



Toolkit

Figure 1. A good toolkit can save the day! ([Ann HS, CC BY-NC-ND 2.0](#))

Investigating Tools





RESEARCH PLAN

A table to help you plan your research, considering various methods and objectives. The table asks you to justify your choices to ensure they are thought through.





COLD CALLS / COLD EMAILS

A list of tips for when you have to contact someone you do not know via phone or email. The tool can be used as a checklist to make sure you are prepared to make a good impression.





CONVERSATION STARTERS / INTRODUCTION TIPS

A list of tips and starters to get the communication flowing. The tool can help you practice engaging with unfamiliar communities.

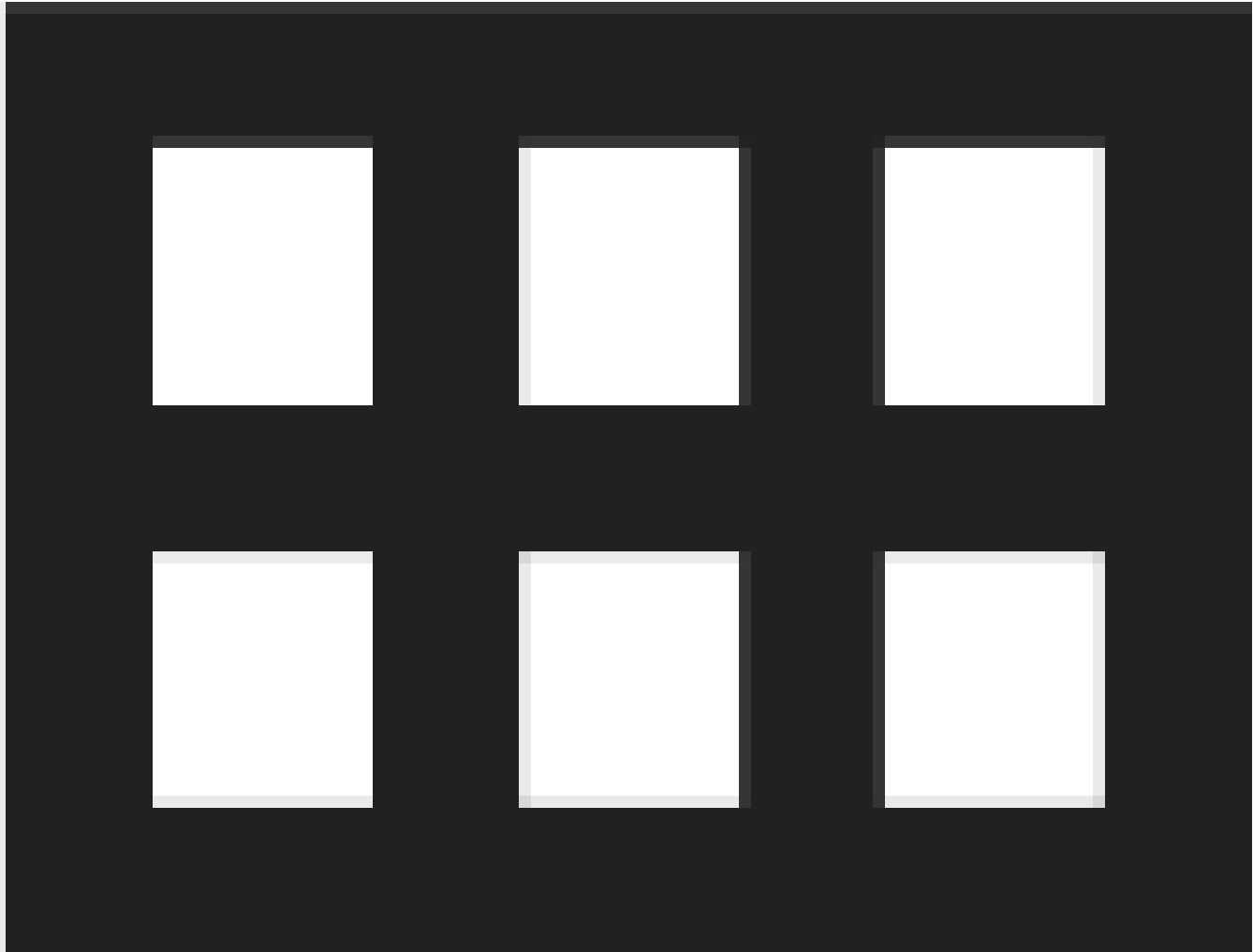




QUESTION PROMPTS

A list of some general questions that you can use or adapt for your interviews, surveys, focus groups when you are investigating or seeking feedback on a pilot.





SPREADSHEETS

A basic introduction to how a spreadsheet works, with some links to more information for when you want to learn more.





BEHAVIOUR CHARTS

An explanation of how to set up an observation of behaviour over time. The tool also provides some tips on how to make clear and powerful charts and graphs.

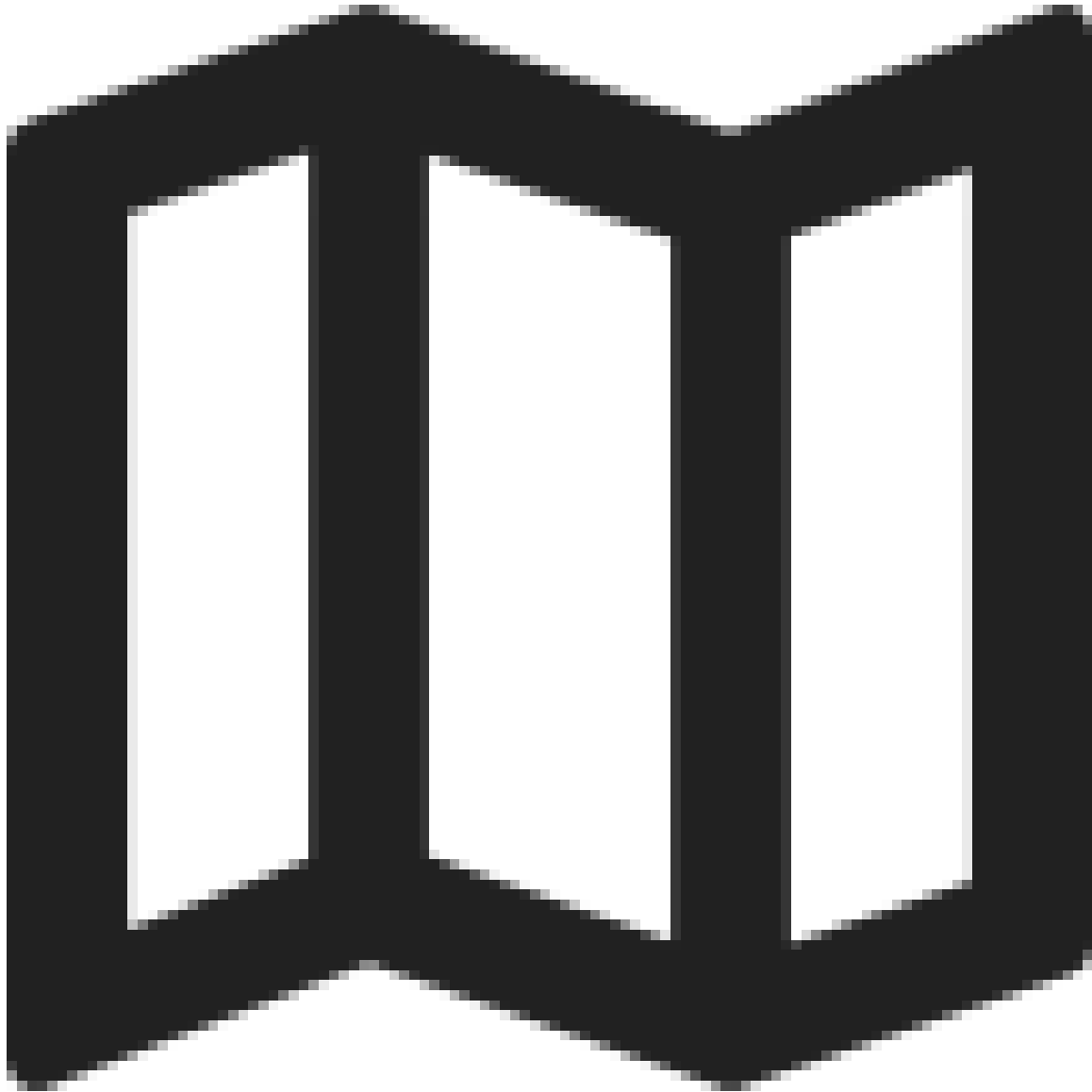




VIDEO

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.

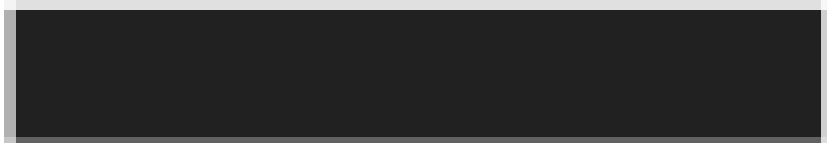
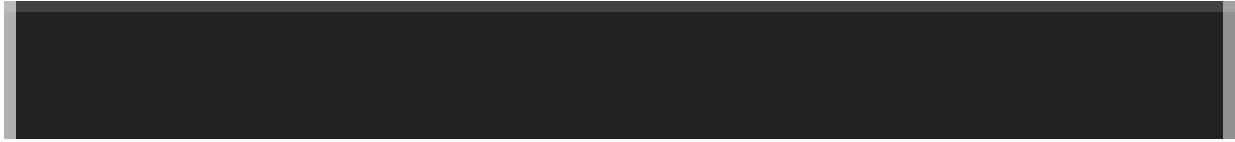




STATIONARY ACTIVITY MAPPING

Instructions, a graphic organiser and a table to help you map and document people's activities in a certain spatial area. The tool, from [Gehl Architects](#), is great for observing behaviour in public spaces.

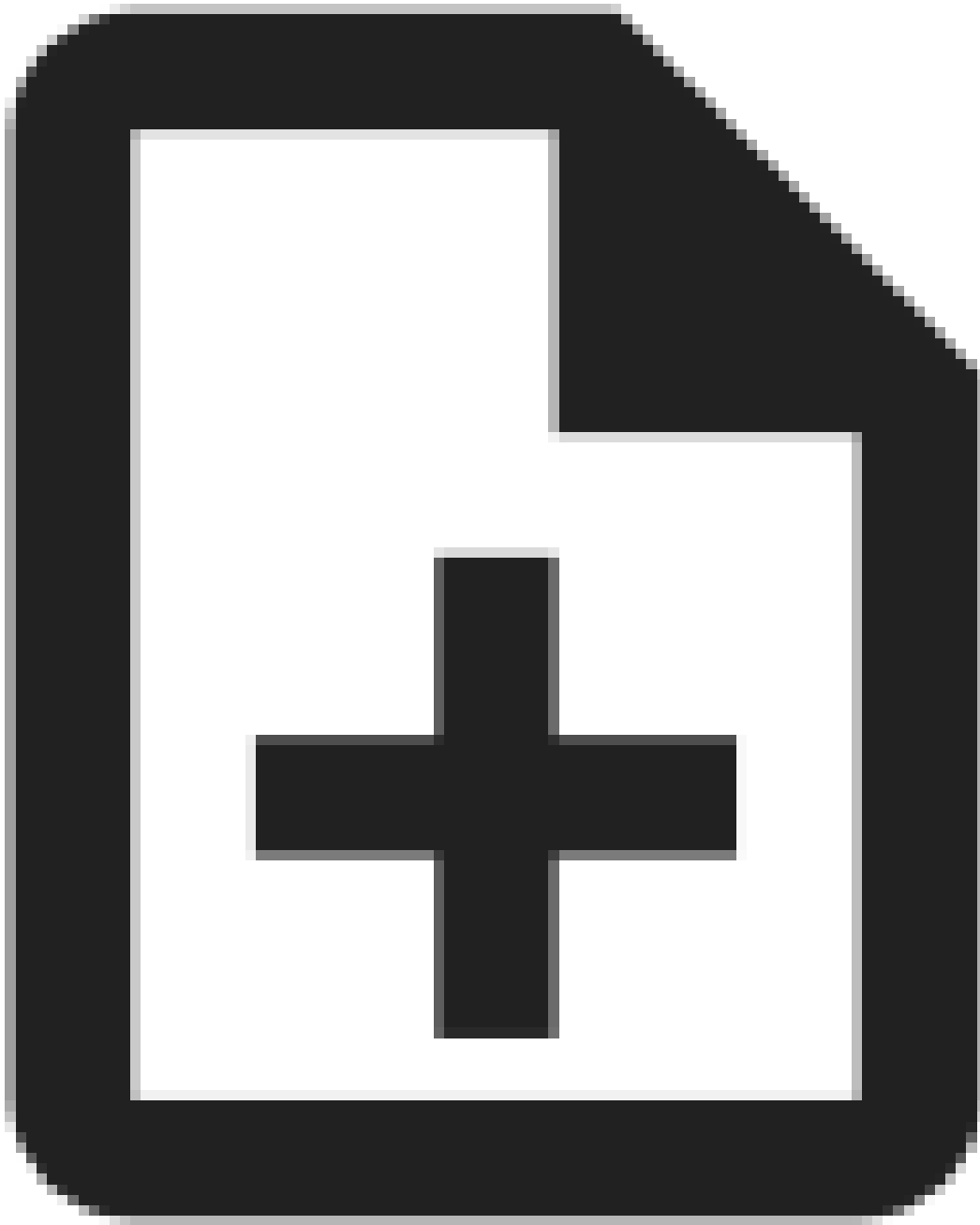




CORNELL NOTES

Simple instructions for taking 'chunked' notes to help deepen your understanding and build memory of what you read. A tool that is useful for everyday school readings too.

