

02

UNDERSTAND



USAID
FROM THE AMERICAN PEOPLE



AGA KHAN FOUNDATION



Developed by: **Accelerate Impact**

Created for **Local Impact**: A Transformative Partnership in Asia and Africa

UNDERSTAND

Use the tools and resources in this guidebook to accomplish the goals below. Once your design team has achieved these objectives, you will be in a strong position to advance to the next phase in your design process. Use the reflection tools in the **Design Work Journal** to evaluate whether your design team is ready to move to the next phase.



Get smart about the context, the stakeholders and the problem



Gather and review research that is relevant to the project



Align as a team around potential problems to solve



Discuss and share previous experiences and expertise on the team



Identify the other organisations and interventions already in the space



Articulate why this problem is worth solving

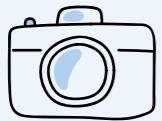


Surface solutions that team members have already imagined



Document your findings and share with others in the organisation in order to get their feedback

UNDERSTAND



CAPTURE YOUR WORK



PROCESS TIPS



MINDSET TIPS



EQUITY STRATEGY



CO-DESIGN STRATEGY



FIELDWORK

We begin by understanding the problem we are trying to solve. This means conducting research to understand the context, the stakeholders that are currently involved, the current circumstances of the problem and how the challenges are already being addressed.

**WE MUST UNDERSTAND
AN UNDERLYING PROBLEM
BEFORE WE CAN SOLVE IT.**

What steps can we take to ensure we understand the context and complexities of a design project?



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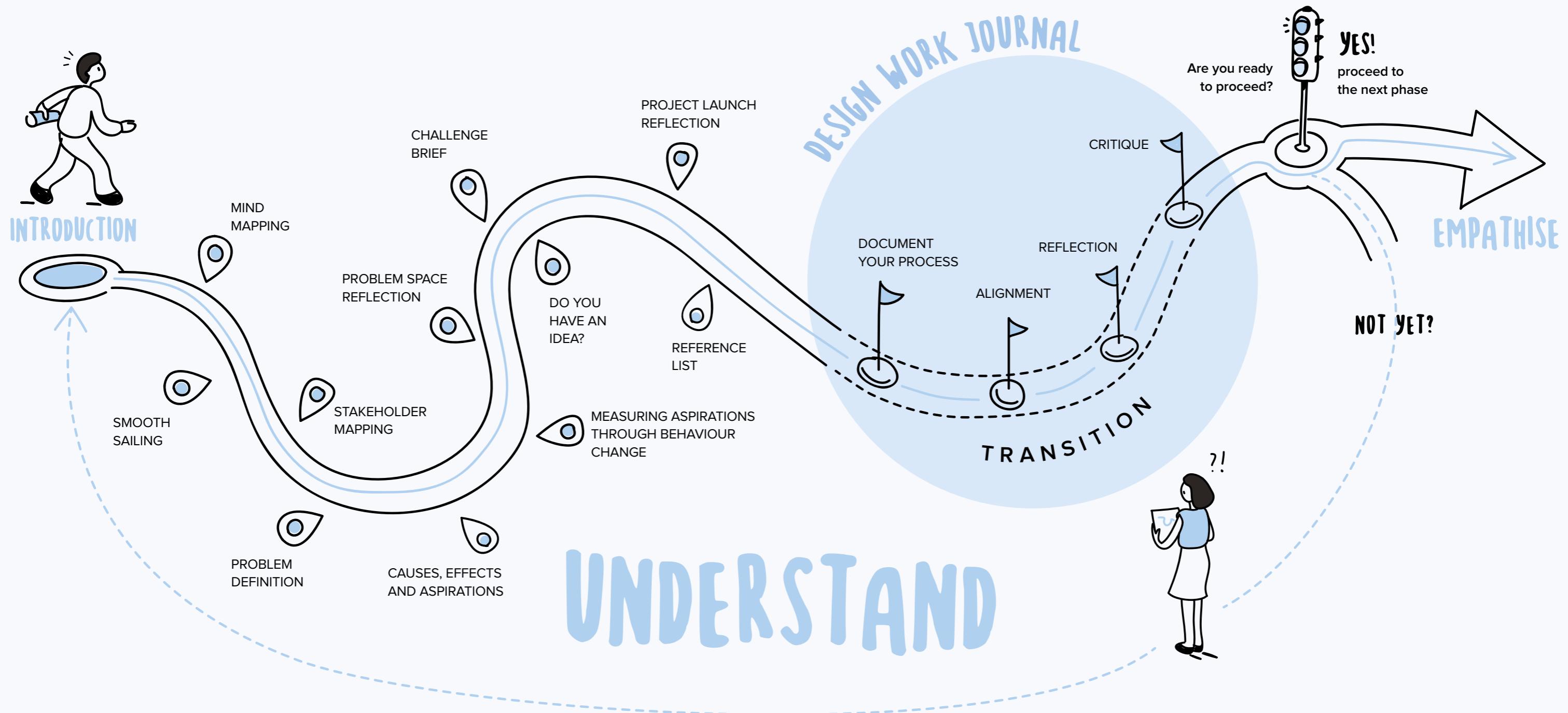
Digital Templates

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Checklist



You can find a video lecture as well as more articles on this phase of the **Human-Centred Design** process in the **Resource Book**. You will also find a full demonstration example of each of the tools. Scan the QR code or click [here](#) to access this resource.



OVERVIEW OF UNDERSTAND PHASE

The tools in the **Understand Phase** are designed to help your team create a shared understanding of the context around the challenge.

During this phase, your design team will - prepare for the design work you will conduct during this project by exploring the context of the challenge.

This phase of the design process will include: exploring what your team knows about the issue through a mind mapping exercise as well as gathering, analysing and presenting contextual information and secondary research.

OBJECTIVES OF UNDERSTAND PHASE

The goal of this phase is to get your design team aligned around the context of the problem as well as the framing of a problem. This ensures that the design work you conduct in the next phases is well-defined and connected to the larger challenges facing your community. The tools will support you to use many different types of resources to help you frame the problem you are working to solve.

At the end of this phase, all team members should be clear and aligned on a common problem you are working to solve and should have a shared understanding of the context of the problem.

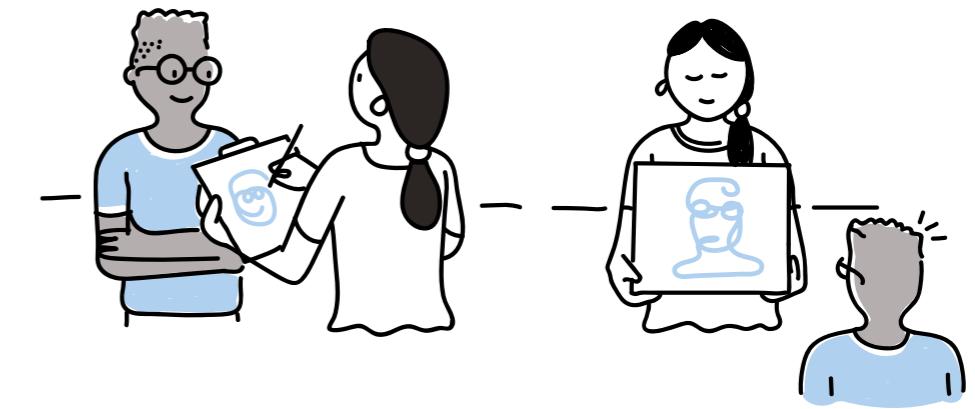
MINDSETS OF UNDERSTAND PHASE

- Work together to understand the context
- Look carefully to understand potential problems and opportunities
- Stay optimistic that you can solve the problem
- Hold back on solving the problem until your team has learned from stakeholders

Scan the QR codes on [page 44](#) for the following resources:

- Understand **Mural Template**
- **Design Work Journal PDF**
- Design Work Journal Mural Template

UNDERSTAND: TEAM ACTIVITIES



BLIND CONTOUR DRAWING



Blind contour drawings are about letting go of perfection and finding the beauty in the imperfect.



