3 Taking action

Figure 1. Plogging at Ngong Hills, Kenya (Xinqing Lu, CC BY-SA 4.0)

It's the moment you've been waiting for - taking action! It will be incredibly exciting and rewarding to see your project unfold, and find out whether it has the impact you were looking for. But even, or especially, here you need to take care to keep your users in mind like a designer would. If you can, you should find a way to test out, or pilot, your idea or product with users so you can refine it. You will probably learn even more about your community in the process! And once you are ready to go, good project management is critical. This section will discuss both piloting and project management.

Piloting your ideas

Once you have brainstormed different ideas and come up with a possible solution it is time to put it to the test, or to ***pilot it.*** The final users should always be at the centre of your project and it is essential that you communicate your ideas with them at this stage. Depending on how large the community is, you can choose to share your idea with all of them (if you can make sure you can reach all of them electronically or if the intervention is within your household or your class, for example) or with a ***focus group.*** A focus group is a diverse sample of 6-12 members of the community who engage in a discussion of your idea, with the aim of providing feedback for improvement. This is where the documentation from your synthesizing and brainstorming process will come in handy. You can use the diagrams or the stories you have developed to efficiently communicate your ideas and then guide your group into a discussion by asking specific questions. There are instructions for conducting a **Focus Group** in the Tools section below.

e 2. It is important to get some feedback through a piloting process, if possible. (Wallpaperflare, CC BY 1.0)

Running a small-scale trial

Sometimes it will be possible to perform a small-scale trial of your idea to see how the users respond to it. If your solution is a concrete product you can do this by showing them a sketch, building a prototype (test product) or having them engage with a part of the product. If your project is an intervention, a service or an activity, you can try to perform or pilot it once or over a short period of time. This allows you to "build to think" and to have a conversation around the product, service, or other action that is based on concreteness.

The Stanford University d.school has the following tips for testing a product or experience with users:

- **Let your user experience the prototype**

  Show, don't tell. Put your prototype in the user's hands (or your user in the prototype) and give only the basic context they need to understand what to do.
- **Have them talk through their experience**

  "Tell me what you're thinking as you do this." The **Narration** tool in the Tools section below can help
- **Actively observe and take notes**

  Don't immediately "correct" your user. Watch how they use (and misuse) your prototype, or behave with the service or event.
- **Follow up with questions**

  This is often the most valuable part. "Show me why this would (not) work for you." "Can you tell me how this made you feel?" "Why?" Answer questions with questions. "Well, what do you think that button does?"

You can also use a **Feedback Capture Matrix** (**Figure 3**, see Tools below) to help you collect the user's reactions. It arranges thoughts and ideas about the pilot into four categories: likes, constructive criticism, questions, and new ideas.