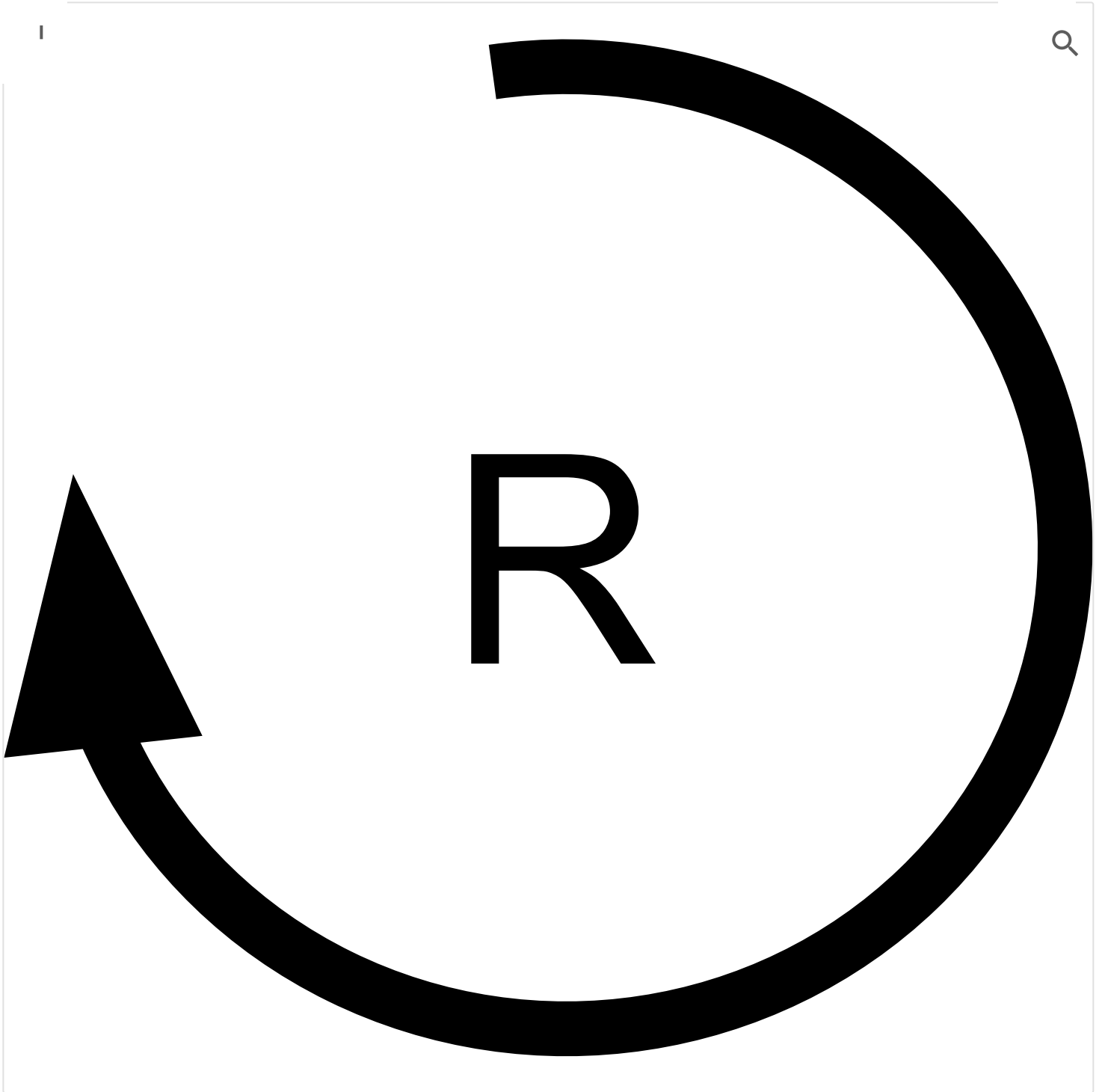




ANNOTATED BIBLIOGRAPHY

An explanation of how to add useful information to a bibliographic citation in accepted academic format. The tool provides an useful concrete example.





SYSTEMS DIAGRAMS

An explanation of how to draw causal loop and stock and flow diagrams to illustrate the systems related to your project.





PARTICIPANT CONSENT FORM

A template you can use to get consent from participants in interviews, focus groups, observations and other methods. The tool helps clarify how you may use information gathered in your primary research.

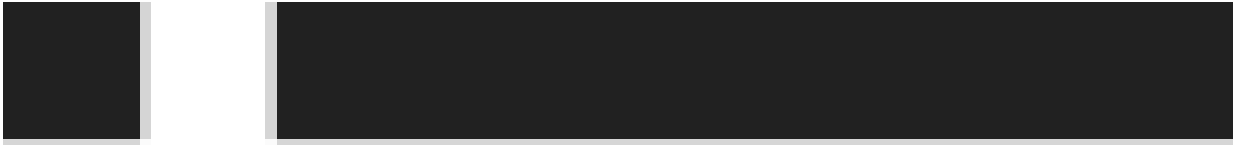
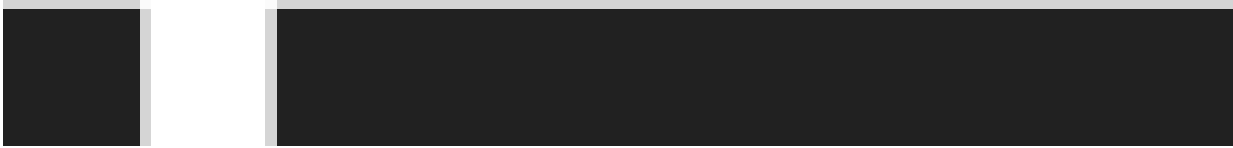




INTERVIEWS

A set of useful tips for preparing for and conducting interviews. Useful especially used in conjunction with the Question Prompts tool.





SURVEYS

Some advice for writing surveys. The tool will help you create a survey that people will actually answer and get you the information you need.





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.

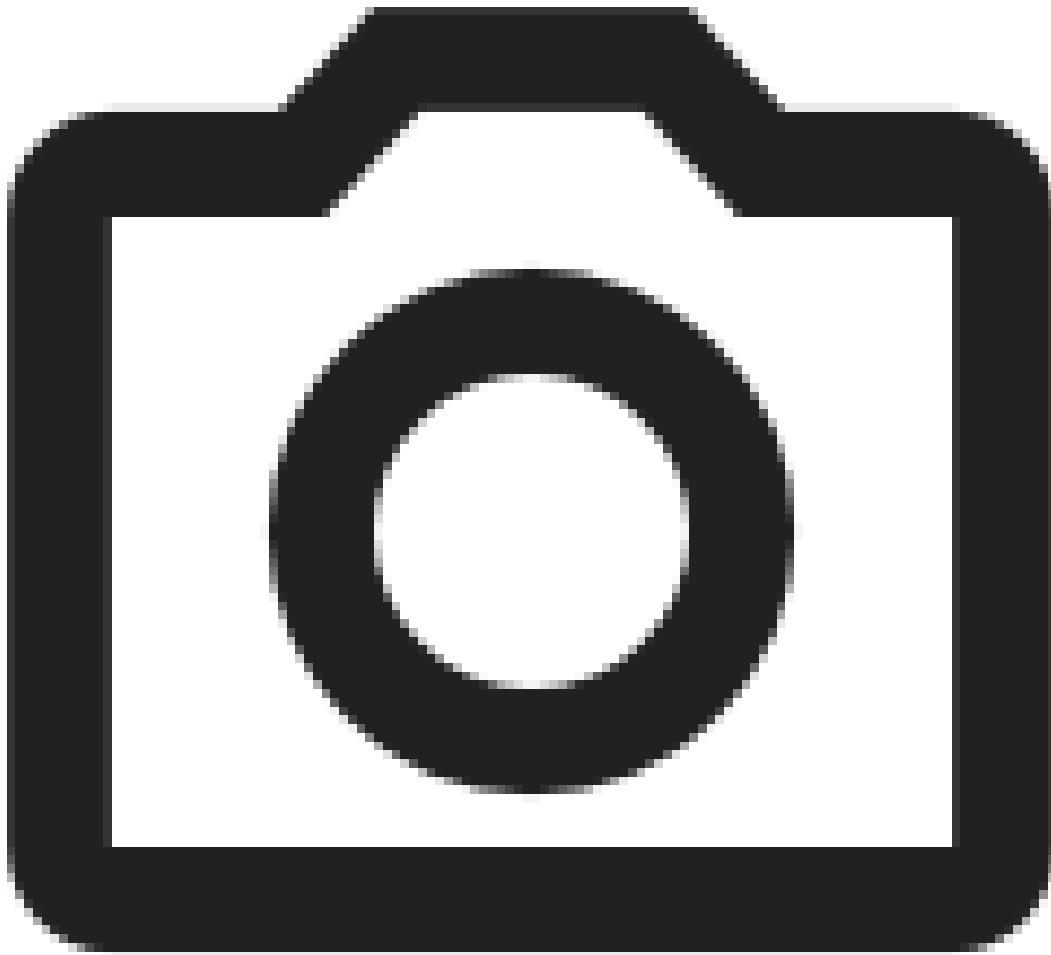




OBSERVATIONS

A tool outlining different types of observation and advice on how to set up the observation to collect useful data.





CAMERA STUDY

A brief list of steps for you to get a stakeholder to take pictures related to the problem or issue you are investigating. The tool is useful in conjunction with the Interviews tool to empathise with the people you are designing for.





COLLAGE STUDY / DRAWING STUDY

A list of steps for you to get a stakeholder to construct a collage or set of drawings related to the problem or issue you are investigating. The tool is useful in conjunction with the Interviews tool to empathise with the people you are designing for.

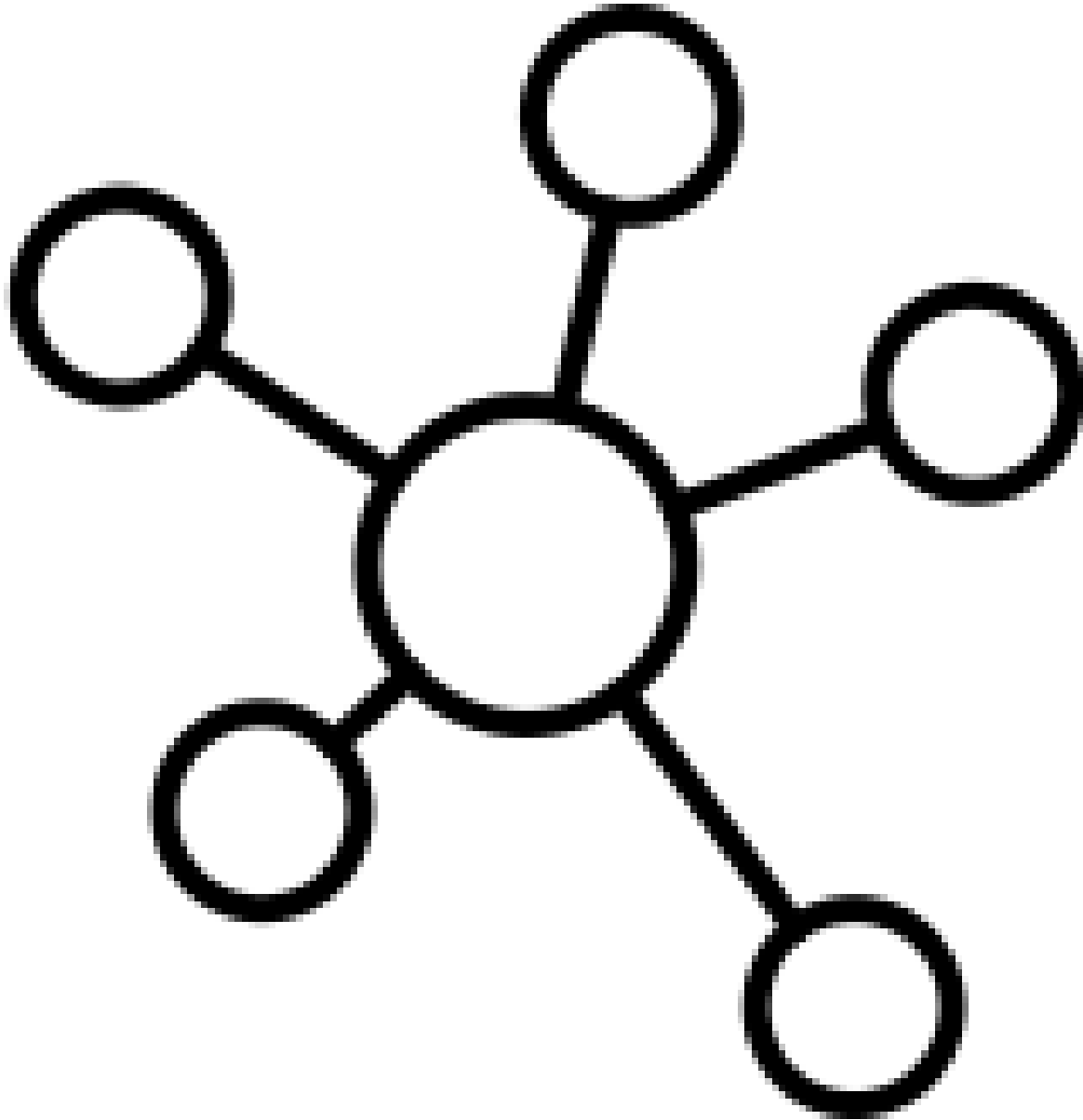




NARRATION

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.