When every drawing is complete, ask everyone to share their blind contour drawings with the group.

Goal: This exercise is designed to help participants let go of their pursuit of perfection. Because of the constraints of the activity, they are not able to create a perfect drawing of their partner. This allows them to embrace the process and appreciate the beauty in the imperfect.

Instructions: Turn to a partner and look them in the eyes. Draw a portrait of them using a Sharpie Marker. You cannot look at the page or lift your pen from the page until you are finished. When everyone is finished have each partner share their drawing. The artist should put the name of the person they drew at the bottom of the page. Hang up the drawings in the space.

Online Adaptation: Turn on the Gallery View in Zoom. Find a random person who you are going to draw. When the facilitator says begin, draw a portrait of that person using a Sharpie Marker. You cannot look at the page or lift your pen from the page until you are finished. The artist should put the name of the person they drew at the bottom of the page. Ask everyone to share their drawings on their screen using their camera.

Debrief Questions: What was it like to draw in this way? What were your expectations for what you might produce? How did doing this activity make you feel? What did you learn about yourself in doing this activity? What are some positive lessons to take away from this activity?

Equity Strategy: This activity helps level hierarchies and asks all participants to be vulnerable by sharing their blind contour drawings. This will help build a team where every member feels equally valued.

UNDERSTAND: INTRODUCTION TO TOOLS AND METHODS



At the top of each tool description is the recommended amount of time to complete the tool. Try to spend only the recommended time. If you spend significantly less time on the tool you might not do enough rigorous thinking to advance your project. Also, keep up your project momentum by not spending too much time on each tool.

Design Leads should review this page before the design team is scheduled to meet. Take note of opportunities to engage the community and plan for that. Gather needed materials. Take note of fieldwork and help your teammates plan for that work.



Documentation Strategy: Be sure to capture all of your work throughout this process, using the tools provided as the main place to capture your thoughts and reflections. **Remember:** if it isn't written down or captured, you have no evidence of it! Be sure to take photographs and/or screenshots, especially when working with stakeholders and community members. Be sure to ask permission before you take photos of people.

Equity Strategy: Make sure that you are working to identify those stakeholders, communities and organisations who are under-represented, under-resourced and whose voices are not often heard.

⌚ 60 minutes

MIND MAPPING



WHAT IS THIS TOOL?

The **Mind Mapping** tool helps your team identify and organise information and explore emerging themes connected to the problem you are working to identify and solve.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around important contextual information and themes that you need to explore in order to engage in the next phase of the process.



CO-DESIGN STRATEGY

Inviting community members (experts, stakeholders, civil society organizations, local partners) to contribute to this activity is especially helpful. Inviting community members to bring their knowledge into the process will help your team meet the needs of the community.

UNDERSTAND: TOOLS AND METHODS



60 minutes

#2 SMOOTH SAILING



WHAT IS THIS TOOL?

The **Smooth Sailing** tool helps your design team identify your community's strengths and weaknesses.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around potential problems and opportunities.



CO-DESIGN STRATEGY

If you are only engaging with community members as co-designers on a part time basis, inviting them to contribute to and give feedback on these tools is especially helpful. Inviting community members to join for this exercise helps bring their knowledge of the community into the process.



EQUITY STRATEGY

Focus on identifying the strengths and challenges facing the most vulnerable populations you are working to serve.



60 minutes

#4 PROBLEM DEFINITION

WHAT IS THIS TOOL?

The **Problem Definition** tool helps your team use data to identify problems and the groups most affected by those problems.

WHAT IS THE GOAL?

When you have completed this tool, your team should be aligned around potential problems as well as those stakeholders who are most affected by this problem.



EQUITY STRATEGY

Look for data points about populations who are suffering most from the negative impacts of the problem.



60 minutes

#3 STAKEHOLDER MAPPING



WHAT IS THIS TOOL?

The **Stakeholder Mapping** tool helps your team identify the different stakeholder groups that relate to the problem as well as whose voices are most underrepresented. This is also an opportunity to identify technical experts in the field who can help your team understand the context more deeply.



WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around potential stakeholders to engage in the next phase of the process.



CO-DESIGN STRATEGY

If you are only engaging with community members as co-designers on a part time basis, inviting them to contribute to this activity is especially helpful. By inviting community members to join for this exercise your team is ensuring that their knowledge of the community is fully integrated into the process.

EQUITY STRATEGY

Focus on identifying those stakeholders whose voices are most underrepresented.



60 minutes

#5 CAUSES, EFFECTS AND ASPIRATIONS

WHAT IS THIS TOOL?

The **Causes, Effects & Aspirations** tool helps your team to identify the causes and effects of the negative outcomes of the problem you are working on in the community.



WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around the causes and effects of the problem you are working on as well as the aspirations you have for solving the problem.

EQUITY STRATEGY

Look for data points about populations who are suffering most from the negative impacts of the problem.

UNDERSTAND: TOOLS AND METHODS



60-120 minutes

#6 MEASURING ASPIRATIONS THROUGH BEHAVIOUR CHANGE

WHAT IS THIS TOOL?

The **Measuring Aspirations Through Behavior Change** tool will help your design team to imagine what positive changes in the community might look like and how different stakeholder groups might act differently in the new conditions.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around your team's aspirations for change, how the lives of the different stakeholder groups might be different and how you might measure that change.



CO-DESIGN STRATEGY

If you are engaging community members as co-designers on the design team, make sure to include them in this process of imagining new futures.



EQUITY STRATEGY

When you are reflecting on your team's aspirations for change, how the lives of the different stakeholder groups might be different and how you might measure that change, be sure to consider those who are most negatively effected by the problem.



120-180 minutes

#8 CHALLENGE BRIEF



WHAT IS THIS TOOL?

The **Challenge Brief** helps your team to communicate the scope and intentions of the project clearly and concisely while inspiring others to support your design team's efforts.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should have prioritised the most important contextual information that you want to share with others in order to inspire them to support your work.



EQUITY STRATEGY

Make sure that your team is working to identify those stakeholders, communities and organisations who are under-represented, under-resourced and whose voices are not often heard. Look for data points about populations who are suffering most from the negative impacts of the problem.



120-180 minutes

#7 PROBLEM SPACE REFLECTION

WHAT IS THIS TOOL?

