonating enough to launch? Does it have potential to become a core offer? What needs to change in order to make this a core offer? Discuss these topics with your team, and even consider pulling your library's leadership into the discussion.

### SET GOALS

Through multiple iterations, keep in mind that your goals and hypotheses for your mini-pilot might change. With your team, start brainstorming meaningful metrics that can help you set goals for your upcoming experimenting. These indicators are often untraditional yet just as important as the typical metrics you may have always used.

Our indicators of success:

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### PLAN FOR CONTINUED EXPERIMENTATION

If you would like to continue piloting in an ongoing manner, and can foresee that your mini-pilot will grow, consider the resources that you need to do so. For creating a roadmap and asking for more resource support, continue to the next chapter, Getting to Scale.

# CHAPTER 4

## THINGS LEARNED

# *Checklist*

### YOU'VE MADE IT THROUGH THE DESIGN THINKING PROCESS!

Take time to reflect as a team on all the work that you've done so far to introduce positive change at your library. You have learned new methods, techniques, and practices that have hopefully shifted the way you think about what you offer as a library to your users. Additionally, you've made the critical step in Iteration in getting your ideas out into the world by creating a live experiment that your users can interact with. This is the fastest way to learn how to improve on your ideas.

By now, you should have completed the following:

- Reflected with your team on the Iteration phase
- Planned & Facilitated Feedback on Prototypes
- Synthesized Feedback
- Designed a Mini-Pilot
- Received & Integrated Live Feedback
- Re-evaluated Your Concept

## CHAPTER 5

# Getting to Scale

### ACTIVITY 1

#### **CREATE A PRESENTATION** *pg. 53*

4 hours

### ACTIVITY 2

#### **BUILD A ROADMAP PLAN** *pg. 55*

2+ hours

### ACTIVITY 3

#### **EVALUATE OUTCOMES** *pg. 56*

2 hours

### ACTIVITY 4

#### **PLAN FOR STEWARDSHIP** *pg. 57*

1 hour

### ACTIVITY 5

#### **REFLECT ON YOUR EXPERIENCE** *pg. 58*

1 hour



## ACTIVITY 1

# CREATE A PRESENTATION

4 hours

Take a moment to envision your presentation as an advocacy tool.

Page 1 of 2

You can use a compelling presentation to:

- Ask for further funding or support
- Recruit more team members
- Introduce your idea to possible partners
- Build greater momentum for your project
- Reflect on progress with the larger organization

Why will you be presenting your story?

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What is the goal of the presentation?

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Who is your audience?

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Where will you be presenting?

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Based on the above, what format will you choose?

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Next, create a logical progression in your narrative by using these suggested prompts:

- Introduce yourself: Who are you? Who is your team?
- Define your challenge: What problem did you see, and who are the users?
- Inspiration: Who did you talk to and observe, and what were the top learnings?
- Ideation: What concepts did you come up with, and how did you prototype them?
- Iteration: What feedback did you receive, and how did you build upon that feedback with continued experimentation?
- A call to action: What's next for your team, and how might members of the audience help you with next steps?





## ACTIVITY 1

# CREATE A PRESENTATION

4 hours

Page 2 of 2

Make sure to build interesting experiences and learnings into your narrative. Spend time with your team brainstorming anecdotes to include in your story, including:

- What was the most surprising thing you learned while looking for inspiration?
- What was your most absurd brainstorm idea? The most creative prototype?

· Which moments of the experience were most rewarding?

· Which part of the process was most difficult?

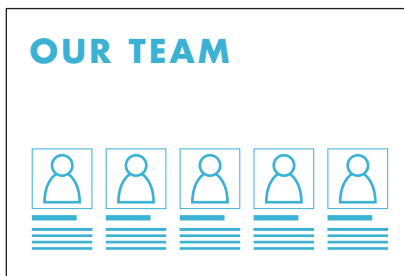
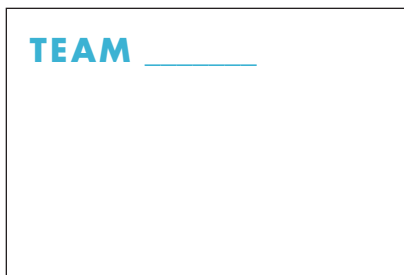
· What illustrative and provocative photos and visuals will best support your story?