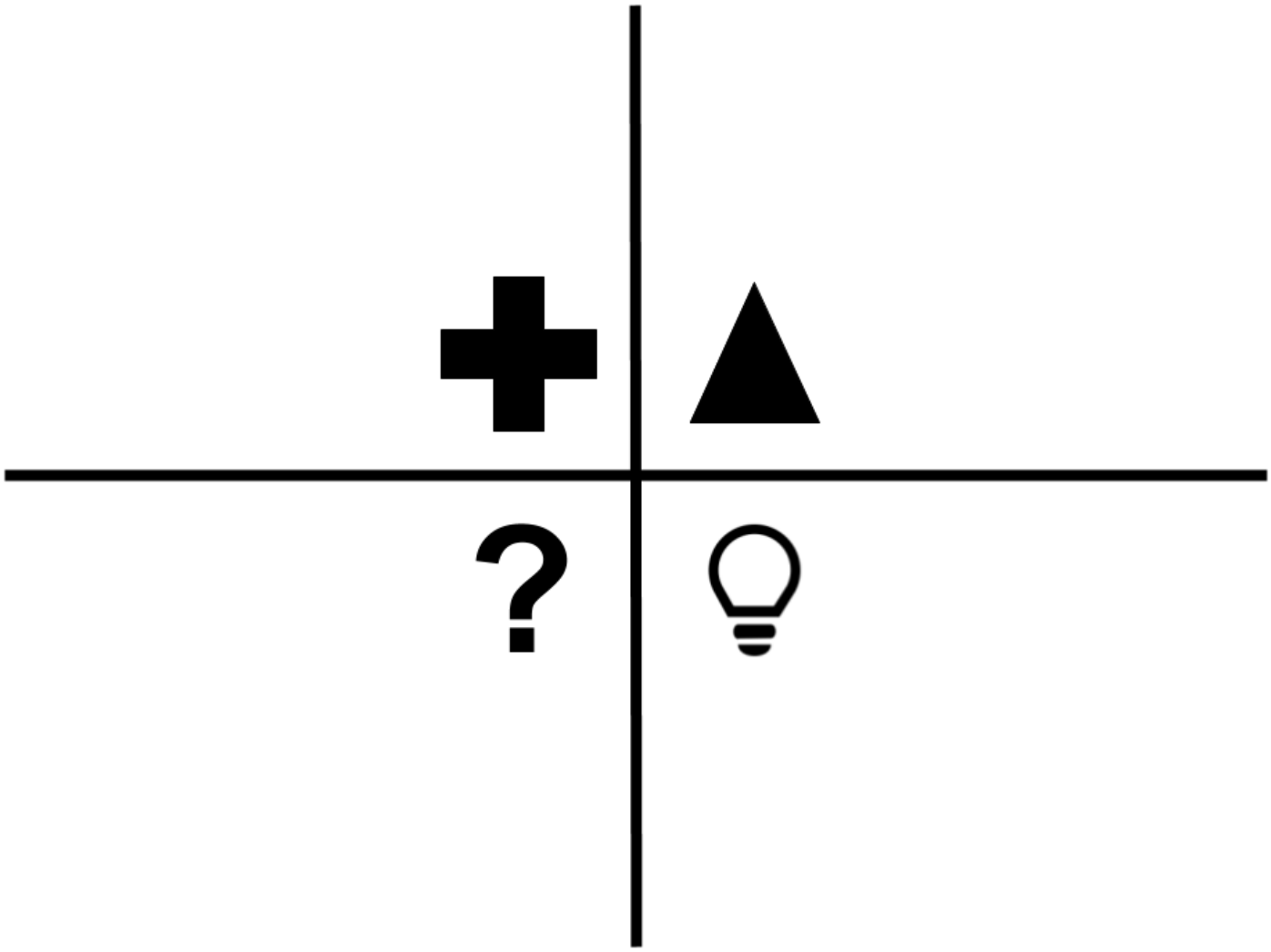


Figure 3. Feedback capture matrix (CC0)

- all the investigation completed, planning done and initial feedback from the stakeholders obtained, it is finally for ***lights, camera, ACTION!***

At this point, good management is the key to executing a successful project. Despite all your best efforts, there is a good chance that your project will not run exactly according to your plan and timeline. Giving good direction, paying close attention to what is going on, and being flexible to deal with the unexpected are key to keeping things on track. In particular, you need to pay attention to the so-called **iron triangle of project management**: budget, scope (the extent of tasks) and schedule.

Regular meetings may be needed if you are working in a group. Running an effective meeting is a skill (that not many have), so if you need to hold meetings, be sure to look at the advice in the **Meetings** tool below.

It is easier to manage your project if you break the project down into:

1. **Project execution**

   This is where you focus on the steps required to meet your project objectives. You can make this happen by allocating resources and keeping team members focused on their assigned tasks. This phase heavily relies on sticking to your project plan and timeline. It is important to have a meeting with your team before taking action, so that each members' responsibilities are discussed. You may already have your **Gantt chart,** so now would be a good time to use tools such as a **Kanban / scrum board**, **Checklist** or an **Urgent / Important Matrix** to help keep track of your project progress and what tasks are the most pressing to complete. A **Mind Map** may also help you keep the big picture in front of you. You can find more information on these in the Tools section below.