The **Problem Space Reflection** tool is a guide to help your team gather important contextual information in order to clarify the scope of the project, its intent, the questions it hopes to explore and the target group of stakeholders.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned around important contextual information that you need in order to engage in the next phase of the process.



EQUITY STRATEGY

Make sure that your team is working to identify those stakeholders, communities and organisations who are under-represented, under-resourced and whose voices are not often heard. Look for data points about populations who are suffering most from the negative impacts of the problem.



30-60 minutes

#9 DO YOU HAVE AN IDEA?

WHAT IS THIS TOOL?

The **Do You Have an Idea?** tool is designed to help your team articulate ideas about how to solve the problem that you already have in mind before you enter the **Empathise Phase**.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should have identified and described ideas you have already -- these could be ideas you have thought about for a long time or they might be new. The purpose of this exercise is to help your team articulate these ideas, so that you can both reference them later in the process but also so that your thinking doesn't get stuck on a preconceived idea. This exercise will help individuals be more aware of the influence they might have on the process by naming ideas they have and sharing them with the group early in the process.

UNDERSTAND: TOOLS AND METHODS



60-90 minutes

#10 PROJECT LAUNCH REFLECTION

WHAT IS THIS TOOL?

Project Launch Reflection tool asks your team to reflect on what you need to succeed in this project.



WHAT IS YOUR GOAL?

When you have completed this tool, your team should be aligned on the resources you need and what you need to learn in order to be successful in this design project.

EQUITY STRATEGY

Make sure everyone's voice on the team is equally valued and heard.



30-60 minutes

#11 REFERENCE LIST

WHAT IS THIS TOOL?

The **Reference List** helps your team to capture the resources you are using in order to refer to them later on in the project.

WHAT IS YOUR GOAL?

When you have completed this tool, your team should have identified and recorded the research and resources you used to complete the work of this design phase.

UNDERSTAND: TOOLS AND METHODS



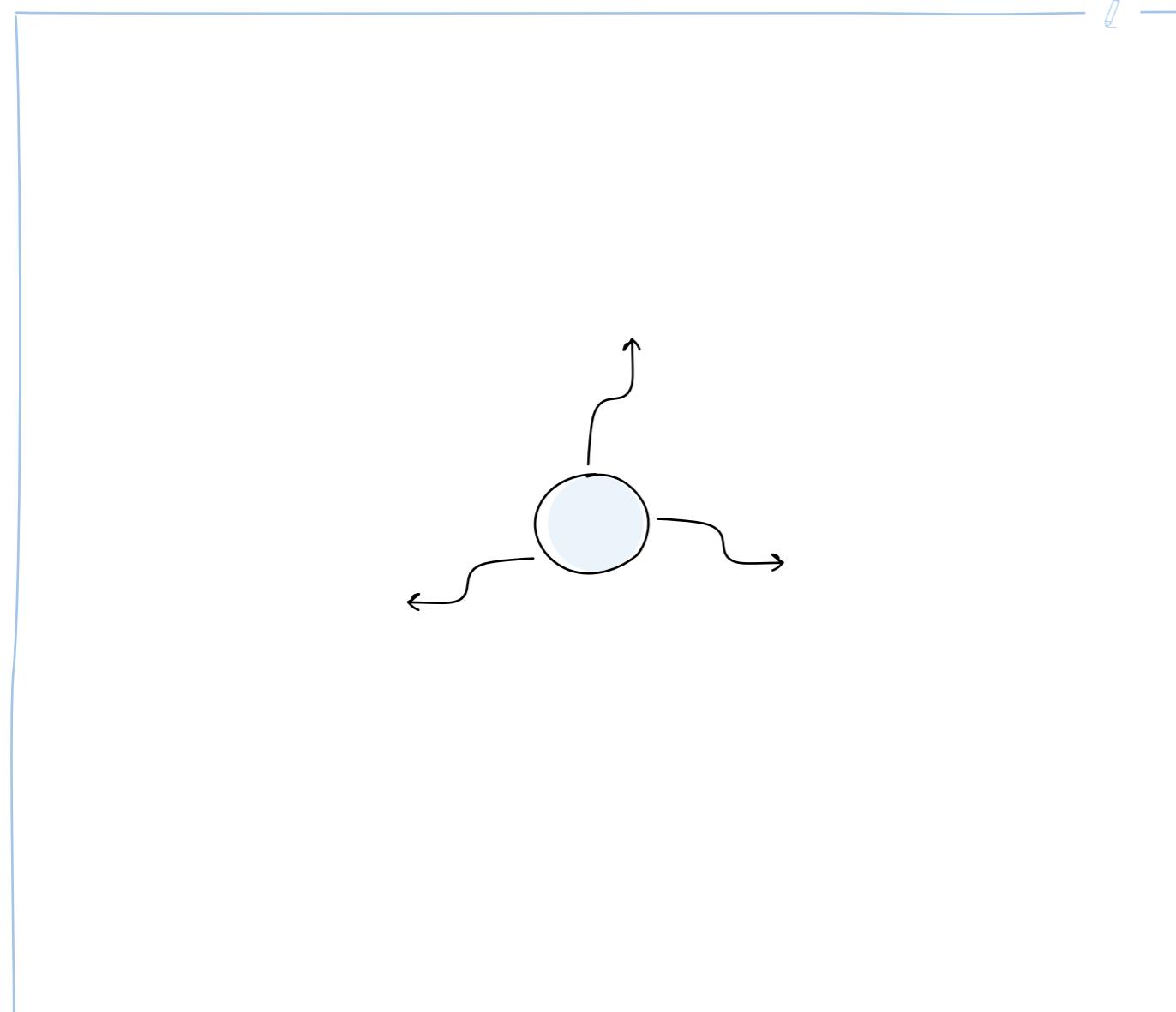


60 minutes

MIND MAPPING



Instructions: During the **Understand Phase** work as a team to review the contextual information you gathered during the **Project Launch**. After reviewing that information, use the blank space below to create a mind map focused on the problem you are working to solve. Write down the central topic in the centre of the sheet. As a team, generate related topics and write them on your mind map. Use these related topics as nodes and 3 lines and arrows to indicate connections between the central topic and the nodes. Continue to expand from the centre and create new nodes that are connected to the first layer of nodes. While this is an analytical exercise, try not to be too critical or evaluative. Let your thoughts flow freely. You can draw, use pictures and color - be creative! Your team will have completed the exercise when you notice that new ideas and contributions become scarce. Feel free to use more than one sheet of paper as necessary.



For more guidance for this tool as well as an example, refer to the **Resource Book** on page 84.



Be sure to include organisations, policies and solutions that already exist.



Challenge your team to think beyond the obvious connections. Try to think of surprising ideas.



60 minutes

SMOOTH SAILING



Instructions: Imagine your community is a sailboat. Use that analogy to think of strengths, advantages, challenges and threats specifically related to improving the lives of those in the community. Be sure to come up with at least three ideas per box.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 85.