Use the content from this exercise and the following slide templates to craft your story:

### step 1 INTRODUCE YOURSELF

- Who is your team?
- What are your roles?
- What are some interesting things about them and their roles?

example:



### step 2 DEFINE THE CHALLENGE

- What challenge did you start out with?
- What big questions are you exploring?
- How are the challenges relevant to the library?

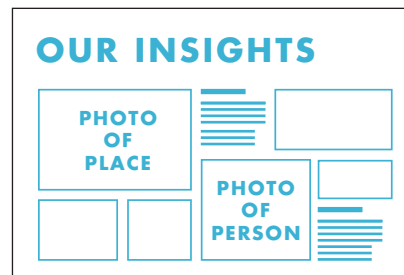
example:



### step 3 LEARNING FROM USERS

- How did you conduct research?
- What stood out to you on the research?
- What are your top 5-10 overarching themes / insights?

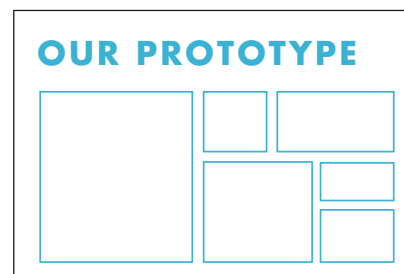
example:



### step 4 EXPERIMENTATION AND ITERATION

- What did you create based on your challenge and research?
- What did you learn from this experiment?
- How did you use feedback to evolve your prototype?

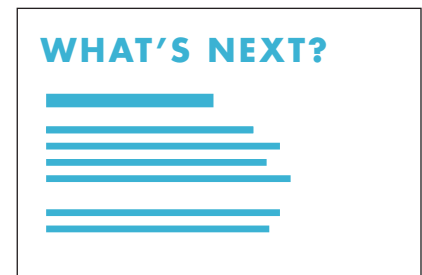
example:



### step 5 WHAT'S NEXT

- How does your experiment fundamentally change patron services for the better?
- What do you want to try next give all your experiences thus far?

example:





## ACTIVITY 2

# BUILD A ROADMAP PLAN *2+ hours*

If you are ready to start planning the future of your experimentation, begin working with your team to build a roadmap and timeline for continued iteration and development.

### 1. ESTABLISH GOALS

What are your ultimate goals for this project?

How do you imagine your idea becoming part of the library?

What do you need to do in order to make this happen?

How do you want your idea to impact the community?

Who do you need to involve?

### 2. CREATE A TIMELINE

Draw an ideal timeline for scaling and implementing your project. Think about what you would like to accomplish across both short-term and long-term timelines. This is a list of milestones you might include, with examples of how long each item might take:

- Craft project presentation (3 days)
- Persuade necessary stakeholders (1 week)
- Procure necessary funding and resources for further iterations (4 weeks)
- Plan for live launch of full pilot (2 weeks)
- Establish metrics for launch (1 week)
- Check in on pilot every week for the next 6 months

The timelines after creating your first prototype and mini-pilot are quite variable, as you must consider several contingencies in order to bring your idea to life. Your own timeline will depend on the resources needed to launch a full-on pilot, who might need to be involved, and how much time it will take to produce a more evolved experience for your users.



## ACTIVITY 3

# EVALUATE OUTCOMES

2 hours

To assess the impact of a pilot solution, it is important to take a systemic and holistic view. We encourage you to look beyond your usual metrics in measuring how your idea is performing. Try the following exercise, or develop a method of your own.

### 1. LIST OR MAP ALL STAKEHOLDERS THAT YOUR SOLUTION MIGHT TOUCH IN POSITIVE, NEGATIVE, OR NEUTRAL WAYS.

A map format works well for this exercise, as it shows networked connections between stakeholders. Try to create a complete list. Remember to include stakeholders that your team may not have directly focused on, such as funders, people in the same community or adjacent communities who are not receiving direct benefits, and non-human stakeholders like animals, the environment, and natural resources. Put this map or list in a place where you can refer to it often.

### 2. AS YOU SEE AND TRACK THE EFFECTS OF A SOLUTION, WRITE THEM ON THE LIST OR MAP.

Color code the stakeholders that receive benefits from the solution and those that experience negative effects. If possible, quantify the value of the effects with a standardized measurement system. 3. Using what you've learned from this exploration, continue to iterate on your solution to find ways to increase the positive effects and lessen negative effects.