2. **Project monitoring and management**

   Monitoring and managing happens as your project is carried out. You must evaluate whether you are on track to deliver the project objectives. It is best to do this during the meetings with your team members, that you should ideally have on a regular basis. To meet the project requirements, team members must complete tasks and track any changes from the plan and timeline. Problems should be highlighted immediately, and resolved quickly. This will ensure your project moves ahead smoothly.

3. **Project closure**

   This is when you have achieved your project objectives. You release the finished product to the stakeholders which, in certain occasions, may indicate the beginning of the next stage of sharing and scaling, especially if your product is digital. In a case where you developed and ran a successful social intervention, you may pass

your product is digital. In a case where you developed and ran a successful social intervention, you may pass on the ownership and future execution to the stakeholders. The action you took with them would hopefully become the norm.

As a team, you evaluate and document the project, you consider the successes and what was learned from the challenges that you can take with you into future projects.

Sometimes projects do not turn out as planned for reasons that may or may not be in your control, such as poor planning, disagreements within the team, interruption of the cooperation with a given organisation, problems with obtaining materials for a specific product, or *force majeure* (just think of the COVID-19 pandemic!). Even if you had to stop working on the project or modify it significantly, it is still a valuable learning experience for you and it is important that you document it as such. You can always use what you learned to inform your future projects and initiatives.

Examples in different contexts

Reducing plastic in the household

The family was presented with a concept plan for reducing plastic waste. They were asked to respond using the feedback capture matrix (link to example on household plastic waste) and the concept plan was revised.

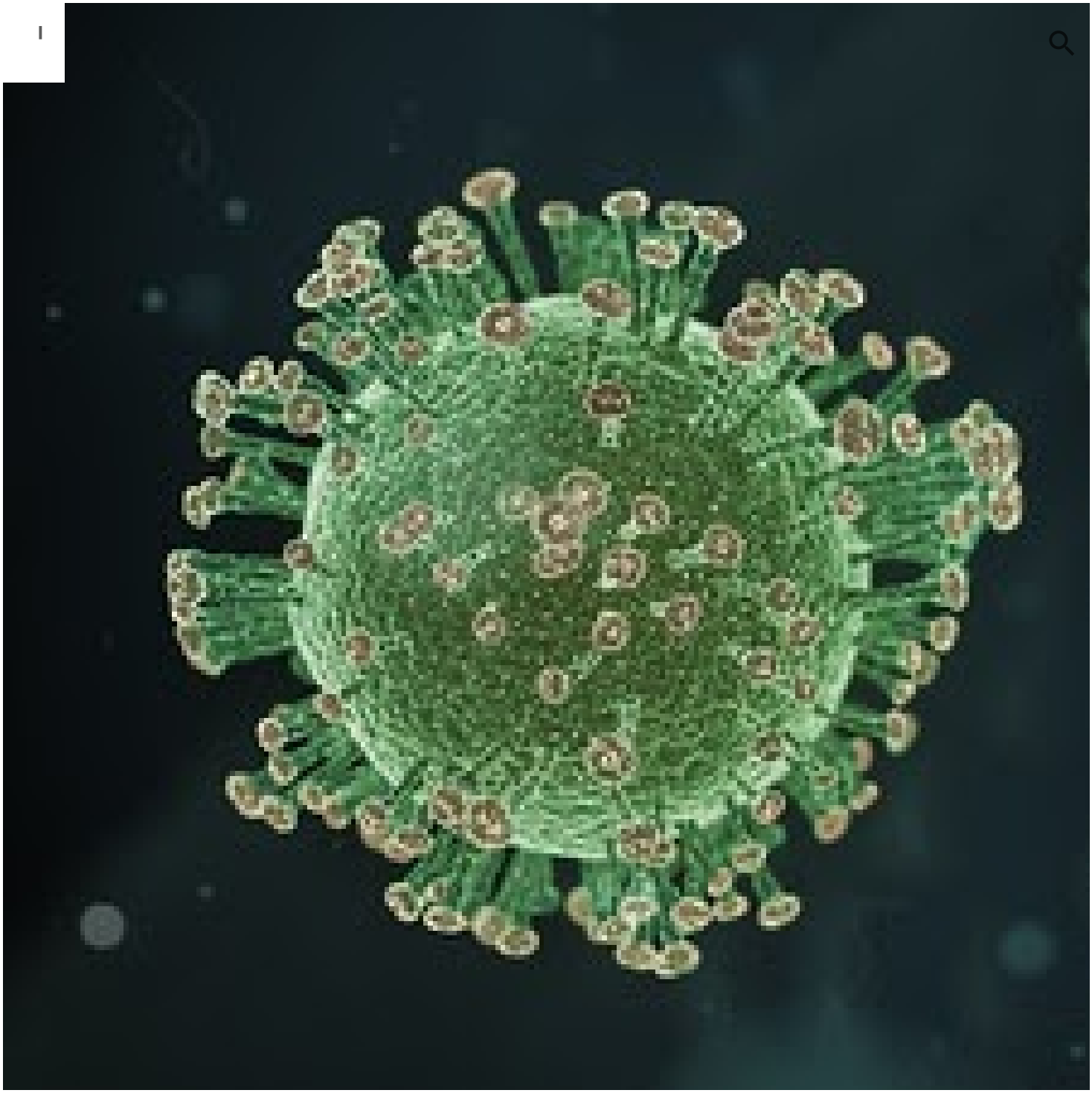
The actions were carried out for four weeks, and the student counted, classified and recorded pieces of plastic waste every week, just like she did during the investigation stage. The student kept a checklist (link to example on household plastic waste) to remember what had to be done each week.

