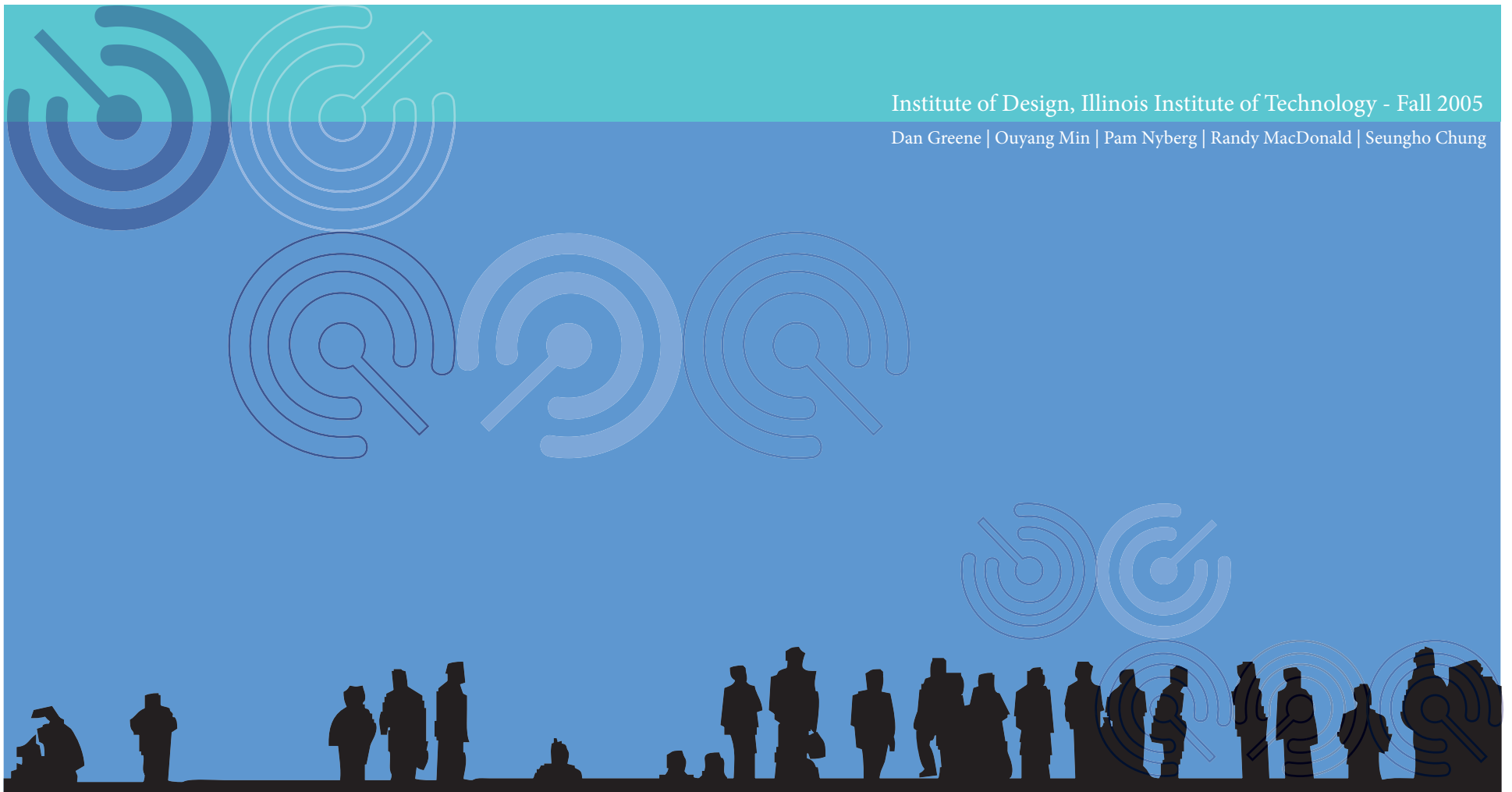


# DESIGN THINKING A Campaign for Policy Design Synthesis

Institute of Design, Illinois Institute of Technology - Fall 2005

Dan Greene | Ouyang Min | Pam Nyberg | Randy MacDonald | Seungho Chung





# Table of Contents

Preface

Introduction

System Elements

## 1. Soapbox

- Design Policy Synthesis Conference
- Lecture Tour
- Design Policy Synthesis Book
- Design Policy Synthesis Workshop
- Success Story Sheet
- CDPS Web Site
- Forums for Discussion
- Powerful Articles
- Creative Messages

## 2. Stylus Operandi

- Communications Design Group
- Style Guide
- Style Assurance

## 3. Content Kangaroo

- Content Creator
- PlugNPlay
- Content Warehouse

## 4. Impresario

- eTribe
- Thanks Team
- Stuff Management
- Show Me the Money
- Communication Mediator
- Meeting Assistant
- Task Overseer
- Resource Manager

## 5. Cross Trainer

- CrazyTrain
- BootCamp
- CardPlay

## 6. Recon

- Current Issue Search
- Choose-Your-Own-Campaign
- Research & Analysis Toolbox
- Remote Usability Testing System

## 7. Outreacher

- Contact Database
- Greasing the Wheels Gift
- Buying Time
- Professional Translators

## 8. Delta P

- State-of-Affairs
- Innovation Progress Newsletter
- Status Checking Bulletin Board
- Impact Survey
- Change-in-action Database
- Campaign Documentary
- Change Agent Monitor
- Campaign Transitioning Workshop

## 9. Media Dashboard

- Questionnaires
- Commercial Ratings Services
- Cost and Value Assessment Features

## 10. Partner Pool

- D-friends Yellow Pages
- Join-iT
- MediaXpert Alliance
- Advisory Board DB
- Volunteer Share
- Multimedia RecruitID

Conclusion

Appendix





# Preface



## Background

In the 1980's, with the first comprehensive gathering data on global warming, tangible effects of population growth began to be firmly associated with the actions of industrial society. Meeting the demands of a growing population for material goods was beginning to be seen as a two-way street. The concept of a "better life" was beginning to like a relative one-briefly better, relative to the past, but frighteningly better, relative to a very uncertain future.

Because few listened when something might have been done about it, we are now confronted with global warming as an observable, highly threatening fact. Like many other massive events, it took a long time to gain strength, and it will take longer to lose it. It is still in a strengthening pattern, and it is hard to see how that will change in the foreseeable future.

In spite of world-wide awareness, population growth also is still in an accelerating phase. The population of the world is now 6.46 billion and rising. Just 50years ago it was 2.76 billion. Despite the fact that almost all developed nations are at replacement –lower birth rates- or lower- world population is still on a steep incline because of high birth rates in developing countries. Before world population begins to level off, we can expect to see the number to see the number rise to over 10 billion –barring catastrophic events.

And catastrophic events are distinct possibilities, growing in probability every year, all because of population growth. A better life for a growing population –even eliminating poverty, as the September 2005 issue of Scientific American argues as a goal-means more energy to be produced and more resources to be processed.

Without sustainability, this can only mean unchecked resource depletion and uncontrolled greenhouse gas emissions, both will generate disasters at an accelerating rate.

Global population growth and the problems it has induced –from resource depletion to global warming – are arguably the most serious threats ever to our civilization. But as we finally commit to confronting them, technologies now just evolving will put awesome new capabilities at our disposal. We may yet be able to escape the worst ravages, perhaps even bring better of life to our descendants. The question is , will our political decision makers have the wisdom to avail themselves of the right tools at the right time? Will we be able to avoid the worst of projected disasters and make best use of the new technologies? Decision makers will need the best of creative thinking from the science community-and form a design community prepared to contribute.

The evidence is that decision makers are not using-or receiving-the full range of advice they need. Advice that offers proactive, constructive, creative options for action is not being heard. The design community must assume new responsibilities and reinvent itself to fill this void. On so doing, it will have to rethink matters of education, research and professional activity, and it will have to prove to leaders that design thinking is a critically valuable asset.



## **Relevant Trends**

*Trends initiated by emerging technologies, changing environmental conditions, and evolving social needs and interests will have a significant impact on the needs and aspirations of individuals, states, nations, and the world at large.*

*Design must understand the causes and implications of the trends specifically mentioned here if it intends to help others sculpt holistic solutions to address them.*

### ***Food production on land***

Food production for a growing population is an absolute requirement. In the last 50+ years, beginning with the green revolution that virtually saved India from starvation, the rise in food production has outstripped population growth. But arable land per capita continues to decrease—by 2050, it will have decreased over 62% since the 1960's—and productivity cannot increase indefinitely.

### ***Food production at sea***

The oceans, once thought to be a limitless food source, are fast becoming a depleted resource. Stocks of wild finfish and shellfish are declining alarmingly. The fish industry is turning more and more to deep-water species to replace them, often with little knowledge of the biology of the replacement species.

### ***Water resources***

Already in many parts of the world, water supplies are reaching levels of insufficiency. Complicated by agricultural needs for irrigation and the need of urban centers becoming mega cities, the fresh water resources of our lakes, rivers and subsurface aquifers are subsid-ing. In 2003, 9,500 children were dying daily from insufficient or contaminated water supplies. One-third of the world's population, by some experts' analysis, live in water-stressed countries now, with two-thirds of the world to share their dilemma by 2050.

### ***Mineral resources***

Mineral resources are approaching finite limits, exhausted in some locations, more difficult to extract in others. While supplies of some minerals are in no immediate danger, others are under severe pressure. Oil is a resource of vital concern, with production expected to peak in this decade or shortly thereafter. The Hubert curve, long-used as a predictive tool in the petroleum industry, when coupled with modern corrective tools, predicts that we are reaching worldwide peak production now and face a reduction in production of approximately 3% per year very soon. Not only will that oil production have to be replaced as an energy source, additional energy sources will have to be found to keep pace with the population curve.

### ***Population movement***

In an interesting paradox, the countryside is becoming less—not more—inhabited as we add to the population. The people are moving from the country to the cities. As of this year, 2005, the world is more urban than rural for the first time. In the next fifteen years 300 million rural Chinese will move to the cities. In 1050, only two cities in the world, Tokyo and New York City, were over 10 million in size. By 1975 there were 4 such mega cities, and by 2003, there were 20. By 2015 there will be at least 22. In China alone there are between 100 and 160 cities with over 1 million inhabitants (America has 9, and Eastern and Western Europe together have 36). Cities are complex, sophisticated systems, but their managers will need all the skill they can command to deal with the great urban migration.

### ***Climate change***

Climate and weather patterns are changing. Some regions are simply getting drier or wetter, but the greatest damage will come from sustained, severe droughts and intense, prolonged flooding. The problem is change: eco-systems confronted with wetter or drier conditions for periods far longer than the environment or its inhabitants are prepared.



## **Relevant Trends**

### ***Raising Ocean Levels***

Ocean levels are rising. Temperature rise under global warming is greatest at the poles, and polar melting is accelerating. Melting icebergs have little effect on rising water levels because the ice is already floating, but ice melting on land, such as in Greenland and Antarctica, will contribute to rising water levels, and the thermal expansion of water as it is heated a degree at a time will also contribute. The intergovernmental Panel on Climate Change in its 2001 report, estimate a 45 cm (18 inch) mean rise by the end of the century with a low estimate of 9 cm (3.5 inches) and high estimate of 88 cm (35 inches ). Many of the world's major cities are on ocean coasts or waterways close to the oceans.

### ***Storm Violence***

The increased heat energy created by global warming is feeding more violent storms. Storms over the water will increase in number and in violence. Storms over land, although less subject to the stimulation of ocean heat, will draw from the weather system that build over the oceans and move readily onto land. All but the regions most remote from the coasts will be influenced. Category 4 and 5 levels can be expected increasingly for hurricanes, cyclones, typhoons and tornados

### ***Moving Ecological Zones***

On a longer scale, climate changes are moving the zones in which species can live. Warmer winters, earlier springs and hotter summers are changing key environmental characteristics crucial for species' survival, even existence; and as ecological zones migrate northward (or southward in the southern hemisphere), they will do so at a pace too fast for plant species to follow. When species disappear, others dependent on them are also affected, and eco-systems disintegrate. Biodiversity will decrease and extinctions will take place.

### ***Increasing Expectations***

The growing availability and capabilities of communications such as cellular telephones, satellite and cable TV, and the Internet across the country (and the world) are providing people with daily knowledge of living conditions, problems, products, threats and services everywhere. The media are creating growing avenues for fast communication between protectors and populace. They are also educating the populace on the state of conditions and creating expectations that both fuel demand and create willingness to change.

### ***Internet Penetration***

Computer use and Internet access grow exponentially every year. Information of encyclopedic detail can be obtained more and more easily, and complex, sophisticated processes can be used remotely. Access to high-quality communications and sophisticated computer tools are increasingly available to individuals and groups anywhere. In the United States, Internet penetration has reached 67%.


### ***Emerging Technologies***

The pace of technological change continues to accelerate, bringing new science to commercial, institutional and industrial uses at an ever quickening pace. Most notable among many fields, major technological innovations can be expected in the new disciplines of molecular nanotechnology, robotics and the biosciences.

### ***New Relationships***

Greater public mobility and access to information is changing the nature of association for many individuals and organizations. Organizations that once operated in isolation are now players in a common environment. Sometimes the emerging relationships are competitive, sometimes cooperative. New forms of relationship can be expected and created as conditions evolve..



 **Project Statement** *Using Structured Planning methodology, develop a proposal for a communication campaign to inform and convince governmental and institutional leaders of the value of design thinking for policy planning. The proposal should:*

Address opinion that high-level decision makers presently hold of design and the design community.

Suggest means, as practicable, for active demonstration of the value of design thinking.

Involve local, regional, national and international professional design organizations.





## Goals

*As general guideline a proposal for a campaign to promote design thinking in policy making should:*

- Consider both high- and low-tech media as they are appropriate.
- Include ideas for content and structure—including procedures, policies, events, activities, organizational concepts and relevant relationships among them.
- Explore revolutionary as well as evolutionary ideas.
- Consider the educational process through which individuals and groups learn to work with and use elements of the system and its associated resources.
- Accommodate all users of the system, from implementation to adaptations and provide for them in the design. Thoroughness is a step toward system integrity.
- Consider potential costs and funding thoughtfully; the proposal should not incorporate unnecessary frills, but it should not sacrifice effectiveness for low cost.
- Treat the design problem as design from the inside out; user operational needs come first, with every attempt possible made to satisfy them in some way, even when tough decisions must be made.
- Conceive the properties and features of the communication process as means to build trust and cooperation between schools, research institutions, professional organizations and the governmental and institutional leaders all will support.
- Consider the project as one component of four demonstrating advanced design thinking and showing how it can be extended to decision making at the policy planning level.

***Overall, the solution should:***

- Assume that the proposal can be acted upon as it is conceived.  
Do not underpropose on the assumption that a concept might be politically opposed.
- Demonstrate what might be achieved.  
The value of the proposal is in its ideas, not its certain attainability.  
Ideas that might not be fully attainable under today's conditions may be incrementally achieved tomorrow—if they are known.



## The Process

The semester-long Systems and Systematic Design course is a project-based course in which teams of graduate students, deliberately of mixed international origins and different academic backgrounds, apply the computer-supported Structured Planning process to complex design and planning problems. The goal for each project is to develop information thoroughly, propose innovative solutions that take maximum advantage of the information, and integrate these ideas into system concepts that can both be evaluated in their own right and (in a real situation) be the comprehensive project specifications for a follow-on detail design phase of development.

## Course Issues

**Complexity.** What is the nature of “systems” concepts, where products, processes, services and settings are organized to act together to achieve multiple goals? What can be done to assure that a concept is as complete as possible, covering many functions and attaining a high degree of “wholeness” and organic reliability?

**Design and planning methods.** What is Structured Planning and how can its tool-kit of methods be used to collect, structure and handle information in projects of greater complexity than can be comfortably dealt with intuitively? How can such methods be used by a team to extend the effectiveness of all?

**Teamwork.** How do individuals with different cultural origins and different academic backgrounds work together successfully on teams? What roles are there to be played and what difficulties must be overcome?



## **Structured Planning**

Structured Planning, the systematic planning process taught in the course, is a process for finding, structuring, using and communicating the information necessary for design and planning activities. It is a front-end process for developing concepts thoroughly and cohesively.

A number of projects have been undertaken with it and used to further its development. Among nearly 100 of these, an early published project for Chicago's transit authority (CTA) was *Getting Around: Making the City Accessible to Its Residents* (1972). In 1983, the *House of the Future* project won the Grand Prize in the Japan Design Foundation's First International Design Competition. In 1985, the design of a habitation module for Space Station was undertaken for NASA. In 1987, the *Aquatecture* project won the Grand Prize again in the Japan Design Foundation's Third International Design Competition. In 1991, Project Phoenix on global warming was honored as Environmental Category Grand Winner in Popular Science magazine's "100 Greatest Achievements in Science and Technology" for the year.

In 1993, two award winning projects, NanoPlastics and Aerotecture, were widely publicized in Europe and Japan; in 1995, the National Parks project developed plans for the future of the U. S. National Park Service. In 2001, Access to Justice, a project sponsored by the National Center for State Courts, was implemented for use in state courts across the United States, and in 2005, four projects on Home, Play, Work and Health were finalists in four of the five competition categories for Denmark's INDEX Awards, the world's richest design prizes. As the process has evolved, it has become an increasingly useful planning tool for products, systems, services, processes and organizations. It is now being used commercially. A diagram of the process, shown below in two figures, outlines the activities that make up Structured Planning and the working documents and final products that are produced along the way. The following general description follows the diagram. Where products of the process are discussed here in the abstract, it is possible to see specific examples produced for this project in the appendices that accompany this report.



# **Structured Planning**

## **I Project Definition**

The Structured Planning process begins with Project Initiation and the production of a Charter. This is a “brief” that serves as an initial communication vehicle between client and planners. It contains background, context, basic goals, a project statement that cuts to the heart of the planning task, resources to be used, and an initial set of issues to be investigated.

Defining Statements are mini “white papers” produced in the Framework Development portion of Project Definition. They focus the project within the direction of the Charter, concentrating on the issues and arguing specific directions that the project should follow with regard to them. Together with the Charter, they define the project.

## **II Action Analysis**

Any system can be viewed as a complex entity working with its users in different ways appropriate to its modes of operation. To plan effectively, a planning team must recognize these Modes, identify Activities that occur within them, and isolate the Functions that the users and system are intended to perform within each Activity. The result of the Activity Analyses conducted is a Function Structure.

Half of the purpose of Action Analysis is the enumeration of Functions. The other half is the development of information about these Functions that reveals insight about what happens as they are performed. During Action Analysis, insights are sought about why things go wrong in performing some Functions, and how other Functions manage to be performed well. These insights are uncovered in the Design Factor Description procedure and developed in documents that become part of a qualitative knowledge base. Activity Analyses record information at the Activity level; Design Factors document insights and ideas associated with Functions.

To capture as fully as possible the ideas suggested on Design Factors,

Solution Element documents are written in the Solution Element Description portion of Action Analysis. These are one-page documents designed to capture enough detail about ideas to give them substance when they are needed later. They have three important sections: “Description” -- a short explanation, “Properties” -- what the idea is, and Features -- what the idea does. The Solution Element form is the tool used for committing ideas to paper.

The product of Action Analysis is three sets of critical information: a set of Functions (the Function Structure), a set of insights (Design Factors) and a set of preliminary ideas (Solution Elements).

## **III Information Structuring**

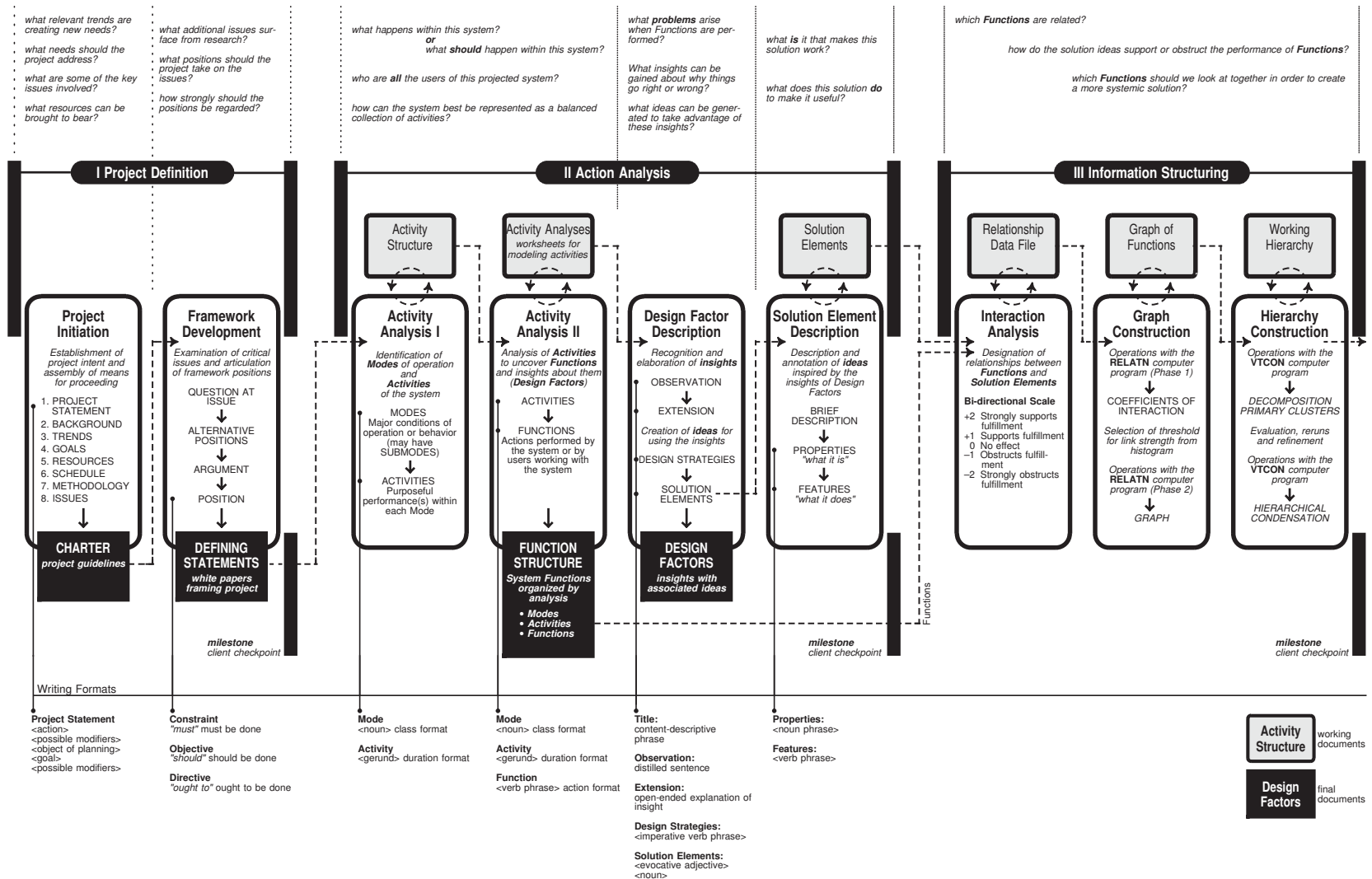
Paradoxically, as useful as the Function Structure is for establishing coverage, it is not the best form of organization for developing concepts. Reorganizing information for use in concept development is the job of two computer programs, RELATN and VTCON.