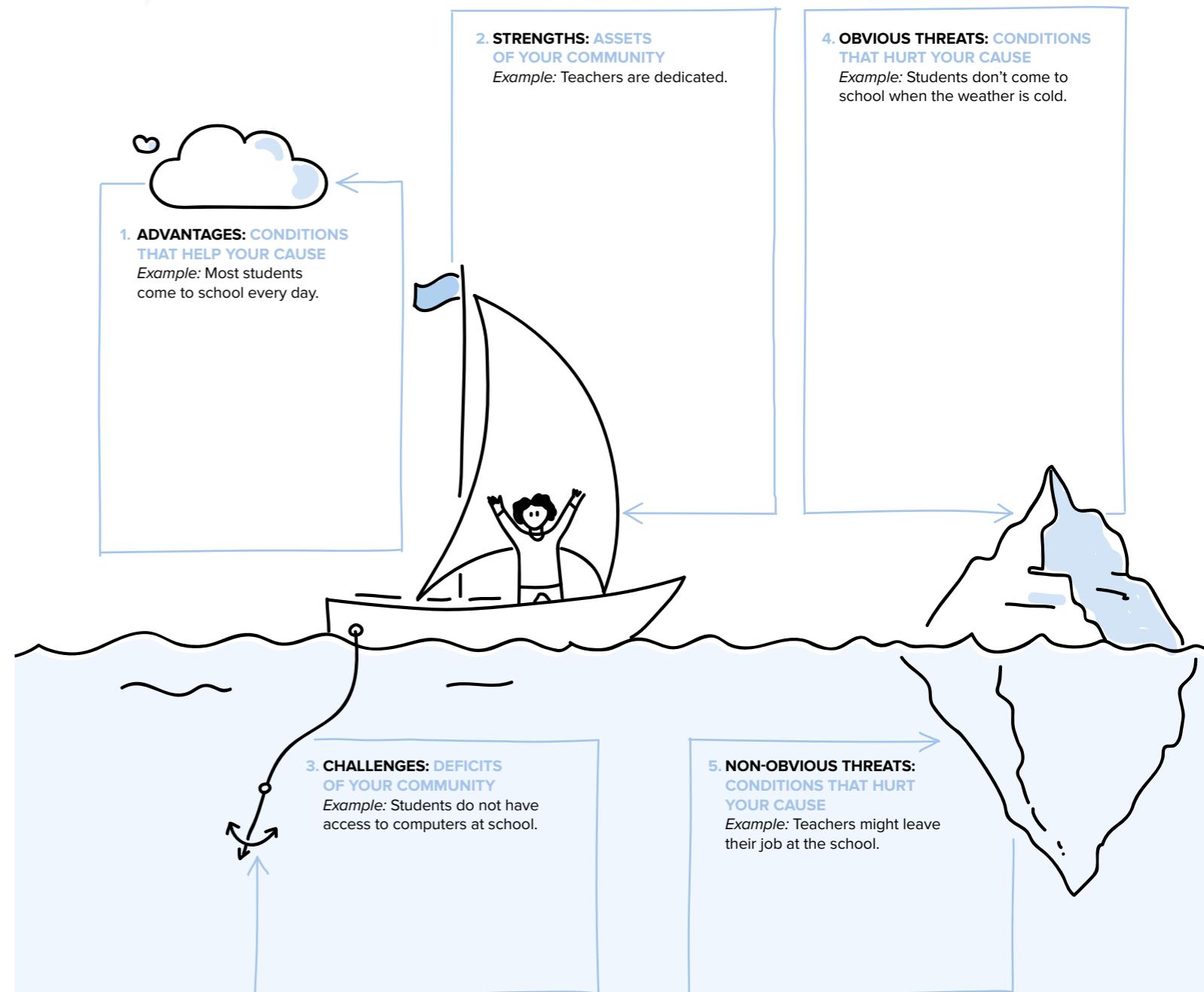


If you are struggling to generate ideas, set aside the tool and begin with just a conversation about the best things and most challenging things in the community.

It may be easier for your team to generate advantages and strengths than disadvantages and challenges. Remember that the goal is to identify and understand the challenges and disadvantages so those challenges can be addressed through the design challenge.



Be sure to include organisations, policies and solutions that already exist.





60 minutes



STAKEHOLDER MAPPING

Instructions: Stakeholders are the people who have experience with and knowledge of the problem you are working to solve. Take some time to chart all of the people who might be influenced by and/or involved with the problem that you have identified. Think of different roles within the different stakeholder groups, including (but not limited to) technical experts and those with lived experience; those names go in the blue circles.

Then, think of relevant demographic characteristics; those groups go in the next ring of circles. Next, think of specific people who match each of those groups; those names go in the outer circles. Next, use arrows, lines and other symbols to indicate relationships between the stakeholder groups.

Once you have completed the map, think about the stakeholders whose views are most represented and least represented when it comes to the problem you are working on. Place them on the spectrum below. This will help you to prioritize the voices of people who are not usually heard.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 87.

