

# Learning from and listening to others

A handbook and guide for  
your Discovery fieldwork

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*taesi*

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# About this Handbook

At TACSI we're continually searching for the best approach to tackle social problems. Along the way we've discovered one or two things that seem to work time and time again, and lots of things that don't. We've still got a lot of exploring and learning to do but these series of handbooks bring together the best of what we've learnt works well so far.

It's our ambition that these handbooks will help you travel the innovation journey - to discover opportunities, design solutions, trial solutions and spread innovations that create impact.

To make it into a handbook stuff needs to be something that:

- we've used and found useful several times
- is simple enough to learn without too much effort
- create a lot of value.

There are lots of tools and methods, our goal is not to create an endless list but to focus on reliable, practical approaches that nearly always yield results.

For people new to particular tools and processes these handbooks are meant to provide an introduction to the basics. For those with some experience they are meant to provide a refresher on the essentials, and a view on what we've found to work in practice - as well as providing a resources for training and coaching others.

# What is design research?

Research for an actionable purpose usually to design or develop a better solution, system or way of working

## 5 key features of design research

1. **Mixed methods** tailored to the question and context
2. **Deep research** to understand the hows and whys; built to test assumptions
3. **Extremes** to learn from positive deviance
4. **Person and system centred** to explore conditions, tensions and relationships
5. **Generative** approaches engages people in co-creating and co-imagining alternatives

# Working in 'Discovery'

The Discovery stage of innovation is all about exploring options, you can break Discovery itself into 3 distinct stages, we'll call them Explore, Options, Choosing.

In the **Explore** stage you're learning from a diversity of sources, and through a range of method to understanding of the current situation, what's known about a particular topic and to expand your own sense of what's possible.

In the **Options** stage you're making sense of multiple streams of information to identify a number of opportunities for making an impact.

In the **Choosing** stage you and your team are going to making choices from the available Options and making decisions as to what to do next.

## Streams of Explore

Exactly why you explore in the Explore stage of Discovery will depend on the nature of the project. Across our project we've identified 5 different kinds of exploration work that help understand situations, alternatives and expand your sense of what's possible.

The 5 streams are

1. Learning from people, typically through contextual user research
2. Learning from systems - analysis of services and systems
3. Learning from alternative practice - typically through analysis of existing models and research from other contexts
4. Learning from theory - typically by understanding theory
5. Learning from thinking - typically by exploring leading edge writing and alternative paradigms

# Learning from people

Over time as public services and systems have become more complex they have become more disconnected from the people they serve. Perhaps the most disruptive work we do is to build empathy and understanding between systems and people. People are experts in their lives, no one knows it better. They can provide the best explanation of why they do what they do, and what they will and will not do in the future (even though this is not always accurate).

## Key questions

In learning from people we keep coming back to a few key questions?

- Who are the customers - the people you are trying to serve?
- What's their context?
- Who supports them?
- What helps and hinders them?
- Why? Why? Why? Why?
- What do they value?
- What would create more value?

## Key methods

There are many methods to do this, here are two we keep coming back to:

- semi-structure interviews
- rapid-ethnography

# Using Interviewing to Learn from People

Good interview technique is at the core of user research. Interviews are often the 'default' method for user research, and for good reason, but you should never default to interviews without some good thought as to whether they will answer the questions you need to answer.

Semi-structured interviews are convenient, they can cover a lot of ground in a short time and incorporate other methods. Here's some questions to ask if you're considering interviews:

- Will getting people to talk give you the information you need?
- Will they be comfortable talking about what you want to explore?
- Is what people say about a particular topic likely to be a reliable account of what they did or will do?
- Will your participants have the capability to respond in an interview?

# Helpful Tips for Interviewing

**Be your awesome, calm, non-biased, observant, curious, respectful self!**

**Make them feel safe.** Be clear, explicit, and confident explaining what it is that this project is about, how appreciative you are of this person's time, and exactly how their information will be used.

**Keep it structured but also conversational and comfortable.** No need to read questions word for word, but do know your interview objectives in advance so you know when to explore useful probes and threads. Remember, it's okay to bring the conversation back on track. You are leading, don't let them wander off and feel lost searching for things to say. They'll want to know that this conversation was useful to you; holding and intentionally steering the interview is a good way to do that.