The controlling factor for whether two Functions are associated from the planning standpoint is not whether they are categorically “related” in some manner, but whether a significant number of their potential solutions are of concern to both. Which Solution Elements are of concern to each Function is established in an Interaction Analysis procedure. The RELATN program then uses this information in a Graph Construction process to establish links between Functions.

Another program, VTCON, completes the information structuring process. The graph establishes paths through the Functions by linking them when they are related, but, unlike a road map, a graph is not naturally arranged nicely for visual comprehension. In the Hierarchy Construction activity, VTCON finds clusters of highly interlinked Functions and organizes them into a semi-lattice hierarchy, a very general form of hierarchy most appropriate for planning. The hierarchy is called an Information Structure.



# Structured Planning





# Structured Planning

## IV Synthesis

In its form from the VTCON program, the Information Structure is simply a hierarchical organization. Nodal points do not have names. The task of Means/Ends Analysis is to create labels for all nodal points in the hierarchy. Moving bottom-up from the known Functions in the bottom level clusters, the question is asked, “To what end are these Functions means?” The answering purpose, in turn is grouped with its sibling nodes and viewed as means to a higher level end. The process continues to a completely labeled Information Structure.

The process is then reversed as a top-down, structured brainstorming procedure: Ends/Means Synthesis. In this process, the planning team asks of high level nodes, “what means do we need to meet this end?” As means are established, they are treated in turn as new ends for which means must be found, until the means become concrete enough to be described as final elements of the system (System Elements). Solution Elements originally conceived for the Functions involved are constantly reviewed as possible end products. New ideas, however, are encouraged, and original ideas are modified or combined in the light of the means that evolve.

During Solution Evaluation, features of the System Elements are evaluated for their contribution to fulfillment of Functions in their part of the Information Structure. If there are unfulfilled Functions, this is the signal to return to the Ends/Means process for additional development.

System Element Interaction compares System Element with System Element in a search for additional synergies that can contribute to systemic qualities. More than simply recognizing relationships, the planning team proactively seeks out ways for System Elements to work together -- to the extent of modifying one, the other, or both. Changes are incorporated in the properties and features of the individual System Elements. The last task, System Element Description, completes the write-up of System Elements as specifications, including a succinct description, all relevant properties and features, and extensive Discussion and Scenario sections that contain detailed expositions of the ideas in both conceptual and operational terms.

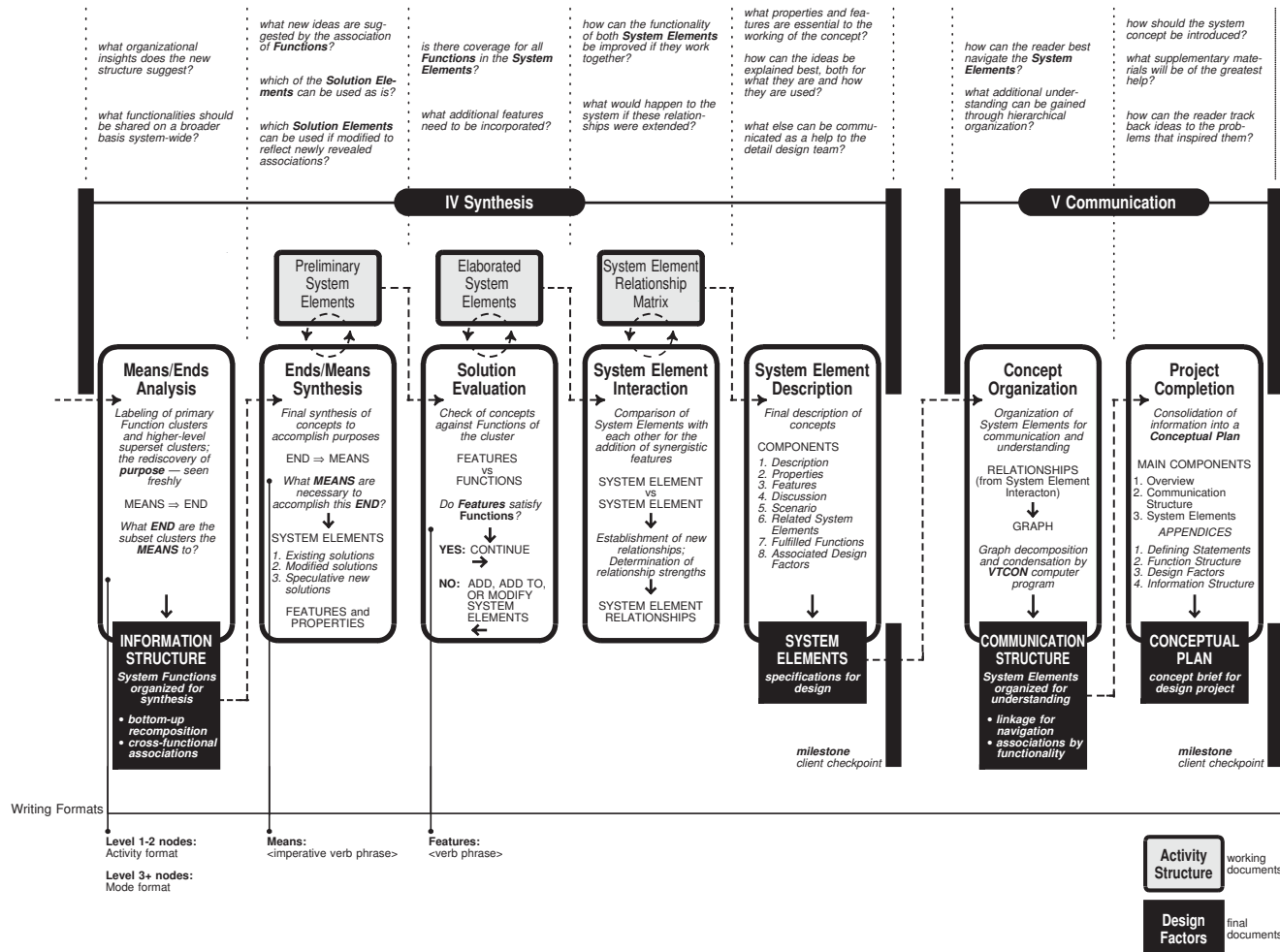
## V Communication

Because the result of the Structured Planning process is a complex system, usually with a number of System Elements, a Communication Structure is frequently included as an aid to understanding. This is created during Concept Organization by the VTCON program from an assessment of how important the System Elements are to each other's operation. Using this structure, the reader can understand the system and navigate its concepts with greater efficiency.

The product of the Structured Planning process, assembled in the Project Completion section, is a Conceptual Plan, made up of an Overview that provides background and introduces the system, the System Elements that describe the ideas and their relationships, and Appendices that contain all relevant support information, including the Defining Statements, Design Factors, Function Structure and Information Structure.



# Structured Planning







### **Planning Team**

#### ***Dan Greene***

BA Music Composition, Dartmouth College (Hanover, New Hampshire)

#### ***Randy MacDonald***

BS Mechanical Engineering, Illinois Institute of Technology (Chicago, Illinois)

#### ***Pam Nyberg***

BA Mathematics, DePauw University (Greencastle, Indiana)

Product Design, Stanford University (Stanford, California)

MSIOE Plant Ergonomics & Occupational Safety, University of Michigan  
(Ann Arbor, Michigan)

#### ***Min Ouyang***

BE Industrial Design / ME Computer Application, Zhejiang University  
( Hangzhou, China)

### **Project Advisor**

#### ***Charles L. Owen***

Distinguished Professor Emeritus, Illinois Institute of Technology





# Introduction



## Introduction

There is growing concern around the world that our planet is becoming an ever more unstable place to live. Many global citizens have adopted this view as they witness terrorist attacks, mounting sociological and economic problems, and increasingly more frequent, more violent natural disasters, quite possibly result of our indirect assault on the environment.

There's no denying that these issues are terribly complex, and there's a growing sense that current leaders in positions of power are either unwilling or unable to address them. So, how did we reach this point?

One of the most major contributors to our current plight is that political decision makers haven't sought the type of multi-disciplinary guidance necessary to help them design thoughtful strategies. Perhaps they don't recognize their lack of knowledge, but they should certainly realize that we are living in a time of change and that we need to make smarter choices. By learning from strategically savvy individuals and by leveraging their expertise, policy makers could ultimately develop policies that are proactive, holistic, and serve the best interests of their citizens.

Such an approach to solving complex problems is called "Design Thinking." It can be more specifically defined as a holistic process that identifies and analyzes system level problems and then develops creative, overarching solutions that satisfy human needs and improve lives in an environmentally responsible way.

Although Design Thinking may seem like a new discipline, its fundamental philosophy has been in existence for centuries. While some leaders have chosen to ignore it, as had the ancient Mayan and Anasazi rulers as well as those governing modern Rwanda and Haiti, others have used it to create a sustainable society, as in Japan and Singapore. Noted scholar Jared Diamond<sup>1</sup> details this successful adoption of Design Thinking principles in his book *Collapse*, describing an outsider's depiction of Japan in 1650. Seemingly on the verge of a societal collapse, catastrophic deforestation and an overabundance of competition for diminishing resources had triggered an environmental crisis. Such tremendous stress on the nation's habitat, in addition to its rapid population growth, was due mainly to a shift in focus from warfare to peace and prosperity beginning in 1603. By 1720, Japan's city of Edo had become the world's most populous urban center.

With the end of warfare in Japan came the establishment of the Shogun as the chief hereditary ruler of the warrior estate, and military force became his monopoly. This strong central government was able to enact the policies that it saw fit, one of which was to cut Japan's contact and trade with the outside world. As a result, the nation was forced to meet most of its needs domestically, becoming virtually self-sufficient with regard to food, timber and metals.

---

<sup>1</sup> Diamond, Jared M. *Collapse*. New York: Penguin Group, 2005.



## Introduction

Deforestation was primarily the result of the dramatic population explosion of 1600s. By 1710, most accessible forests had been cut, and old growth forests only remained on steep slopes, in inaccessible areas, and on sites too difficult or costly to log using Japanese technology.

Deforestation hurt Japan because it limited the wood available for timber, fuel, and fodder, forcing an end to previously monumental construction efforts. Disputes over timber and fuel became increasingly frequent between different villages, within the villages themselves, and between villages and the Shogun. In addition, wildfires increased due to the second growth being more flammable than old growth forests. Furthermore, once forest cover had been removed, the rate of soil erosion on steep slopes increased during Japan's frequently heavy rainfall, snowmelt, and earthquakes. Flooding in the lowlands also occurred due to increased water runoff from the denuded slopes. Higher water levels in lowland irrigation systems increased storm damage as a result of soil erosion and flooding. Shortages of forest-derived fertilizer and fodder led to decreased crop yields at a time of increasing population, exacerbating the major famines that beset Japan from the late 1600s onward.

In 1657, a city fire and the resulting demand for timber to rebuild served as a wake-up call exposing the country's growing scarcity of timber and other resources. In reaction, the Shogun led a campaign to shift the thinking of the Japanese people, and over the course of the next two centuries Japan gradually achieved a stable population and much more nearly sustainable resource consumption rates. This shift was led from the top by successive Shoguns, who invoked Confusion principles to promulgate an official ideology that encouraged limiting consumption and accumulating reserve supplies in order to protect the country from disaster.

In response to the crises, the Shogun instituted a series of top-down measures aimed at correcting the imbalance between cutting trees and producing trees. One of the first signs of executive awareness occurred when leaders issued a warning about the dangers of erosion, stream siltation, and flooding caused by deforestation, further urging their people to plant seedlings. Beginning in the same decade, Japan launched a nationwide effort at all levels of society to regulate use of its forests. By 1700, an elaborate system of woodland management was in place, strictly regulating the harvesting and price of lumber.

Other initiatives focused on three stages in the wood supply chain: woodland management, wood transport, and wood consumption in towns. The Shogun paid for very detailed inventories of their forests, posted guards on highways and rivers to inspect wood shipments, and ensured that all rules governing woodland management were being obeyed. As a positive measure, Japan developed plantation forestry and viewed trees as a slow growing crop.



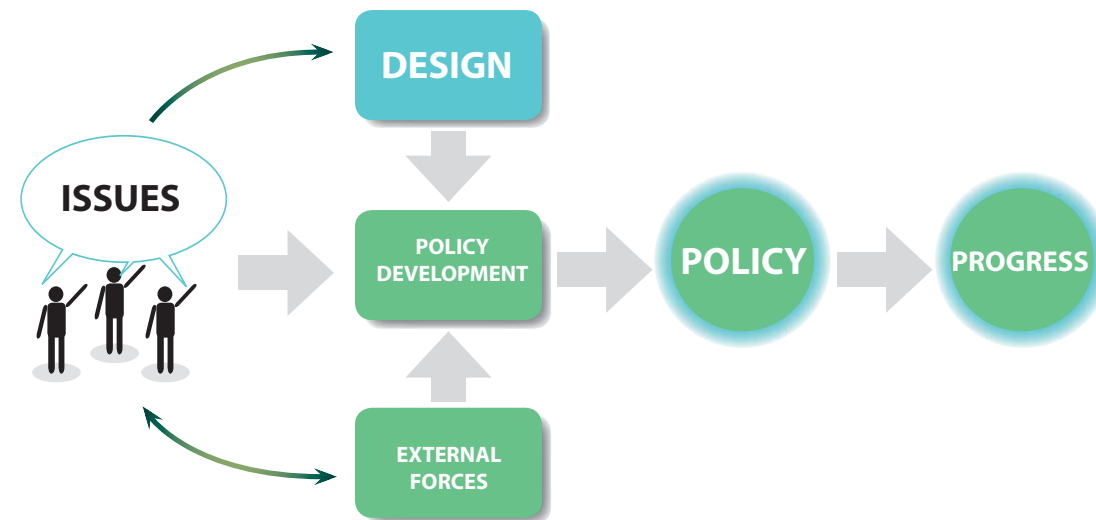
## Introduction

Today, Japan has the highest population density of any first world country, with nearly 1,000 people per square mile of total area. Despite the high population, almost 80% of Japan's land mass consists of sparsely populated forested mountains. Those forests are so well protected and managed that their density continues to increase, despite their continual utilization as a valuable source of timber.

In this example, it is evident that the Shogun's own campaign and use of Design Thinking in drafting policy helped Japan to achieve peace (at least for a significant period of time), political stability, and well-justified confidence in its own future.

Historically, the execution of Design Thinking principles was especially successful in non-democratic cultures, where brutal and dehumanizing penalties could be imposed for non-compliance with governmental mandates. Such practices may have been acceptable during the time of emperors, chiefs, and Shogun, but in modern democratic societies, they would rarely be entertained. Nevertheless, the underlying philosophy of Design Thinking is more important now than it ever has been due to the ever increasing interdependence among nations.

Because of the tremendous benefits that Design Thinking can provide to governmental and institutional leaders, a campaign blueprint for policy design synthesis has been crafted. Its intention is to educate influential leaders about the value of Design Thinking and urge them to include Design Thinkers in their policy development activities.

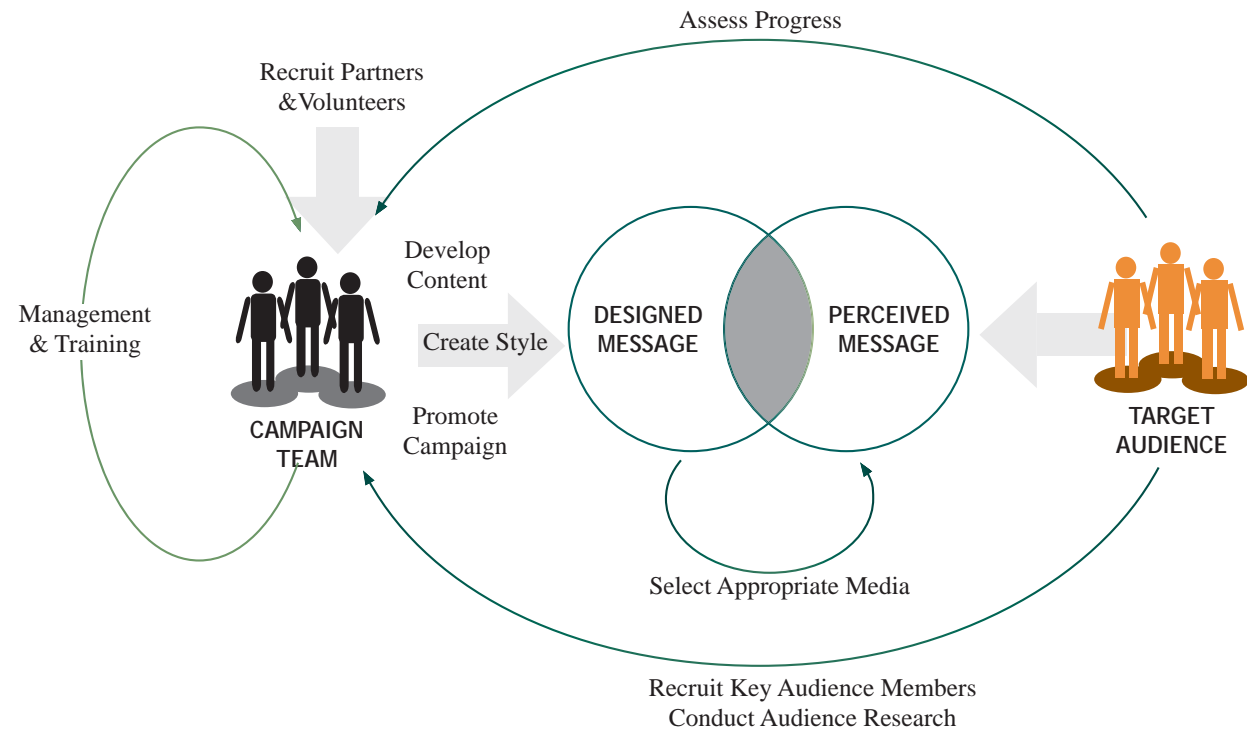




## Introduction

The Campaign for Policy Design Synthesis employs a system that addresses and integrates campaign management, content research and creation, content delivery to target audiences, and the monitoring of campaign progress.

### CPDS System Overview

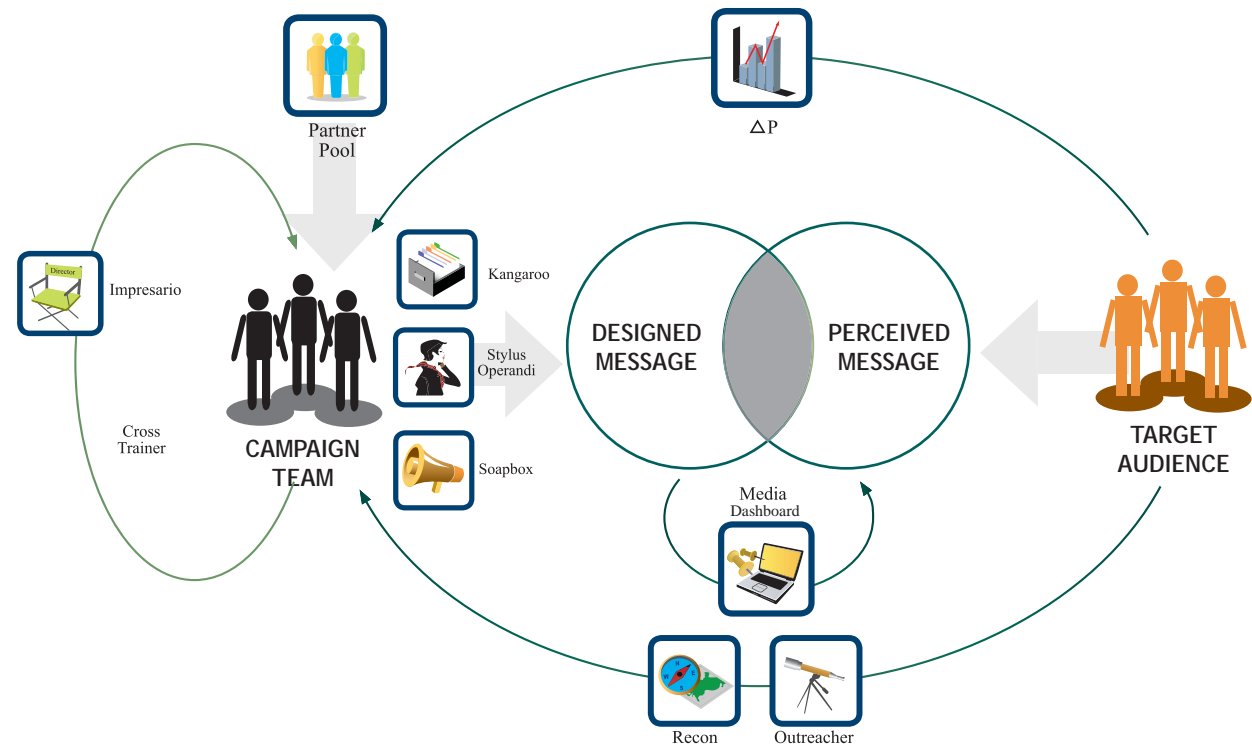




## Introduction

A more complete overview of the Campaign includes ten interdependent groups of systemic solutions. These system elements address the aforementioned functions.