Mitigating CO2 emissions in the school

A faculty advisor was presented with a concept and action plan for the tree planting and feedback was given and used to revise the action. A pilot was not really an option in this project.

After the initial research was conducted, the students decided to set up a Kanban board to list the various tasks that had to be accomplished, so that everyone could see the status of the various pieces, some of which were happening at the same time (for example, researching regulations and writing the concept / action plans).

The tree-planting action itself was relatively short. However, tools and people had to be organised to prepare the site and holes and to actually plant the trees. Though the Gantt chart helped them with the big picture, the students found that checklists, created and shared on a Google Doc, helped them manage all the specific details. In particular, because this was a group project, the checklists were important for making sure that everyone involved knew what to do and when



Informing people with Down syndrome about social distancing during a pandemic

The idea for a video slide-show was shared with a focus group consisting of 12 people - 6 with Down syndrome and 6 family members. The students created a sample slide in order to get feedback. The stakeholders particularly liked that photos would be used as the audience would relate better to them. Permission was given to use photographs. The focus group suggested adding audio, reading the text, for improved access.

The students then used a Kanban board to list tasks and referred to it at the daily meetings. They divided the responsibilities in the following way:

- Creating 20 slides with key information on social distancing based on the documentary analysis and following guidelines for easy-read materials

- tting appropriate photographs to match the text (for example, “wash your hands”) from families who were asked to take photos in these