**Find a balance of interviewing and being responsive** feel free to speak between their answers to help segue to your next question.

**Build rapport** (and that includes your body language, tone and eye contact) – it's not one size fits all, check in with where the participant is at, and start there. Have a casual conversation getting to know one another as people before you start and work to earn their trust at the start. Begin the interview with some warm up questions like "how's your summer holiday going?"



**Ask open ended, non-leading questions** (e.g. ones that start with ‘how’, ‘when’, ‘tell me about’, ‘why’, etc) – listen to the responses and ask follow up questions to gain clarity. Try to avoid leading questions that suggest an answer you’re looking for. Try not to give your respondents multiple choice options which could influence their response (e.g. Do you like going out for dinner, or do you prefer staying in, or do you like dinner parties better, or something else entirely!?)

**Observe and listen for what people are not saying.** Observe body language as they respond to different questions and capture notes on that. Observe how they interact with others, with artefacts, and their surroundings.

**‘Show (don’t tell)’** – ask for really specific examples or see if participants are willing to physically show you things / point things out for you. This often makes for some rich insights. Feel comfortable asking for concrete examples of a time when whatever it is that they’re talking about happened.

**Be curious and non judgmental** in questioning any inconsistencies you listen to or observe. There is no need to interrogate, and you’re not an investigator so remember there’s little need for questions like “and what time was it when they left the house? And what’s the precise location of the child now? And the name of their foster carers? the foster carer’s ages?”

**Pace yourself** ... it’s not a race (but at the same time, don’t move in!), go with the flow and allow for silences. If they start going in one direction that you need to talk about, run with it. You’re not beholden to the interview guide, you can get back to other questions later.

**End on a high.** This could be questions about what people want in their lives, their ideas for how things could be different, and in your close how this interview will help inform future design for creating change for people. Ensure

they understand that this conversation was helpful for you and that you genuinely appreciated their time and openness.

**Above all, be flexible, patient, and kind** - honour the fact that this person is sharing personal information for you and ensure they feel valued and respected. If you notice that the environment isn't working, it's okay to suggest going for a walk or grabbing a cup of coffee. Also sometimes situations will be raw, recent, or difficult, it's okay to give people the option to talk another time or not at all.

# Before the Interview

*Here are some tips for preparing for interviews*

- Design and distribute a consent form specific to this research brief
- Understand who you're talking to and a bit about where they're coming from - do a little background research on them if you can.
- Ensure interview appointments are confirmed via text / telephone the day before.
- Plan a safety and safe practices strategy in advance.
- Pack kit: interview guide, camera, voice / video recorder (charged), consent forms, notebook and pens, tools and plain paper, gifts for participants (voucher, cake / refreshments).
- Write down your questions in a notebook and be familiar with what it is that you want to ask in advance. Leave blank space to jot down probes or details you want to return to. Some people like to fold a page in half and write questions on one side and probe opportunities or notes on the other as they arise.
- Write down and know your interview objectives before you go in to your interview so you know what kind of information you're looking for. At the end it's a nice reflective tool to be able to see which of your objectives you ticked off, and which you didn't.

# Ethics Principles

Our approach to ethics is guided by the following principles:

1. **Our experiences with people should create value and be transformative.** We acknowledge that unintentionally, some conversations can be difficult for the people we engage with and it is our responsibility to make sure appropriate supports are in place around vulnerable individuals; we do our pre-work to minimise risk of harm from recruitment to followup. Our engagements are designed to be empowering and helpful, not only extractive.
2. **We make sure the people we engage with know and understand exactly what our intentions are and how information might be used or not used.** We use informed consent that is transparent, explicit, accessible, in plain English and user friendly.
3. **We take anonymity and confidentiality seriously.** We put processes in place to protect people's privacy and the details of the information they share with us whilst maintaining rigour and quality of data.

4. **Participation is always voluntary and we make sure people are aware of that.** Participants can withdraw information or participation at any time and are given clear steps for how to do so.
  
5. **We value people's time and the information shared with us.** We deeply engage with the details offered; we are committed to honouring people's stories and respecting the ways in which they feel comfortable sharing that information during and outside of our conversations.
  
6. **We are committed to taking action and turning peoples' stories into useful solutions.** Transitioning research findings beyond recommendations and into pragmatic social innovation efforts is an integral part of how we effect change for vulnerable communities. We encourage commissioning organisations to make research findings public to the wider benefit of society.