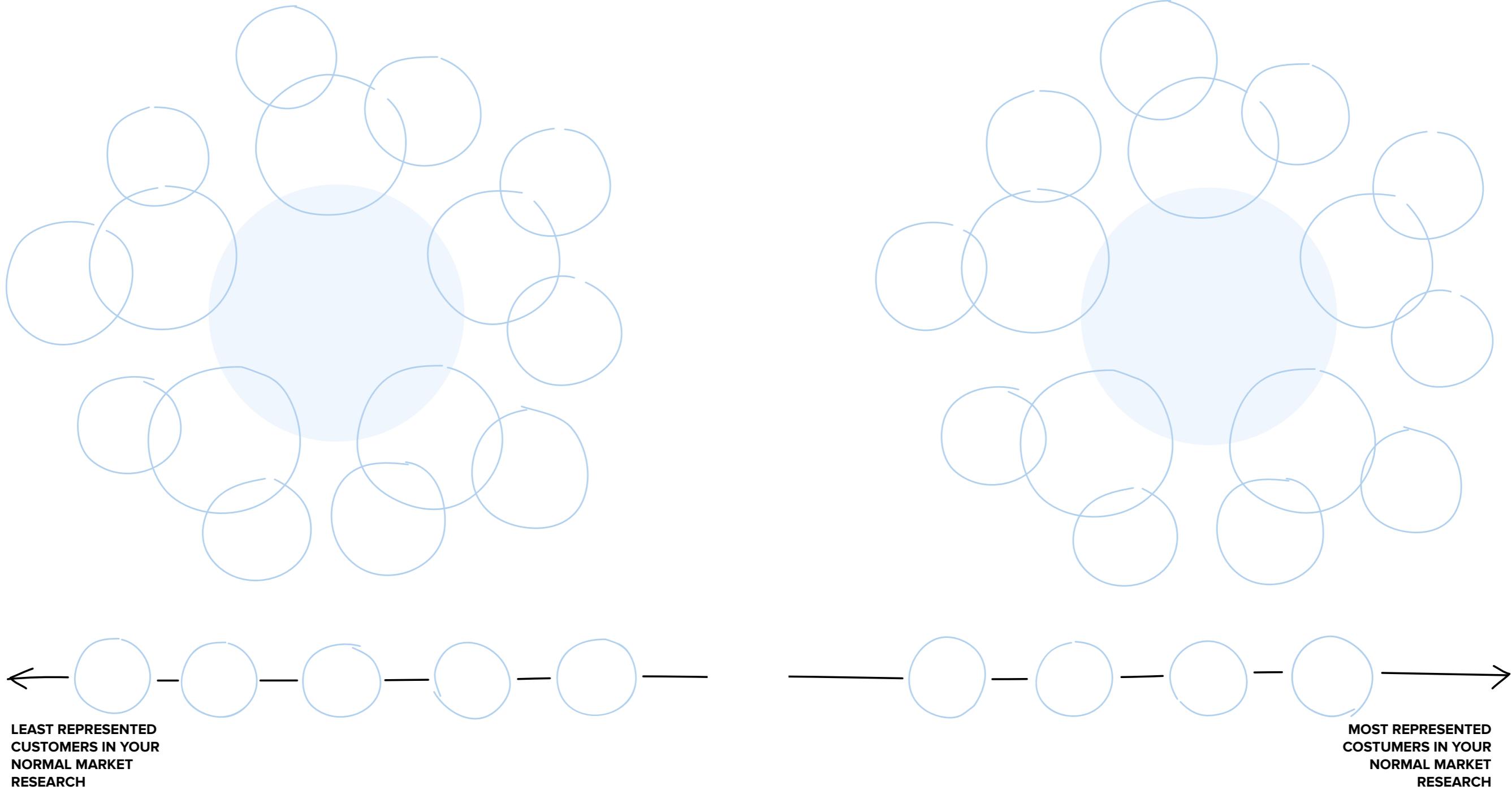


Try thinking about the different types of stakeholders (for example: students, families, teachers.). Make sure you identify specific people from each of those groups.

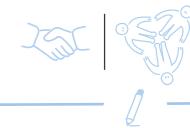
If design teams are struggling to identify the least represented, ask the group to think about those with whom they frequently interact and those with whom they do not.



Work together to understand the context by engaging everyone on your team to contribute to the stakeholder list



PROBLEM DEFINITION



Instructions: During the **Understand Phase** work as a team to review the contextual information you gathered during the **Project Launch**. After reviewing that information, identify the quantitative data points you find most interesting or troubling in regards to the problem you are working to solve. You may need to seek additional data if you don't have enough data from the **Project Launch Phase**. Using an equity lens look out for those who do not get everything they need to survive and thrive. Think about how you can use the quantitative data to identify populations who are suffering most from the negative impacts of this problem.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 88.



If your design team is struggling to find data, consider using your intuition and local knowledge about the topic.



If teams are struggling to define the problem, ask them to think about all the factors causing the data point they identified. From there, work to identify what is causing these factors and how they might be addressed.

1. INTERESTING QUANTITATIVE DATA POINTS

Analyse data to find the most interesting or troubling quantitative data points related to the problem space you are working on.

• Data:

• Source:

• Data:

• Source:

2. ANALYSING WITH AN EQUITY LENS

Now, look at the most interesting and troubling data points you found and analyse again, looking for populations who are most negatively impacted by the problem. Describe those populations below as well as inequities you see. See the glossary in the **Introduction to Human-Centred Design Guidebook** for a definition of equity.



• What are the negative impacts of the problem for stakeholders?

• What do you need to learn more about to better understand the problem?

For more guidance for this tool as well as an example, refer to the **Resource Book** on 89.



Look closely at the data to understand potential problems and opportunities that you might not have considered before.



Review literature to find statistics and information about the problem space.

CAUSES, EFFECTS AND ASPIRATIONS



What is a **problem** for the **most negatively impacted stakeholders**?

What caused this **problem**?
Consider the root causes that led to this negative impact

What caused this **problem**?

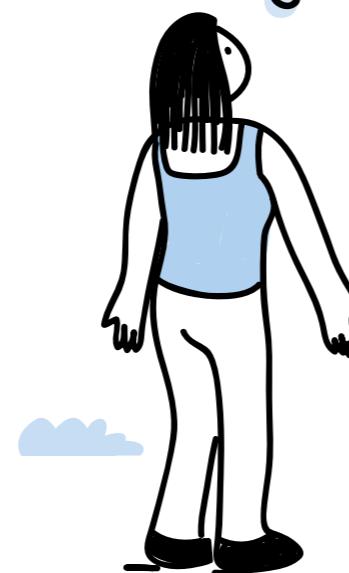
What is a **negative effect** that comes from the **problem** above?

What is another **negative effect** that comes from the **problem** above?



What is a **negative effect** that comes from the effect directly above?

What is a **negative effect** that comes from the effect directly above?



2. ASPIRATIONS FOR SOLVING THE PROBLEM

- What positive changes do you want to see in the community?

- How might the lives of those most negatively impacted be improved if you solved this problem?

- What potential unintended harm to people or the planet could this project cause without a careful, thoughtful, participatory approach? How might your design team work to avoid these potential harms?

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 91.



Work as a team to look closely to understand potential problems and opportunities in the system.



Consider both the upstream causes of the problem and the downstream effects of the problem.



120-180 minutes



MEASURING ASPIRATIONS THROUGH BEHAVIOUR CHANGE

Audacious Goal: Your vision for a new future state - a goal you might be working on for a lifetime

A

Name a specific community or system

WHICH

Conditions you are seeking to create

Near-Term Goal: what change are you working to make toward that audacious goal?

INCREASE / DECREASE

Metric of improvement

FOR / WITHIN

Define a group or system you are seeking impact

INDICATORS:

What are the measures you might use to demonstrate that you aspire to have a positive impact?

Instructions: Use this framework to help identify what a better imagined future might look like. First state your big, audacious goal. Next, state your near-term goal that is connected to the mission of your organisation. From there, imagine how the lives of the different stakeholder groups would be different and how you might measure that change.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 93.



While you may not know exactly what the positive change you are seeking might look like, work together to imagine ideas for what it could be.



Work as a team to imagine how different stakeholder groups might act differently in the new conditions. Use these ideas to develop potential indicators for measurement.

BEHAVIOURS:

What new behaviours might you see in the community if your design teams meets your goals?

Stakeholder Group #1:**Stakeholder Group #2:****Stakeholder Group #3:****Stakeholder Group #4:**



120-180 minutes

PROBLEM SPACE REFLECTION



Instructions: During the **Understand Phase** work as a team to review the contextual information you gathered during the **Project Launch**. After reviewing that information, use the prompts below to dig deeper into your analysis and refine this information as a team. Feel free to seek information from resources and perspectives beyond your team. Work together to develop a final draft that everyone agrees on.

1. WHAT IS THE PROBLEM YOU ARE TRYING TO SOLVE?

Take a few minutes as a team to review your mind map and discuss what the problem is that you are trying to solve. Think of the problem in terms of **negative experiences or unmet needs** that those you are serving have because of this problem. Then frame the problem into an opportunity using the question prompt of "How Might We" (HMW).

2. WHY IS THIS PROBLEM WORTH SOLVING?

Discuss as a team why you believe this problem is important enough that it warrants the use of resources to try to solve it. Why would solving this problem make a difference? Why does solving this problem matter to the community you are serving? Take notes below.