### CPDS System Elements Overview







# System Elements



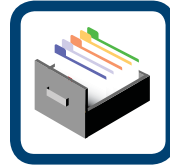
Soapbox



Stylus Operandi



Content Kangaroo



Impresario



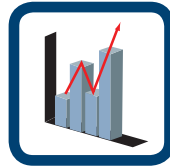
Cross Trainer



Recon



Outreacher



$\Delta P$



Media Dashboard



Partner Pool



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



$\Delta P$



Media dashboard



Partner Pool

### Elements

Design Policy Synthesis Conference  
Lecture Tour  
Design Policy Synthesis Book  
Design Policy Synthesis Workshop  
Success Story Sheet  
CPDS Web Site  
Forums for Discussion  
Powerful Articles  
Creative Messages

### Discussion

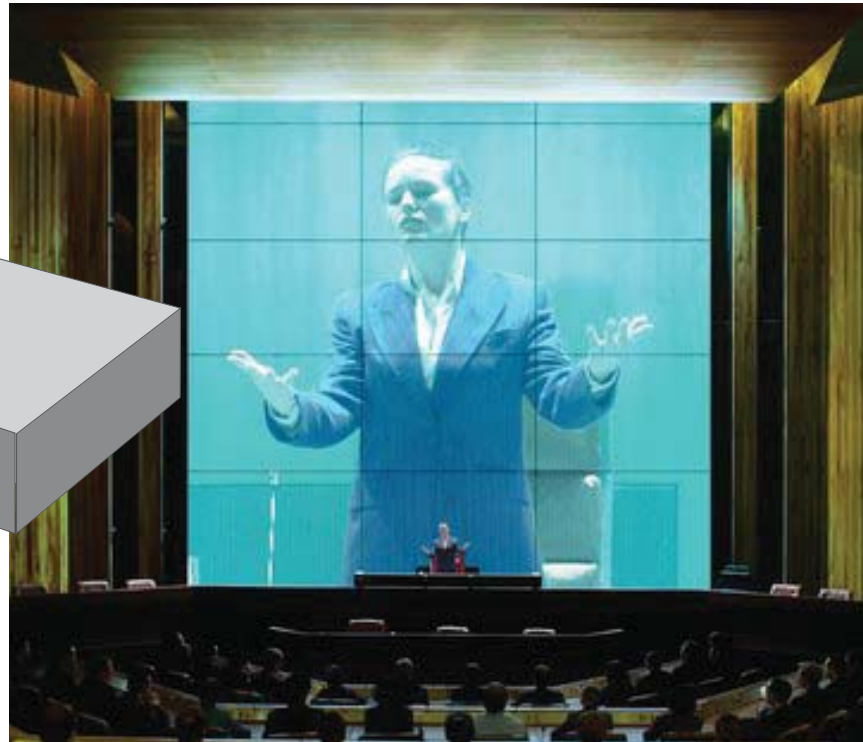
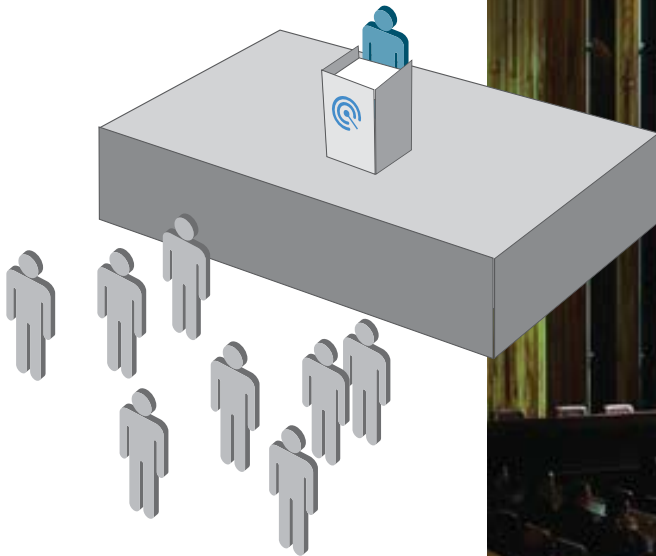
The Campaign for Policy Design Synthesis (CPDS) is a small organization determined to promote the benefits of Design Thinking in high and low level policy-making arenas. In order to accomplish this, the campaign must consider which means are most compelling to the desired audience. Because this audience – consisting of professionals, academics, policy makers and those who may influence policy formulation – is a diverse one, several different methods have been considered to effectively deliver the campaign message.

### Description

The Campaign for Policy Design Synthesis must have a strategy to reach its target audience and to correct misperceptions about Design and Design Thinking. Soapbox provides such a forum.

Taking the attributes of the target audience into consideration, Soapbox provides a variety of methods to reach them including Forums for Discussion, Powerful Articles, and Creative Messages. These elements are all designed to educate, provoke a response, and generate conversation around Design Thinking.





### ***Properties***

- Conference that showcases the promise of design policy synthesis
- Pre-recorded presentations created by leaders in policy Design Thinking
- Workshops to teach and demonstrate tools and frameworks

### ***Features***

- Establishes relationships with design and policy communities
- Provides interactive forums for design and policy discussions
- Provides methods to locate and recruit key note speakers
- Demonstrates innovative uses of new media technology

## **Design Policy Synthesis Conference**

The Design Policy Synthesis Conference is an event that showcases the promise and benefits of design and policy makers working together to craft public policy. This event brings together a range of speakers and workshop leaders who are experts in the field of Design Thinking. Those in attendance would be encouraged to engage with the speakers and participate in the workshops to gain a strong introductory understanding to the process behind design policy synthesis.

The first issue to be addressed is the establishment of a specific theme which would frame the campaign's message. To help determine an appropriate theme, the management team should use the capabilities of Recon to assess the current climate and make recommendations.

Another consideration for a successful conference is staffing. The campaign team must have adequate staff available to host the conference. A well-run event will require staff with skills in project management, logistics, publicity, content, communications, and web design. Impresario should be used to determine an effective organizational structure for the conference team as well as to recruit the appropriate staff and volunteers for the event itself.

Finally, conferences require money to fund rental of a venue, keynote speakers, catering, lodging for key participants, and a variety of other operational expenses. To break even – or perhaps make a profit – the campaign may consider charging or accepting donations for attendance. For assistance in dealing with these budgetary concerns, the Design Policy Synthesis Conference team should consult Impresario.



## Lecture Tour

Lecture Tour promotes the campaign message by sending key Design Thinkers to speak at universities, corporations and non-profits – places where target audience members typically reside. This tour provides campaign supporters with an opportunity to share their ideas with groups who have a vested interest in the potential for design participation in policy development. Speakers should have excellent presentation skills and be well-versed in design and policy development. Ideally, the same team who develops the Design Policy Synthesis Book should also lead Lecture Tour.



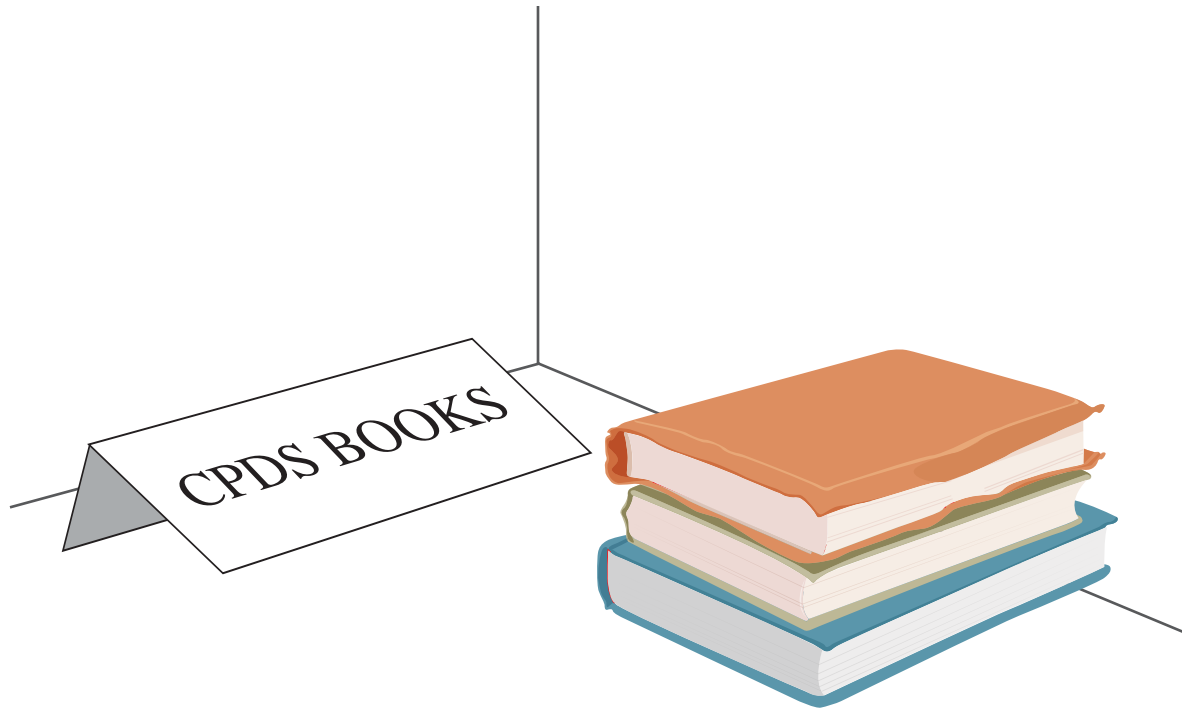
### *Properties*

- Plan to send knowledgeable staff members and Design Thinkers to speak about the need for policy design synthesis and the value such an effort would bring
- Lecture tour of educational institutions, corporations and non-profits

### *Features*

- Promotes the message that design policy thinking is needed for the world we live in
- Illustrates problems that can best be solved using design policy thinking
- Demonstrates how problems can be approached using design policy thinking
- Provides general education about the Campaign for Policy Design Synthesis





### ***Properties***

- Plan to write, edit and publish book on design policy synthesis
- Policy Design Thinking definition and its relevance for today's problems
- Promotional instrument of the campaign to disseminate its vision, goals and philosophy
- Database that contains relevant articles, sources, images and examples for writing a design policy synthesis book
- Plan to determine cost to publish book and the distribution channels that will be required to get the book to the target audience

### ***Features***

- Promotes campaign vision, goals and philosophy
- Helps interested people understand the benefits of design policy thinking
- Establishes perspective and legitimacy for the campaign
- Determines appropriate book for target audience and assures that it reaches that audience

## **Design Policy Synthesis Book**

Design Policy Synthesis Book is a comprehensive book on design policy synthesis. It will be especially appealing to those familiar with design who want to understand its application to policy making and to policy makers who are intrigued by Design Thinking. Those who already feel strongly about design involvement in policy development but don't necessarily understand how the campaign intends to instigate change will also find this publication illuminating.

The substantive content of the book should consist of a general definition of Design Thinking and must demonstrate how design involvement in policy making will yield true benefits to society and the environment.

Beyond a simple explanation of design policy synthesis, this book will promote the philosophy, ideas, and vision behind the campaign. By implementing Design Policy Synthesis Book, interested parties will be able to gain a complete understanding of the campaign, which may motivate people to participate or donate funds. Moreover, a well-written book will further enrich and legitimize the campaign.



## Design Policy Synthesis Workshop

One way to bring designers and policy makers together to experience each other's unique perspectives and sense of innovation is to organize a Design Policy Synthesis Workshop. This two or three-day course would be held at the Design Policy Synthesis Conference or at an independent event co-sponsored by a university or corporation. It might include a series of mini symposiums centered around campaign-related topics or simulation exercises requiring design policy synthesis through cooperative innovation.

The chief benefits of this workshop are to demonstrate the merits of design in policy development and to teach policy makers and designers how to use tools and methods that encourage multi-disciplinary design thinking to resolve problems. Consequently, attendees would promote the message of the campaign through word of mouth and return to their professional positions better equipped to tackle problems related to policy and design.

### *Properties*

- 2-3 day course taught at conferences or independently
- Set of activities to demonstrate design policy thinking
- Set of tools and frameworks designed to prime participants on design policy thinking

### *Features*

- Informs participants about the need for design policy thinking
- Teaches relevant tools and frameworks to participants through active engagement
- Provides an opportunity to reach policy makers and designers and to demonstrate how their talents can be combined to create a powerful synergy





## **Success Story Sheet**

Success Story Sheet is a one page case study detailing a success story of a nation or company using Design Thinking – ideally, policy design synthesis – to improve the lives of a populace, to generate profits or to achieve other environmental benefits. This case study acts to strengthen the campaign message by providing a concrete and timely example of a situation in which design policy synthesis has been successful.



### ***Properties***

- Case study detailing successful use of design policy thinking

### ***Features***

- Promotes successful efforts
- Demonstrates innovative design policy thinking





A main website is essential for the Campaign for Policy Design Synthesis to help promote its mission, ideas, and philosophy. Furthermore, it would provide a way to inform interested target audience members of relevant events, news, and other information.

In addition to CPDS Web Site, Stylus Operandi and Impresario should be consulted to determine what domain names would be most appropriate for the campaign.



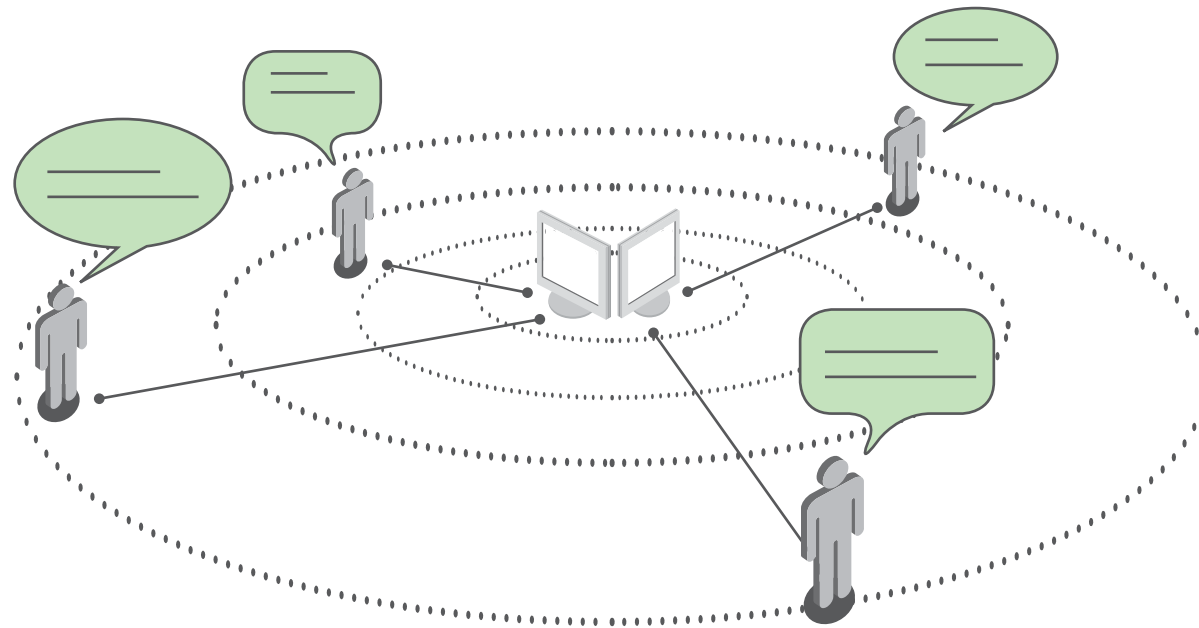
### *Properties*

- Website
- Business tool

### *Features*

- Promotes campaigns mission, vision and philosophy
- Provides contact and recruiting information
- Increases campaign legitimacy





## Forums for Discussion

In the near future, emerging media technologies will most likely obsolete current information distribution methods. In anticipation of this eventuality, Forums for Discussion should be established as a way of communicating campaign-related information using new media, including weblogs, chat rooms, podcasts, and streaming video. Forums also anticipates the use of even more advanced communication methods like 3D teleconferencing. Finally, Forums for Discussion encourages designers and policy makers to plan collaborative projects by leveraging these new technologies, possibly resulting in billable consulting hours for campaign partners.

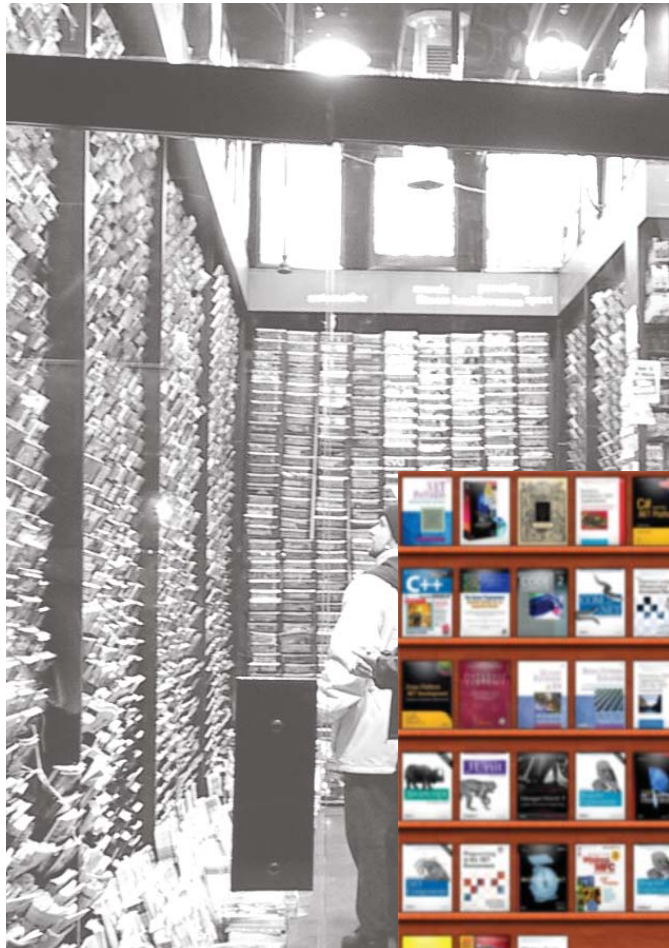
### *Properties*

- Interactive media
- Emerging media technology

### *Features*

- Allows for the exchange of communications and information between campaign and target audiences
- Utilizes new media technology such as podcasting, streaming video, and blogs to spread campaign message and educate audience
- Utilizes innovating tools such as virtual teleconferencing





## Powerful Articles

Powerful Articles is an initiative to leverage research and synthesis efforts by producing credible reports, articles, case studies and other papers. These papers would clearly and compellingly define Design Thinking and illustrate its benefits. Ideally, readers of these publications would develop an appreciation for and understanding of the campaign message and its importance. Moreover, they would more easily comprehend how Design Thinking and policy thinking can be used in conjunction to address global problems as well as more immediate issues faced by their own organization. Successfully placing these articles in respected publications such as Popular Science or The New York Times would broaden the campaign's reach, help to alter reader perceptions about design (and policy), and lend the campaign greater legitimacy.

### *Properties*

- Initiative to produce articles on policy Design Thinking to be published in distinguished publications
- Articles, papers and interviews

### *Features*

- Promotes campaign message
- Demonstrates power of policy Design Thinking
- Increases campaign legitimacy and recognition
- Improves understanding of how policy design synthesis can solve problems



## **Creative Messages**

Creative Messages is an evocative method for creating “buzz” and interest in the campaign. Messages could be as high-impact as a televised event in Times Square or as understated as uniquely-designed informational packages sent to high-level policy makers. However, Creative Messages should not merely be employed as a way to showcase good design, but rather they should reflect how Design Thinking can bring smart solutions to complex problem solving.



### ***Properties***

- Method to create “buzz” around campaign
- Leading by example

### ***Features***

- Creates buzz and interest through excellent, unique or even whimsical use of media channels
- Endorses good design and demonstrates the power of Design Thinking



## Soapbox



### Scenario

Nathan is a manager and part of the Impresario group within the Campaign for Policy Design Synthesis. He's a passionate supporter of the campaign but doesn't initially know how to promote it to the target audience. Before proceeding, he consults the sub-elements of the Soapbox master tool and finds several promising methods that make it possible for him to begin crafting a compelling promotion strategy.

Nathan begins by examining the data collected by Content Kangaroo and Recon. The process is time consuming, but once familiar with the general trends, he meets with the Stylus Operandi group to begin tailoring the campaign's communications style.

Now that Nathan better understands his target audience as well as the desired campaign style, he investigates the Powerful Articles approach described within Soapbox. Leveraging the collection of articles and lectures, Nathan begins assembling an article for submission to publications like Popular Science or The New York Times.

Having developed a better sense of the various system sub-elements and their interactions with each other, Nathan directs his staff to locate relevant Design Thinking content that could be used for Powerful Articles, the Lecture Tour, and the Design Policy Synthesis Book. Further use of the tools in Content Kangaroo and Recon enable Nathan to gather data, analyze it, and synthesis it in a way that can be presented effectively in the press.

Having written several articles which exemplify the power of Design Thinking, The New Yorker contacts him to discuss the publication of an article he wrote entitled, "Policy and Design Working to Combat Suburban Sprawl." Encouraged by this success, Nathan and the campaign continue their efforts, determined to share the virtues of policy Design Thinking with whomever will listen.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



△ P



Media Dashboard



Partner Pool

### Elements

Communications Design Group  
Style Guide  
Style Assurance

### Discussion

The Campaign for Policy Design Synthesis (CPDS) has a vision to promote the power of innovative thinking. With the help of a coherent, creative communications design approach, the central message can be effectively conveyed to target audiences. The desire for a strong campaign identity requires consistent repetition of the style elements. These elements should reflect the campaign's underlying philosophies and vision. Stylus Operandi, a style development toolkit, addresses such concerns through the inclusion of an internal style guide which defines the campaign style and the style elements' appropriate use in communication materials.

Customizable training exercises are also provided to familiarize staff with campaign "terminology." This training improves the chances that the campaign identity elements will be appropriately applied and that the campaign identity will have a consistent public-facing appearance. In addition, it will contribute to the cultivation of the campaign's internal culture.

Like coherence, creativity is essential when producing compelling communications for an audiences. As such, collaboration among talented designers is critical to the development of appropriate and inspiring messages.

### Description

Stylus Operandi is a versatile toolset that enables the campaign to articulate its message through effective communication design. It does this by establishing a core team of specialists, providing them with a style guide, and using training to reinforce the information contained in the Style Guide. Its constituent elements include a dedicated Communications Design Group, a campaign-wide Style Guide, and a Style Assurance process.





## **Communication Design Group**

The Communications Design Group is a team of inventive individuals professionally trained in communications design. Passionate and disciplined, they follow the guiding principles of the Style Guide closely and are well equipped to provide style training sessions for fellow staffers. Working in small groups, their tasks include website construction, developing animations to illustrate principals, designing graphics for communications materials, and supervising the implementation of the campaign's Style Guide.

### ***Properties***

- A compact and dedicated team with solid mastery of style guidelines
- A group of innovative individuals well-versed in communications design

### ***Features***

- Creates outstanding design graphics for the campaign
- Produces a variety of campaign communications materials including webpages, brochures, and banner ads
- Provides professional advice on how to approach design-related issues





## **Style Guide**

The Style Guide is an internal style guidebook developed by senior designers in the Communications Design Group. It establishes a consistent campaign-wide style language and aligns diverse teams with the campaign's singular vision. In addition to articulating the campaign's core philosophies and protocols, the guide dictates visual style constraints (e.g. logo colors, logotype, photographs, graphics), demonstrating each with relevant examples. Moreover, a series of templates are provided to facilitate and standardize the development of communications materials such as presentations, press releases, brochures, white papers, and webpages.

### *Properties*

- An internal manual dictating the design language of the campaign
- A set of design guidelines
- A set of standard communications templates

### *Features*

- Declares philosophy and internal culture of the campaign
- Establishes a set of style guidelines
- Ensures consistent style across all campaign messages
- Aligns disparate teams with the campaign vision



## **Style Assurance**

With the help of Style Assurance, an online style training tool, staffers become well versed in the principles of the Style Guide. Training sessions are adaptive, interactive and customizable, catering to a wide variety of knowledge levels, personal interests, and individual timetables. Campaign fundamentals are illustrated in the appropriate contexts, along with both proper and improper examples of style implementation. Finally, the application assesses staffers' proficiency through a battery of mock tasks, each exploring one or more facets of campaign style.