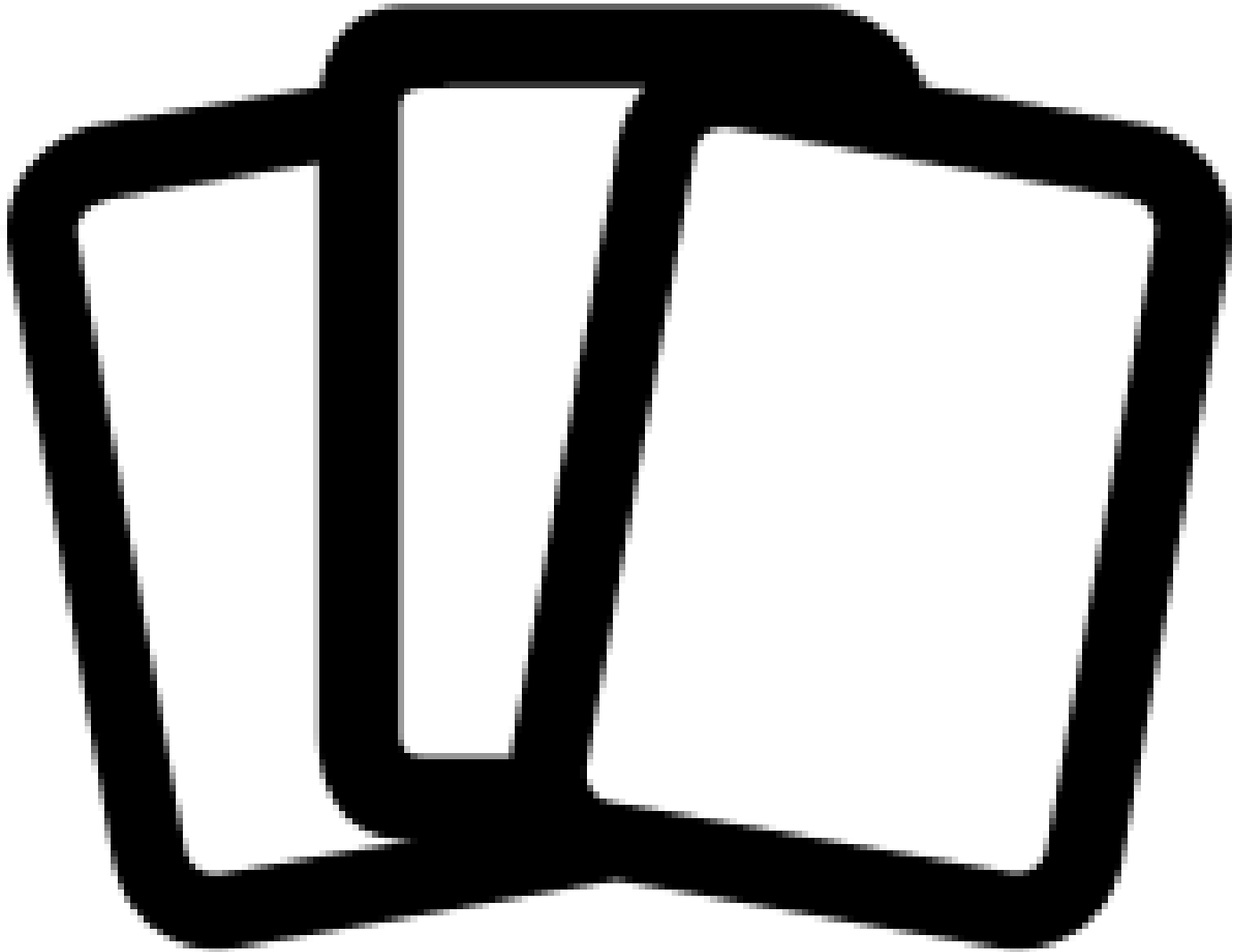




MIND MAPS

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



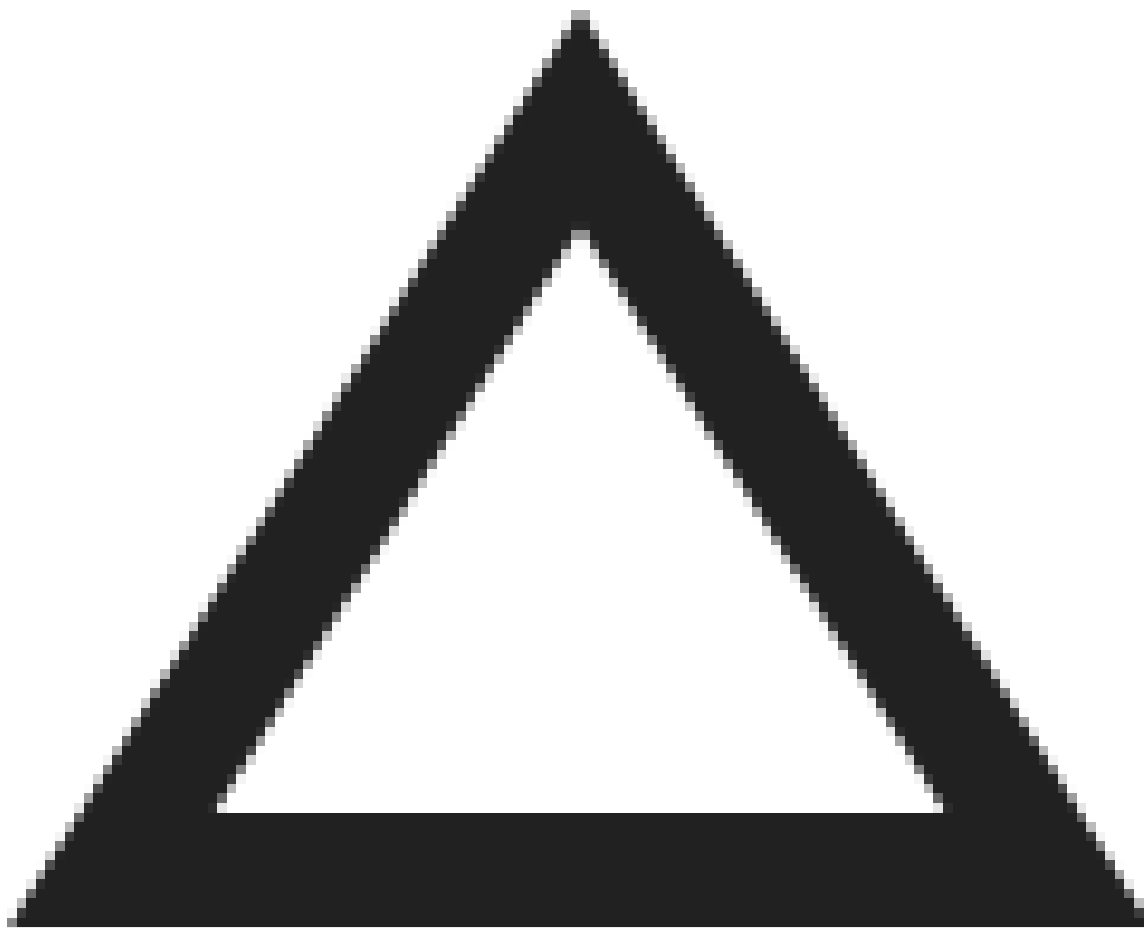


CARD SORT WITH VALUES

Instructions for using a card sorting activity during interviews. The tool comes with a set of cards for understanding the values that stakeholders have related to an issue or problem, but can be adapted to understand other aspects of mental models.

Planning / Designing Tools

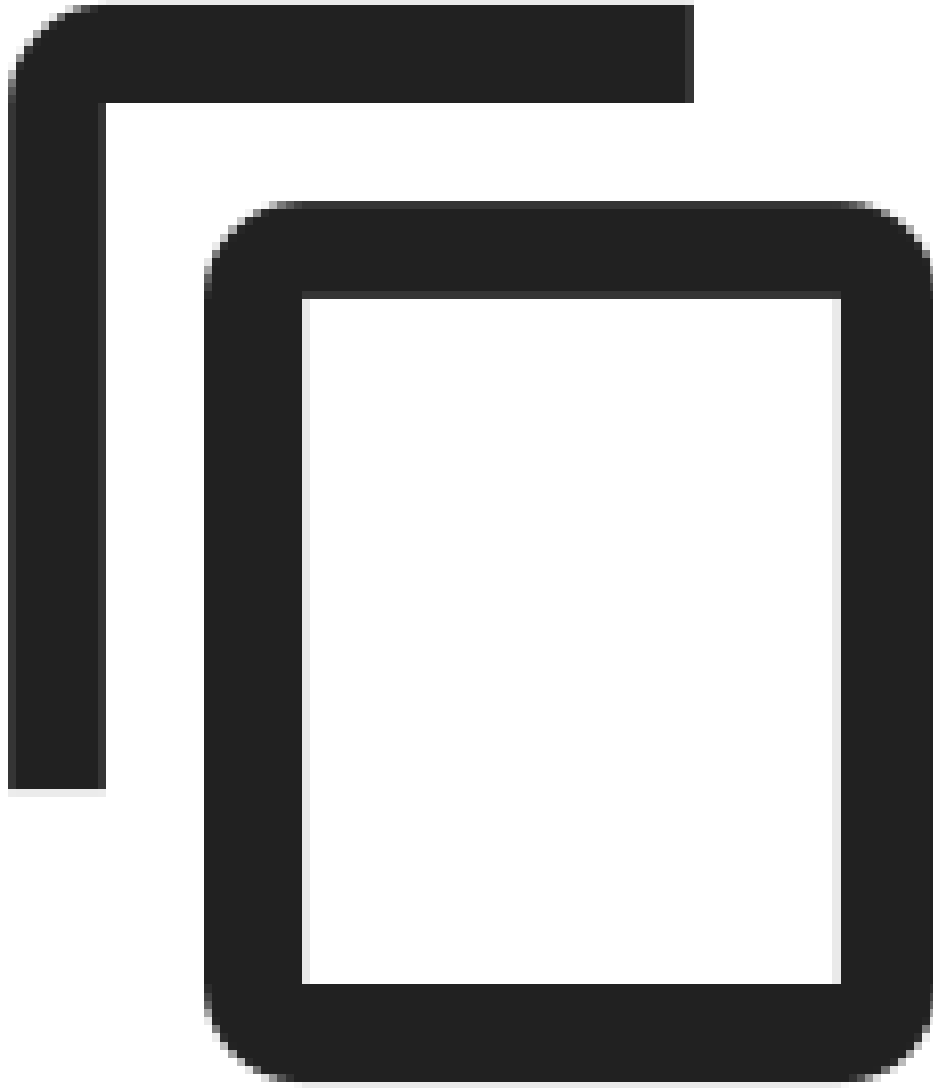




TRIANGULATION

A tool to help plan for and carry out triangulation, an important process to confirm research findings. The tool discusses several ways that research can be triangulated.

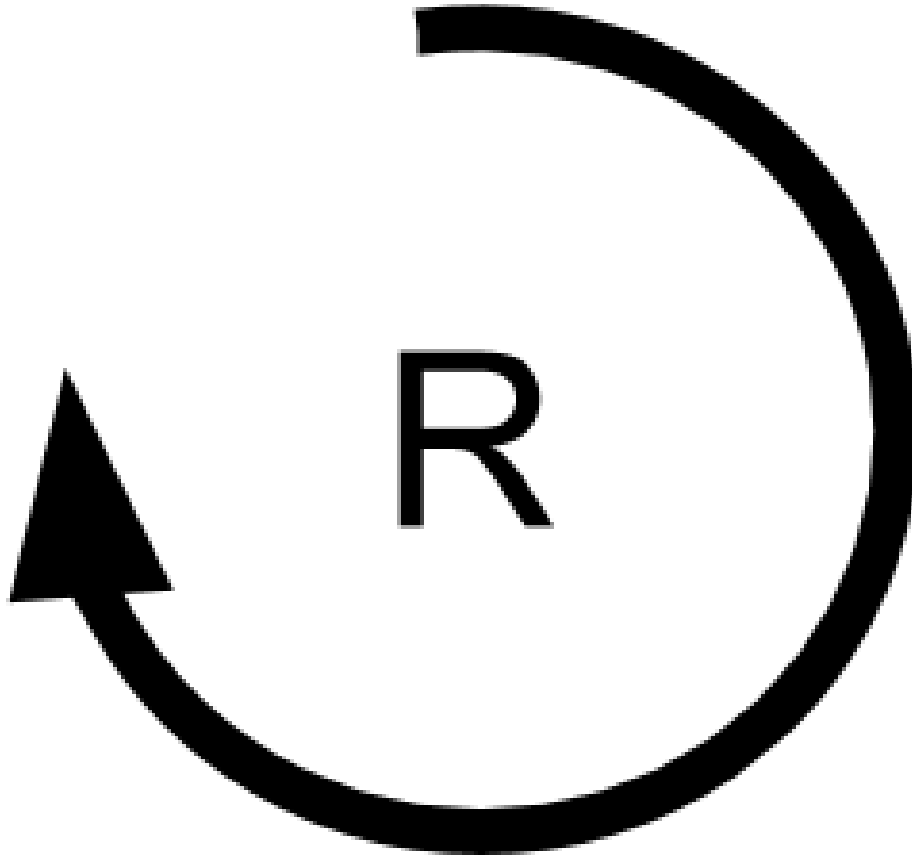




POST-IT SESSIONS

Instructions for conducting a post-it session, one way of brainstorming or getting findings out in the open.