3. WHAT IS THE IMPACT YOU ARE HOPING TO CREATE?

Discuss as a team what impact you hope to achieve by solving this problem. **How will the experiences of those you are serving be improved if you solve this problem?** What are some criteria that could be used to measure successful outcomes? Take notes below.

4. WHAT ARE SOME POTENTIAL UNINTENDED HARMS TO PEOPLE OR PLANET?

Discuss as a team the **potential unintended harms** that this project could cause without a **careful, thoughtful, participatory approach**. How might your design team work to **avoid these potential harms**? Take notes below.

5. FOR WHOM ARE YOU WORKING TO SOLVE THIS PROBLEM?

Take a few minutes to discuss as a team who you think the primary user or beneficiary of your solution might be. **Are there other stakeholders interacting with or influencing the problem?** Who do you need to talk to in order to learn more about the problem? Take notes below.

6. WHAT ARE THE CONSTRAINTS OF THE PROJECT?

Discuss as a team if there are requirements that a successful solution needs to meet. **What is within and outside the scope of this project?** Are there any particular constraints? Do you need to define a particular geography, timeline or budget?

7. WHAT IS THE CONTEXT OF THIS WORK?

Discuss as a team what the historical context of this issue is and how it relates to today. Discuss the current landscape. Are there statistics or quantitative data that would be helpful to understand the current context? **What cultural norms or values does your team need to be aware of?** Take notes below.

8. WHO ARE THE PLAYERS IN THE SPACE?

Discuss as a team what other efforts are being made to tackle the same issue? **What organisations are involved?** Have they succeeded? Why or why not? Are there overlaps or opportunities for partnerships? Take notes below.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 95.



Use the tool to reflect on what you know so far about the problem space. Do research as needed to answer the questions.



Work together as a team to understand the context. Use your collective knowledge to reflect on the problem space. It's okay if you don't have the answers to every question. Do research, ask colleagues or engage community members to answer the questions you don't know. If there are questions left unanswered at the end of this process, use the design process to explore the answers.



4-6 minutes

CHALLENGE BRIEF

Instructions: During the **Understand Phase** work as a team to review the contextual information you gathered during the **Project Launch**. Use the prompts below to organise the information you already have, identify gaps in your knowledge and conduct research to fill those gaps. Feel free to seek information from resources and perspectives beyond your team. Once you have completed this process, dig deeper into your analysis, refine this information and present it in a compelling way as a team using the slide deck template provided. Work together to develop a final draft that everyone agrees on. A **Challenge Brief** allows your team to communicate the scope and intentions of the project effectively and inspire others to support or join your team. You can find a QR code that links to a digital slide deck template at the bottom of this page and also at the end of the guidebook.

FORMAT FOR YOUR CHALLENGE BRIEF

- A slide deck presentation should be used to present the challenge.
- While we provide a template and some examples, feel free to customise it to your team's design challenge. Feel free to add more pictures and/or more information as your team sees fit!



- The goal of the presentation is to ensure that the design team is able to communicate with other stakeholders and communities in a way that ensures they understand the challenge, the context and the ultimate goal.
- Make sure to make your presentation as visual and engaging as possible by including pictures, statistics, maps, diagrams or anything you feel is relevant.

PREPARING TO CREATE YOUR TEAM'S SLIDE DECK

THE WHAT

- What are the requirements that a **successful solution** needs to meet?
- What is **within and outside the scope** of this project? Are there any particular constraints?
- What is the **problem facing the community**? What are the pain points?
- What **solutions have already been tried** to address this problem?
- Have they **succeeded**? Why or why not?
- What **positive outcomes** do you hope to achieve?

Reflect on the questions to the left before you design your slides.



Scan this QR Code or [click here](#) to access a digital slide deck template.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 96.



Be sure to select statistics and quotations that will be compelling to your audience.



Work together as a team to communicate what you understand about the context to relevant audiences.

CREATING YOUR TEAM'S SLIDE DECK



THE WHAT

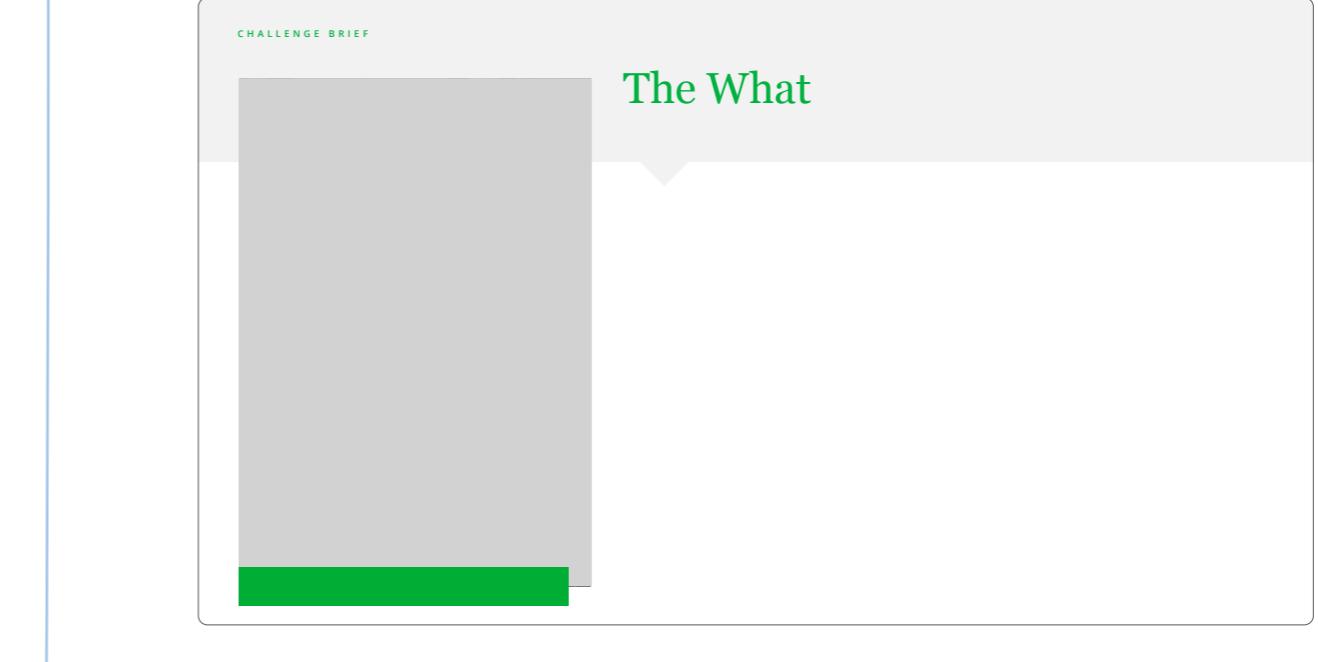
THE SLIDE SHOULD ANSWER THE FOLLOWING QUESTIONS:

What is the **problem facing the community**?
What are the **pain points**?