### ***Properties***

- Online training relevant to examples in the Style Guide
- Web-based assessment tool to examine campaigners' knowledge of the Style Guide

### ***Features***

- Enforces the rules and principles in the Style Guide
- Builds campaigners' comprehension of the style guidelines through progressive training
- Assesses campaigners' knowledge and mastery of the Style Guide using mock tasks





## Stylus Operandi



### Scenario

Andrea, a veteran communications designer at a leading advertising company, recently joined the CPDS Communications Design Group, a team responsible for developing publicity animations. Like all newcomers, she is required to complete an online training program contained within the Style Assurance application. This process is intended to orient Andrea to the campaign culture and design language stipulated in the campaign's Style Guide.

Andrea initializes Style Assurance and is immediately struck by the contrast between the campaign's style approaches and her own. To help bridge the gap she completes several training exercises, engaging in a multitude of highly interactive, illustrative examples to further her understanding of Style Guide's principles.

Following her successful completion of the training program, Andrea decides to broaden her knowledge of the campaign's more complex identity specs, taking notes from the Style Guide on Post-its and mounting them onto the small white board in her cubicle. In the ensuing weeks, she occasionally revisits Style Assurance to improve her campaign style proficiency.



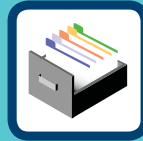
Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



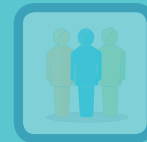
Outreacher



Δ P



Media Dashboard



Partner Pool

#### Elements

Content Creator  
PlugNPlay  
Content Warehouse

#### Discussion

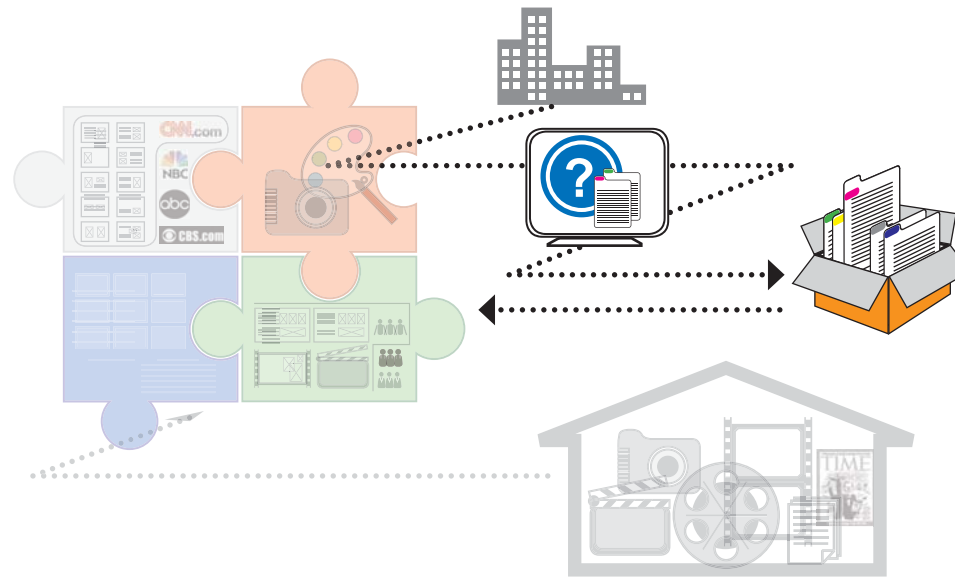
Running an effective campaign requires several key elements to be successful. First and foremost, one must identify its primary audience. After establishing the individuals to be targeted with a message, appropriate and consistent content must be generated which resonates with their experiences.

Knowledge management is another critical element which contributes to an effective campaign. Information will be gleaned during research, and inspirational reference materials will be identified for use during the development process. Additionally, campaign materials will be stored and referenced when preparing public facing communication content for presentations, press releases, and articles.

#### Description

To address these content creation and management needs, Content Kangaroo was established to encapsulate all required functionality. This system is comprised of three sub-elements. Content Creator is used to develop campaign content for various media types and key audiences. Content Warehouse is used to store and reference previously conducted research, previously created public facing materials, and examples of strong communication pieces from other campaigns or public service efforts. PlugNPlay facilitates flexible content creation by enabling standardized content modules to be plugged into a skeletal architecture.





## Content Creator

In the initial stages of content development, the team relies heavily on Content Creator, leveraging its creative brainstorming offerings with the goal of identifying compelling campaign directions, based on the previously conducted research.

Concurrently, companies are encouraged to share case studies which demonstrate solid Design Thinking with the campaign for use as examples of thoughtful design. These case studies are submitted through Content Creator's web based case study wizard to ensure that all submissions are in a consistent format.

Once audience and media research data have been analyzed, the findings are used to inspire content creation. To expedite the process, drag-n-drop templates are available within StoryBoard Quick software to accommodate novices, giving them the ability to create professional quality storyboards in a short time. As a complement, SureAids allows teams the ability to create functional storyboards by encouraging them to stage situations and capture them on film. Both of these tools can be used in conjunction with Apple's media creation software. Standard document creation software like InDesign or the Microsoft Suite of products are also provided within Content Creator.

### *Properties*

- StoryBoard Quick software
- SureAids which uses live people, a digital still camera and photo editing software to create quick storyboards
- Web-based case study wizard for use by companies submitting case studies
- Style templates library for various media types
- Document creation software
- Techniques for focused brainstorming

### *Features*

- Allows novices to quickly compose professional quality storyboards
- Allows team to create quick functional storyboards for a low price by staging situations and photographing them
- Allows companies to submit their case studies in a common format
- Serves as repository for relevant multi-media library
- Leverages sophisticated drag-n-drop functionality to facilitate quick content creation in templates
- Provides set of techniques for generating creative ideas related to a focused message

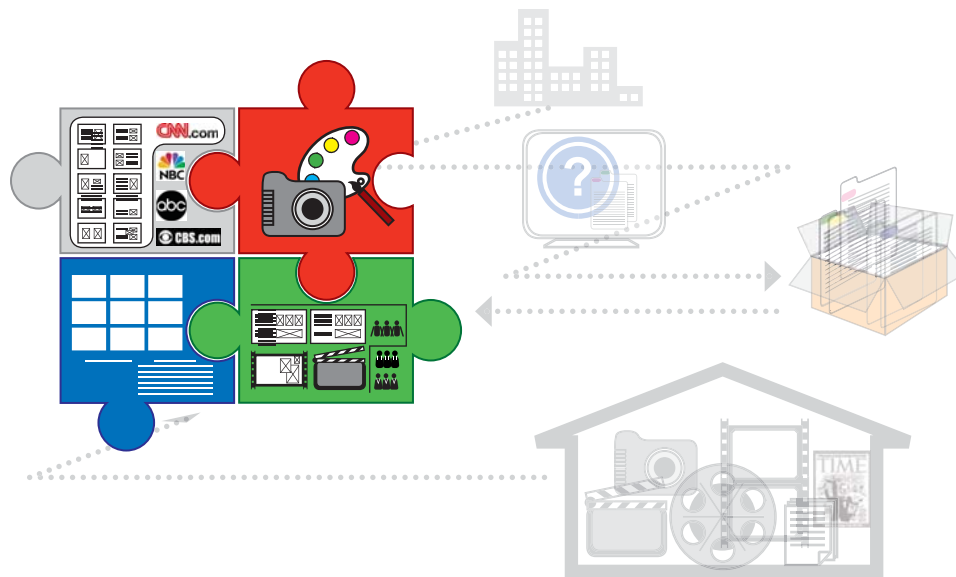




The structural requirements of each content module are dictated by PlugNPlay.

This platform architecture includes a skeletal architecture with standardized connectors, allowing any number of modules to be connected together.

The benefits of this object-oriented approach are modular compatibility, ability to swap modules into and out of the architecture, and simplified integration process.



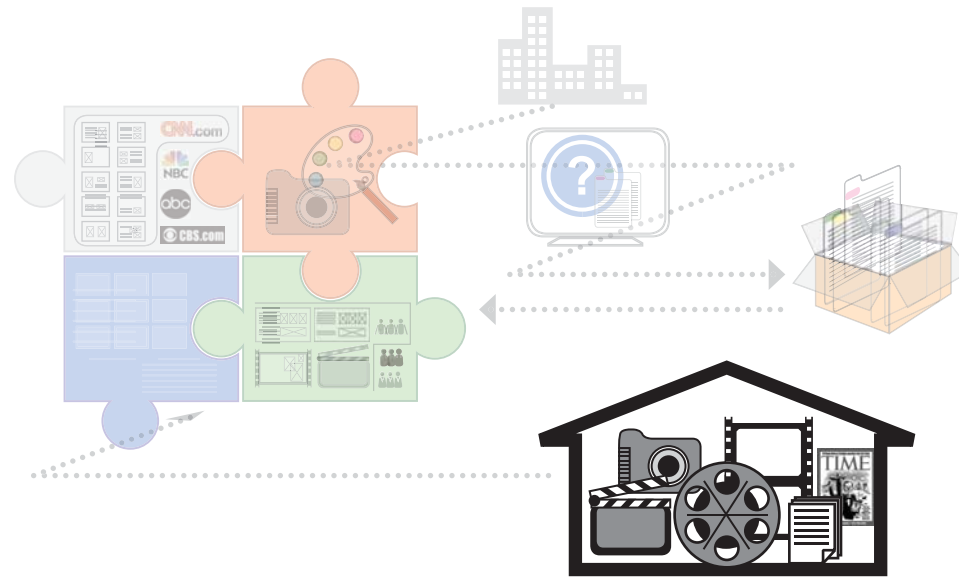
#### ***Properties***

- Architecture which relies on object-oriented code, allowing relevant content modules to be plugged into a skeletal template

#### ***Features***

- Imports content from Content Creator
- Leverages skeleton templates for web content and animations to encourage compatibility and consistency
- Utilizes common integration connectors to simplify integration process





## **Content Warehouse**

In the initial stages of campaign development, Content Warehouse is used to store relevant Design Thinking articles, images, video, and examples. Not only can these artifacts be used to inspire and inform campaign development, but their creators may be contacted for further information and potential partnership opportunities. As audience and media research is conducted using Content Research Tools and CurrentIssue Search, Content Warehouse stores the resulting data as well as the data analysis and synthesis results, for use in crafting campaign modules targeted toward each key audience.

Once the campaign launch nears, Content Warehouse audience and media research results are leveraged to inform the creation of public facing materials. Content such as articles, presentations, press releases, and white papers are then crafted to generate interest and enthusiasm in the campaign.

### ***Properties***

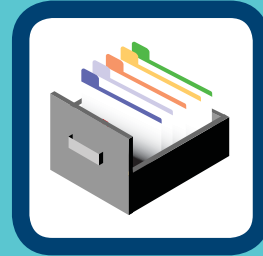
- Database that contains the results of research and analysis
- Repository of presentations, presentation modules, press releases, and white papers
- Images and examples of Design Thinking
- Articles of Design Thinking and policy
- Search capabilities for message generation

### ***Features***

- Imports relevant audience information from CurrentIssue Search
- Allows reuse of presentations to ensure consistency of content delivered
- Provides best examples of communicating Design Thinking
- Allow staff to access information, videos, images and ideas on the topic of design and policy to create appropriate messages for dissemination
- Greatly decreases time required to develop presentations
- Serves as a resource for those releasing messages



## Content Kangaroo



### Scenario

Having always been fascinated by policy development and seeing this as a perfect opportunity to strengthen his resume, Carson earns a 6 month internship within the Campaign for Policy Design Synthesis (CPDS), an especially exciting opportunity since this group has recently formed and he strongly supports their mission.

Following orientation, Carson's manager Jaime requests that he perform a broad based search for relevant material on Design Thinking, including articles, images, video, or interviews that could be used as inspiration for the campaign. As he locates media, he deposits them in the Content Warehouse multimedia database. Carson also notes any relevant companies or individuals who could serve as future references for campaign staff. Given his talent for facilitating discussions, Carson is asked to serve as a brainstorming mediator several weeks after his initial start date. In preparation for an upcoming brainstorm, he sifts through the recommended tools and approaches noted in Content Warehouse, selecting several that seem especially appropriate to campaign style creation. Several months later, Carson is asked to work on content creation with several other interns and full time campaign staff. After several meetings with campaign researchers in which they present research findings and implications, Carson and the other content developers begin structuring the desired campaign content for key audiences and appropriate media types. For these efforts, the team relies heavily on the offerings contained within Content Creator.

Graphic designers use document creation software and previously created template layouts to generate physical campaign materials while interns leverage StoryBoard Quick and SureAids to create initial story boards, examining different message approaches. In parallel, several experienced designers prepare the structure that will support the content modules. They roll in test case studies as well as examine other forms of media that would need to be created for online applications.

Fortunately, Content Creator's web based case study wizard ensures that all submissions are consistent and reflect the desired architecture initially defined by the system architect. The structural requirements of each content module were dictated early in the project by Sabrina, the system architect, using an object-oriented application called PlugNPlay. The beauty of this platform architecture is that, depending on the audience being targeted, modules can be swapped into and out of the structure, with minimal effort. As such, all content creators on the team, including Carson, are trained on the procedure required to create modules and the rationale for this approach.

Although his internship is drawing to a close, Carson is asked to begin assembling a presentation that will eventually be delivered as a series of influential design conferences. Considering the material he's gathered in his first weeks with the team, he returns to the Content Warehouse system to search and select information that generates interest and enthusiasm to key audience members.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



△ P



Media dashboard



Partner Pool

#### Elements

eTribe  
Thanks Team  
Stuff Management  
Show Me the Money  
Communication Mediator  
Meeting Assistant  
Task Overseer  
Resource Manager

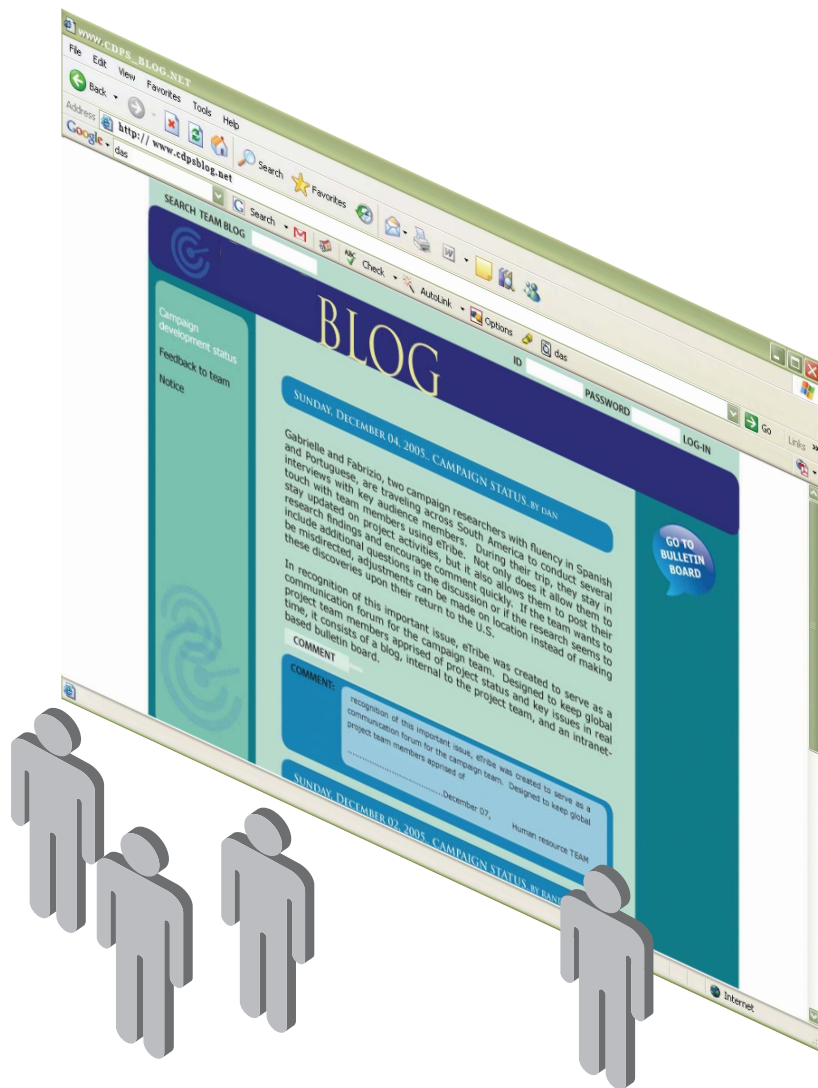
#### Discussion

Improper management of material resources can sink a campaign before it even sets sail. It is therefore crucial that they are constantly monitored, with campaign staffers evaluating their application, measuring consumption, and remaining on the lookout for sources of replenishment. These activities necessitate a fluent organization employing consistently practiced protocols, cohesive teamwork, and logistical efficiency to be accurate and effective. Furthermore, good management can be achieved by implementing reliable feedback methods that provide reliable data helpful to maintenance and restructuring efforts.

#### Description

Impresario has been established to fulfill resource management needs. Main components include a weblog for reporting campaign progress (eTribe), a materials management and sharing system (Stuff Management), an intelligent electronic fundraising system (Show Me the Money), an online meeting and scheduling application (Meeting Assistant), and an automated progress monitor (Progress Overseer)





Maintaining good communication among team members is critical to project success and requires that management make a concerted effort to keep the lines of communication flowing. This is more easily accomplished when team members are based in the same location. When project participants are located in other parts of the world, keeping individuals informed of project developments is especially important, but it also becomes increasingly more complex because of obstacles which include language barriers and different time zones.

In recognition of these issues, eTribe was created to serve as a communication forum for the campaign team. Designed to keep global project team members apprised of project status and key issues in real time, it consists of a weblog (internal to the project team) and an intranet-based bulletin board.

### *Properties*

- Intranet-based bulletin board system
- Internal weblog for participants

### *Features*

- Generates real-time updates regarding campaign development status
- Provides feedback to team
- Provides a public space to encourage internal conversations around issues, challenges, and solutions



**happy birthday !**



## **Thanks Team**

Primary contributors to employee satisfaction in the workplace include recognition of one's contributions and personal respect. This is especially true when working on projects with extremely challenging goals or time frames. In the event that a subordinate, peer, or supervisor becomes aware of a fellow staffer's exceptional performance, he or she is encouraged to recognize that achievement by initiating a chosen activity within Thanks Team.

### ***Properties***

- Regular team building events such as social outings, awards for excellence, scholarship program for volunteers and staff, recognition of special events (e.g. birthdays, baby showers, etc.)

### ***Features***

- Builds team morale



## **Stuff Management**



In the event that management decides to run the campaign out of a physical rather than a virtual office, resources are needed to make the office fully functional. Materials such as office furniture, computers, and office supplies have to be acquired at a cost that is palatable to a non-profit organization. Moreover, efforts are made to purchase, share, or rent used furniture which reflect the desired culture of the campaign. To oversee acquisition and maintenance of these resources, staff members are required to follow the protocols established and included within the Stuff Management system. In addition to procedures, this system also contains the functionality required to make purchases and monitor preventative maintenance activities.

### ***Properties***

- Materials management system
- Protocol to purchase new material resources
- Policy to try to buy used office equipment
- Program to perform preventive maintenance on equipment
- Program to share equipment when possible

### ***Features***

- Manages material resources to make sure that things are accounted for and that the appropriate resources are allocated to the appropriate parties
- Assure resources are not wasted repairing equipment because of poor preventive maintenance plan
- Assures that campaign has the equipment it requires to function
- Puts rules in place to purchase new equipment
- Used designer furniture helps create a designer culture on a budget
- Allows campaign to save money by sharing equipment





**DONATE TO  
OUR CAMPAIGN!!!**



**Show Me the  
Money**



To effectively run a global campaign, funds must be raised to cover development and launch-related expenses. Because some potential sponsors are more likely to donate money than others, a strategy must be crafted to target those individuals or companies and monitor their donation status. In addition to applications that encourage thoughtful strategy development, Show Me the Money contains spreadsheet functionality which would help campaign management determine the necessary funds required for each of their critical activities. Campaign staff populate the spreadsheet with activities and assign values to each task which represent the percentage of funds to be allocated toward that activity. A total project expense value is then entered into the spreadsheet, subsequently allowing team members to see how those funds are distributed across project activities.

Show Me the Money also contains mini applications that can be placed on web pages (buttons which link back to the campaign site) with the owner's permission. This functionality is used to solicit funds spontaneously from individuals who frequent these relevant sites.