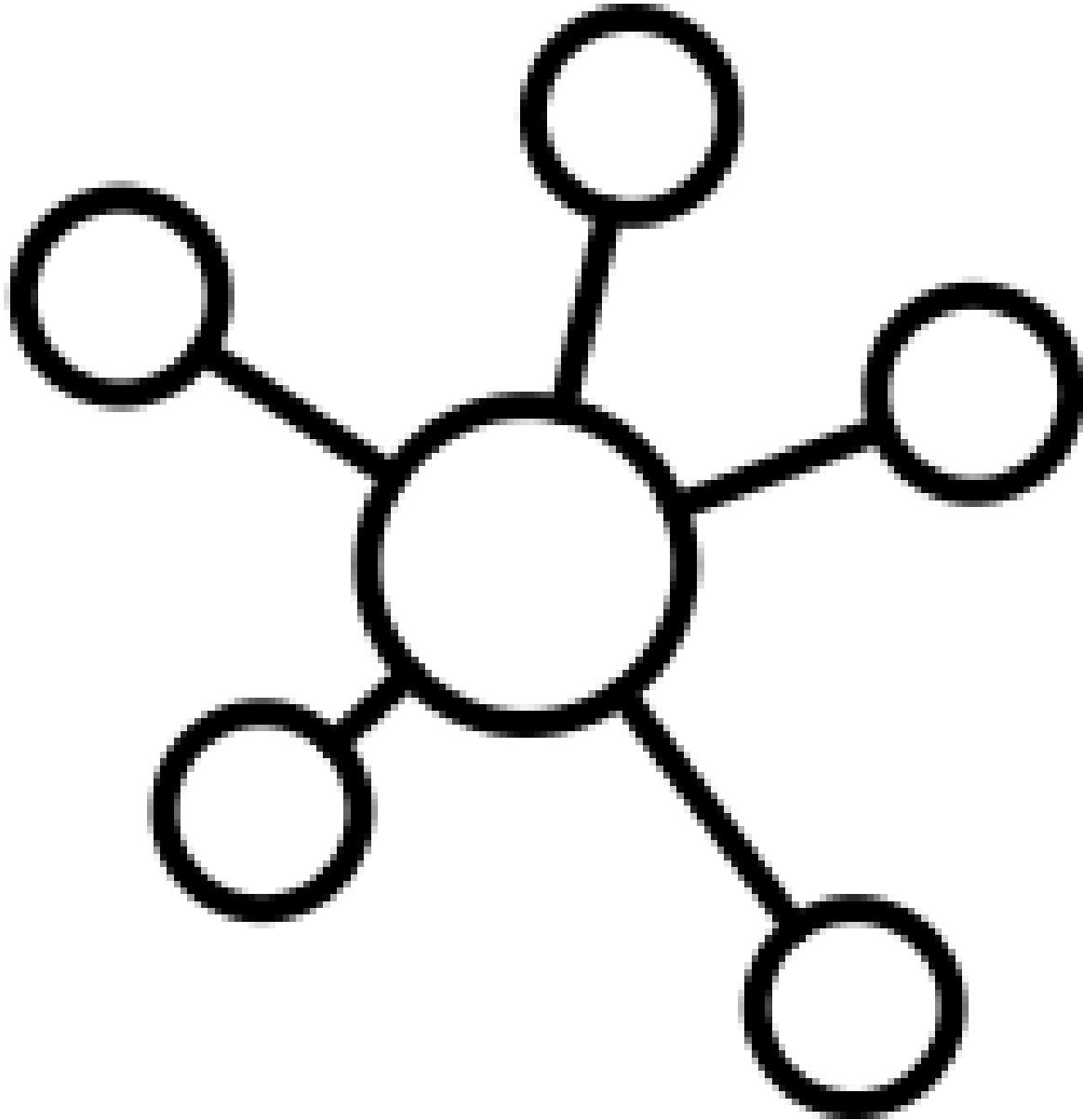




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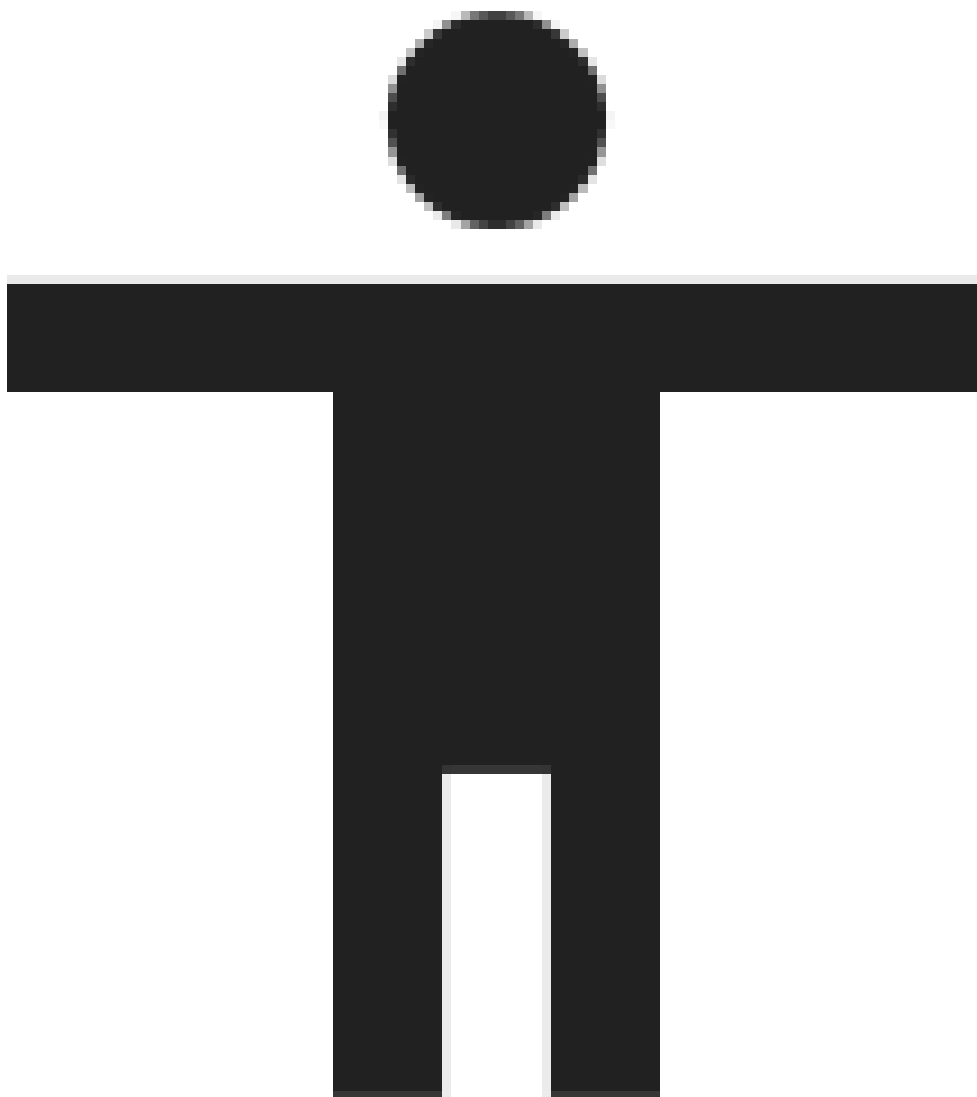




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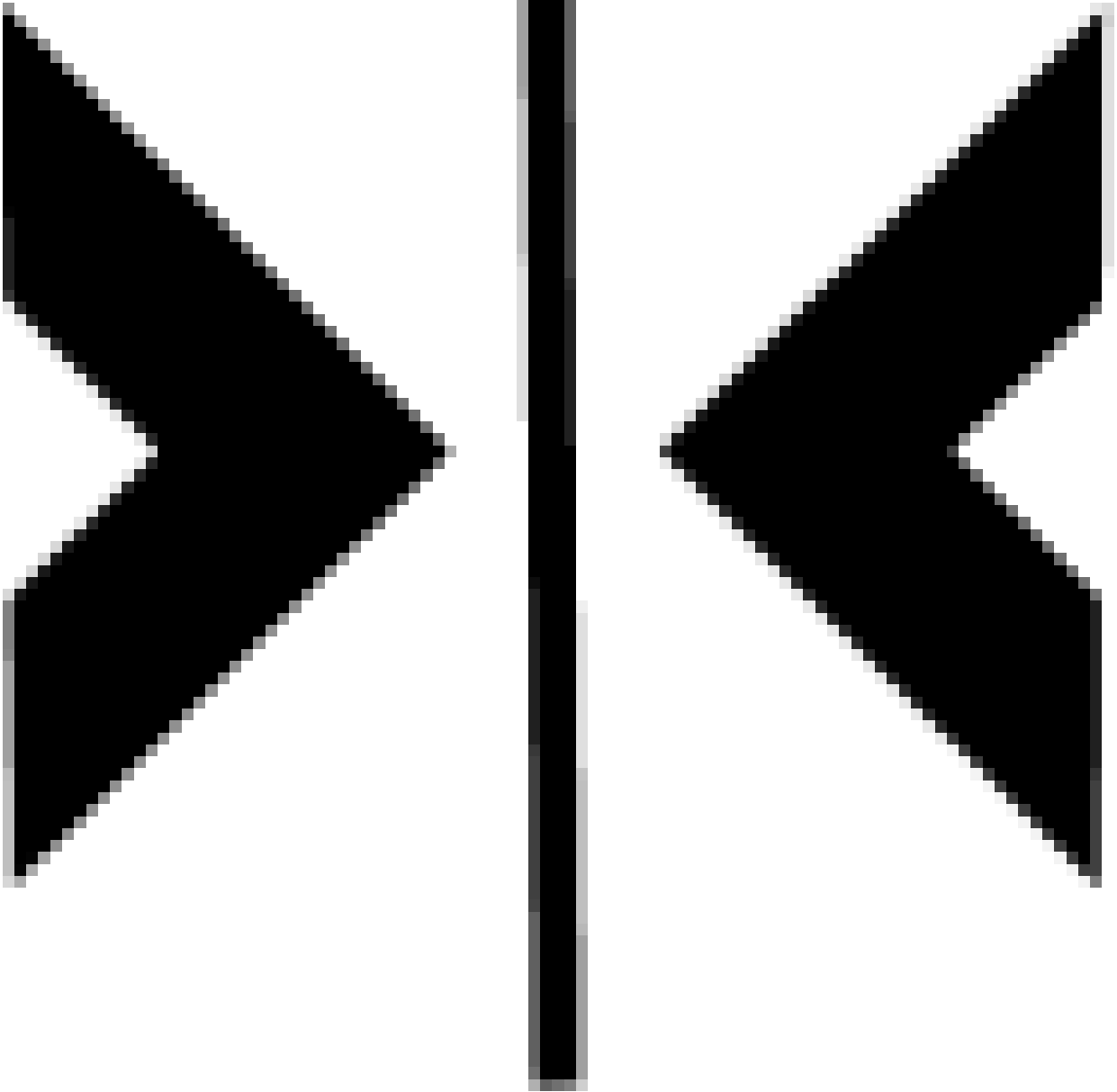




STAKEHOLDERS

An explanation of different groups of stakeholders, along with two graphic organisers to help you analyse and compare stakeholder interest and influence.

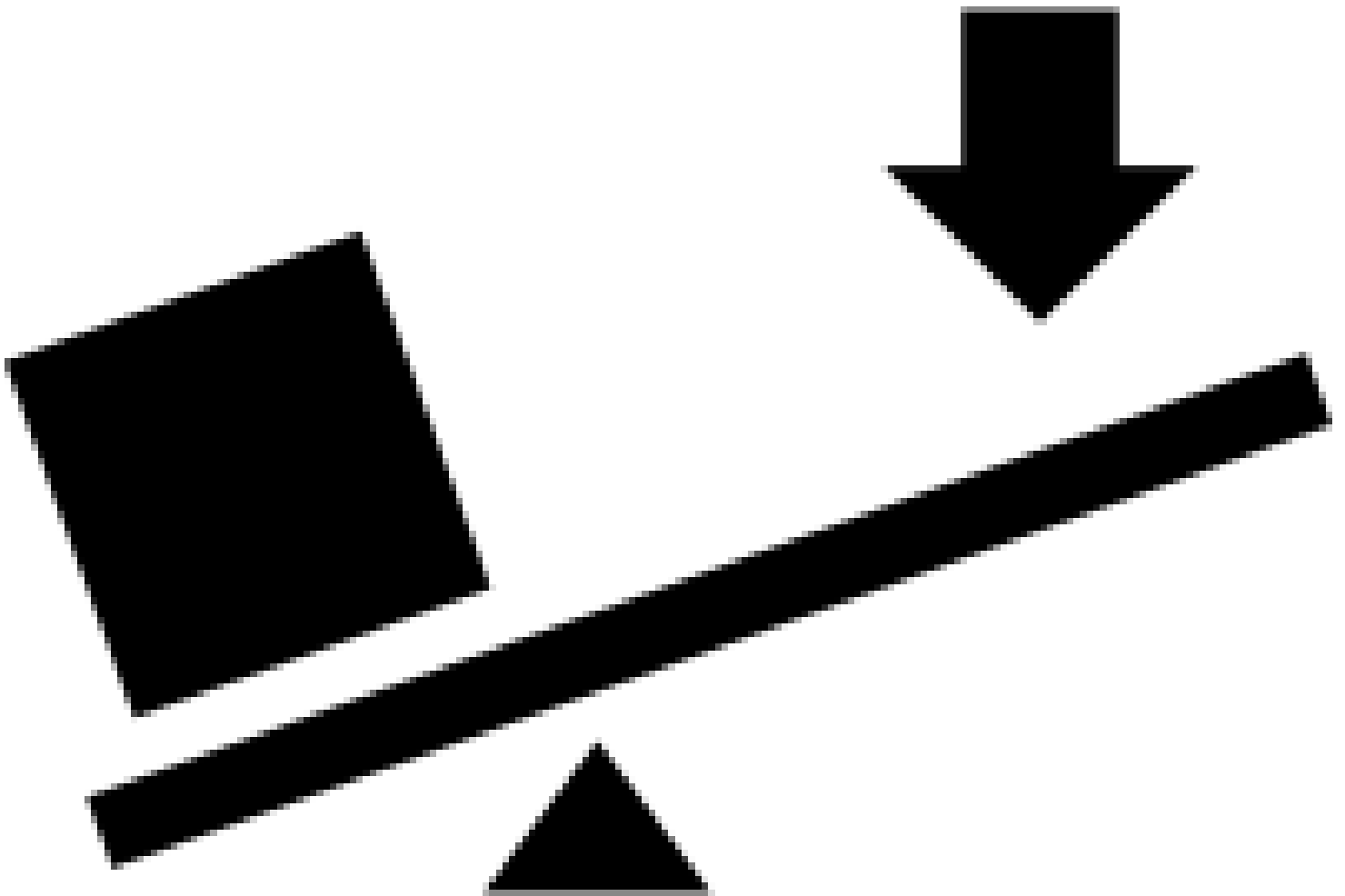




FORCE FIELD ANALYSIS

A graphic organiser for helping you identify and evaluate the strength of forces for change and forces resisting change in a given situation.