### 4. EXAMINE THE SOLUTION'S NET VALUE.

See this exercise as a way to continue learning and challenge the team to improve on solutions in order to make the outcomes more and more positive.

Review the readings where we discuss types of indicators for success, including leading, analogous, awareness, engagement, and dynamic changes. Discuss the following with your team:

- What indicators will you use for your project?
- What are your goals?
- What can you measure? In the short term?  
In the long term?





## ACTIVITY 4

# PLAN FOR STEWARDSHIP

*1 hour*

As your solution becomes more sustainable, it's critical to plan for how your project will be stewarded, or guided, throughout time. In the design thinking process, ideas never cease to be iterated and improved upon, so establishing a plan around stewardship is key to ensuring that your idea stays relevant and useful for your target group.

### 1. RECRUIT HELP

Think about who on your team and in the library will be invited to share the responsibility to move forward. Here are several roles to consider:

- Advisor
- Prototyping help
- Observer
- Fundraiser
- Facilitator
- Publicist

### 2. CHECK-INS

Start scheduling milestone meetings far in advance with the team stewarding the work. You will often have a diverse team, and everyone might be in completely different locations. Check-ins will help with continuity and allow you to learn when to adapt your concept.



## ACTIVITY 5

# REFLECT ON YOUR EXPERIENCE *1 hour*

Page 1 of 2



### MY STRENGTHS AND WEAKNESSES

Take time to reflect on your personal growth. You likely felt more comfortable during some parts of the human-centered design process than others. This is entirely normal. Think back over the last four classes. Which areas felt most natural? Where did you struggle? Why? For each phase in the design process (Inspiration, Ideation, Iteration) mark where you fall on the axis between “I struggled” and “I excelled.” Below that, write a few sentences about why.



I STRUGGLED I EXCELLED

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Why? What was your biggest “aha” moment during this stage?

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I STRUGGLED I EXCELLED

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Why? What was your biggest “aha” moment during this stage?

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I STRUGGLED I EXCELLED

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Why? What was your biggest “aha” moment during this stage?

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## ACTIVITY 5

# REFLECT ON YOUR EXPERIENCE *1 hour*

Page 2 of 2

Think about what you liked or didn't like about working together as a design team, this toolkit, and the design thinking process overall.

### DISCUSS THE TOPICS BELOW

#### Team Dynamics

- What was it like to work as a design team? Did you like working together?
- What was the most inspiring moment for your team?
- What was the most frustrating?
- Were there moments of conflict or disagreement? How did your team reach a resolution?

#### The Toolkit

- What were the most successful aspects of the toolkit?
- What were its weakest parts?
- Imagine we received a grant from a very generous donor to improve the toolkit. Could you give us three suggestions about where to start? Send us this feedback to: [hello@designthinkingforlibraries.com](mailto:hello@designthinkingforlibraries.com)

|          |          |          |
|----------|----------|----------|
| 1. _____ | 2. _____ | 3. _____ |
| _____    | _____    | _____    |
| _____    | _____    | _____    |
| _____    | _____    | _____    |

#### You!

Members of your team likely felt more comfortable during some parts of the design thinking process than others. This is entirely normal and one of the reasons that having an interdisciplinary design team is so important. Think back over the course.

- Which areas felt most natural for members of your team? Was it during the Inspiration phase? The Ideation phase? Iteration?
- Where did members of the team struggle? Why?
- Were there skill sets that were missing from your team? What were they?
- If you could draft a new member to your team for your next design challenge, what key skills would they possess?

# CHAPTER 5

## THINGS LEARNED

# *Checklist*

### **CONGRATS ON TAKING YOUR IDEA TO THE NEXT LEVEL, AND ON THE ROAD TO IMPLEMENTATION!**

Hopefully you've learned a ton, and have to optimism to make your project sustainable and more permanent in your library context.

So what's next? Armed with this new human-centered design approach, Discuss whether staying together as a team makes sense while stewarding your idea. Alternatively, you might wish to pursue another idea altogether individually, or recruit new team members to get involved. Thanks for taking the time to learn about human-centered design. Have fun out there!

By now, you should have completed the following:

- Created a Presentation
- Built a Roadmap Plan
- Evaluated Outcomes
- Planned for Stewardship
- Reflected on Your Experience