Tools

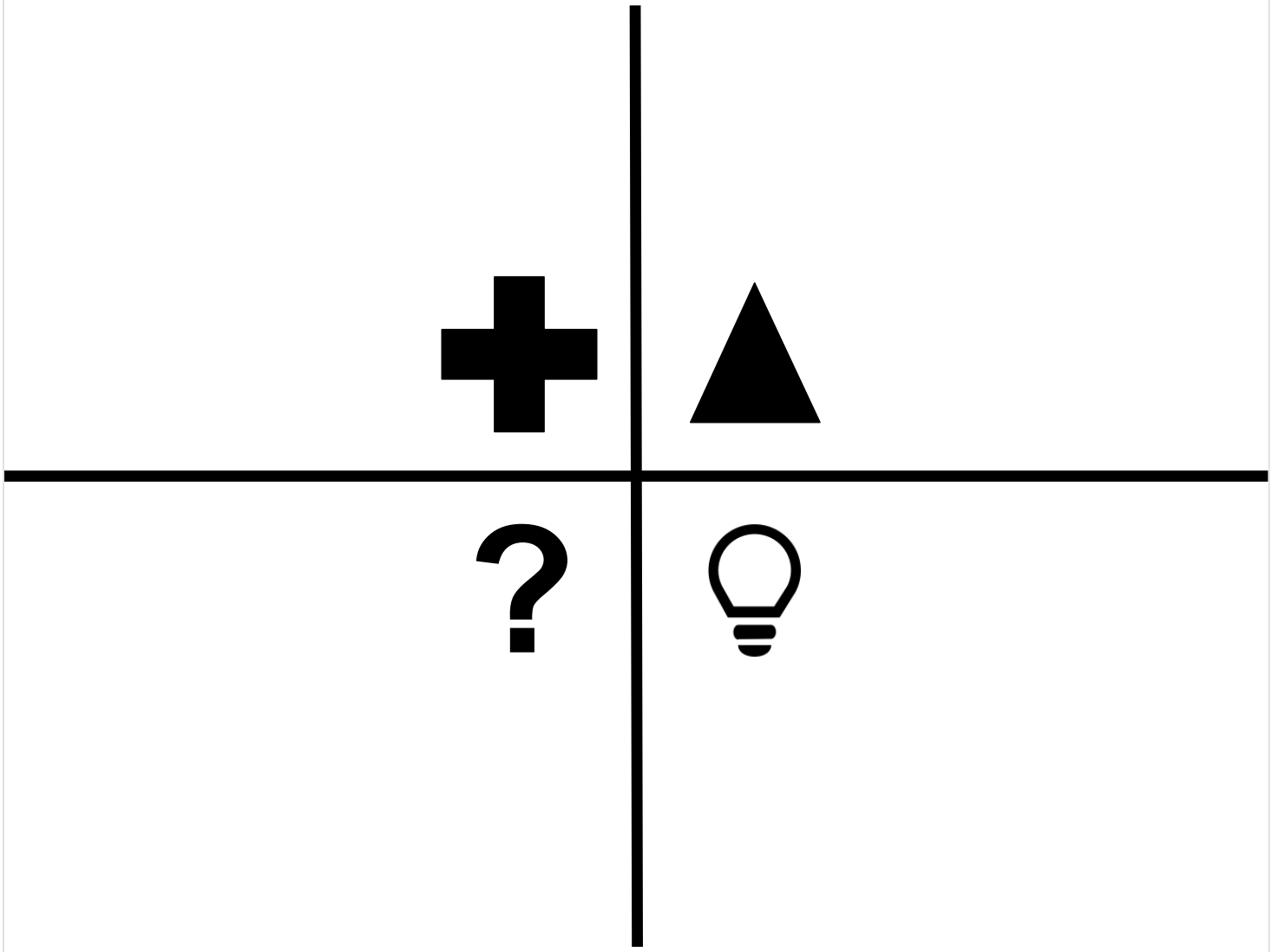
The video was piloted in full with the focus group again. The reactions were positive, with one minor technical suggestion. The project was then finalised.

FOCUS GROUPS

Some advice for setting up and running focus groups. The tool will help you select participants and lead a discussion in the group.

NARRATION

A set of instructions for how to get a stakeholder to narrate their experience with a product, action, issue or environment. The tool can be used in conjunction with other primary resource instruments like interviews, and camera / collage / drawing studies.