LEVERAGE POINTS

A description of 12 leverage points to consider for changemaking. A tool for those really wanting to geek out on leverage points in systems theory.





BRAINSTORMING RULES

A simple set of 5 rules to set for brainstorming sessions. The tool will help your group get the most ideas on the table.

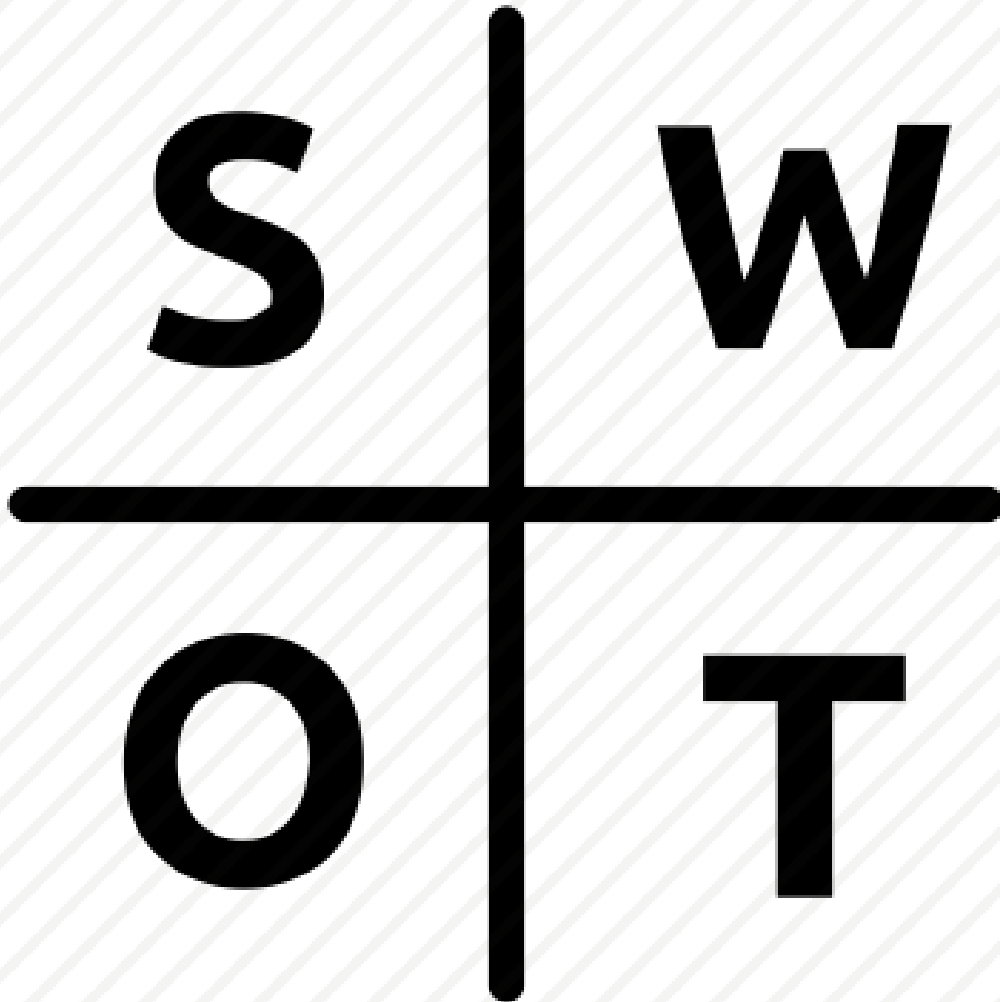




SCAMPER CARDS

A set of cards that helps you generate new ideas or improve existing ones. The tool moves your brain out of a box and in different directions.

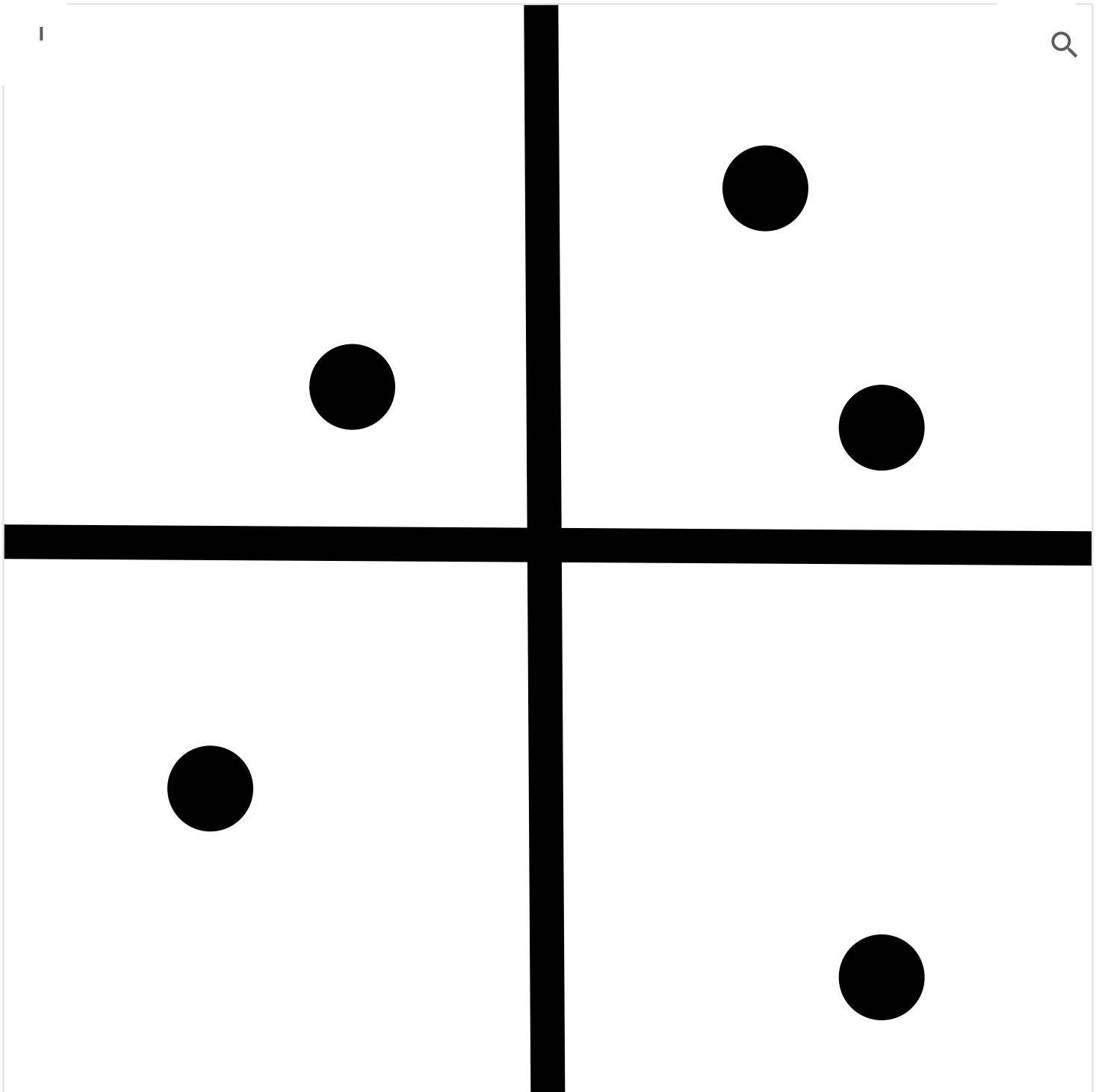




SWOT ANALYSIS

A graphic organiser for breaking down the internal strengths and weaknesses and external opportunities and threats for an organisation, action, or product.



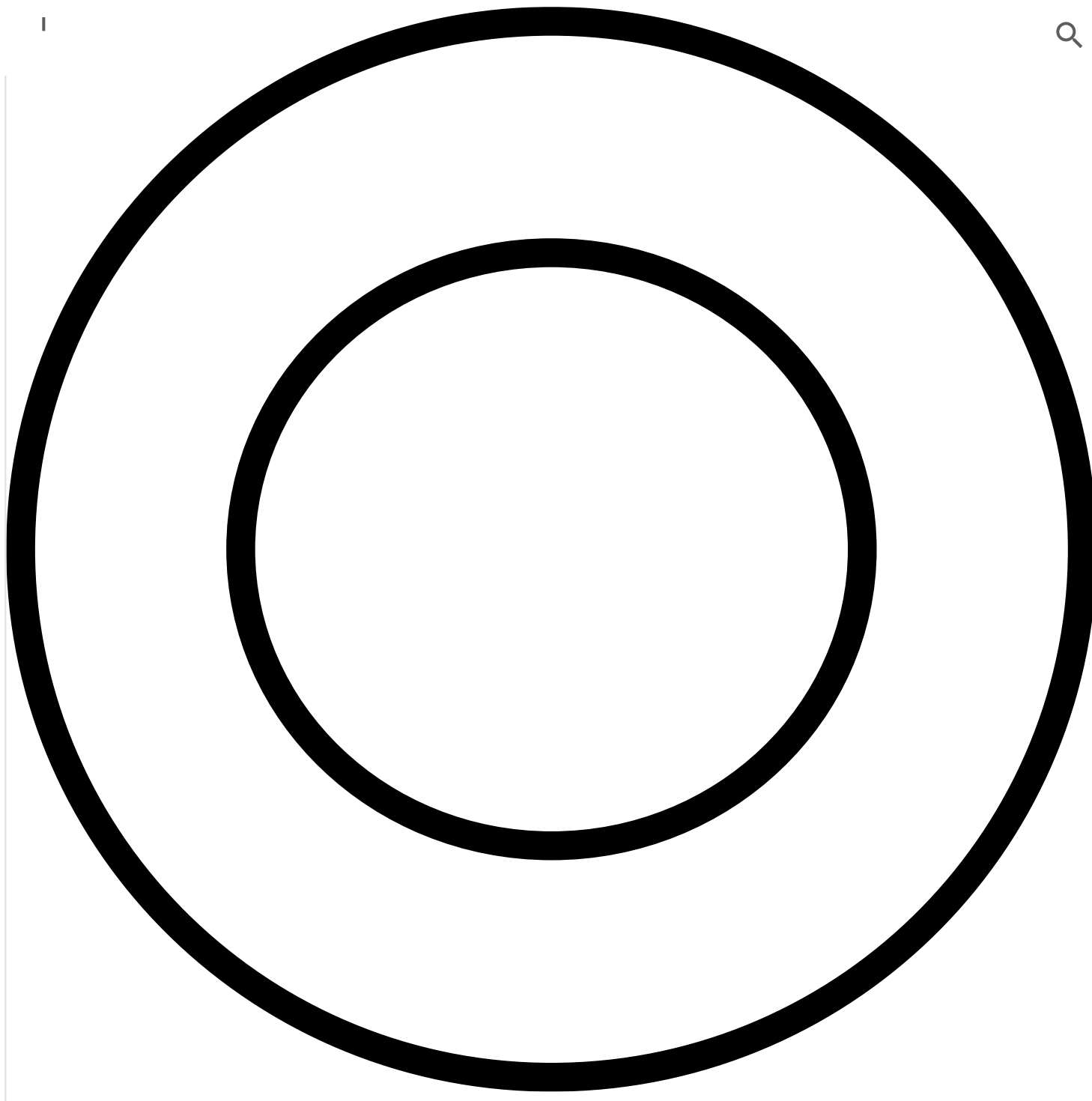


IMPACT / FEASIBILITY POSITION MAP

A graphic organiser for comparing multiple ideas according their impact and feasibility. The position map can be adapted for other criteria comparisons too.



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DOUGHNUT MODEL

A description of the Doughnut Economics Model and the four lenses used to apply the Doughnut at the city-level. Two ways of using the model for Youth Mayors projects are described.