THE SLIDE SHOULD USE IMAGES, STATISTICS AND/OR QUOTATIONS TO SUPPORT THE CONTENT OF THE SLIDE:

What **images** might you use to make this section of your slide deck?

What **key information** (quotations, references, statistics, etc.) might you use to support your ideas?





4-6 hours



CHALLENGE BRIEF CONTINUED

PREPARING TO CREATE YOUR TEAM'S SLIDE DECK



THE WHOM

- What group or groups of people are most negatively affected by this problem?
- Can this be further specified by demographic traits, situational characteristics, etc.?
- Who are the other stakeholders involved?

Reflect on the questions to the left before you design your slides.

CREATING YOUR TEAM'S SLIDE DECK



THE WHO

THE SLIDE SHOULD ANSWER THE FOLLOWING QUESTIONS:

What group or groups of people are most negatively affected by this problem?

THE SLIDE SHOULD USE IMAGES, STATISTICS AND/OR QUOTATIONS TO SUPPORT THE CONTENT OF THE SLIDE:

What images might you use to make this section of your slide deck?

What key information (quotations, references, statistics, etc.) might you use to support your ideas?

CHALLENGE BRIEF

The Who

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 99.



Be sure to select statistics and quotations that will be compelling to your audience.



Work together as a team to communicate what you understand about the context to relevant audiences.



4-6 hours



CHALLENGE BRIEF CONTINUED

PREPARING TO CREATE YOUR TEAM'S SLIDE DECK



THE WHERE

- Where do the people who are experiencing this problem live?
- Is there a physical location involved in this challenge?
- What are some of the environmental conditions?
- Are there geographical challenges we should consider?
- What are the relevant cultural norms?
- What is the relevant historical context?

Reflect on the questions to the left before you design your slides.



CREATING YOUR TEAM'S SLIDE DECK



THE WHERE

THE SLIDE SHOULD ANSWER THE FOLLOWING QUESTIONS:

Where do those who are most negatively impacted by the problem you are working to solve live? In what conditions?

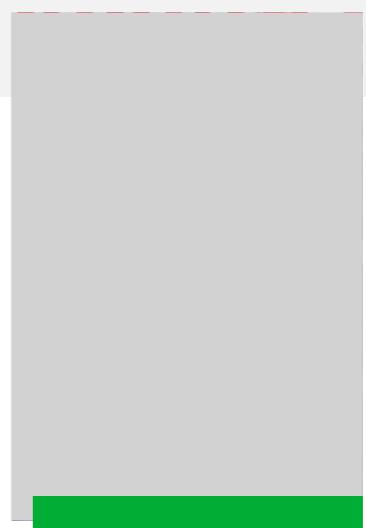
THE SLIDE SHOULD USE IMAGES, STATISTICS AND/OR QUOTATIONS TO SUPPORT THE CONTENT OF THE SLIDE:

What images might you use to make this section of your slide deck?

What key information (quotations, references, statistics, etc.) might you use to support your ideas?

CHALLENGE BRIEF

The Where



For more guidance for this tool as well as an example, refer to the **Resource Book** on page 101.



Be sure to select statistics and quotations that will be compelling to your audience.



Work together as a team to communicate what you understand about the context to relevant audiences.



4-6 hours



CHALLENGE BRIEF CONTINUED

PREPARING TO CREATE YOUR TEAM'S SLIDE DECK



THE WHY

- Why is this problem worth solving?
- Why should we invest time and resources into solving it?
- Why would solving this problem make a difference for the community?
- What value will solving this problem bring to the targeted stakeholders?
- How will their lives improve?
- What are some criteria that could be used to measure successful outcomes?

Reflect on the questions to the left before you design your slides.

CREATING YOUR TEAM'S SLIDE DECK



THE WHY

THE SLIDE SHOULD ANSWER THE FOLLOWING QUESTIONS:

Why is this problem **worth** solving? Why will this idea improve the **circumstances** of the community?

THE SLIDE SHOULD USE IMAGES, STATISTICS AND/OR QUOTATIONS TO SUPPORT THE CONTENT OF THE SLIDE:

What **images** might you use to make this section of your slide deck?

What **key information** (quotations, references, statistics, etc.) might you use to support your ideas?

CHALLENGE BRIEF

The Why



For more guidance for this tool as well as an example, refer to the **Resource Book** on page 103.



Be sure to select the most compelling statistic and/or quotation.



Work together as a team to communicate what you understand about the context to relevant audiences.



4-6 hours

CHALLENGE BRIEF CONTINUED

PREPARING TO CREATE YOUR TEAM'S SLIDE DECK



THE CLOSING SLIDE - OUR CHALLENGE

What is the problem you are trying to solve or situation you are trying to improve?
Write a problem statement by adding the words How Might We in front of a sentence that describes the opportunity to meet a need or solve a problem. What images might you use?



30-60 minutes

DO YOU HAVE AN IDEA?

Instructions: Take a moment to check in as a team before you move on. Does your team have an idea for a solution to this problem already in mind? If so, use the tool below to reflect and describe the ideas you already have. This is an important exercise because you want your team to articulate any ideas you have before you begin the design process so that you can both reference those ideas later and so that you can avoid getting stuck on a preconceived idea.

1. REWRITE THE PROBLEM, AS YOUR TEAM UNDERSTANDS IT RIGHT NOW, IN ONLY ONE OR TWO SENTENCES.

2. WRITE DOWN ANY IDEAS YOU HAVE ABOUT HOW TO SOLVE THAT PROBLEM.

These may be ideas you have had for a long time or they may be new ideas that you have thought of during the first phase of design work.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 104.



If your problem statement (HMW) is too narrow, ask yourselves, "Why would we want to do this?" If it is too broad, ask yourselves, "What's stopping us?"



Work as a team to hold back on solving the problem during this phase. Rather, focus on defining the opportunity.



60-90 minutes

PROJECT LAUNCH REFLECTION

Instructions: During the **Understand Phase** you should work as a team to review the contextual information you gathered during the **Project Launch**. After reviewing that information and completing the previous tools in the Understand Phase, your team should reflect on what you need to begin this project. Use the prompts below to gather this information, share ideas and concerns and get aligned. Work together to develop a final draft that everyone agrees on.

1. WHAT ARE THE MAJOR RISKS AND BARRIERS TO YOUR SUCCESS?

Take a few minutes to discuss as a team what the factors are that could prevent you from being successful. What are the largest obstacles in your way? What resources do you need to address these challenges? Take notes below.

2. WHAT DO YOU KNOW AND WHAT DO YOU NEED TO LEARN MORE ABOUT?

Discuss as a team the aspects of the challenge that you already know a lot about. Are there any key insights that you have uncovered from speaking with stakeholders or working in this space in the past? What are the aspects of the design challenge where you need to learn more? What are assumptions you are making about the situation that you would like to explore further? Take notes below.

For more guidance for this tool as well as an example, refer to the **Resource Book** on page 106.



It is important for all members of the team to feel safe sharing what they think. This will help contribute to a more creative and authentic discussion.