# Designing Interview Questions

**Make sure questions serve a purpose:** lean on your lines of enquiry. Is your question meant to clarify, explore, confirm? Does it tell you something about their values or motivations? Is it just something you're curious about, is it useful to the research to be curious about that?

**Be intentional about each question:** think about the types of responses might receive when asking a question and then check that that information is what you're looking to gather. Test it out (on yourself, a team member, etc.) Another strategy that helps is to try thinking about the information you need to collect, then work backward thinking about what ways there are to ask questions about that.

**Review, edit, revise, evolve.** Update your questions as you gather more information and surface new areas to investigate. Update them as you see what works/doesn't when asking certain questions. Design your questions based on different respondents, tailor them to the specific cohort or interview.

**Design an intentional flow of the conversation** where you start open ended and light and move into more targeted and/or heavy topics.

# Designing and Using Tools in Interviews

## **Going beyond conversation**

Part of the utility of interviews is their flexibility. An interview can involve more than talking and listening alongside the questions you ask you can incorporate other methods and activities. Here's some examples.

Asking people to draw a **timeline** of their experience to better understand emotions over time, or explore what happened in the past.

Short **observations** of people doing a particular task, e.g. using a website to better understand what they actually do rather than what they say they do.

Using **Card Sorting** to understand existing experience, explore what people value or to get a response to early stage ideas.

Using **serious games** can help people envision what could be and map what's most important.

**Evidencing** - creating fake evidence from a future service e.g. a brochure and discussing them with people.

## **Be Intentional and consider your users.**

Just as you need to be intentional with the question you ask - be intentional about the tools you use - design them so that you learn what you need to learn. Remember - good conversation is almost always better than bad tools.

**Design for your user**

Tools won't work for everyone in your sample. Consider the accessibility of your tools and the likely levels of literacy of your participants. Beware of designing tools that make people feel they are being tested or experimented on. Beware of tools that trivialise people's experience or may be perceived as juvenile. Always test your tools with people who might know what the experience would be like for a respondent.

Think carefully about how you'll introduce tools and activities, and prompts or questions you'll use when you're using them.



# During the Interview

## Selecting Interviewers

Try to be intentional when selecting who from your team will interview respondents to ensure a mutually-comfortable conversation and that people are open with sharing their story honestly. Additionally, in some cases there may be safety considerations to take into account. Some things to ask yourself when selecting an interviewer might be:

- Who are you interviewing and what are sensitive topics to them?
- Who on your team could best connect with this person based on what they value, their past experiences, possibly their gender, or their cultural background?
- Who will make this person feel most comfortable sharing sensitive information?

## Key Strategies and Techniques

### Building rapport

- How will you leave your worldview and ideas at the door?
- What are the ways you can build trust and put your interviewee at ease?
- How might you come across as sincere and interested?
- How will you 'step into their shoes' and see things from their perspective?
- How will you take care of them?
- Where can you find genuine commonalities with this person that you can connect on?

## **Listening**

- How will you really give your attention to the responses of your interviewee?
- What will you do to seek clarity?
- What's going on with the assumptions / interpretations you're making as you're listening?
- How will you make these explicit?
- How will you probe deeper?

## **Body language**

- How would you like to show up?
- Are there any shifts you can make to your tone of voice, facial expression or posture so both you and the interviewee feel more comfortable?

## **Observation**

- What are you sensing from the environment?
- Are you seeing anything that might prompt behaviour? Indicate a barrier they have overcome?
- What about patterns?
- Is anything standing out as unusual?
- How will you capture concrete details as well as your interpretations?
- What interpretations are you making about how are they engaging with you?

## **Probing deeper**

- What are you curious about? What themes are jumping out to you?
- How are you tuning into the interesting or surprising bits you want to find out more about?
- What can you say and do to really tap into what they value and care about? What about their pain points?
- What would it take for you to ask the naive or tough questions?

- How are you utilising your intuition, but staying on track with what the purpose of this conversation is about?
- Are you drilling into minutia unnecessarily or asking substantive questions that illuminate values and motivations?