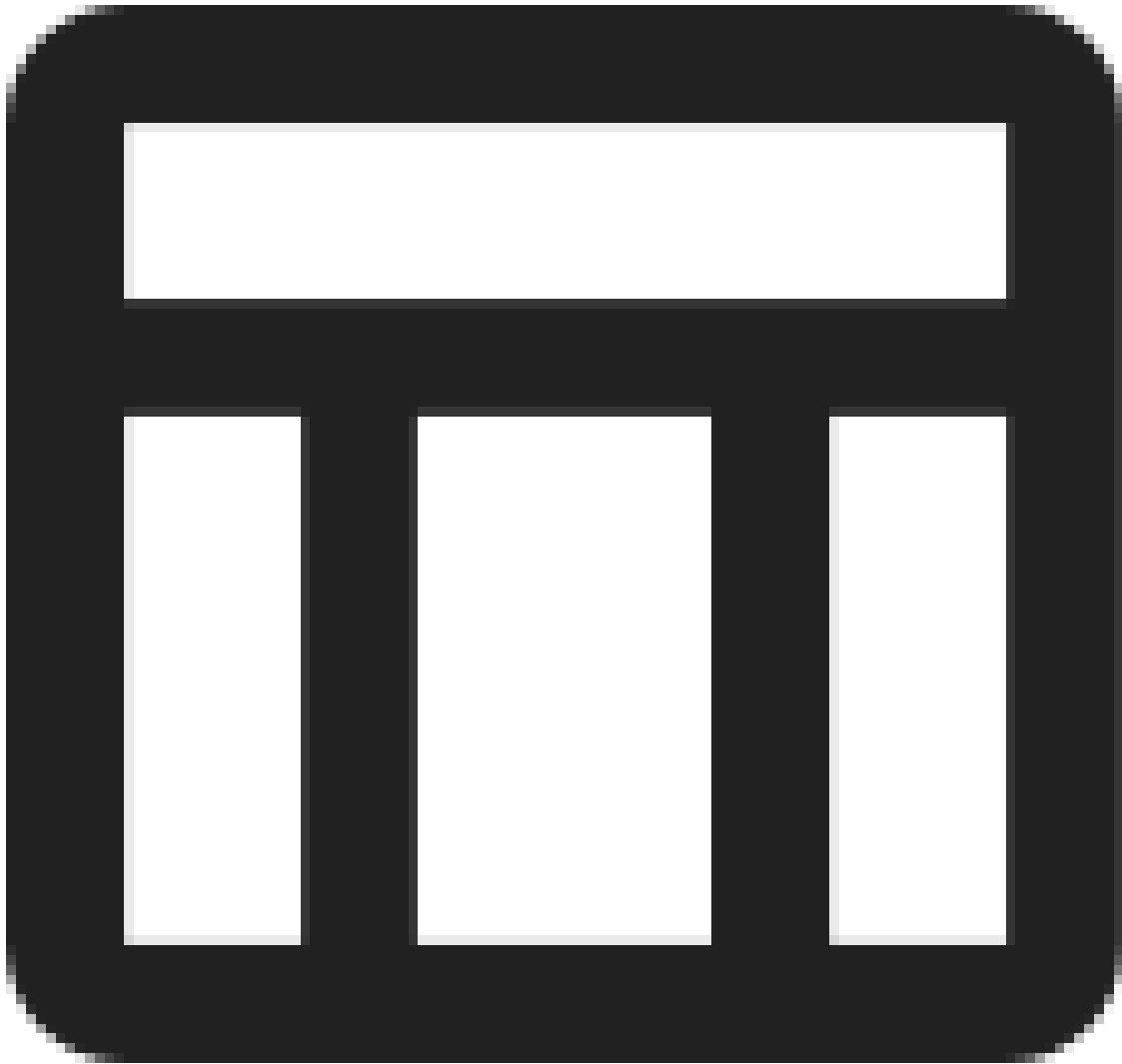




CONCEPT PLAN / CONCEPT NOTE

A template for a concept plan so you can concisely outline your project for to communicate, seek permission and support, or fundraise for your project.

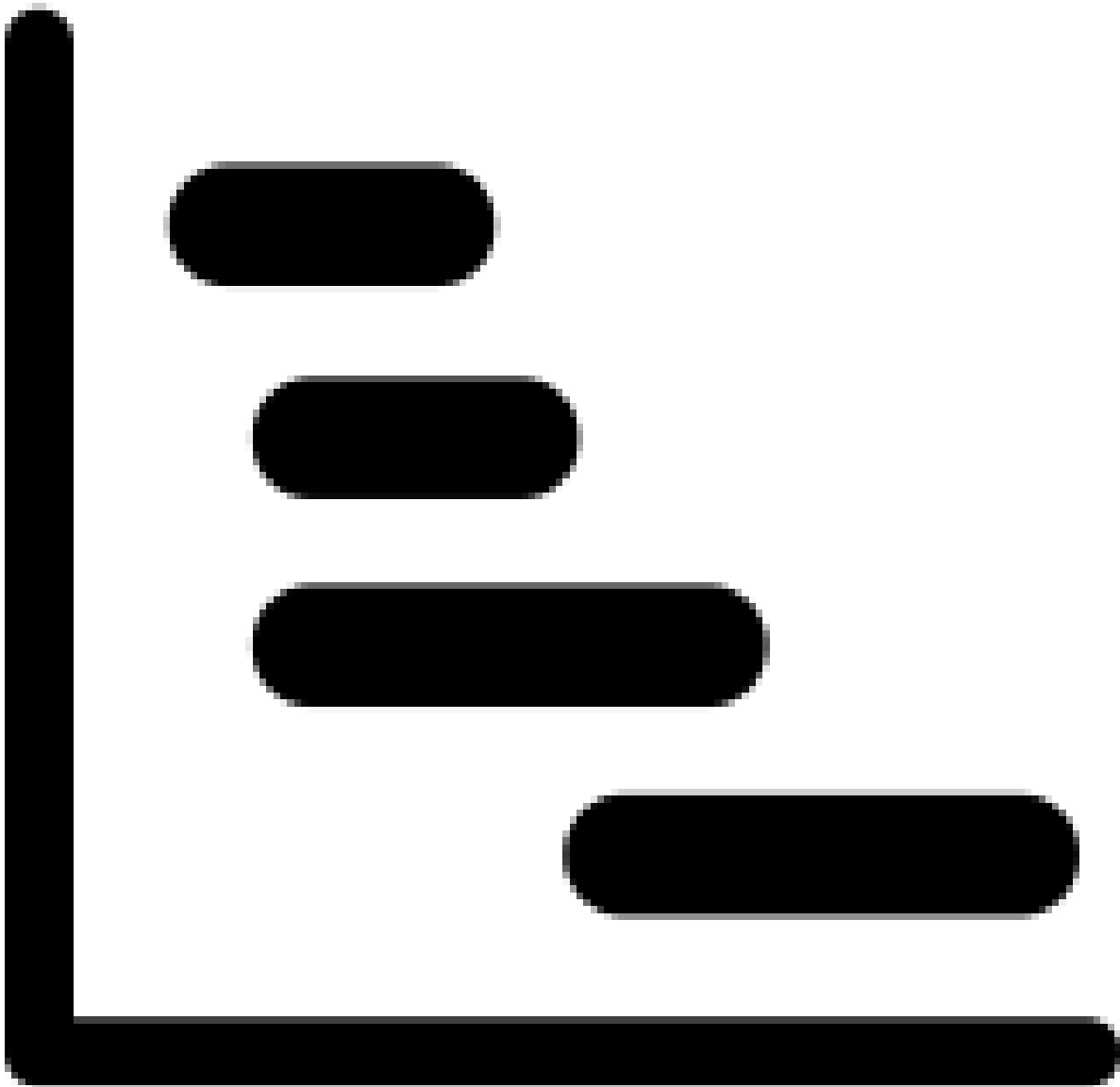




SOCIAL BUSINESS MODEL CANVAS

A one-page template for capturing the most important information about your project to communicate, seek permission and support, or fundraise for your project.

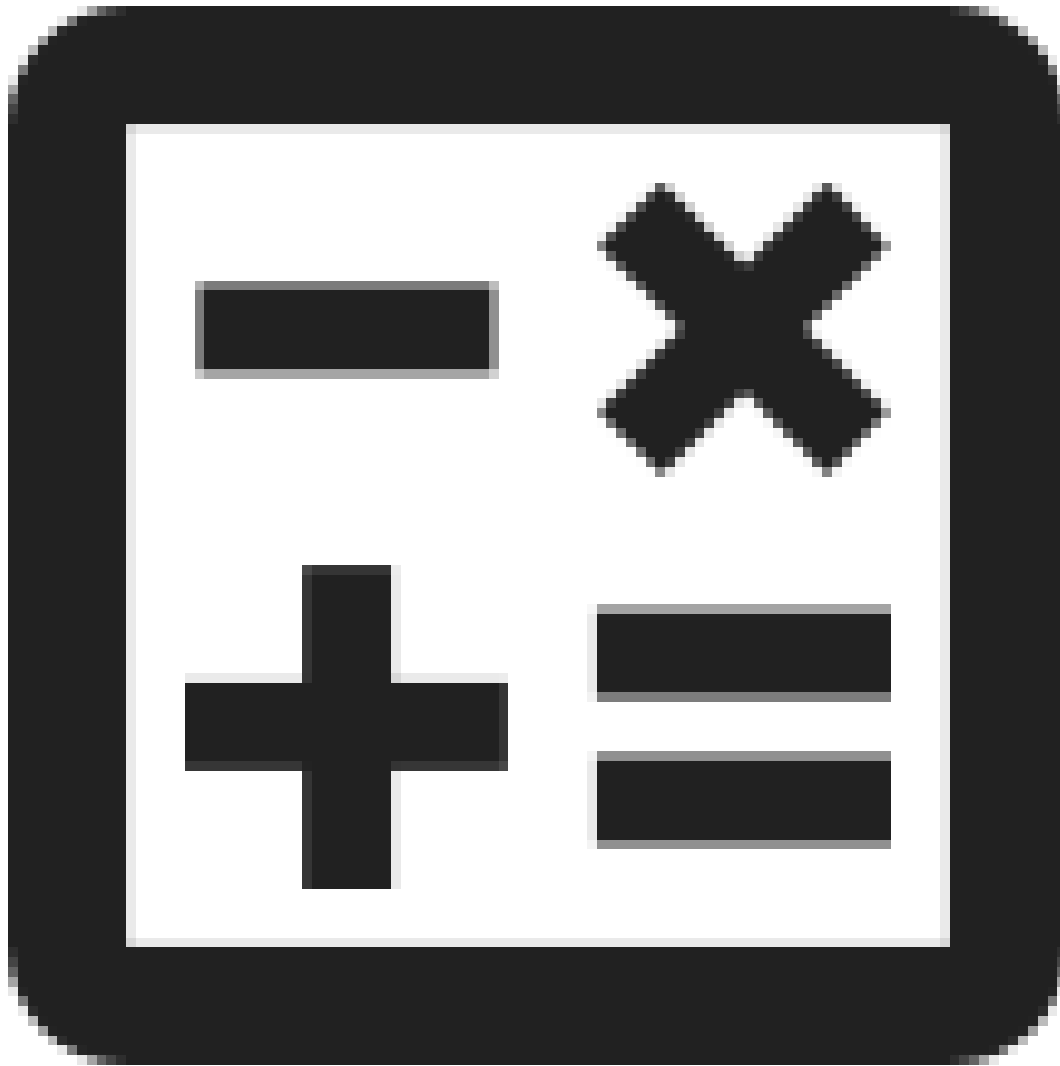




GANTT CHART

Instructions for constructing a project plan, with detailed steps, timing, and responsibilities. An example is given, along with links to tools for making Gantt charts.





BUDGET TEMPLATE

A budget spreadsheet with categories and formulas already embedded. You can adapt the template as needed for your project.





FUNDING SOURCES

A mind map of internal and external funding sources. The tool also has a table where you can list potential sources and justify why you think they are appropriate for your project.

Taking Action Tools





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.

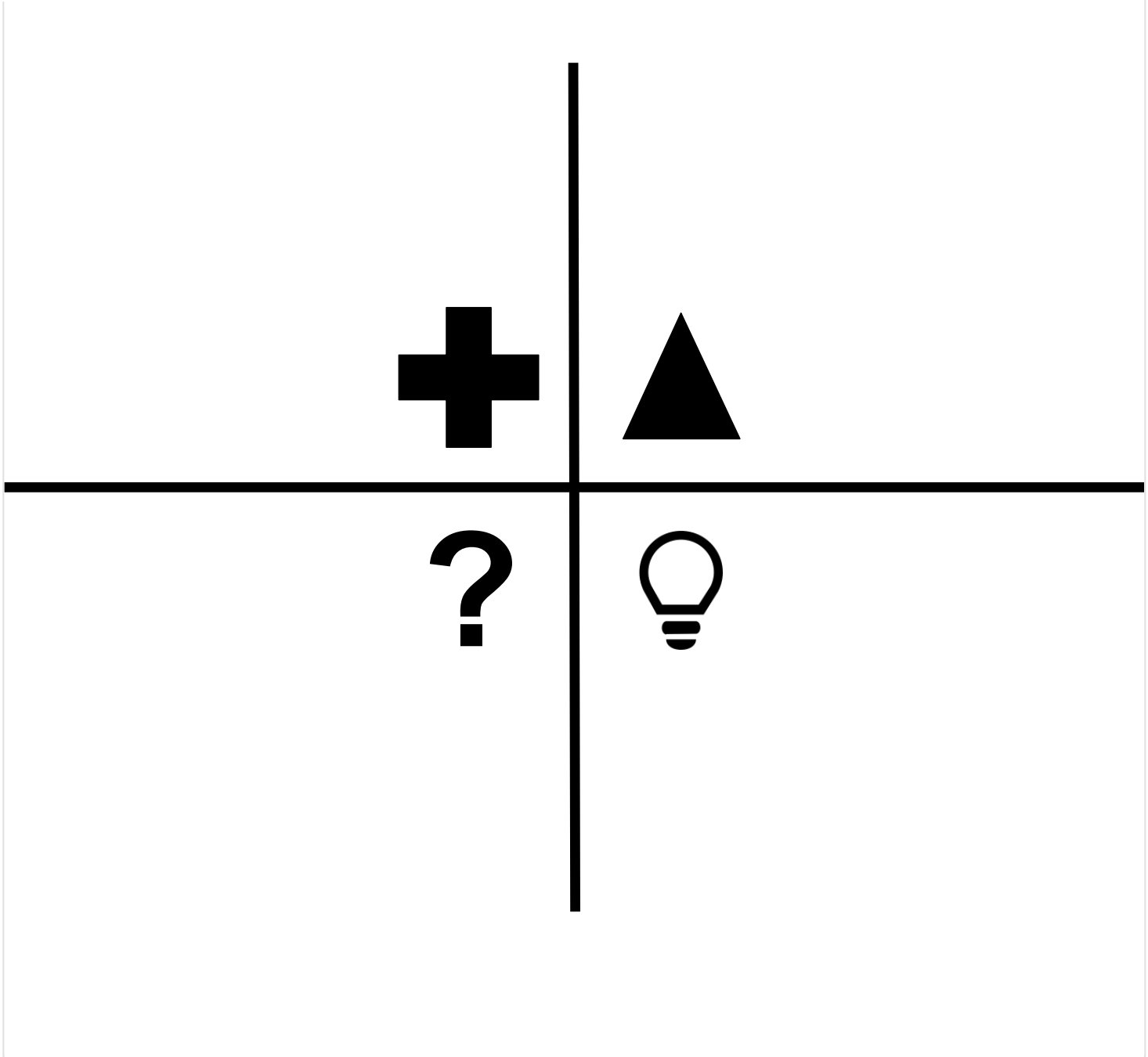




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FEEDBACK CAPTURE MATRIX

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.