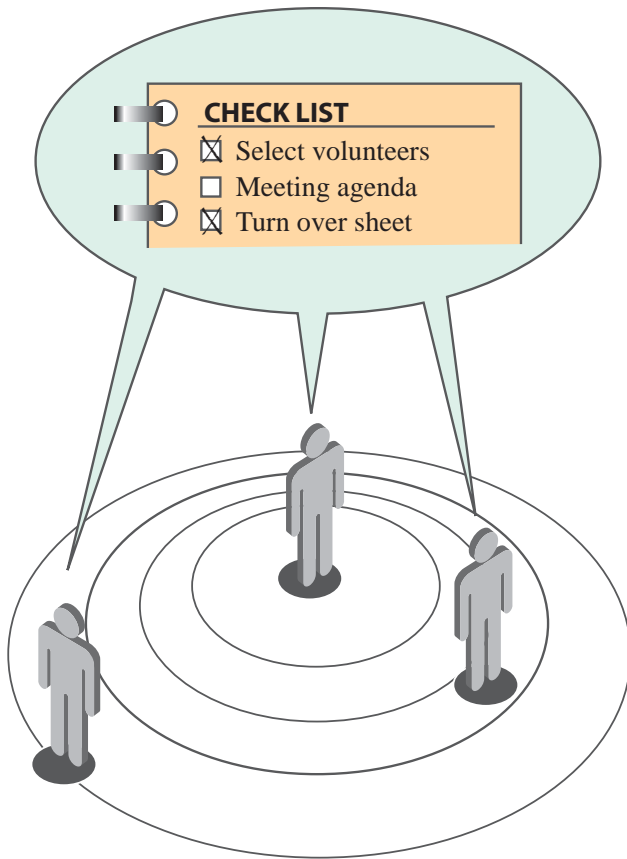
### Properties

- Strategy to acquire funding
- Monitoring system for financial resources
- Banner on major websites (both professional and non-professional). Hyperlink to online campaign donation site
- Buttons embedded in web pages bearing the “Paypal” logo

### Features

- Matches resources with appropriations based on a matrix
- Breaks down funding and distributes it into each task category based on an assigned allocation percentage
- Gathers voluntary money from browsers of major websites (e.g. Amazon, core 77, IDSA, etc.)
- Significantly adds to the number of funding sources for the campaign
- Enables campaign organizers to target “impulse givers” by embedding donation buttons in their websites





#### **Properties**

- Communication Organizer to establish communication and documentation sharing practices
- Do-it-together Checklist to build turnover checklists

#### **Features**

- Builds agreement on the most suitable communication practices among campaign staff
- Enables multiple parties to co-work on documentation
- Smartly and reliably tracks and locates the key info/knowledge owners at any time
- Facilitates knowledge retrieval through explicitly structured links that point to relevant archives in the Content Warehouse

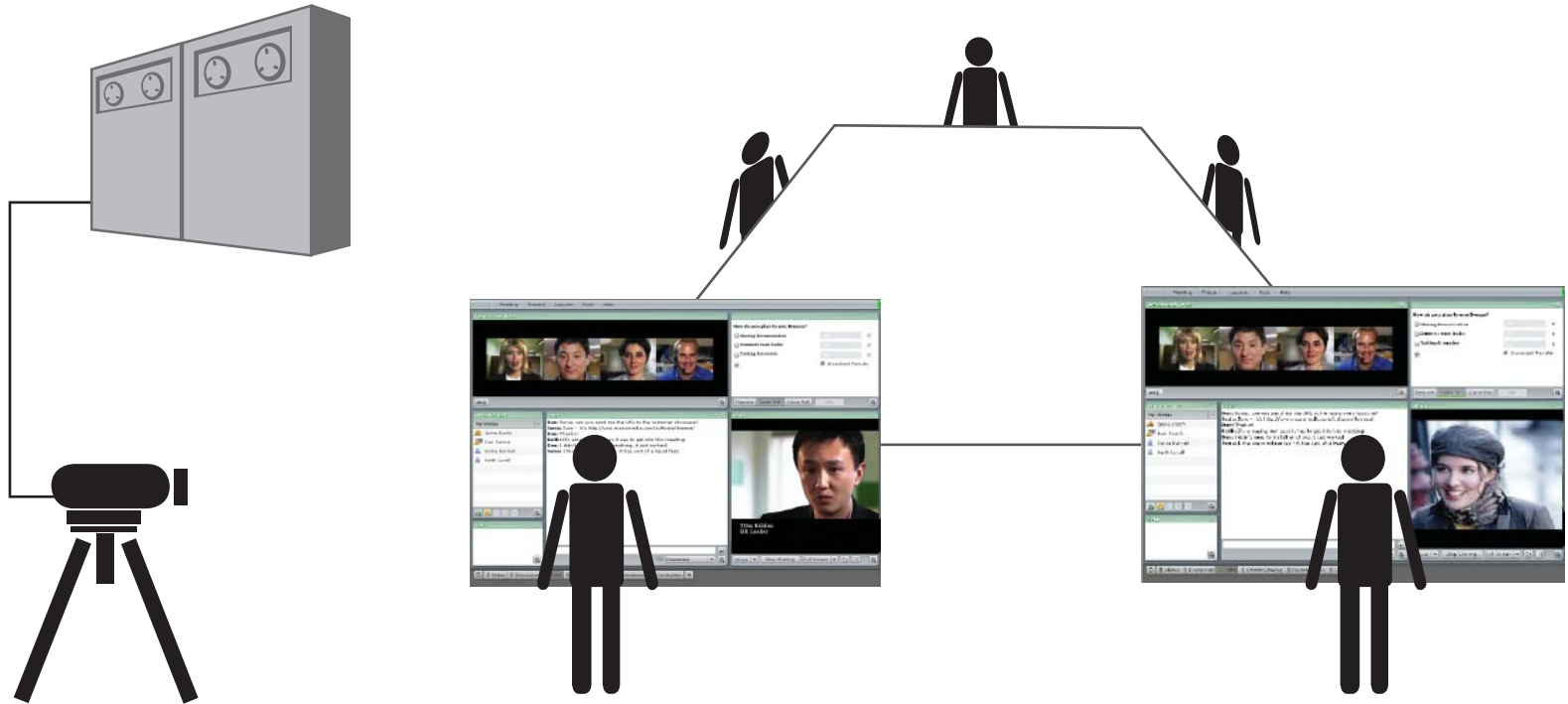
## **Communication Mediator**

The Campaign for Policy Design Synthesis is a collective effort in which special expertise as well as coordinated alignment impacts the ultimate success of the campaign. This calls for standard protocols among teams and individuals. Communication Mediator is designed to solve these issues by providing online “public spaces” to promote discussion and compromise within the campaign.

Communication Organizer includes a series of online forms to be accessed through an intranet. Campaigners can suggest, from their perspectives, desirable communication and documentation practices, accompanied by a few comments on pros and cons of their proposals. People then vote for their advocacies that will be counted by an embedded tally plug-in. This approach solicits opinions from different teams and individuals, which makes it easier to come to a campaign-wide agreement. It is, therefore, particularly useful at the onset of the campaign, when staffers are attempting to figure out appropriate means of communication and documentation.

Do-it-together Checklist is a dedicated web-based documentation checklist builder. It can be edited by multiple parties involved in the project turnover. It records contact details of the information/knowledge owners and contains links to destinations of transferred information/knowledge archived in the Content Warehouse. Email updates/requests after any addition/modification will be sent out in a timely way to relevant people. With the Do-it-together Checklist, campaigners need not be overly concerned with efficiency and completion of the transition of information/knowledge at the project windup phase.





## Meeting Assistant

Meetings are scheduled for people to share ideas, report issues/progress, and align stakeholders. Since messages bounce back and forth among different parties, attendees tend to be overwhelmed by the wealth of information. A successful meeting, otherwise, communicates relevant messages in a way that they can be well received by attendees. What's more important, people are able to apply the resulting take-aways to ground and improve their work for the campaign.

Meeting Assistant comes into play when helping campaigners develop efficient and productive meetings. It is a comprehensive system that integrates four functional components: Content Advisor, ConnetiStation, Smart Tailor, and Meeting Depot. They support different stages/activities of a meeting, from initial preparation to follow-ups.

Content Advisor is the combination of a web-based software tool and an e-library of referable communication samples. It advises meeting content design/communication at campaigners' request, which either result from a series of online questions or from keyword queries. According to specific criteria like audience type, memory load, content relevance, and clarity, Content Advisor also supports assessment of meeting content upfront. In addition, it is able to incorporate after-meeting feedback from attendees via its learning system so as to expand and enhance its advising mechanisms like collections of samples, evaluation criteria, inquiry questions, matching capabilities, etc.



ConnectiStation is a conferencing system based on streaming technology. It includes hardware and a communication infrastructure. Real-time meeting content (video/audio/text/image) is captured through either analog or digital devices. The captured content is then transmitted over a network to other attendees (both remotely and on-the-spot) via Meeting Depot. Streamed content can be viewed on both stationary displays (eg. desktops and TVs) and mobile devices such as mobile phones, PDAs, and laptops.

Smart Tailor is a web-based software application for content customization and communication. Attendees can request meeting content of interest by filling out an online inquiry form. Otherwise, they will receive default information packages preset by Smart Tailor, according to their roles in the campaign. Queries are sent to Meeting Depot (the server of streaming media). It then searches its database which transmits new information packets back to the requestor's sites. Smart Tailor also supports real-time content sharing with authorized contacts, allowing people to recommend worthwhile content to their colleagues. This ability to customize is a significant competitive advantage over Macromedia Breeze, a new conferencing system mainly used for training and marketing purposes. The other advantage of Smart Tailor lies in its capability to synchronize translations of meeting content into different languages and display results in a desired version. Furthermore, it can generate tailored action item lists immediately following meetings and send them to relevant personnel.

Meeting Depot doubles as the server for ConnectiStation and the database for storing meeting records and supplementary materials. Staffers can retrieve content of interest from Meeting Depot using a simple keyword search.

### ***Properties***

- Meeting content design/planning/assessment toolkit
- Web-based meeting content DIY software
- Database for complete meeting records and supplementary materials
- Retrieval system with keyword matching capabilities
- Streaming media-based conferencing system
- Synchronized interpretation
- Meeting minutes generator

### ***Features***

- Helps speakers plan and design targeted meeting content upfront
- Supports real-time meeting content delivery through both multicasting and unicasting
- Enables attendees to customize their own content of interest besides the default system configurations
- Synchronizes content translation into different languages if needed
- Generates immediate meeting minutes
- Archives searchable meeting records and supplementary materials
- Permits on-demand after-meeting playback

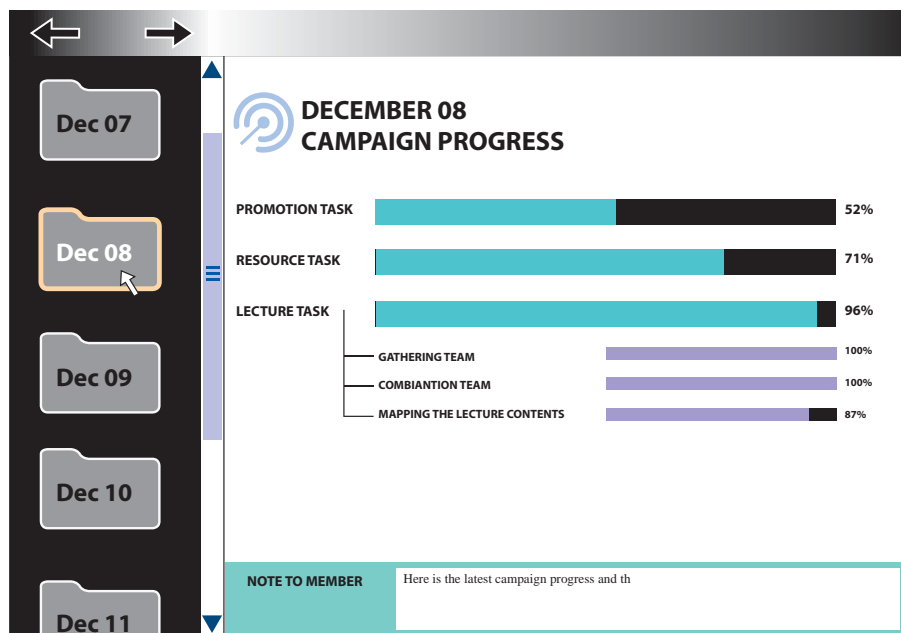


## Task Overseer

Due to its novelty and scope, Campaign for Policy Design Synthesis cannot achieve most of its goals in a short period of time, necessitating careful, long-term planning of campaign tasks and activities. Still, the campaign must be quick to respond to immediate changes in interdependent task schedules in order to avoid a snowballing of short-term complications that can hamper efforts well into the future.

The Task Overseer toolset can help the campaign elude such problems by providing a specialized network application called Calendar Manager. Installable on any networked device, this intelligent task manager/scheduler consists of two central components, Calendar Planner and Calendar Tracker. While the Calendar Planner allows staffers to plan or modify their task schedules, Calendar Tracker updates the calendars of staff members when a change in a colleague's schedule affects theirs.

A second component of the Task Overseer is the Direction & Health Meeting, a formal gathering of campaign managers focusing on how to better adapt to sudden changes in task schedules. Crisis management plans are also discussed in detail, addressing the need to provide for operational continuity in the event that unchecked task interruptions spiral out of control and threaten to bring campaign activities to a standstill.



### Properties

- Time management software
- Meeting and task scheduler
- Campaign progress monitoring effort
- Crisis management planning

### Features

- Helps plan and prioritize everyday tasks and activities for individuals
- Tracks team and individual progress and notifies all relevant parties of changes in progress resulting from the completion/delay of tasks
- Facilitates tracking and identification of task-related issues through a top-down approach
- Adapts the schedule to unexpected changes for more accurate time planning
- Proposes contingency plans related to spiraling crises

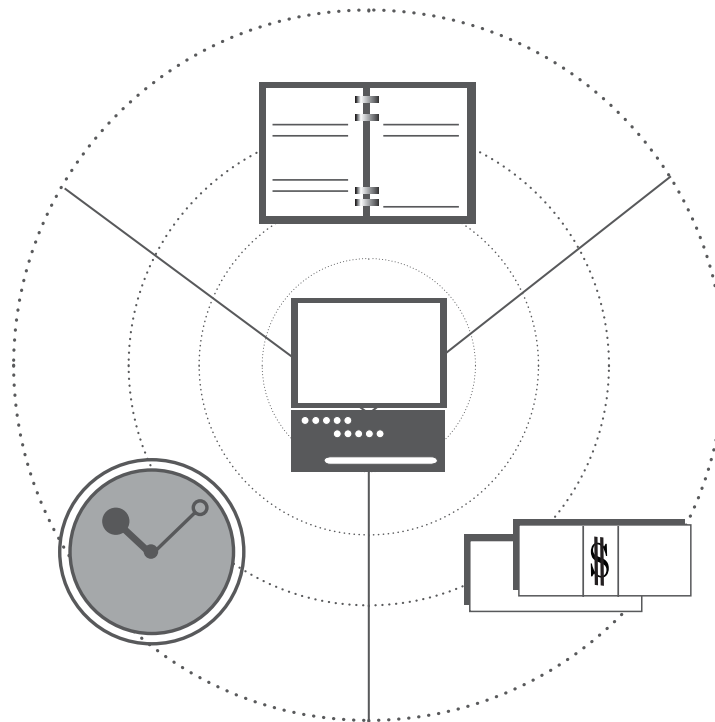


## Resource Manager

Project managers are charged with a variety of responsibilities during the course of a project. Several of their most important areas of focus relate to the management of resources, including time and budget. In the event that they are employed by a non-profit organization, they would also be concerned with fundraising.

For each of these three resource areas, project managers develop a resource allocation plan, manage those resources according to the plan, and make adjustments to the plan, as necessary, when external influences affect the underlying assumptions. Clearly this role is very detail intensive since one missed milestone or one over-budget activity could potentially derail the entire project.

In recognition of these challenges, the Resource Manager system was created. This system combines the commonly used software application, Microsoft Project, with a Web application called BaseCamp, created by 37 Signals. BaseCamp allows project managers to post their Microsoft Project documents while also posting key milestones and deadlines on the BaseCamp home page for everyone's review and consideration. Making the schedule and budget accessible to the entire project team is a benefit since all involved can then appreciate how their actions and decisions affect the overall resource management plan.



### **Properties**

- Microsoft Project software application
- Web application BaseCamp (37 Signals)

### **Features**

- Provides ability to plan, modify, and track schedule, budget, and fundraising activities and progress
- Optimizes the efficiency of resource usage
- Allows the sharing of files, posting of milestones, scheduling, and message posting on the Internet



## Impresario



### Scenario A

Gabrielle and Fabrizio, two campaign researchers with fluency in Spanish and Portuguese, are traveling across South America to conduct several interviews with key audience members. During their trip, they stay in touch with team members using eTribe. Not only does it allow them to stay updated on project activities, but it also allows them to post their research findings and encourage comment quickly. If the team wants to include additional questions in the discussion or if the research seems to be misdirected, adjustments can be made on location instead of making these discoveries upon their return to the U.S.

### Scenario B

Katrina specialized in campaign fundraising over the course of her career and agreed to help the campaign team because of her belief that changes in the policy development process are desperately needed. Her first priority is to construct a strategy for acquiring funds. She planned to work with the team to identify individuals who might be especially inclined to donate funds, include their contact info in the database, and begin networking with their organizations.

Katrina is also utilizing the spreadsheet in Show Me the Money to help campaign staff identify the activities that require funding and the percent of the total funds raised that should be allocated toward each task. Then, they will identify the approximate amounts needed to perform each task. After identifying these objectives, they can run various quick simulations with the spreadsheet to determine the amount of funding they actually needed to carry out the project.

Concurrently, Katrina has contacted administrators of design-oriented web sites and is seeking permission to post a donation button on each site. The donation button functionality has already been created and is being stored in Show Me the Money until it's needed. The buttons launch a quick payment approval window which decrements the desired funds from people's Paypal accounts.

By leveraging this combination of tools, Katrina is optimistic that the campaign group will receive at least the minimum amount of funding required to launch an influential campaign.



### Impresario



#### Scenario C

Before operations could formally begin in their new office space, the campaign staff needed to acquire basic furnishings and supplies. Tom, the office manager, had been working to assemble the Stuff Management system which contained acquisition and maintenance protocols as well as tools to facilitate purchase.

He had already established a list of preferred vendors based on his past procurement experience at a local company. He'd also identified organizations that would share or rent furnishings to them, depending on their needs. Having struggled with maintenance issues in the past, he was currently in the process of reviewing bids for contract repair staff so he could include their contact info in the database. Although the system wasn't finished yet, Tom knew the effort would be well spent because they wouldn't have time to spend on such things as the project progressed.

#### Scenario D

Grace worked all night to finish designing the campaign's first interactive media prototype for an executive review the next morning. Her co-worker, Nadine, found her asleep at her desk, taking a brief nap before the meeting, and heard what she'd done. Knowing that Grace always goes above and beyond with her work, Nadine submitted a request for a free lunch prize from Thanks Team to her favorite restaurant. The award was presented at the executive review, following their enthusiastic reception to Grace's stellar work.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



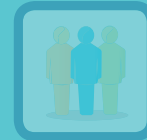
Outreacher



△ P



Media dashboard



Partner Pool

#### Elements

CrazyTrain  
BootCamp  
CardPlay

#### Discussion

A campaign can only be as good as the people running it. While professionalism, experience, and confidence are all requisite qualities in a campaign staff, high morale, team cohesion, and a strong belief in the cause are perhaps most crucial in driving a successful endeavor.

#### Description

Cross Trainer is a toolset that can help build trust amongst team members, familiarize volunteers with the established campaign style, help participants understand the core tenets of the initiative, and educate team members in their relative skills in order to promote efficiency and flexibility.





## CrazyTrain

Establishing a strong sense of purpose, coupled with excitement among the staff should be one of the first priorities for campaign leaders. The first day of operations at campaign headquarters – when all staff members are present – provides the perfect opportunity to instill team spirit, respect for leadership, an understanding of fundamental campaign protocols, and campaign-specific information they will need to convince others of its value. This day kicks off with a high-energy multimedia presentation headed by campaign leaders. Imbued with a broad sense of humor, this orientation will be scripted for maximum fanfare, sacrificing intensity for fun, although audience participation will be aggressively sought. Following an exploration of primary campaign goals and themes – namely promoting the value of Design Thinking to the world and its application to policy formulation – campaign staffers will be assigned to teams and their leaders introduced

### ***Properties***

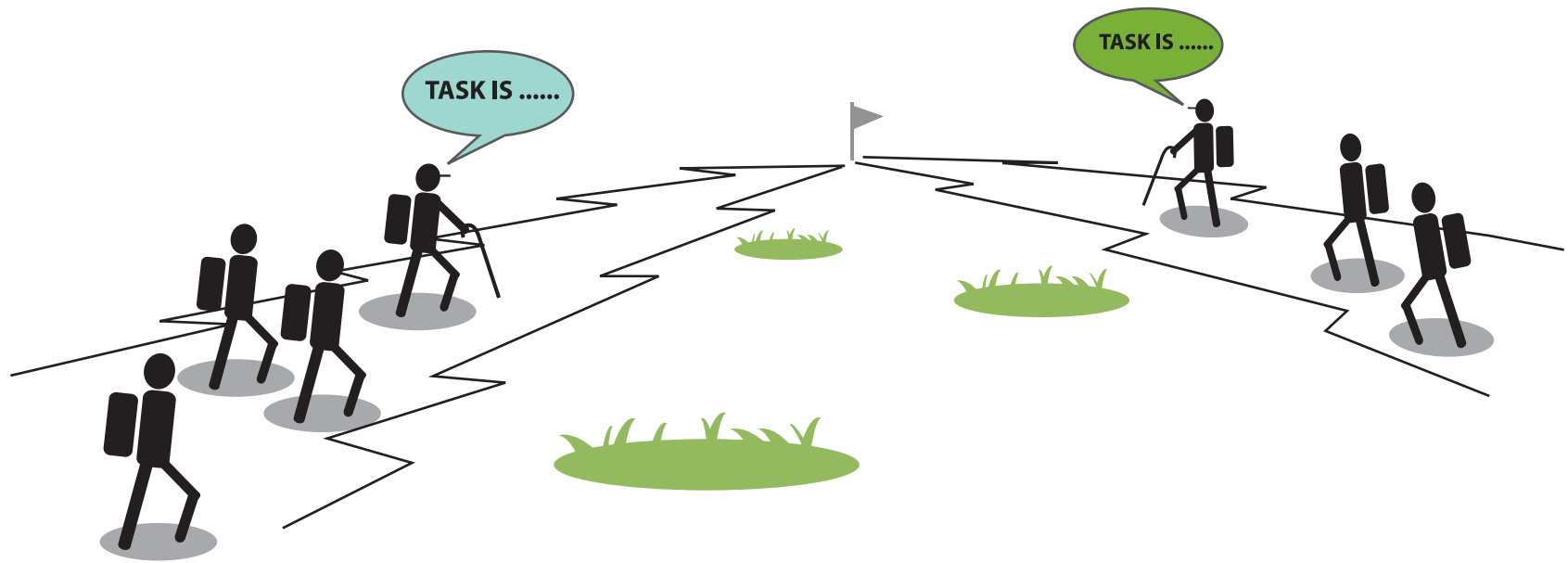
- A high-energy “pep-rally” run by campaign leaders at the opening of campaign headquarters
- Workshops/seminars focusing on campaign style assimilation and execution

Following the pep rally, a series of team-oriented workshops and seminars begins and continues for the remainder of the day. These sessions will introduce staffers to campaign protocols (explained further in manuals and directives), place them in simulated “crisis” situations, and stress the importance of teamwork. In order to help staffers become ambassadors of Design Thinking, a number of important case studies demonstrating its value and application to real-world situations will be examined in depth. An abridged version of the campaign’s Innovation and Policy Workshop will also be taught to familiarize staffers with the basics of policy synthesis, using planning frameworks. This may prove important for staffers engaging in personal contact with key audience members.

### ***Features***

- Builds immediate team cohesion and morale
- Helps assimilate team members into corporate culture
- Familiarizes the team with the campaign-specific information through casual team activities





## BootCamp

Building on the momentum of the first week of operations, campaign staffers will travel to a remote rural area for a weekend retreat that will balance relaxation with team-oriented exercises. They will be tasked with overcoming a variety of mental and physical challenges -- from obstacle and ropes courses to navigating mazes and caves -- that will put Design Thinking principals and their capacity to work as teams to the test. Run by professional corporate trainers as well as associates of outdoor/character-building programs like Outward Bound, this excursion seeks to strengthen relationships between team members, expose staffers' strengths and weaknesses, and promote a richer sense of purpose.

### *Properties*

- An off-site training program to increase participants' knowledge and understanding of the campaign
- Professional corporate trainers and outdoors experts

### *Features*

- Provides an engaging training program based on outdoor activities in lieu of tedious lectures
- Familiarizes the team with the campaign-specific information through casual team activities
- Builds relationships between team members





## Interactive CardPlay

Throughout the course of the campaign, staffers will need to seek the assistance of their peers, both within and outside their assigned teams. To minimize the amount of time and energy required in procuring such services (in addition to server-clogging mass email solicitations), all campaign participants should possess at the very least, a cursory knowledge of all staff members and their specialties. To expedite the learning process, a set of cards will be distributed to everyone. Each card will contain the picture and name of a staff member on one side. The other side will display team affiliation, skill specialties, and a brief background summary. Card memorization is further incentivized through a series of related games devised by team leaders. Winners receive prizes or cash. Team leaders may also make good use of the cards in reorganizing teams.