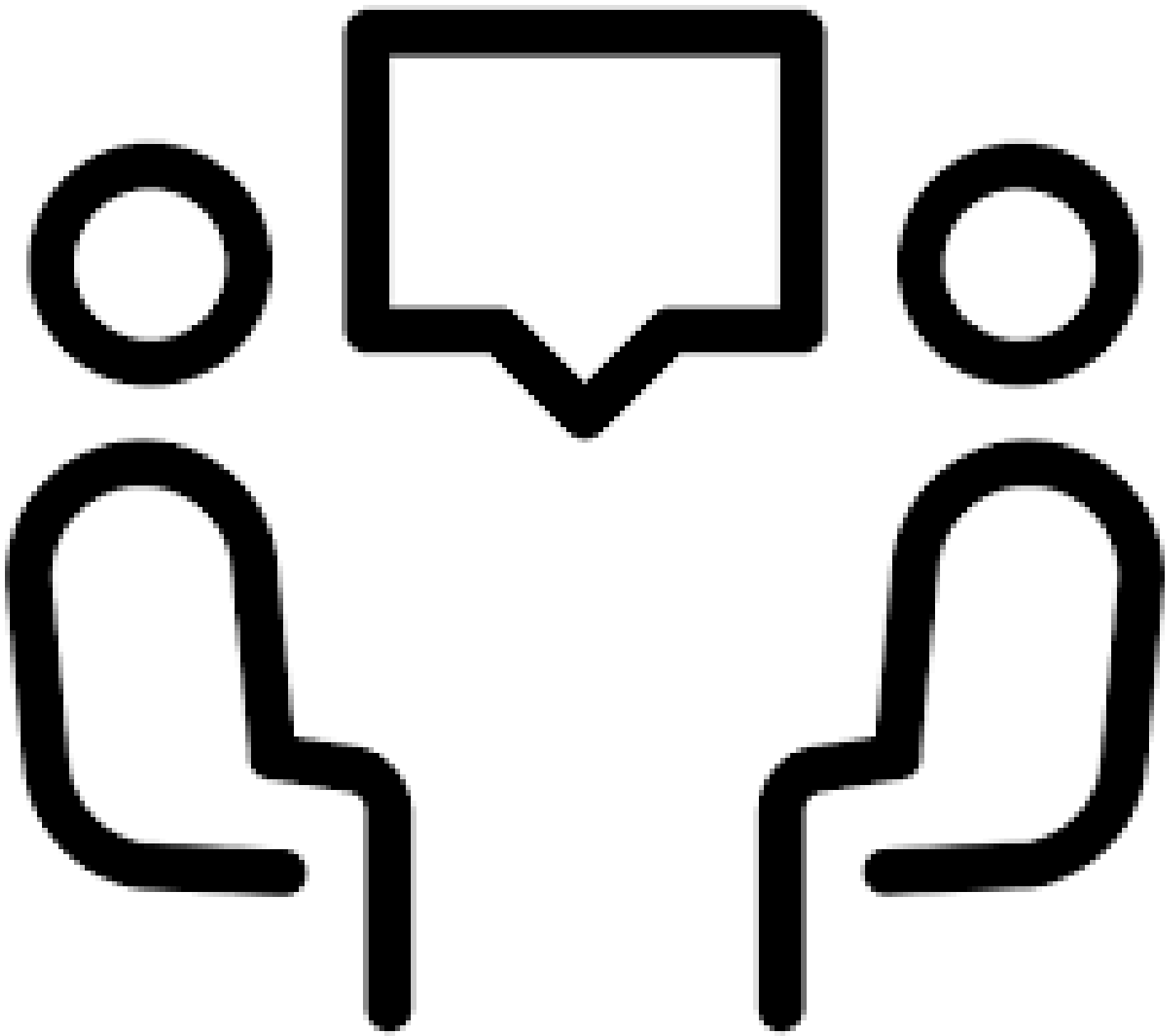


FEEDBACK CAPTURE MATRIX

A graphic organiser that you can use during a pilot to capture user feedback. They identify things they liked, changes they recommend, questions they have, and new ideas.