### **Capturing**

- Record! (with permission!)
- Take lots of photos if you can and have been granted permission!
- Don't privilege your notes - be present in the conversation. If you have two people in the interview, allow one of the interviewers to prioritise note taking. When you cannot record, do try your best to capture direct quotes as much as possible and debrief on content as soon as possible afterward to ensure you capture their story accurately.

## **Framing Questions**

There's a difference between the question we want to ask and how we actually ask it. There are some different strategies for approaching question asking to help respondents answer in a way that provides useful information and makes them feel comfortable.

For example, if we wanted to know about the challenges a case worker faces on a daily basis at work, we have different options about how to ask this question:

### **We could ask directly:**

*"What's the hardest part about your day?"*

This might give us some helpful tidbits but it's so straightforward that it will be limited in its utility to provide deep, honest answers depending on the respondent. This is more like a job interview question, it works well for people who are prepared, who are already thinking about these kinds of things in advance.

**We could ask through pacing:**

*“Could you tell me about what you do over the course of a day here at the office or in the field?”*

[In their response look for moments where they tell you something that seems like a challenge]

*“You said sometimes you have to have difficult conversations with clients that leave you feeling drained. Could you tell us more about that? What effect does that have on you?”*

[In their response look for moments where they tell you something that seems like a challenge]

*“Wow that seems [synonym or same word they’ve used to describe what they said], Are there other similar types of moments that “drain you” in a day?”*

This strategy can prime a respondent to be speaking about challenges. Also, it will give you additional content to reference in other questions later.

**We could ask indirectly:**

*“What frustrates your colleagues in this type of work? What do you reckon they might change if they could?”*

It helps take the attention off their answer, then you can follow up with “And how do those attitudes resonate with you?”

**Better Ways to Ask ‘Why’**

Sometimes you want to ask why without asking why - Because usually people will tell you what they think which could be laced in assumptions, more valuable information will be what they did, what happened, what they thought, who else was involved - what they said etc. So, sometimes when you want to ask why a better approach is sometimes to ask:

Could you explain what you mean by that?  
When \_\_\_\_\_ happened what thoughts did you have?  
What questions did you have?  
How were you feeling?  
What gave you that impression?  
Could you tell me more about \_\_\_\_\_?  
What makes you say \_\_\_\_\_?  
You said “\_\_\_\_\_” could you elaborate on what you mean by that?

### **Spotting Probe Opportunities and Threads**

Conversations can be quite exciting and interesting, it can be easy to allow the respondent to veer off track and explore tangentially-related topics. It's important that as an interviewer we strike a balance between allowing new topics to bubble up organically through conversation but also ensuring we hold and guide the respondent - positioning them to be able to provide useful information so they too feel their time was well spent.

One subtle but tricky moment in an interview is when you ask a question, but don't get a related answer. Another tough skill to hone is spotting probes. A lot of times these two challenges converge a bit in conversation.

Read an example below where we ask a mother what her contact visits are like:

*What's a day with a contact visit like?*

Well i see my six month old baby twice a week. my other son once weekly then it goes to a fortnightly type thing it sort of swaps over a bit. That's for two hours and he's 4 years old. he's a rough head. he's got a real massive deep scar across his head. he's just got a lot of energy. its just the way he his. he used to head but when he couldn't get his own way. but he's still good kid. they all have their ups and downs but he's actually a good kid I didn't have much trouble with him

apart from the whole head banging thing i had to get him out of that. More problems with my daughter she was the worst one. But she's settling down a bit.

*How do you get there?*

Public transport it takes about 2 hours

You'll notice that the respondent avoids the question, but that doesn't mean we need to skip over it. Nor does it mean we need to ask the same question again. The most tempting next step is to ask a specific question about something else you want to know (e.g how long does it take to get there?), but that starts to take the conversation in another direction rather than surface deeper more meaningful anecdotes. The best option is to pull on a thread around something she's shared with us in that.

In this case the information she shared about the two hour visit with her four year old son is a great opportunity. Instead of asking about transportation hoping for lead with a different question, we can continue on this topic by asking:

- So you mentioned you see your son for a about two hours every week... (often times the respondent will jump in and finish your sentence)
- What do you and your son do together when you visit? What happened at your last contact visit?
- What do you look forward to most when you visit with your son?
- What was the first visit like compared to more recent visits? What's changed over time?
- Could you walk us through start to finish on a day when you visit your son? How do you get there? Who joins you? What's it like for you as a mother?