### *Properties*

- Trading cards
- Card games

### *Features*

- Helps orient team members with each other
- Helps team leaders organize/reorganize teams
- Actively engages the whole team by enabling interaction between team members



## Cross Trainer



### Scenario

Rene and Tony – two graduate students studying communication design and public relations respectively – have recently volunteered as support staff members in the Campaign for Policy Design Synthesis. On the first day of campaign operations, dubbed CrazyTrain, they arrive at the headquarters office and are greeted by clapping permanent staff members lining the entrance corridor. Pumped up with excitement, the two are escorted into a conference room that has been converted into a makeshift auditorium, replete with rows of chairs and a small elevated stage. Once the room is full of conversing volunteers, the lights dim, and the campaign's charismatic leader, Steve, takes the stage. Breaking the ice with a few well-placed, good-natured jokes – including one about Tony's Chicago Cubs jacket – Steve quickly launches into a rousing, passion-filled speech about the important of the campaign and its cause.

Following these opening remarks, he begins a multimedia presentation, illustrating ways that Design Thinking can and will improve a variety of local and global maladies. A question and answer session follows with Steve calling out members of the audience and asking them why they joined the campaign. Finally, Steve introduces team leaders, who then call on their team members to follow them out of the room.

Placed on the P.R. team, Tony joins his leader and teammates in a seminar focused on Design Thinking and its application to public relations. The campaign's style guide is distributed, after which communications protocols, campaign image, and publicity strategies are examined in depth.

Meanwhile, Rene and her communication design team are conducting rapid design exercises to simulate crisis situations in which a radical redesign of communication materials has been ordered. They evaluate each others solutions, rating them on the basis of their adherence to the campaign style guide.

Following lunch, Rene, Tony, and all team members congregate in the conference room once again to participate in an Innovation and Policy Workshop. Guest policy and design experts lead a panel discussion and ensuing breakouts session focus on the use of planning frameworks in policy synthesis. Following this workshop the entire staff adjourns to a local bar for a relaxing happy hour.



## Cross Trainer



The following weekend, Rene and Tony find themselves in the wooded backcountry with their CPDS compatriots to participate in a program known as BootCamp. Staffers break into their respective teams as they did previously in CrazyTrain and are paired with a professional corporate trainer as well as an outdoors expert (from an Outward Bound-type organization). The overarching goals of this retreat are building trust amongst team members and encouraging innovative solutions to problems using Design Thinking skills.

Within a matter of minutes, Rene and her communication design team find themselves blindfolded as they attempt to navigate a ropes course with only their voices to guide each other. Meanwhile, Tony is stand on the edge of a six-foot tree stump his back to his awaiting team, standing on the ground below with outstretched hands. This “trust fall” exercise is design to build faith and reliance. Similar exercises mixing physical and mental challenges continue throughout the weekend, along with relaxing barbeques and campfire handouts.

The following week, Rene and Tony are back at campaign headquarters. In addition to daily tasks, they set aside a half an hour to study their Interactive CardPlay sets, collections of cards containing pictures of all campaign staffers, background summaries, and special skills. Rene and Tony’s team leaders tell them that familiarity with different team members and their relevant abilities will facilitate cooperation between teams, increase efficiency and improve rapport. Near the end of the day, Tony’s team leader Geri brings the group into her office and conducts a “Jeopardy-like” session to determine which team member is most familiar with his campaign peers. Tony wins the contest, earning himself a \$25 Borders Books gift certificate.

A week later, Geri asks Tony to find someone in the communication design team who can help them design a catchy Flash presentation to help convince prospective partners of the campaign’s value. Thanks to his CardPlay derived knowledge of staffers, Tony knows that Rene is just the Flash specialist that Geri and her team needs.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



△ P



Media Dashboard



Partner Pool

#### Elements

CurrentIssue Search  
Choose-Your-Own-Campaign  
Research & Analysis Toolbox  
Remote Usability Testing System

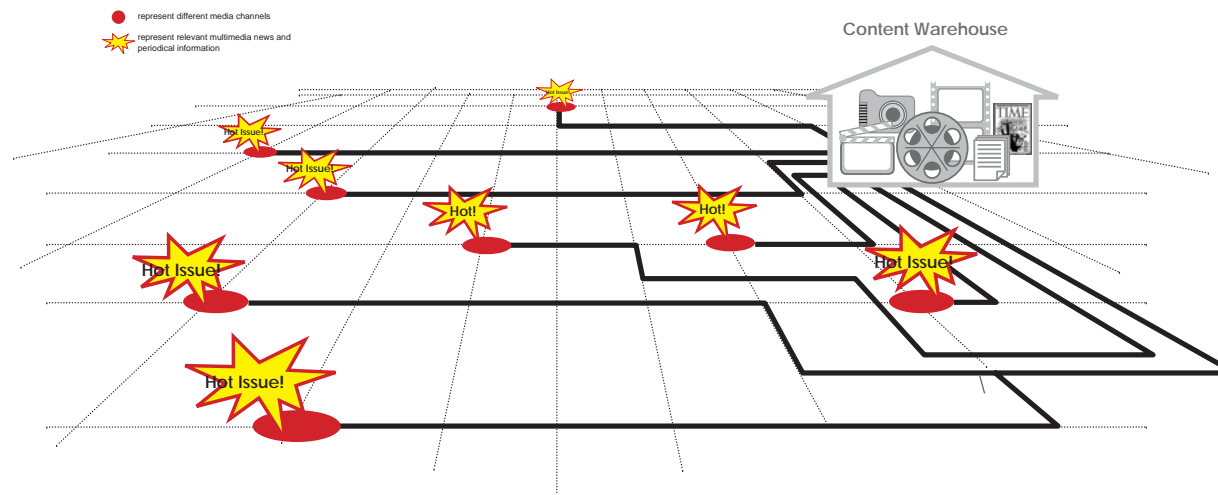
#### Discussion

Because the campaign and its target audience must resonate with each other in order to be successful, it is imperative that campaign researchers thoroughly survey its potential supporters. This requires a reconnaissance operation of sorts in order to learn who these audience members are, what issues are meaningful to them, how media shapes their attitudes, and which media formats influence them the most. Such an undertaking requires both human intelligence efforts and automated systems to economically gather and analyze all of the necessary data.

#### Description

Recon is a tool kit that can help campaign researchers better understand and communicate with their target audience. Its four constituent elements include a powerful search engine for identifying popular issues (CurrentIssue Search), a tool for tailoring message delivery methods (Choose-Your-Own-Campaign), software-based research tools for gathering and analyzing data (Research & Analysis Toolbox), and an online system for testing interactive media from afar (Remote Usability Testing System).





### Properties

- Keyword search which crawls through relevant media channels, similar to LexisNexis
- Populates searchable database in Content Warehouse with multimedia results

### Features

- Identifies “hot” issues relevant to a given audience
- Requests that users enter the name of an individual, organization, or country
- Retrieves high priority, relevant multimedia news and periodical information based on frequency of mentions and keywords

## CurrentIssue Search

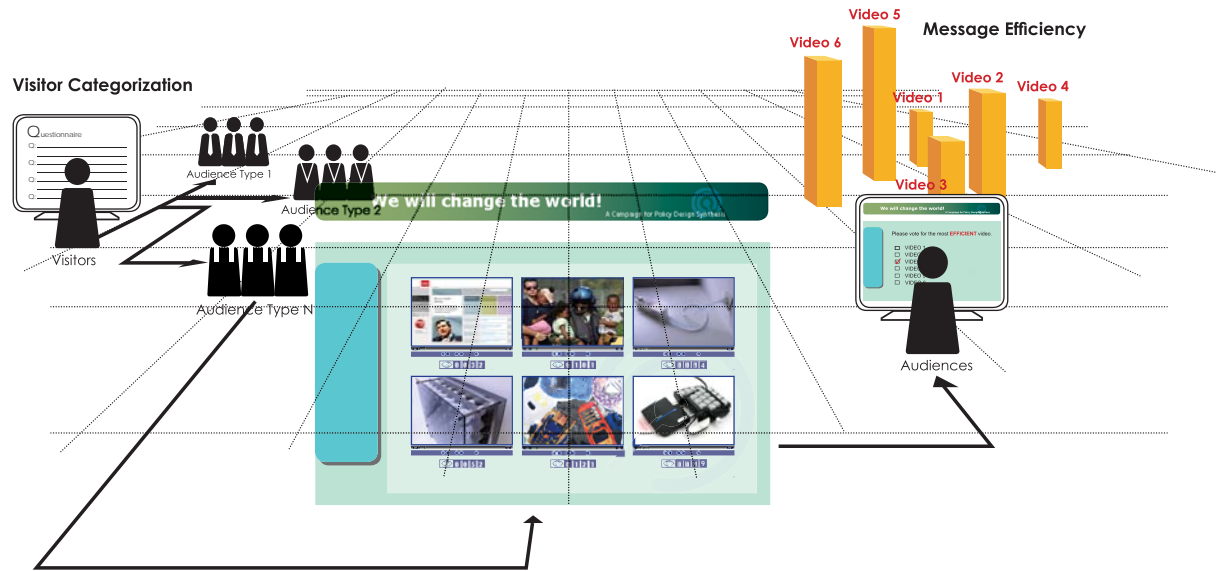
When launching a campaign, the key to attracting intended audiences is ensuring that one’s message is relevant to those audiences. This goal is best achieved by investigating the issues that are most pressing to these individuals and then incorporating those messages into the campaign content.

To facilitate the identification of challenges to specific audiences and individuals, researchers can use CurrentIssue Search. To use this application, a researcher defines their search subject (e.g. name of a country, organization, audience, or individual) and the media type (e.g. periodicals, newspapers, broadcasts etc.) or specific set of media (e.g. New York Times, I.D., CNN broadcasts, Scientific American, etc.) where the search would be conducted.

The smart application will focus the search on potential areas of difficulty for the subject, based on common terms used to describe problems, challenges, or difficult situations.

Relevant multi-media pieces will then be located, with key terms highlighted, bookmarked, or indexed for quick review. Results will populate a searchable multimedia database in Content Warehouse where researchers can mine the findings for specific audience challenges.





### Properties

- Website with different campaign videos
- Quick pre-video questionnaire which is used to categorize visitor into an audience group
- Tallies number of votes each campaign video message gets, based on key audience member selection
- Provides “thumbs up” or “thumbs down” audience vote indicating effectiveness of viewed video message

### Features

- Categorizes visitors into an audience by having them complete a quick, pre-video survey
- Presents visitors with different campaign videos and asks them to select the video most associated with their perception of design.
- Helps to identify the campaign whose initial message seems most appealing to a given audience prior to viewing
- Measures the effectiveness of the video message after viewing

## Choose-Your-Own-Campaign

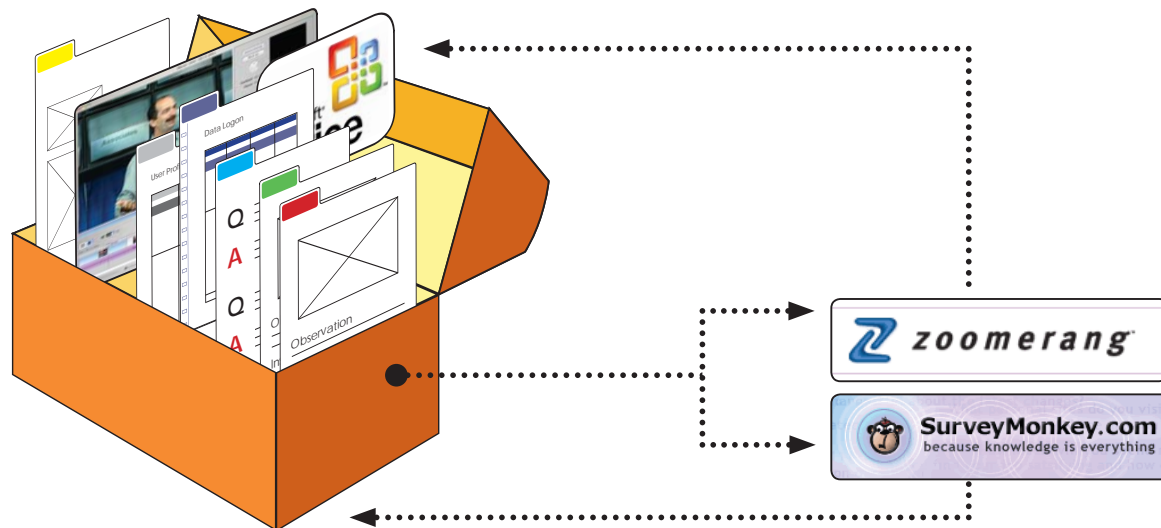
Running an effective campaign requires several key elements to be successful. First and foremost, the target audience(s) must be identified. After establishing who should be targeted with the message, appropriate, consistent content must be generated which resonates with audience experiences.

CurrentIssue Search identifies critical challenges to countries, organizations, and individuals. By comparing the search results to each other, patterns will emerge which suggest larger need themes. Since campaigns want to disseminate consistent, focused messages, they typically have very few aspects to their message. As such, their choice of message is crucial to campaign success and should be tested with representative audience members to ensure that it's powerful and inspiring.

To accomplish this feat, an application called Choose-Your-Own-Campaign is used, through which campaign developers generate several video messages per audience for evaluation via the campaign website. Before viewing the messages, participants complete a brief questionnaire to sort them into a particular audience category. Participants will then be requested to select the message that initially seems most compelling. Following each video, they indicate with a thumbs-up/thumbs-down vote whether the message is effective. After viewing all videos, participants cast a final vote indicating which is their most preferred video message. This feedback is then used to select the final campaign message for each audience.



## **Research & Analysis Toolbox**



At different phases of campaign development, research will be required to inform the campaign direction. Potential audiences and media will need to be explored. Messaging will need to be tested with audiences and refined. Campaign websites and associated content will also need to be evaluated to ensure smooth operation. After the campaign launch, progress toward the campaign's goal will need to be tracked to determine whether course corrections are necessary. Despite the many different testing objectives, similar processes will be followed to acquire data and analyze results.

For this reason, the Research & Analysis Toolbox was created. It houses links to free research tools like Zoomerang and Survey Monkey. Software packages used for quantitative and qualitative analysis are also provided, including Excel and Word. If video is used, video editing and analysis software is available. Additionally, templates for the most commonly used research documents like screeners and discussion guides are kept on file for reference purposes. The primary benefits of the Research & Analysis Toolbox to researchers are convenience, consistency between researchers, and speed as a result of reuse.

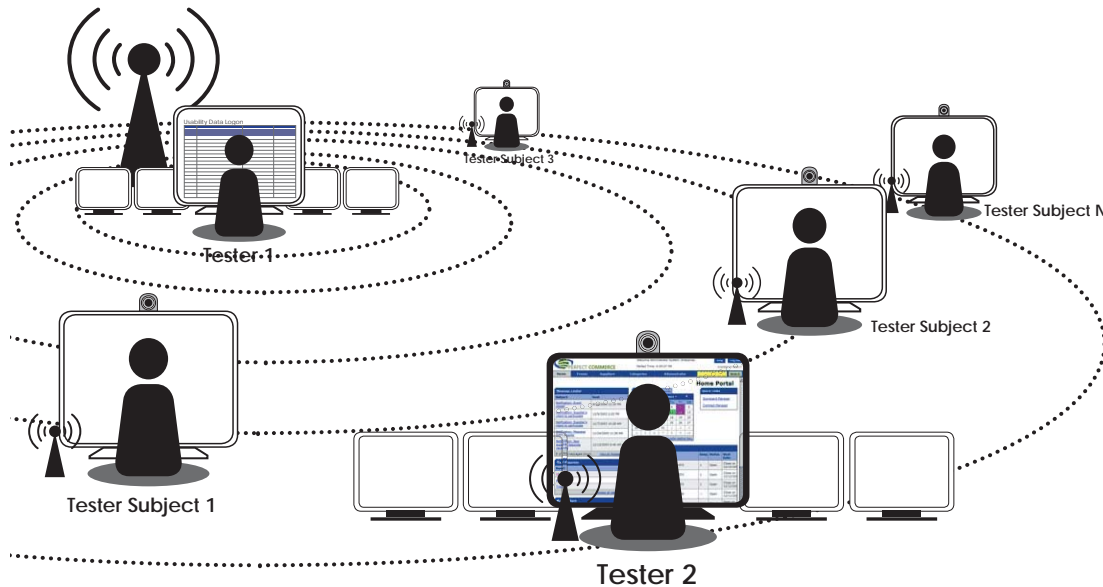
### **Properties**

- Links to free quantitative/qualitative research tool sites (e.g. Zoomerang, Survey Monkey, etc.)
- Excel for quantitative data and statistics analysis
- Word for qualitative data
- Video software which facilitates importing, tagging, categorizing data
- Templates for all major research documents, including screeners, discussion guides, surveys, and research summaries

### **Features**

- Provides researchers with free resources and tools
- Analyzes surveys using quantitative analysis functionality
- Analyzes raw qualitative data and video
- Provides searchable database capabilities for qualitative analysis and synthesis
- Ensures that all researchers consider the same topics and concerns when developing and sharing research
- Speeds up research process because no need to recreate docs





### **Properties**

- Logging software used for usability testing
- Network installed software
- Software installed on the system where test data will be collected, analyzed, and refined into a test presentation

### **Features**

- Automatically annotates collected data, indicating web page changes, mouse clicks, and keystrokes
- Allows viewers to watch remote usability testing live, over a network, and add notes
- Allows searching of test data to look for error messages or text unique to a particular part of the site while reviewing the associated video to determine user responses.

## **Remote Usability Testing System**

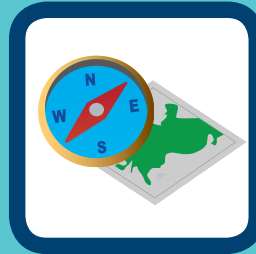
As interactive media is being prototyped for various purposes, including the campaign website, it must be tested to ensure that its functionality is understandable, simple to operate, and engaging. Additionally, it must run smoothly on various technical platforms and within various technical infrastructures. For example, some regions of the world might not have access to broadband, which could prove frustrating if the application is visually laden.

To address these concerns, a Remote Usability Testing System would be useful. (The system detailed here is produced by Morae, but there are others which perform similar services). Users are initially instructed to download Morae Recorder from the network and install it before beginning. (Recorder logs each move a user makes when interacting with the prototype). If the user has a web cam or microphone, those peripherals can also provide input to Recorder to create a richer understanding of users' experience with the prototype. Once the download is complete, the test participant is instructed to go to the prototype site and begin performing the requisite tasks.

A related application, Remote Viewer, allows interested parties in remote locations to follow the test over the network and add notes to the feed. After the session has been completed, the Manager application allows researchers to search through test data for errors while viewing the video to better understand user comments and behaviors.



## Recon



### Scenario A

Monique, a design researcher for XYZ consultancy, was encouraged to participate in the Campaign for Policy Design Synthesis (CPDS) by the head of her consultancy. Her firm has partnered with the Campaign to expand their exposure to forward thinking clients who are seeking thoughtful approaches to difficult problems.

This morning, Monique is charged with investigating several countries – in an effort to determine their most pressing social issues – with the thought that they might be especially interested in understanding the material the campaign is trying to disseminate. Her campaign advisor specifically asks that she investigate Germany since they’ve just elected a new Chancellor. Monique goes to CurrentIssue Search and enters “Germany” into the search field, indicating that she wants to look at international newspapers as well as other multimedia broadcasts related to the current challenges it’s facing.

After a few seconds, CurrentIssue Search returns a series of articles and broadcasts which indicate that Germany’s major challenges involve a stagnant economy, unemployment at postwar highs, and no national consensus about what to do. Germany seems like a prime target for further investigation and targeting.

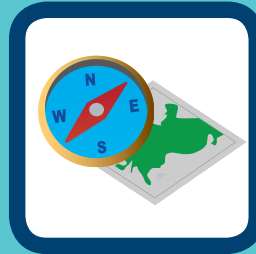
### Scenario B

Emily is a member of the California legislature and serving on the Committee for Economic Growth. Over the past few years, she’s been troubled by the growing number of working poor in her state and has been seeking ways to alleviate this troubled population’s most desperate concerns. She’s been exposed to design because of her involvement in the Bay Area community, which is a hub for leading design consultancies. Through those connections, she has agreed to serve as a consultant to CPDS.

One morning, she receives a note from the campaign to review several potential messages in order to determine their impact and effectiveness. After completing a brief profile survey, Emily is presented with four video images and accompanying taglines. Following the instructions, she picks the video that seems most compelling based on its initial frame imagery and tagline. After viewing the video, she gives it a “thumbs down”. It didn’t resonate with her the way she’d expected. She then views the remaining videos, assigning them thumbs up and thumbs down ratings. Following her rating of the final video, she is asked which video was most effective at conveying a relevant message. Emily selects her preferred message, submits her vote, and leaves the site to focus on the day’s work.



## Recon



### Scenario C

Linus is an experienced researcher who volunteers with CPDS. He originally became interested in the group's mission because of his parents' lifelong participation in public policy. He remembers their bemoaning the process required to affect policy development and thought this would be a perfect opportunity to clarify his own perspective on the situation.

Today, Linus' supervisor Jaime requests that he conduct online surveys with potential audiences about their perceptions of design, as well as run several remote usability studies. Because the Research & Analysis Toolbox contains past surveys and links to online survey tools, Linus is able to initiate the research himself in less than a day.

Less than a week later, Linus reaches his desired sample size and closes the survey. Returning to the Toolbox, he imports the online survey feedback into Excel for analysis. Using the research summary template, he crafts a brief presentation for the team's benefit, highlighting key findings.

Concurrently, Linus lays the groundwork for the remote usability studies. He leverages a relevant screener and discussion guide found in the Toolbox, making only a few minor changes before launching his search for participants. Over the course of several weeks, he locates appropriate respondents, informs them of the process to be followed, and sends them the necessary electronic files to download from the Remote Usability Testing System.