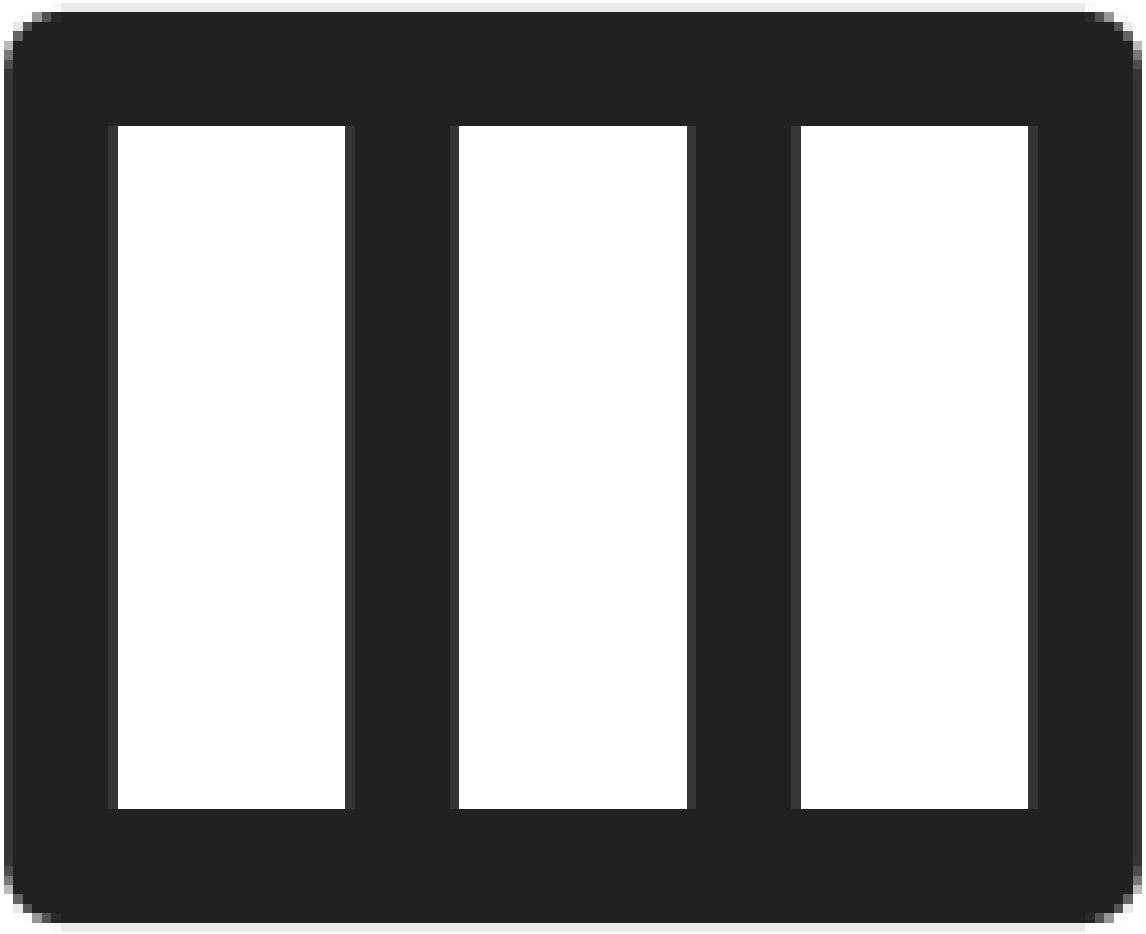
VIDEO

Some quick tips on shooting and editing video for your projects, either to record information for your projects. The tool may be useful for investigating, documenting, or for sharing.



MEETINGS

Tips for running meetings that people don't hate. Includes a template for a meeting agenda.