## Listening

*"We do not see things as they are. We see things as we are." (Anaïs Nin)*

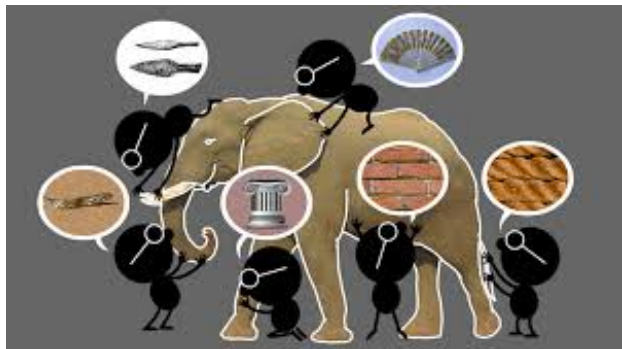
Part of being human is that we come with our own interpretations. These are based on learning triggered from all of our past experiences. Therefore the same words we say or hear and take for granted can have very different meanings to others. One way of thinking about listening is that it is **hearing + our interpretation**. Listening is not passive, but an active process where we are continually making assumptions about what we think, feel, see and hear.

In our interviews, to be a better observers of others, we can learn to become a better observer of ourselves.

### The blind men and the elephant

Have you heard the story of the six wise blind men who were problem solvers in their time? One day they were invited by the king to touch an elephant and tell him what it was. One touched the ear and

declared it to be a giant fan, one another felt the belly and stated it was a wall. The one who touched the trunk shared it was a fat snake, the tail was stated as a rope, the horns a spear and finally the felt leg was declared to be a pillar.



Each came to a different conclusion about what they were touching due to their unique reference points. With on the ground research, it's important we identify the reference points and lenses we're holding and to remember we

come into any situation with our own biases and blindspots and that these need inspection. Otherwise...

“To the man with only a hammer, every problem looks like a nail.” (Abraham Maslow)

What to try?

- Name our assumptions. This starts before the interview. Identify what are the assumptions you’re already holding about the person you are about to speak with. It can help to write these down or to name them in the objectives you’re going into the interview with as an example of the type of information you’re looking for
- Use the conversation to make these explicit and question them. For example you might start a question like this: *“Lots of people told us ... what are your thoughts on that?”*
- Similarly use questioning and sharing back to come to shared understanding. You might ask: *“Can I just check my understanding about what you have just shared?”*



# After an Interview: Reflection and Debrief

## Interviewing Practice

Sometimes it's helpful to set an intention for an interview for things you would like to work on. For example, you might like to work on asking fewer leading questions. Share this with your partner in advance and afterwards ask for some feedback on how you did, or review your transcript thoughtfully to see where you can improve for next time.

A nice format for doing so might be asking the following two questions to yourself as a ritual after each interview:

- 1. Three things you appreciated about yourself**
- 2. Three things you will change or try in your next interview**

### **What worked for you?**

e.g. Building rapport and trust, making your interviewee feel comfortable, making your assumptions explicit, listening, meeting your objectives, getting some great photo's, probing and digging deeper, working through emotion, highlighting and talking through inconsistencies, using appropriate humour, allowing for silence, pacing.

### **What didn't?**

e.g. Asking closed questions, asking leading questions, being distracted, filling silence, making noise to indicate listening, not seeking clarity or probing, not picking up on emotional or physical cues, finishing off the interviewee's answers.

## **Emotional Debriefs**

In our work at TACSI, sometimes we hear some heavy stories, sometimes we have the privilege of connecting with someone around some of their toughest life moments, sometimes we hear deeply saddening and traumatic experiences. It's important for you as an interviewer to discuss these stories with another colleague if you need to. If you've heard some information that's hard to cope with, feel free to reach out to a team member or our EAP program to discuss how to acknowledge your own wellbeing.

# Analysis of Interviews

“We interpret what we see based on our own life experiences, assumptions, preference, priorities, and implicit rules about how things work and how one should be.” When doing research we want to preserve the stories of the people we’ve heard in their purest state and do our best not to confuse data with our interpretation,

There are a few techniques that can help us ensure that we’re analysing evidence and data and not layers of interpretation. This helps our design process lean on what people have actually told us and not what we want to hear.