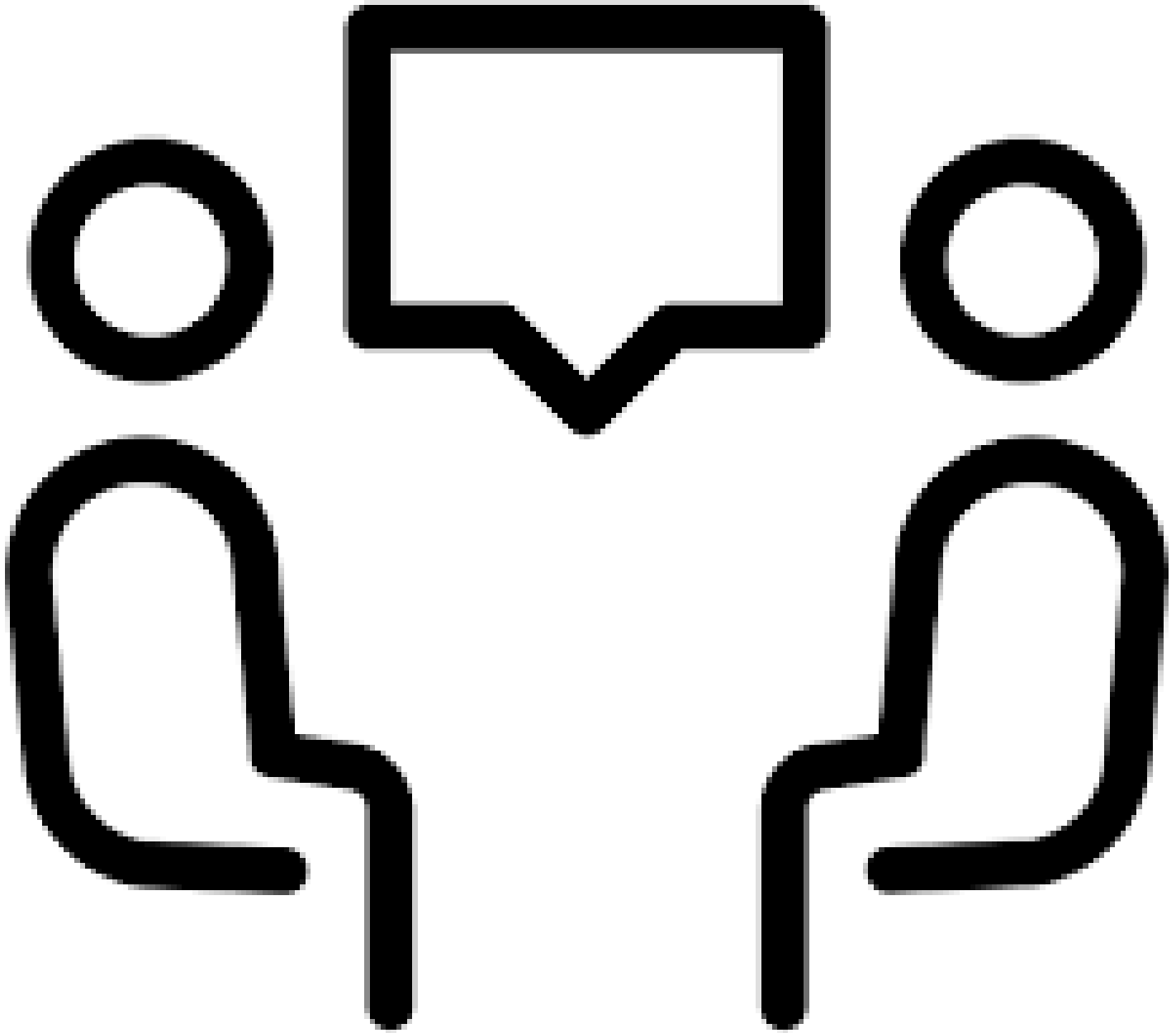




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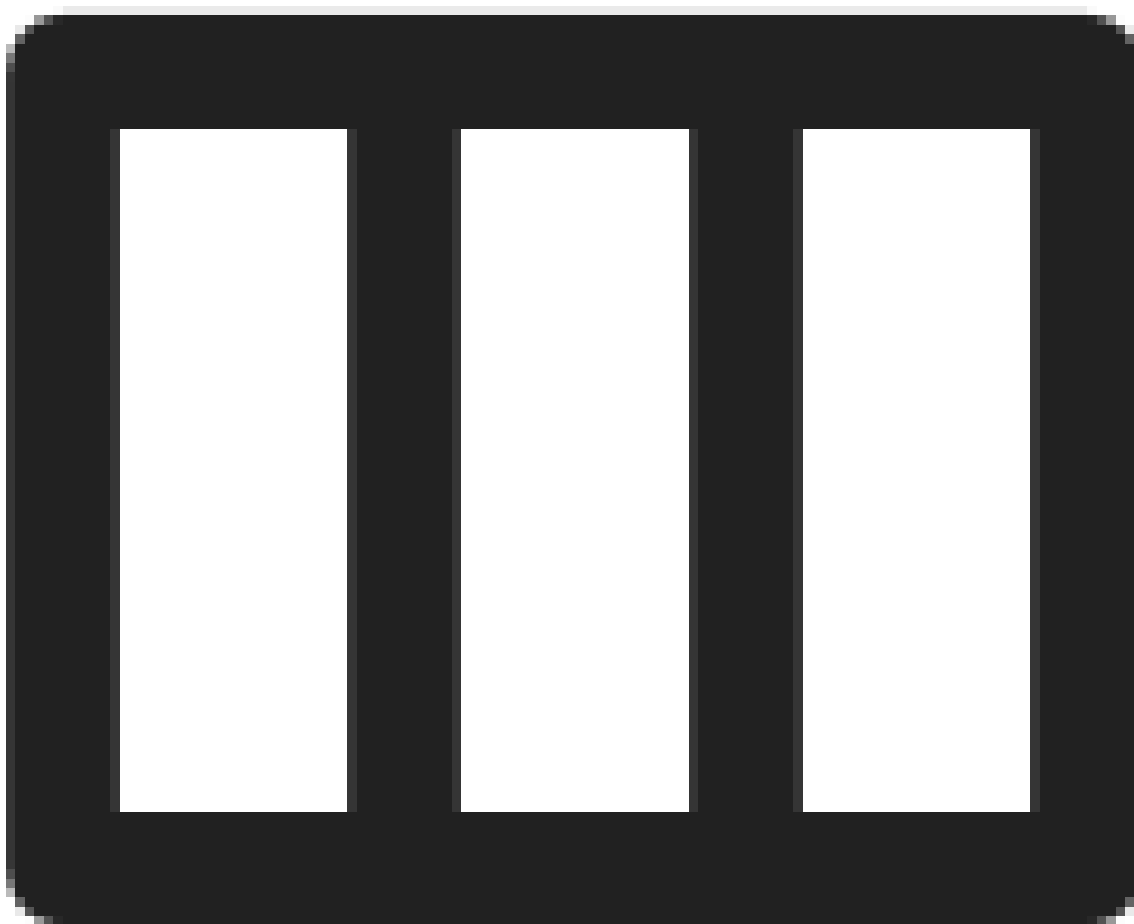




MEETINGS

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

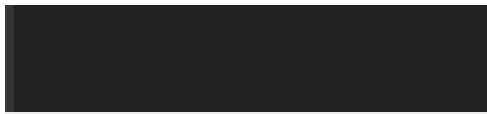
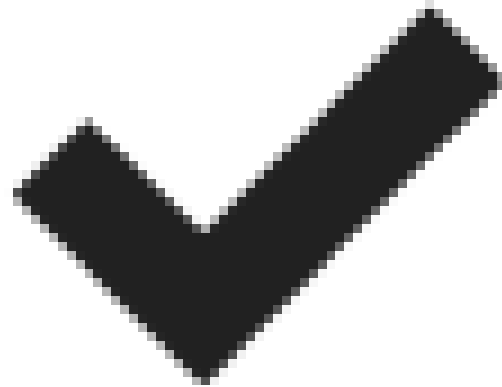
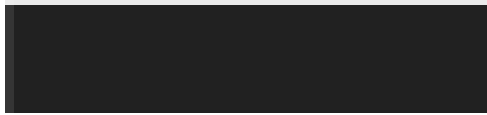




KANBAN / SCRUM BOARD

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.

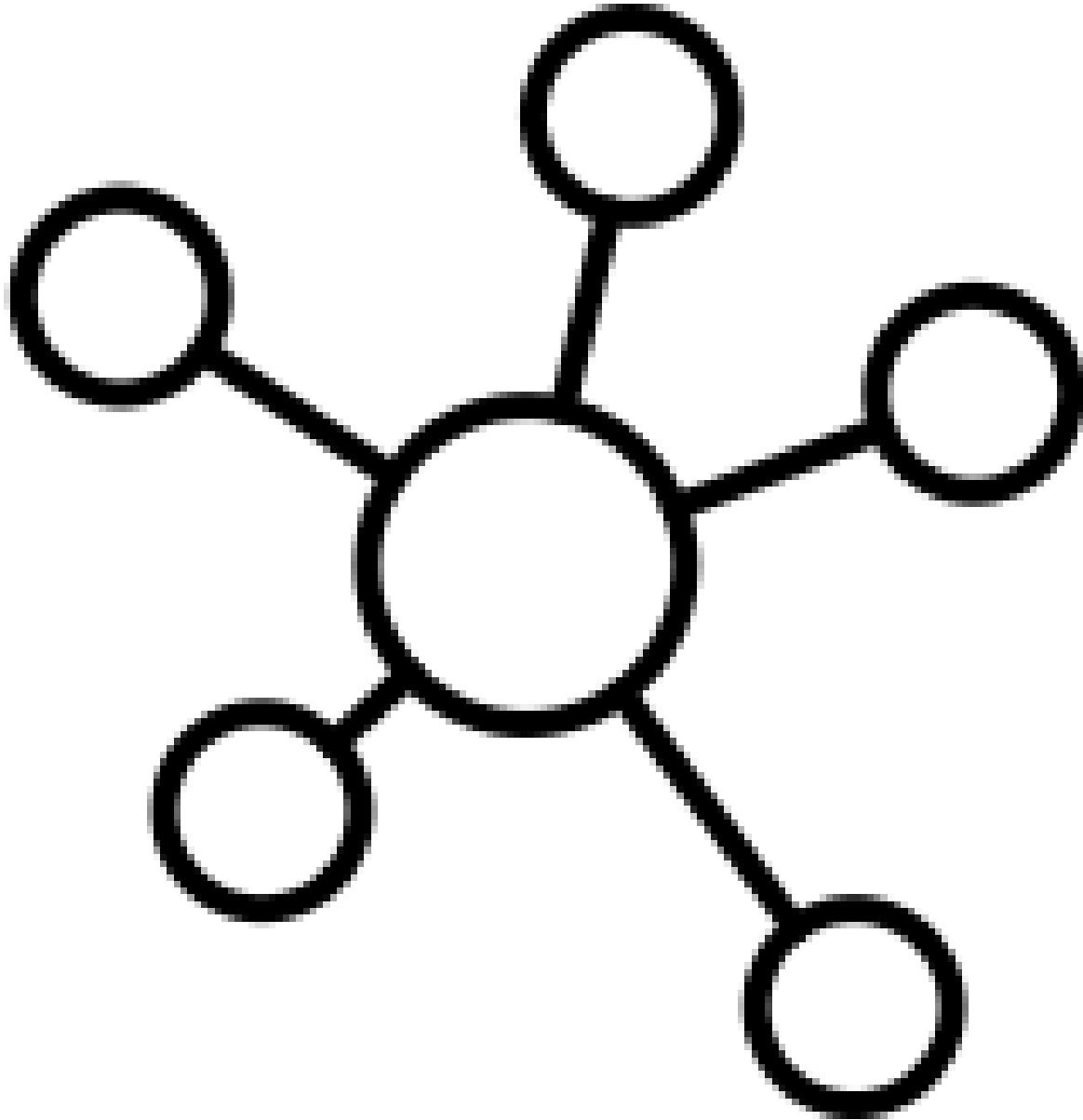




URGENT-IMPORTANT MATRIX

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.