KANBAN / SCRUM BOARD

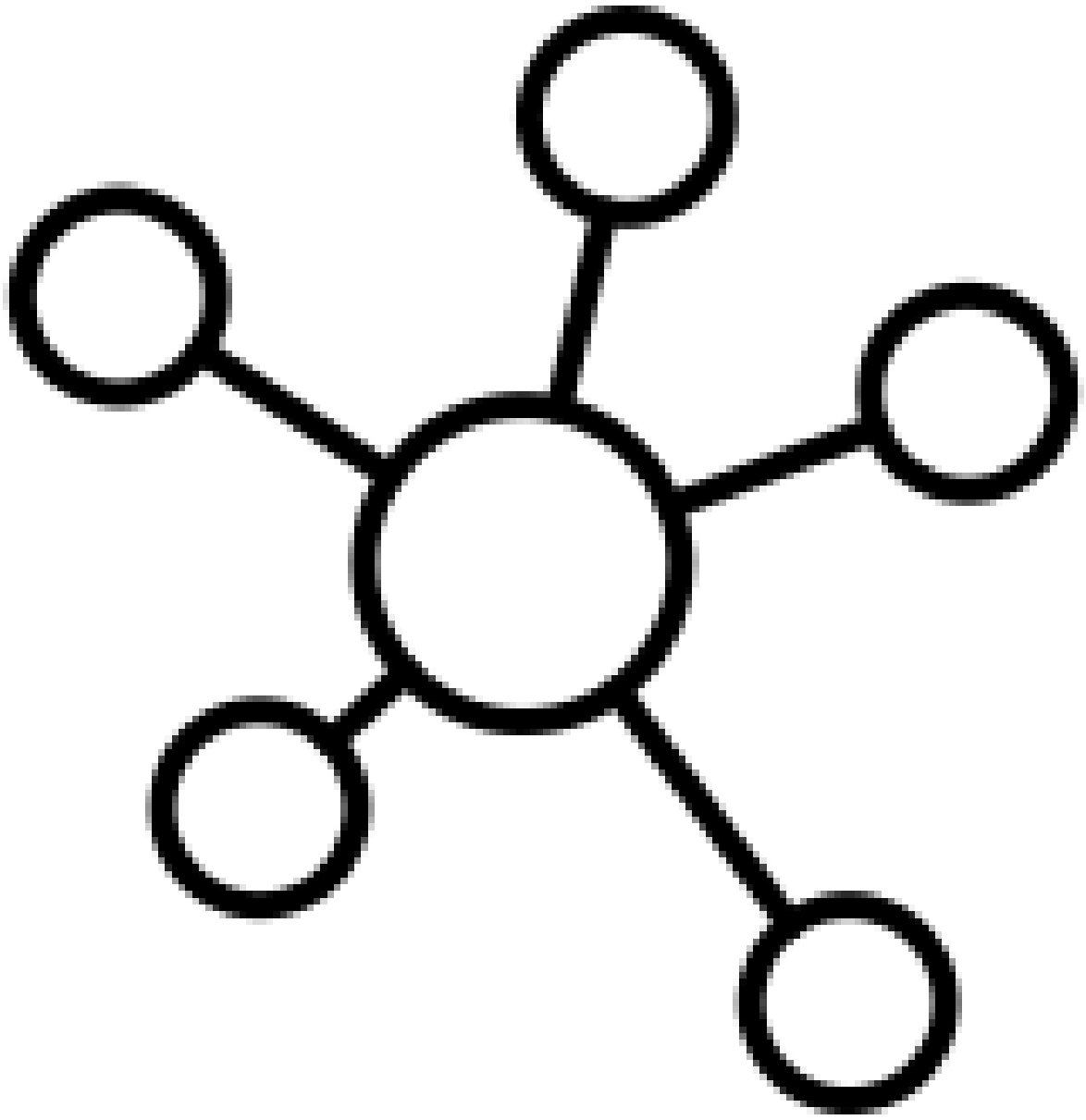
Explanation of how to set up a project planning board, using the famous model from Japan.

PROJECT CHECKLIST

A template for setting up detailed to-do lists. Useful for listing concrete steps to bigger project objectives set out in your Gantt charts.

URGENT-IMPORTANT MATRIX

A graphic organiser for prioritising tasks. Great for figuring out what has to be done now, what can put put off, and what might not get done at all.



MIND MAPS

An explanation of how to make mind maps to visualise complex information about a project, or relationships. The tool includes an example.

Documentation for exhibitions and reports

forget to document your work. For a reminder about documentation, see Module 1(e).

For piloting:

- Audio or video recordings of feedback of focus group
- Written notes of responses from focus group
- Results of feedback capture matrix
- Photographs/videos of the piloting process.

For project management:

- Photographs/videos of the process of taking action
- Audio files- recording feedback of stakeholders
- Photographs of your Kanban board, checklist or urgent/important matrix
- Written records of meeting agendas and minutes

Works cited

"Tools for Taking Action." *Stanford D.school*, dschool.stanford.edu/resources.

Images for examples in different contexts source information:

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