## Separate your transcript from the analysis.

Do analysis for sure! Document insights, synthesise anecdotes, and draw patterns from the evidence you gather, but make sure you’re analysing data and not interpretations. Here’s an example of a template you might use.

Unique Code_Date_Type_Initials
Interview by: _____
(Background Information)
Pseudonym Name:
Interview Type:
Location:
Occupation:
Gender:
Age:
Family Breakdown:
Summary: (a 1-2 sentence summary of this person's situation, demographic, outlook on life)
(Interview Context)
Description of space and environment: (Where did you meet? What did it look like? How did the person seem, hear? What else was going on?)
(Interview Notes)
(Date/Time)
Key Observations:
Emerging Themes:
Emerging Insights:
Emerging Assumptions or Hypotheses to test:
Open Questions:

## Know the difference between observations/ data, interpretations, and insights.

### Observation: Ellie hit her child.

If you saw it, that’s an observation. you’re not weaving in any emotional biases. Straight forward, that’s what you saw.

### Interpretation: Ellie is a violent, aggressive, and bad parent.

That’s an interpretation based on your opinion of what a good, gentle parent is or maybe based on what research you’ve read about parenting, either way it describes your understanding of the situation.

**Insight: Ellie draws on parenting techniques that she saw modelled from her own parents in her childhood. Intergenerational parenting behaviours are hard to influence because they are learned norms over a long period of time.**

This is an insight because it explains how or why someone did something and it's informed by other evidence.

# Analysis Tools

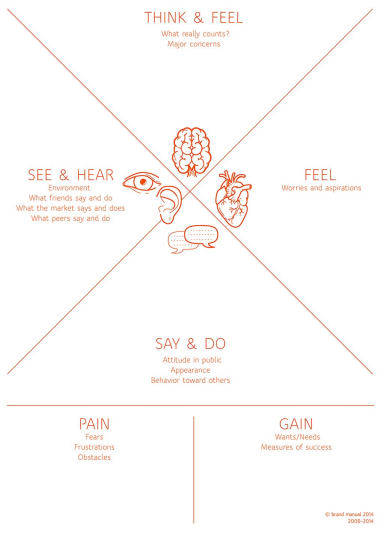
Here are some examples of tools to help you make sense of complex information and organise into themes, patterns and eventually insights.

**Patterns** (clustering) *What themes are emerging?*

**Cohorts** (personas) *What are new and unexpected ways to understand cohorts based on common needs, motivations or jobs to be done?*

**Experiences** (journey maps) *What are the highs + lows? Barriers + benefits?*

**Ecosystems** (systems maps) *How does what we've learned fit into and influence a larger context?*



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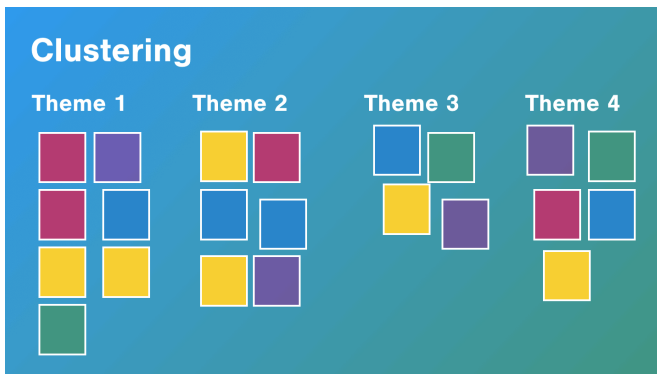
## Creating a persona/storyworld

Use this to describe someone in their world

<p><b>The backstory</b> My family, study and work background...</p>	<p><b>Current situation</b> My name is... My age is... I live in... with... How and when I spend my time... My work and income...</p>	
<p><b>Beliefs about change</b> How I think about the future...</p>	<p><b>Key insights</b></p>	<p><b>Capacities and resources</b> I can easily... I can't easily... My skills are... because...</p>
<p><b>Goals and values</b> The future I want is... because...</p>	<p><b>Issues and challenges</b></p>	<p><b>Workarounds</b></p>
<p><b>"I think/feel/know..."</b></p>	<p><b>Devices and technologies</b> Things I have with or around me (eg car, TV, mobile/phone)... because...</p>	<p><b>Relationships with organizations</b> Formal/informal... occasional/request</p>
		<p><b>Strong ties with...</b> People, places and organizations</p>
		<p><b>Weak ties with...</b> People, places and organizations</p>

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## Patterns (clustering)



(personas)

### Anatomy of a persona

1. **Segments** – What are the extremes or groups of cohorts we want to represent?
2. **Characteristics** – Who is this person and what do we need to know about them?
3. **Barriers and benefits** – What are the key things that help and hinder this person? Why?
4. **Needs and wants** – What's the job to be done?
5. **Motivations and incentives** – What drives this person's behaviours?
6. **Supports and Influencers** – Who else is in their network (positive or negative)?