Since a third of participants have webcams, Linus will be able to videotape their sessions and create highlight videos for the team. Having worked with designers in the past, he's learned that they're very visually oriented so video summaries are especially compelling to them. He returns to the Toolbox for the video analysis and editing software he needs to assemble the highlight videos.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



Δ P



Media Dashboard



Partner Pool

#### Elements

Contact Database  
Greasing-the-Wheels Gift  
Buying Time  
Professional Translators

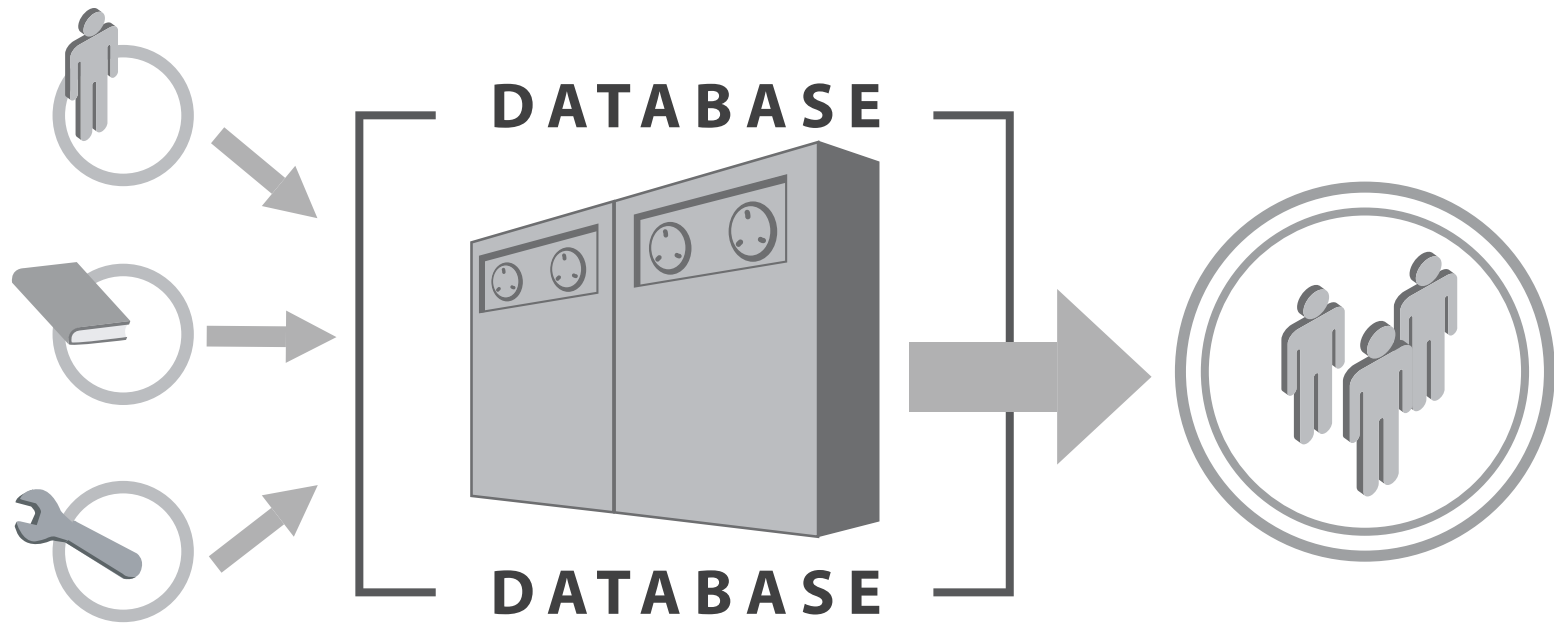
#### Discussion

The central aim of any campaign is to compel a specified audience to support a particular viewpoint by motivating them to affect a desired change in the system. Rather than simply inundating various media channels with the campaign's message with the hope that it will be received by some audience members, a time and cash limited campaign requires a more efficient, targeted approach. This means that individual audience members – principally those who are influential with fellow audience members or the greater public – need to be identified and convinced of the campaign's merits.

#### Description

A set of tools that would allow the campaign to create a repository of contact information which could quickly and easily be accessed. Having this contact information readily available would facilitate meeting and communicating with key audience members. Other tools would help promote acceptance of the campaign's core message, which would be beneficial. Outreacher is a comprehensive toolset that addresses these needs.





## **Contact DataBase**

Essentially a giant digital Rolodex, Contact Data Base allows campaign workers to store contact information for potential advisors, media representatives, partners, and key audience members. This repository can be accessed by staffers virtually anywhere and from any campaign-related application. New information can be manually entered into the database or automatically copied there anytime an automated system task retrieves relevant contact information (as in Media Dashboard's cost and value assessment procedures).

### ***Properties***

- Database of contact details accumulated during the project from volunteers and partners

### ***Features***

- Provides one location where people can go to record or seek contact details that may be needed for different project phases. Includes details for advisors, partners, and audience members



## Greasing-the-Wheels Gift

One-on-one interviews provide invaluable insights about the preferences, attributes, and attitudes of a targeted group, which in turn help a campaign tailor their communications to that audience. In reality, however, such interviews can be difficult to obtain when influential individuals have layers of staff between them and the general public. Specifically, administrative assistants or aids cannot regularly be circumvented. As such, they must be convinced that the campaign is worth their manager's valuable time. If they cannot be swayed by the campaign's standard pitch, more extreme measures may be in order, namely the giving of an "appreciation" gift. The hope is that the gift may lead to an appointment with the influential individual.

### ***Properties***

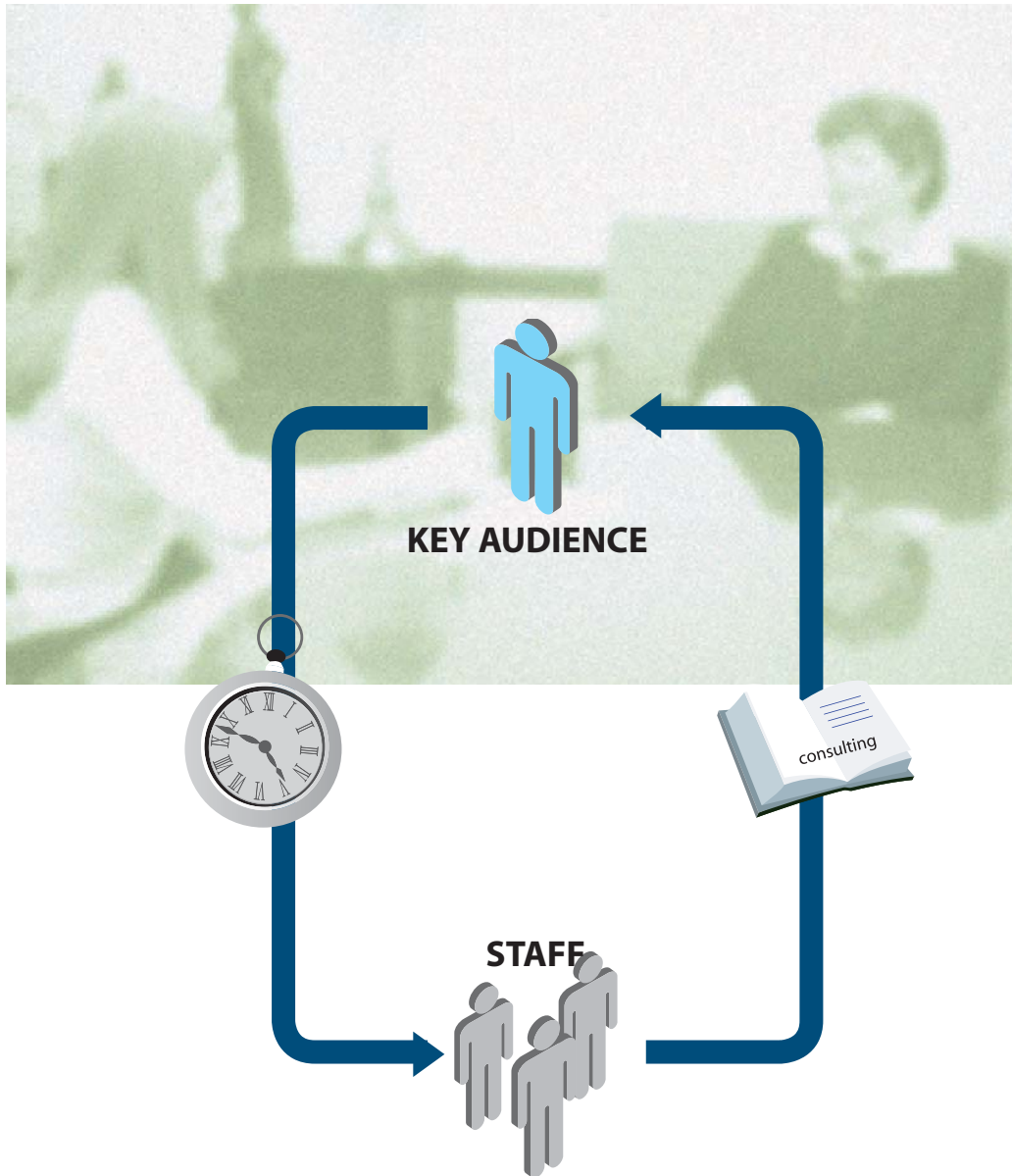
- A gift sent to the assistant of a key audience member

### ***Features***

- Facilitates obtaining a meeting with a key audience member







## Buying Time

Design Thinking is not always so easily accepted. A media-based campaign may have little effect on an audience member who's been jaded by the torrent of advertisements and claims inundating the airwaves on a daily basis. In trying to convert key audience members into emissaries of Design Thinking, the campaign must be willing to put its money where its mouth is. They need to provide evidence of the power of Design Thinking as it applies to a real-world problem. More specifically, they will assign a volunteer design consultant to spend the day with a skeptical audience member, demonstrating the process, logic, and techniques comprising Design Thinking's philosophy and applying them to a problem this audience member is currently tackling.

### *Properties*

- Free consulting time provided to a key audience member
- Scheduling system

### *Features*

- Helps convince audience members of the potential of Design Thinking by donating design consulting hours to a project
- Helps obtain meeting with key audience member and demonstrates value of Design Thinking on real world issues





## Professional Translators

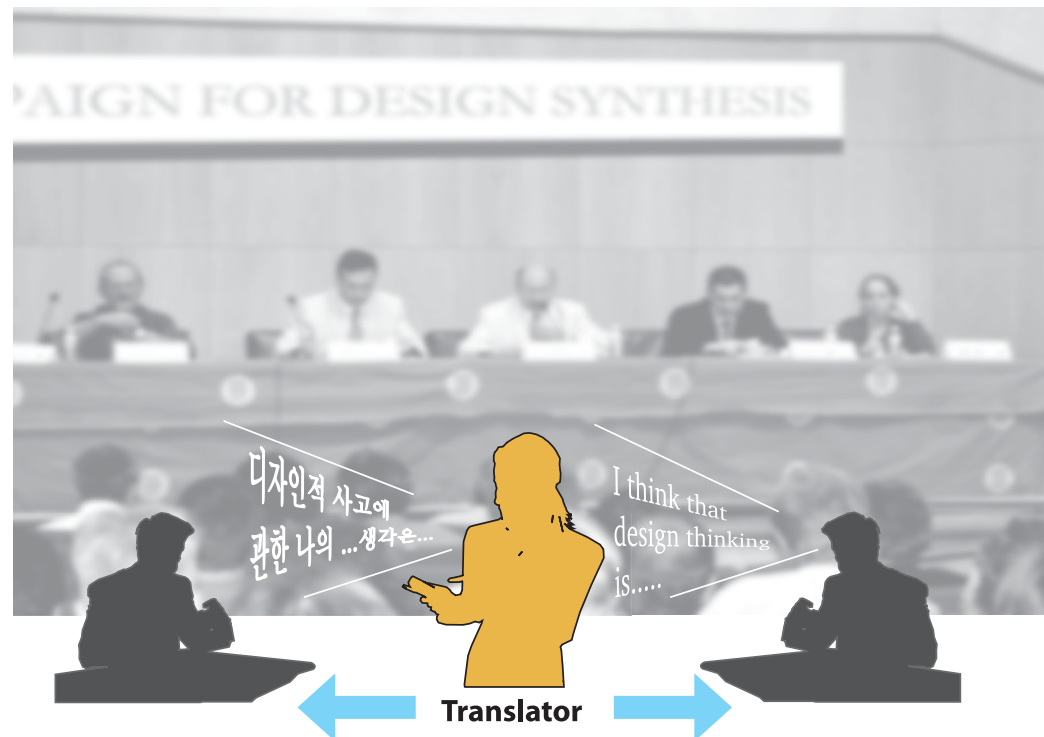
There will be instances in which the native language of some audience members will differ from that of the campaign staff. While useful translation software (text-to-text, voice-to-text) has progressed rapidly in the last decade and would provide the most economical solution, the subtleties and language peculiarities of Design Thinking necessitate the use of detail-oriented human professionals possessing the ability not only to accurately translate text, spoken language and symbols, but also to convey abstract concepts and practices.

### *Properties*

- Human translators who specialize in various languages

### *Features*

- Facilitates meetings with individuals who speak languages other than English





## Outreacher



### Scenario

Marlene is a researcher volunteering for the Campaign for Design Policy Synthesis. Assigned to arrange an interview with a audience member, she begins her task by connecting to the Contact Database via her laptop and searching for prospects. She selects Don Gerber, the director of Congressional Relations at a local think tank. Marlene dials his office number and speaks to Don's assistant Lenore, explaining the purpose of her call and offering a brief synopsis of the campaign's background before requesting an interview with her boss. Lenore politely replies that Don's schedule is booked for the next several months, but she will get back to her to possibly arrange for a phone interview.

Several days pass with no call back from Don's office. Marlene places a follow up call and learns from Lenore that Don's schedule hasn't budged. Undeterred, Marlene probes Lenore for some information regarding Don's reading habits (what publications he receives at work). Marlene thanks Lenore for her time and hangs up. Unwavering in her desire to secure a one-on-one interview with Don, she decides to use the campaign's Greasing-the-Wheels Gift by ordering a beautiful flower bouquet for Lenore. She includes a 'thank you' note, expressing her gratitude to Lenore for her efforts to arrange an interview with Don and taking the time to chat.

The following day, Marlene receives an email from Lenore, thanking her for the flowers along with an offer to set up a lunchtime meeting with Don the following week.

Marlene finds her subsequent meeting with Don to be both cordial and informative, enlightening her on the policy advising practices of his think tank. However, Don is somewhat skeptical of the extent to which 'Design Thinking' can help solve the problems he faces on a daily basis. In response, Marlene offers to have the campaign "loan" Don a design consultant for a day (Buying Time) to demonstrate the application of the campaign's core principles.

The following day design planner Carol Blank is dispatched to Don's think tank, where she accompanies him throughout the day, demonstrating how she would use Design Thinking to approach a number of global issues being studied. Persuaded by Carol's expertise, Don pledges his support to the campaign.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



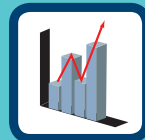
Cross Trainer



Recon



Outreacher



$\Delta$  P



Media Dashboard



Partner Pool

### Elements

State-of-Affairs  
Innovation Progress Newsletter  
Status Checking Bulletin Board  
Impact Survey  
Change-in-action Database  
Campaign Documentary  
Change Agent Monitor  
Campaign Transitioning Workshop

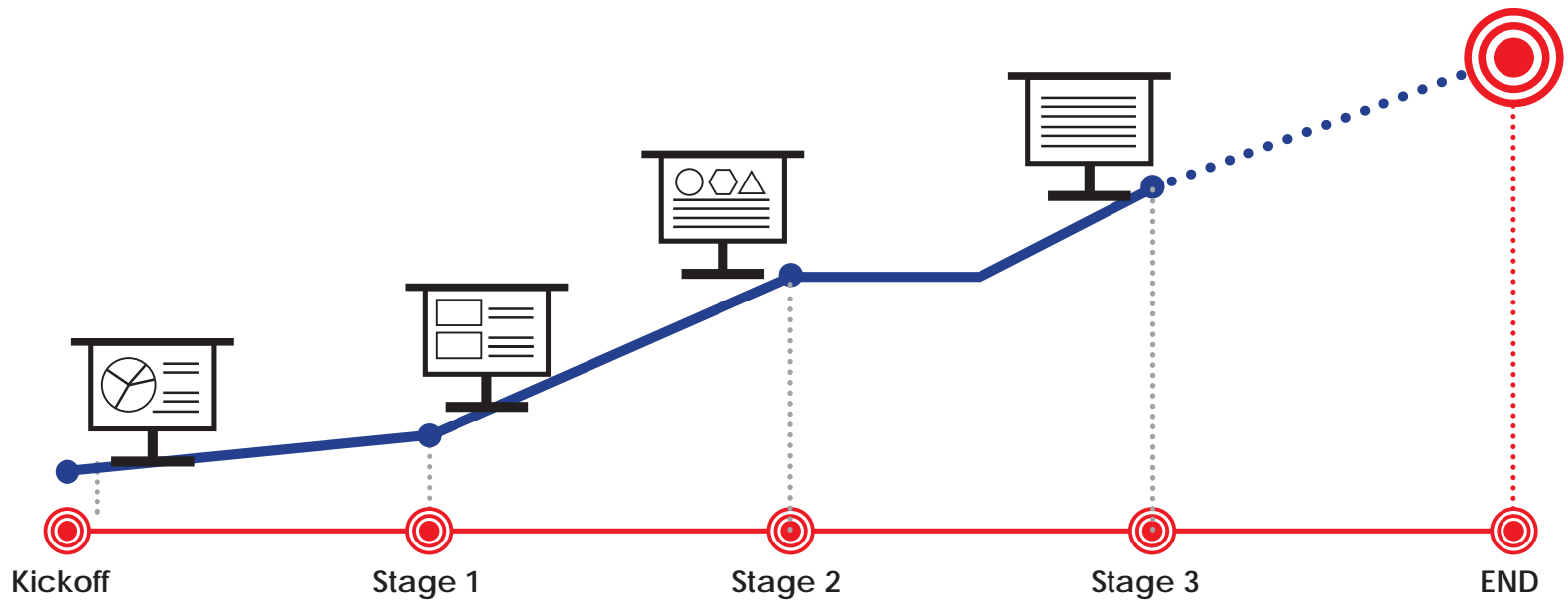
### Discussion

The Campaign for Policy Design Synthesis (CPDS) uses a variety of means to reach the target audience and change its perceptions regarding policy design synthesis. Campaign proponents are confident that its methods will help to ameliorate many societal problems. Moving beyond mere guesswork and simple assessment methods, a successful campaign requires a disciplined approach to monitoring progress, disposing of ineffective routines, and making recommendations for change. Thus, Delta P (Delta Progress) has been established to accurately measure the progress of the campaign as well as to inform system element Impresario as to what is effective and what should be changed.

### Description

Delta P consists of various elements that work in concert to help staffers assess progress, suggest changes, and recommend an overall direction for the transitioning team at the conclusion of the campaign. For example, State-of-Affairs provides a monthly presentation to management regarding the progress of the campaign and is supported by Impact Survey, which helps, along with Recon, to gather data about the target audience. The Campaign Transitioning Workshop, on the other hand, helps prepare the transitioning team for post-campaign team maintenance duties.





## State-of-Affairs

State-of-Affairs takes input data produced by Recon and produces a report and presentation to Impresario on the status of the campaign and the current environment in which the campaign is operating. Among the elements presented are an updated schedule of activities, relevant data on resources available to the campaign, a projection of resources that will be available in the future, skill-related statistics on the current staff, and the skills that will be required of future staffers to move the campaign forward. Additionally, a general summary about campaign progress will be included along with any pertinent observations that may be helpful to management and the board of overseers. The data produced by State-of-Affairs will directly affect the operation of many system elements, including Content Kangaroo, Stylus Operandi, Soapbox, and Crosstrainer.

### **Properties**

- Presentation to management on status of the campaign.
- Report detailing the status of the campaign.

### **Features**

- Provides facts on resources available and projected resources.
- Provides updated time schedule to advisory board and management.
- Provides information about current staff, skills, morale and compensation.
- Considers mistakes and successes of campaign.
- Reflects on progress made by campaign.





## **Innovation Progress Newsletter**

Innovation Progress Newsletter is a monthly newsletter that provides updates on campaign progress as well as educational articles and new research tools. It is distributed to those who have participated or demonstrated interest in the campaign. The system elements that support the Innovation Progress Newsletter are Recon and Content Kangaroo, and to a lesser extent, Stylus Operandi.

### ***Properties***

- Monthly newsletter providing updates on campaign progress, as well as educational articles.

### ***Features***

- Provides news, opinions and analysis on the campaign.
- Keeps interested parties engaged in the campaign.
- Provides educational information to increase knowledge about new developments in the policy and design fields.



## **Status Checking Bulletin Board**

Status Checking Bulletin Board is an online bulletin board that interested parties can use to check the status of the campaign. Though similar to the Innovation Progress Newsletter, it is updated more frequently in order to provide day-to-day news and call attention to issues relevant to the campaign. Furthermore, the bulletin board allows for feedback and discussions related to campaign improvement.

### ***Properties***

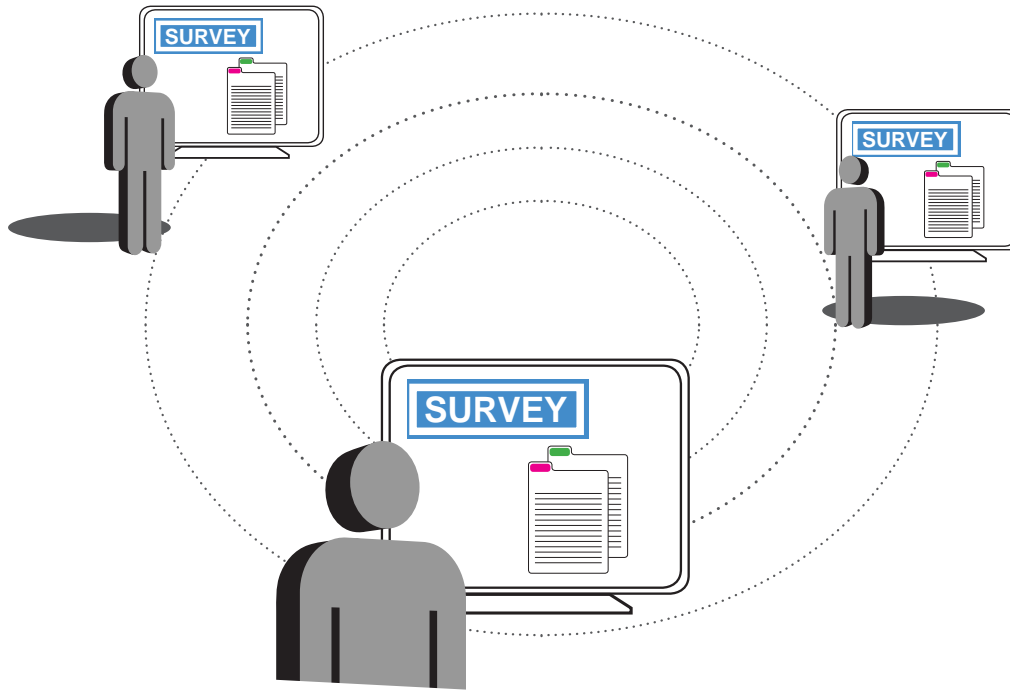
- Bulletin board for tracking progress of campaign

### ***Features***

- Provides news, opinions and analysis on the campaign.
- Keeps interested parties engaged in the campaign.
- Updates what has been accomplished and what did get accomplished.







## **Impact Survey**

Impact Survey is a brief on-line survey that queries key audience members about the impact of the campaign on their professions, on the field of design, and on policy development. The results of these surveys are automatically compiled and incorporated into reports and presentations found in State-of-Affairs.

### ***Properties***

- On-line survey sent to audience members.

### ***Features***

- Measures impact of campaign on audience members.
- Provides data to assess the campaigns progress



## Change-In-Action Database

Change-In-Action Database is a database that contains information relevant to Delta P. More specifically, it is used to capture policy and cultural or societal changes occurring as a result of campaign. In addition, it captures the location of such changes, the people affected, and the nature of the shifts. Recon and Delta P will share data collection responsibilities.