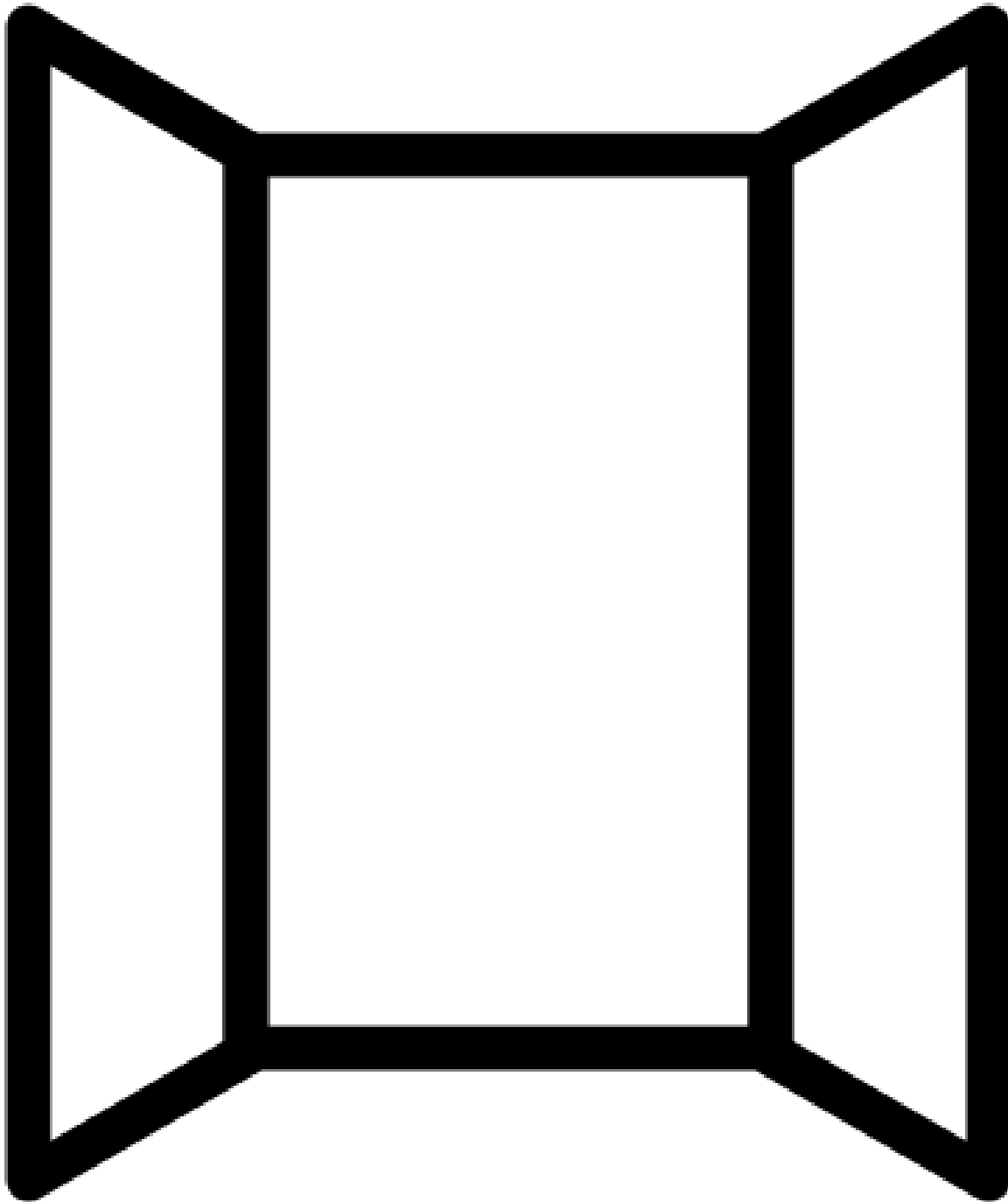
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Sharing and Scaling Tools



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EXHIBITION PLAN

Instructions and a template for planning an exhibit of your project.





COMMUNICATION PLAN

A table to help you identify the right methods of communication for your audience and purpose. Justifying your choices will help you get clarity on your communication strategy.

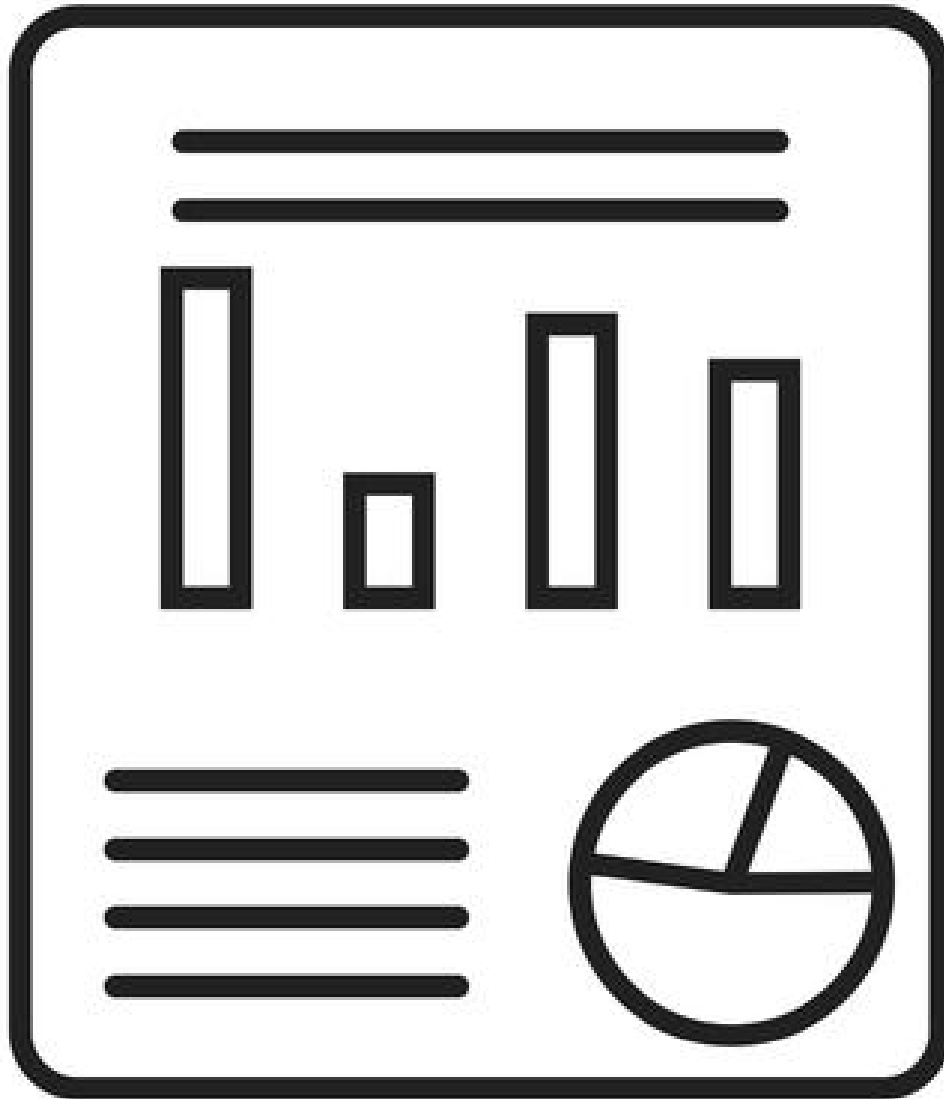




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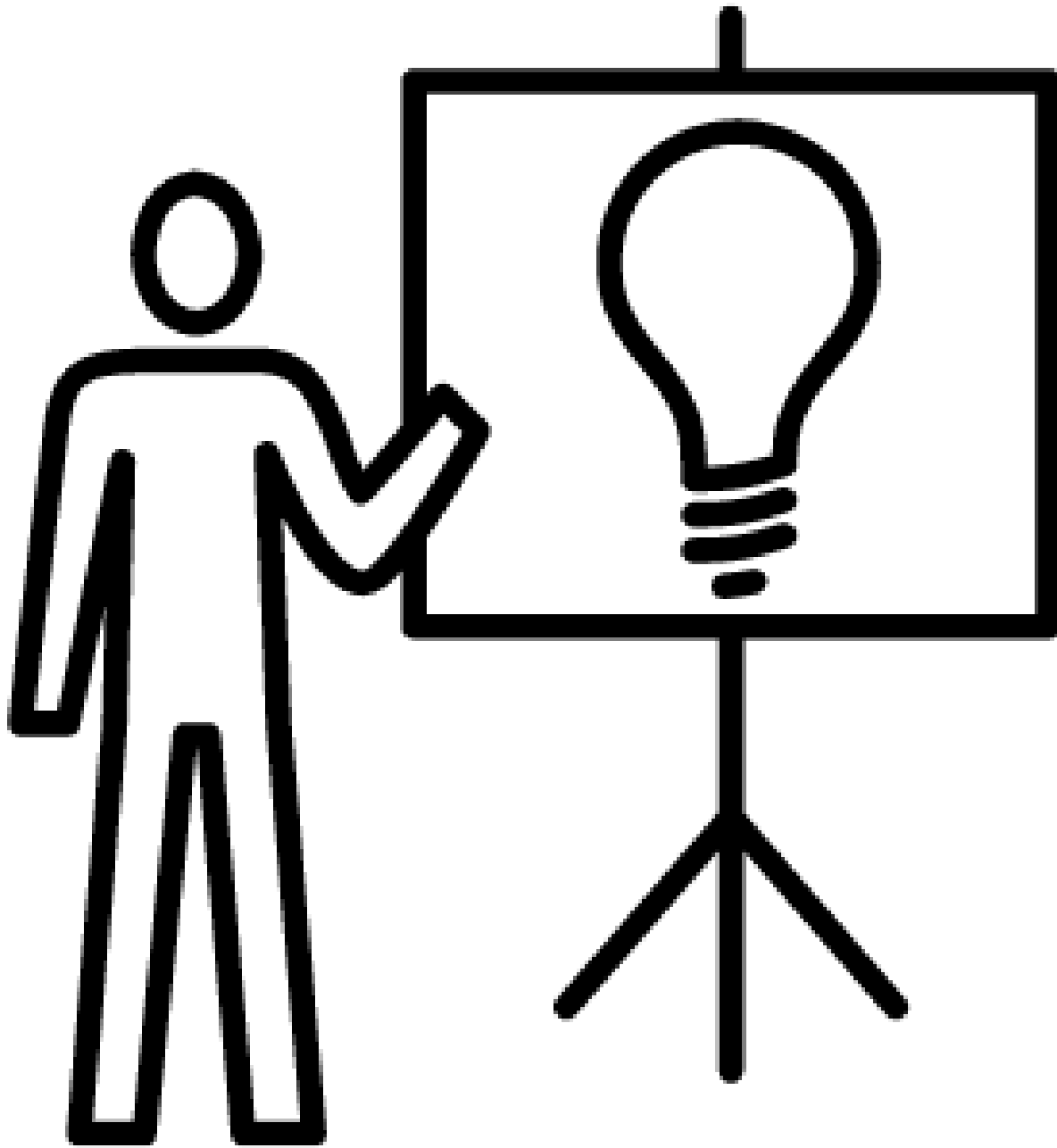




BUSINESS PLAN

A template for writing a business plan to help you scale your project for greater impact. The tool is particularly useful if you are seeking larger amounts of funding, or are proposing a social enterprise.





PITCH

Useful tips for writing and delivering a pitch that will get you the support you need for your project. The tool includes advice for the pitch and pitch deck (slides).

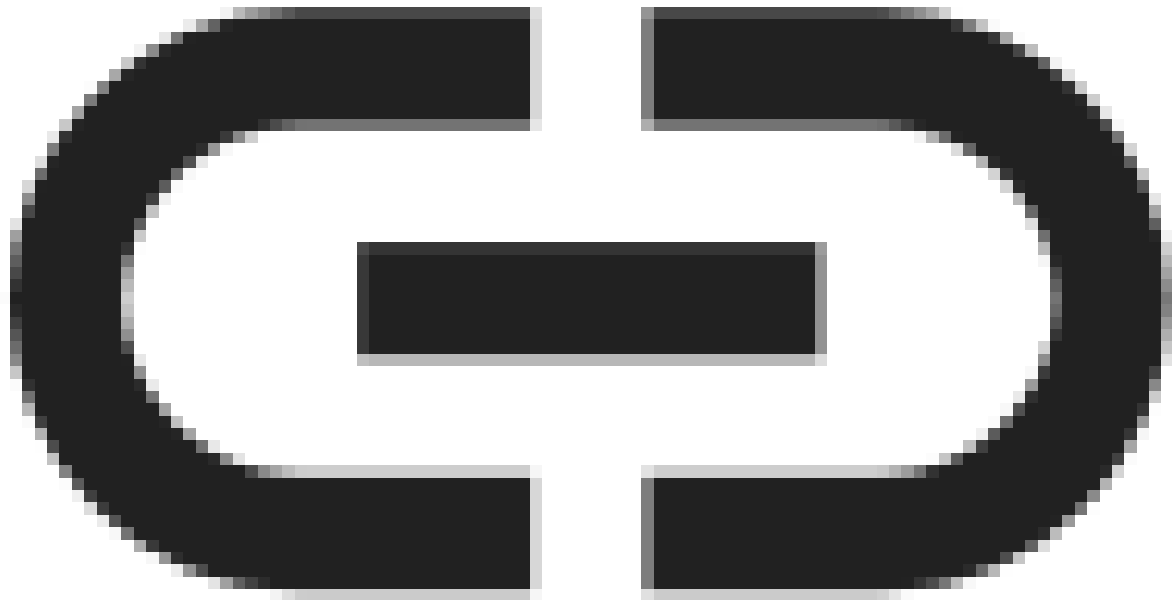




TALK

Advice for writing and delivering a talk that will inspire. The tool includes a table of some useful guiding questions.





NETWORKING

A spreadsheet to help you document and keep track of contacts for your project.





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