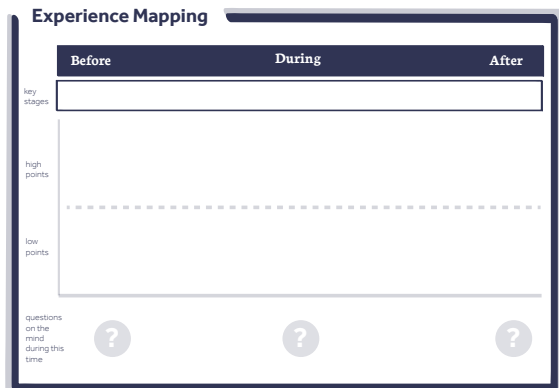
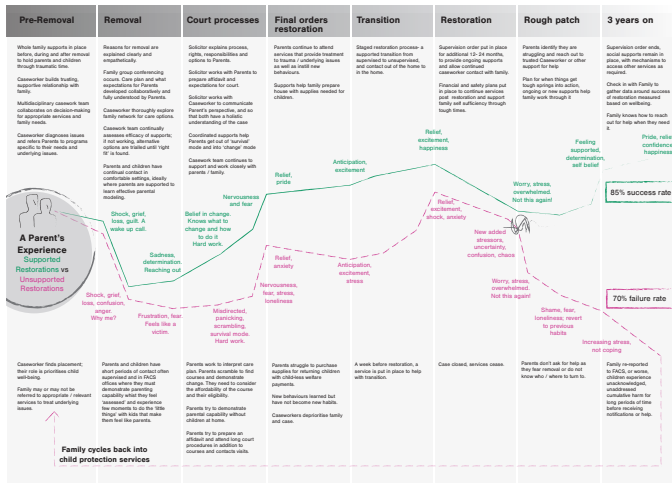
# Experiences (journey maps)

## Anatomy of a journey map

1. Scenes – What happens when and why? What is the intended outcome of each situation?
2. Actors – Who is doing what? What is the role?
3. Props – What are the tools and touch points that are used? How do these create behavioural cues?
4. Sensory experience – What does this moment feel like? Look like? Sound like? Smell like?
5. Emotional experience – What are the highs and lows?