3. WHAT DOES YOUR TEAM NEED IN ORDER TO BEGIN THIS PROJECT?

Discuss as a team what sort of resources, budget, timeline, and staff that you need to have in place. This doesn't have to be detailed but it helps you scope your resources effectively. Who should be part of the design team? Who else should be included in key moments of the process? How might you elevate the voices of those you are serving throughout this process? Take notes below.

4. WHAT ARE THE LOGISTICS OF THE PROJECT?

Take a few minutes to discuss as a team what roles are needed on the team and who will fill those roles. Who is the Design Lead? How long is this project scoped for (between now and the pilot, implementation, and launch of the solution)? How much funding do you have to spend on the design process? Take notes below.



30-60 minutes

REFERENCE LIST

WHAT ARE YOUR SOURCES OF INFORMATION?

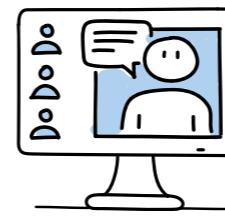
Be sure to capture all the **secondary sources of information** that you used during this process.
Make a list below.

Instructions: As a design team, use this tool to make a list of all of the research sources that informed your work during the **Project Launch** and **Understand Phases** of the project.

UNDERSTAND: DIGITAL TEMPLATES



UNDERSTAND: DIGITAL TEMPLATES



All of the **tools and resources** have **digital versions** that will allow your design team to capture your work, share it with others and collaborate while working remotely. Scan the **QR codes** below to access these resources.

#1

CHALLENGE BRIEF TEMPLATE

Use this slide deck template to create your team's **Challenge Brief**.



Scan this QR Code or [click here](#) to access a Challenge Brief slide deck template.

#3

DESIGN WORK JOURNAL PDF

Use this PDF of the **Design Work Journal** to capture the most important information from each phase of the design process, as well as reflect on and improve the quality of your design work. Your design team will use the same Design Work Journal throughout your project.



Scan this QR Code or [click here](#) to access a PDF of the Design Work Journal.

#2

UNDERSTAND PHASE MURAL TEMPLATE

Use this Mural template to complete your team's **Understand Phase**.



Scan this QR Code or [click here](#) to access a template in Mural, an online collaborative platform.

#4

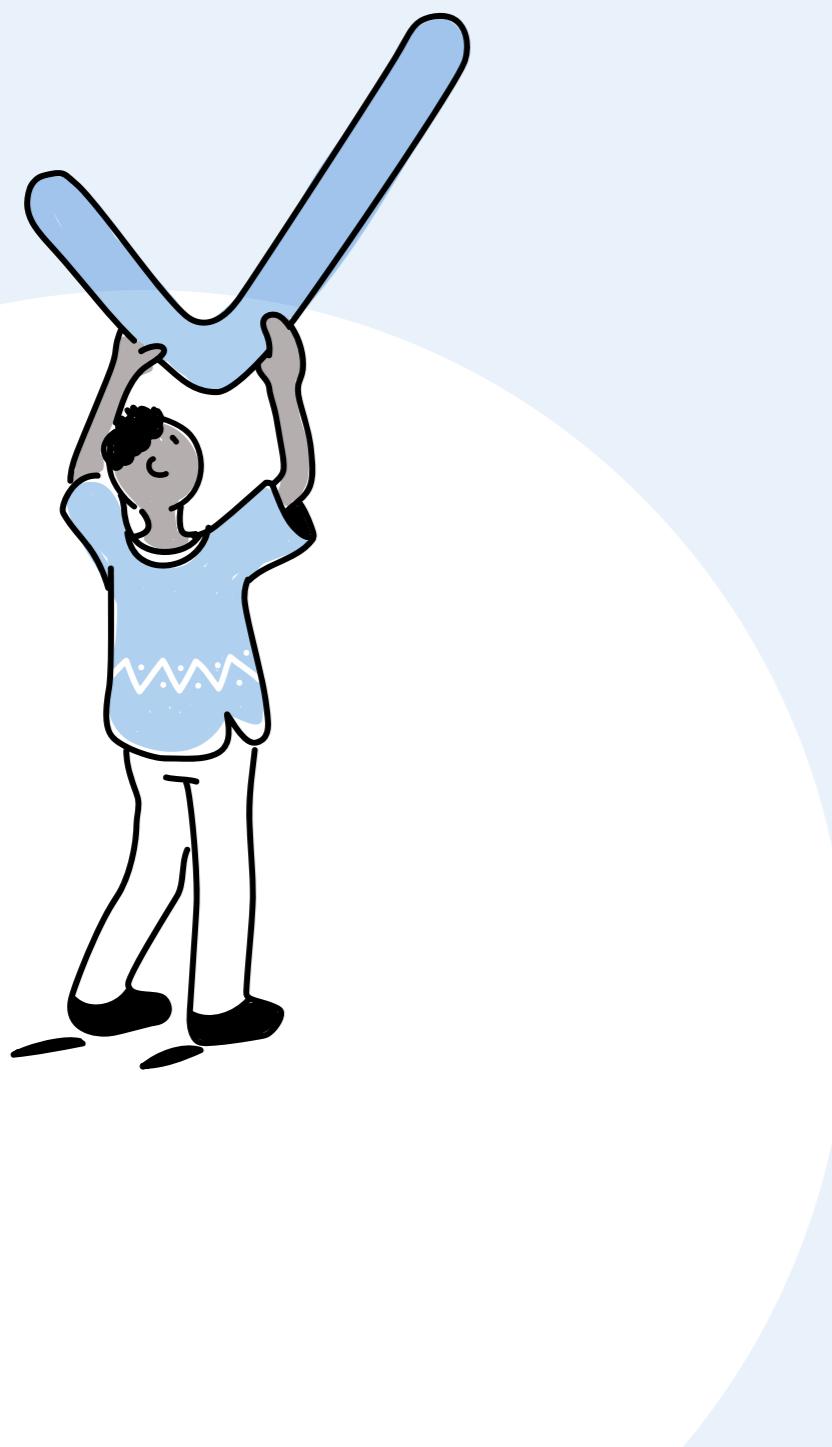
DESIGN WORK JOURNAL MURAL TEMPLATE

Use this Mural template of the **Design Work Journal** to capture the most important information from each phase of the design process, as well as reflect on and improve the quality of your design work. Your design team will use the same Design Work Journal throughout your project.



Scan this QR Code or [click here](#) to access a template in Mural, an online collaborative platform.

UNDERSTAND: CHECKLIST



Congratulations on completing the **Understand Phase** of your design challenge. At the end of this step, your design team should feel aligned about the problem space you are working on.

At the end of every phase of the design process, use the checklist provided to make sure you are making progress and are ready to move forward.

BY NOW, YOU SHOULD HAVE COMPLETED THE FOLLOWING:

- Complete the tools of the **Understand Phase** that were listed in your design pathway; depending on your design pathway, you may skip this phase.
- Document your work in your **Design Work Journal** through pictures and reflections on what you learned
- Complete the **Team Alignment** exercises in your **Design Work Journal**
- Complete the **Equity Reflection** exercise in your **Design Work Journal**
- Complete the **Process Reflection** exercise in your **Design Work Journal**
- Use the **Process Critique** tools in the **Design Work Journal** to reflect on the quality of your design work



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02
UNDERSTAND

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