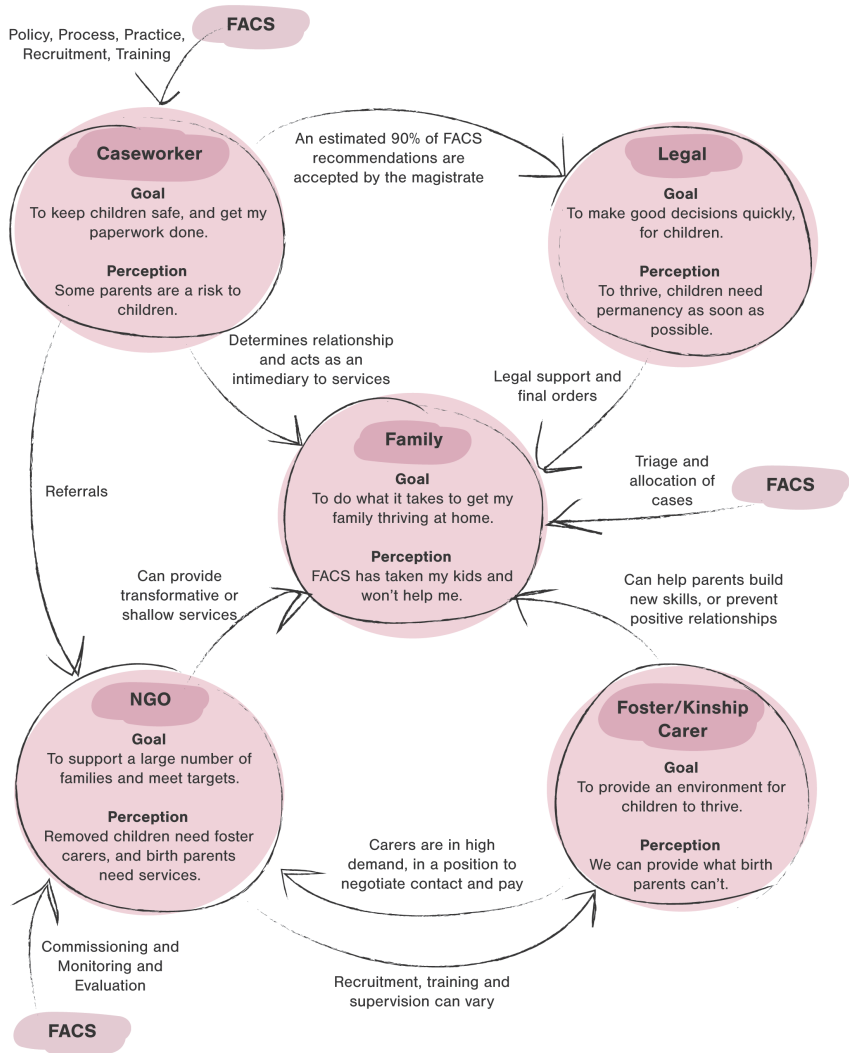
## Restoration Experience Journey What Helps and Hinders

The types of support a family receives and the statutory agency's approach to restoration has significant implications for restoration outcomes. These are the patterns of care practice approaches we observed in successful restorations and in unsuccessful restorations.



# Ecosystems (systems maps)

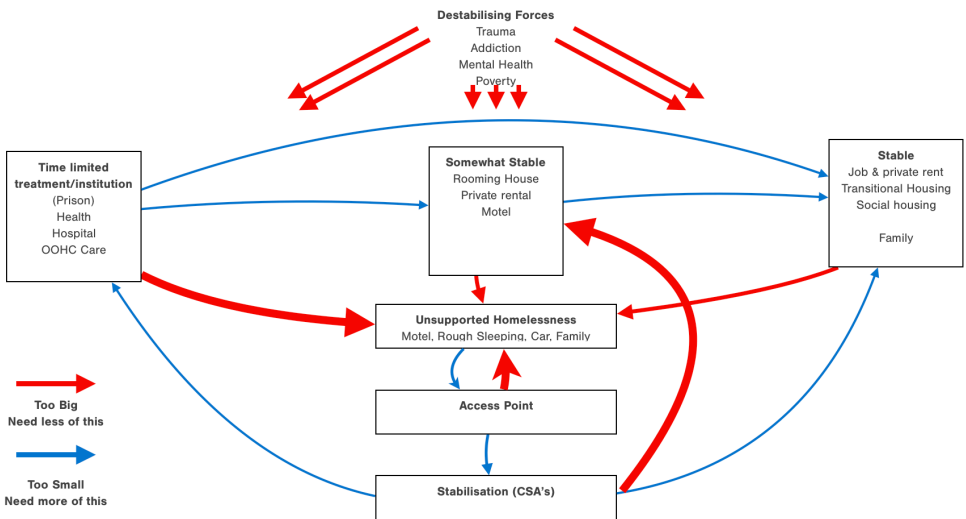
## Anatomy of a systems map





1. Entities – Who are the actors and organisations? What are their goals and objectives?
2. Flows – What information or resources flows from one place to another
3. Movement – Where do people transition to or from?
4. Blockages – What creates barriers or unwanted outcomes?
5. Influencers – What drives or incentivises decisions or power dynamics?

## The Wider System: Current Flows



# Additional Resources

## **Qualitative Research practice** (144-165)

Tips on staging the interview and types of question-asking strategies from a technical social science perspective

## **Interviewing for Introverts**, Rachele Annechino - ethnographymatters.com

Quick tips on interviewing techniques

## **Design Research for Media Development**, Reboot (38 - 49)

Types of design research and interviewing methods

## **Writing Ethnographic Fieldnotes**, Robert Emerson (-)

Tips on observation and ethnographic data collection

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