### *Properties*

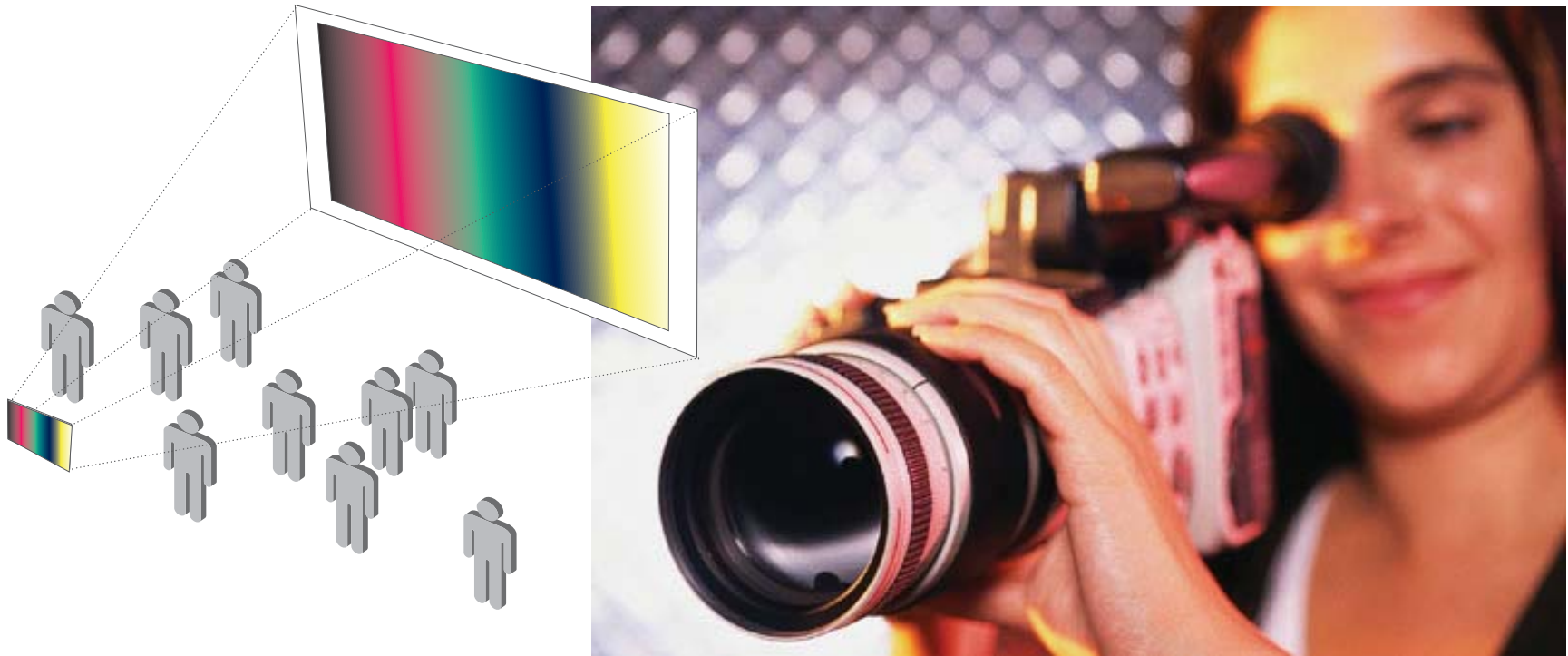
- Database used to document policy, cultural shifts, and societal shifts occurring as a result of campaign.

### *Features*

- Provides a designated location for all data relevant to Delta P.
- Provides interested parties with easy access to data on campaign progress.







## **Campaign Documentary**

Campaign Documentary is a documentary film about the campaign meant to inspire, prepare and educate subsequent endeavors that seek to promote the idea of policy design synthesis. The piece will attempt to provide an accurate account of campaign-related events, highlighting both its successes and failures. It will also showcase examples of campaign-driver progress in the policy arena. Once completed, the documentary will be archived in Content Kangaroo and disseminated through the appropriate media channels.

### ***Properties***

- Documentary film about campaign.

### ***Features***

- Gives account of campaign.
- Illustrates campaign success and failures.
- Provides promotional content to further feedback into campaign.





## **Change Agent Monitor**

Change Agent Monitor is a group of volunteers recruited from various industries to measure campaign impact with regard to policy development, cultural shifts, or societal changes brought about by campaign activities. Delta P helps maintain the campaign's relationship with these volunteers and integrates any insights they generate into State-of-Affairs.

### ***Properties***

- Volunteers recruited from various industries tasked with monitoring and reporting policy developments, cultural shifts, or societal changes resulting from the campaign.

### ***Features***

- Measures campaign impact with regard to changes made by campaign.



## Campaign Transitioning Workshop

Campaign Transitioning Workshop is a training session conducted for the benefit of the maintenance team. It provides the tools and frameworks necessary to indoctrinate this new team and propel a condensed campaign forward.

### *Properties*

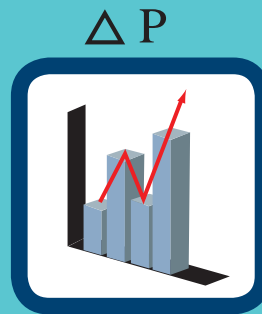
- Training session including turnover documents for the maintenance team.

### *Features*

- Provides tools and frameworks for maintenance team.







### Scenario

Paul is a staff member of the Campaign for Policy Design Synthesis and has been implementing the tools in Soapbox to help promote its agenda. In order to assess the effectiveness of his efforts, he attends a monthly presentation called State-of-Affairs, a sub-element of the campaign's Delta P program.

At State-of-Affairs, Paul gains an understanding of what is working and what needs further improvement. He learns that use of the Powerful Articles tool has resulted in the publication of pieces appearing in Popular Science and Nature magazines. State-of-Affairs credits these articles with raising the awareness of the campaign to a statistically significant level. Moreover, the campaign has seen an increase in visits to CPDS Web Site, indicating an expanded reach of the campaign message.

On the other hand, State-of-Affairs indicates that Lecture Tour is not sufficiently accomplishing its goals. Attendance is down and speakers are not connecting with target audiences. Paul solicits an explanation of the tool's shortcomings from the State-of-Affairs team and uses their insight to craft a new strategy designed to help the Lecture Tour accomplish its goals.

Paul leaves the presentation and meets with his Soapbox group to discuss how their strategies can be improved. Since all have attended the State-of-Affairs presentation, team members are aware of what is working in the campaign and what is not, leading to a productive meeting during which informed decisions on how to proceed with implementing Soapbox can be reached.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



Δ P



Media Dashboard



Partner Pool

### Elements

Questionnaires  
Commercial Ratings Services  
Cost and Value Assessment Feature

### Discussion

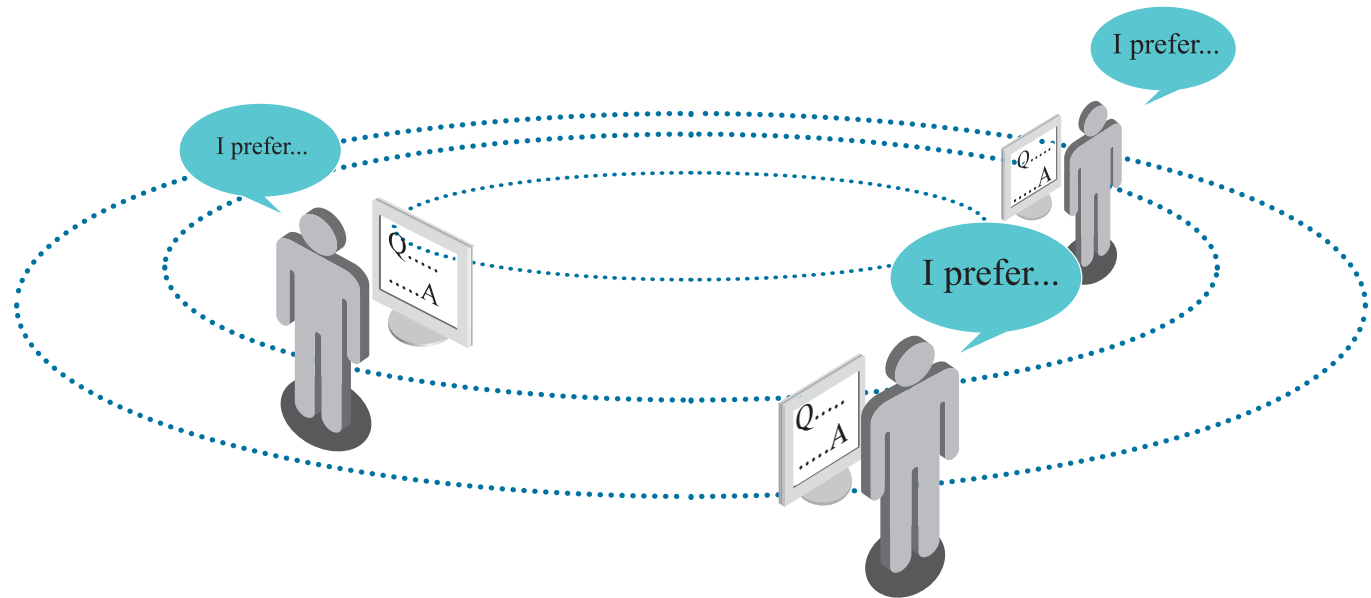
The paramount concerns of campaign promotions are visibility and press coverage. Because the central goal of a campaign is to convince a targeted audience to support a specified course of action, the communicative persuasiveness and ubiquity of media must be consistent and compelling. Thanks to the rise of the internet and developments in associated communications technologies, the number of viable media channels has increased tremendously in the last decade, enabling even the most humble of efforts to have potentially widespread exposure.

### Description

There are a number a strategies a campaign might employ to garner media coverage. A well-funded effort could simply purchase “air-time”, delivering their pitch in the form of quick, soundbite-heavy commercials, flashy print or web-banner ads, public promotional events (rallies), or even phone-based campaigns. A leaner, more grassroots-based campaign might leverage free or low cost internet-based tools like weblogs, email, or podcasts. Regardless of funding, campaigns should strive to acquire free, widely distributed interviews with the mainstream press.

Because time is precious to any campaign, a toolset that could quickly assist organizers in effectively determining which media channel might have the most impact with its particular audience would be invaluable. Media Dashboard is a compelling example of such a system.





**Questionnaire** One of the best ways to quickly gather data regarding the preferences of an audience is to go to the source. A questionnaire designed to determine which media channels (e.g. TV shows, web sites, magazines, newspapers) are most frequented by the target audience can fulfill this task efficiently due to ease of distribution and reception through the internet. In Media Dashboard, questionnaires are sent to audience members selected from the Contact Database. Completed questionnaires are automatically scanned, scored, and categorized, resulting in a list of ranked media channels. Due to potential selection biases, however, an alternate means of data collection should also be employed for this procedure.

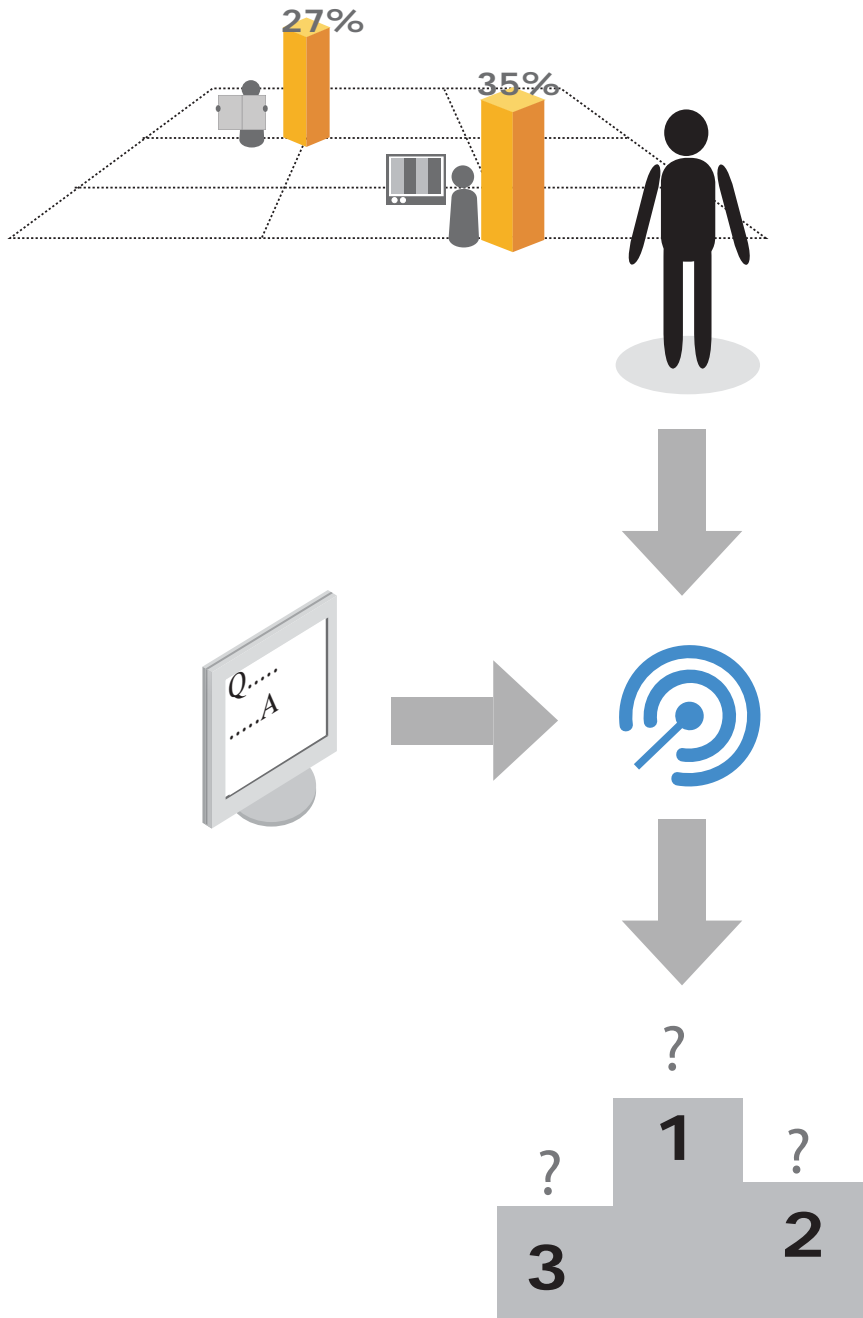
**Properties**

- Online questionnaires that are automatically distributed and analyzed upon receipt

**Features**

- Help PR staff determine most effective media channels for target audience





## Commercial Rating Services

A central tool advertisers and campaigns use in determining which channels best reach their target demographic is the commercial rating system. Leading services like Nielsen and Arbitron sample a broad range of users to generate accurate estimations of media consumption in the media world. They may also be contracted by organizations seeking specific demographic data. Services like these would feed into Media Dashboard in order to cover the spectrum of broadcast, internet, and print media and serve as a check against selection biases in the questionnaire process. Data would be filtered using search parameters matching the target audience profile. Ratings would be added to those obtained by the questionnaires, cross checked, and finally averaged to obtain a final ranking order predictive of which media channels would most effectively deliver the campaign's message to its target audience.

### *Properties*

- Services that specialize in determining levels of media consumption

### *Features*

- Samples random audiences to determine ratings
- Offers services to commercial and private interests
- Electronic access for instant results





## Cost & Value Assessment Features

After the final ranked list of most-frequented media channels is assembled, Media Dashboard's integrated search engine locates contact information for each media firm within a given channel, including email, addresses, and phone numbers in case campaign staff members need to reach them later.

Once staffers decide which media channels they want to use Media Dashboard will automatically (if directed) contact each media firm via email with background information on the campaign, a request for advertising pricing information, and an interview inquiry. Because the system has already generated contact information for each media firm, staffers may also contact them by phone.

As soon as pricing information has been received, the application uses a cost assessment feature to automatically scan price quotes for airtime, print ad space, or web banners that fall within the prescribed budget. Numbers can also be entered manually or imported from Excel spreadsheets which contain budgeting information. As a result, costs of each affordable media channel are automatically compared against each other to determine which channel and firm within the channel would be the best value.

### *Properties*

- Excel plugin
- Integrated online data search engine
- Automated emailer
- Spreadsheet generator

### *Features*

- Helps PR staff determine relative costs of "airtime" and assess chances of obtaining free publicity (ex. Interviews)
- Requests pricing and interviews from media channels
- Finds contact information for each media channel so PR can contact
- Helps determine affordability and value of media channels





## Media Dashboard



### Scenario

Elliot, a PR intern with the Campaign for Policy Design Synthesis, has been tasked with finding the ten best media channels in which a paid pre-taped video advertisement could be aired. Ideally, several channel firms would be receptive to conducting an interview with a campaign spokesperson. Elliot opens the Media Dashboard application on his computer workstation and hits the “Channel Rankings” tab to see which channels are most widely frequented by the campaign’s target audience. The rankings have been created by the system through the analysis of online questionnaires and commercial media ratings services like Nielson and Arbitron. Because opinions and tastes in media channels are constantly evolving, Elliot must occasionally request updated rankings. He presses an “Update” button in the Rankings tab and waits a few moments for the system to receive new data and make calculations. The resulting ranking table lists the most popular media channels from the top down along with key media firms and their contact information.

In order to ascertain the affordability of the most popular media channels, Elliot must first obtain an updated list of advertising costs. Because some will be inevitably cost prohibitive, he selects significantly more than the top ten (clicking in check boxes next to each channel title) and clicks a button labeled “Request Pricing/Interview.”

The system automatically emails sales and public relations contacts at each media firm, requesting pricing information and the opportunity to be interviewed. All replies are routed through Media Dashboard, which extracts pricing information and interview requests.

The following day, Elliot logs back on to Media Dashboard and selects the “Respondents” tab. He discovers that nearly half of the fifty odd media firms he selected the previous day have responded. He checks prices and notes which channels have expressed interest in interviewing campaign spokespersons. Next, he marks the desired respondents in the spreadsheet and clicks a button labeled “Assess.” A new window appears moments later displaying the respondent media channel plotted on a two-by-two matrix, with x-axis measuring ratings strength (low vs. high) and the y-axis accounting for cost (cheap vs. expensive). A checkbox at the bottom of the window allows Elliot to toggle on and off the level of interview receptivity for each firm within a channel. With the requisite data now in hand, Elliot can make an informed decision as to which media channels can be used most effectively by the campaign.



Soapbox



Stylus Operandi



Content Kangaroo



Impresario



Cross Trainer



Recon



Outreacher



$\Delta$  P



Media Dashboard



Partner Pool

### Elements

D-friend Yellow Pages  
Join-iT  
MediaXpert Alliance  
Advisory Board DB  
Volunteer Share  
Multimedia RecruitID

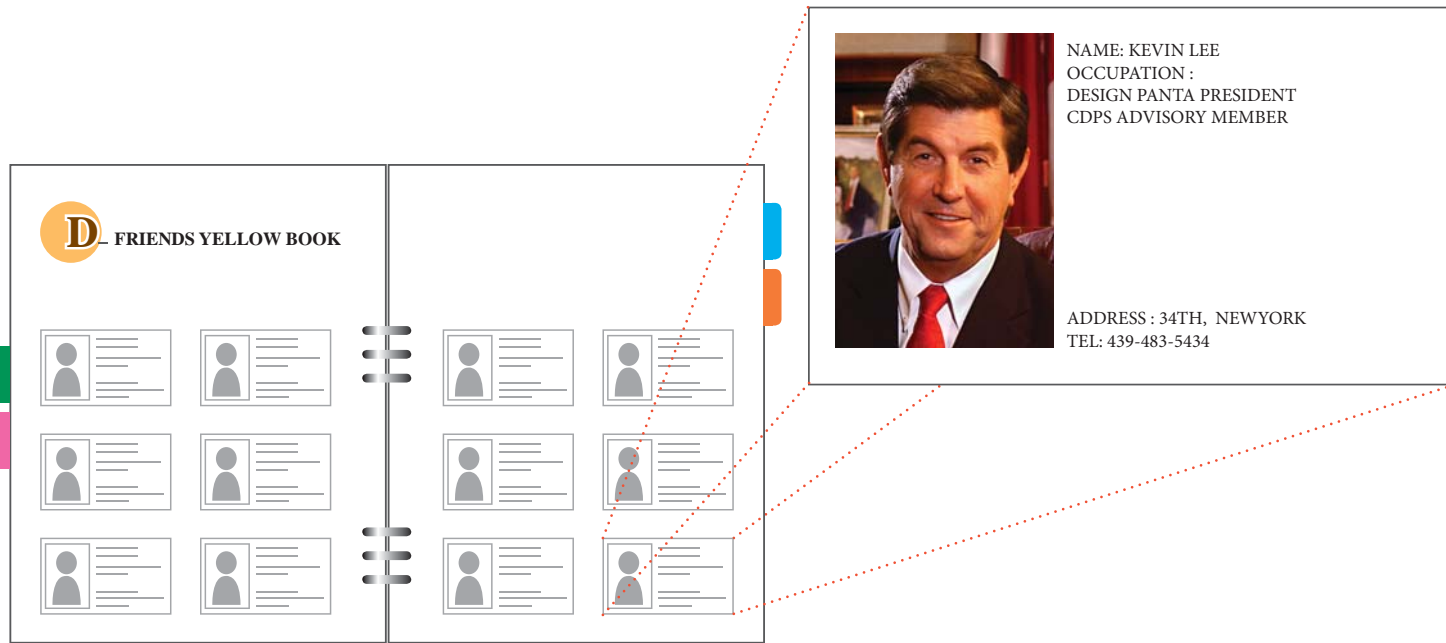
### Discussion

The Campaign for Policy Design Synthesis is an ambitious, far-reaching endeavor that requires the assistance of a broad range of capable individuals. These talented professionals would assist in resolving operations issues, consulting on important decisions, and possibly providing financial support. As such, campaign staff must not only locate parties who will publicly support the message but also locate those who might be willing to invest their own resources. Partner Pool can help simplify these challenges.

### Description

By leveraging pervasive computing technologies and traditional networking approaches, Partner Pool attracts qualified participants to assist with the campaign. For example, experienced professionals are invited to join an advisory board to consult on key topics like strategic planning, partnering strategies, and innovative thinking. Partnerships are established with media savvy firms to identify and select media channels that are most appropriate for the target audience. Finally, there is an internal, incentivized trading system that encourages good stewardship and optimization of human resources during the campaign. Ultimately, Partner Pool helps promote efficient use of human resources and assists campaign leaders in making informed decisions through collaborative means.





## **D-friend Yellow Pages**

Assembled by campaign researchers and staff, the D-friend Yellow Pages is an Excel spreadsheet with a comprehensive list of design-friendly entities, ranging from passionate individuals and professional organizations to academic institutions and corporations. These entities are believed to be potential campaign supporters in some capacity. In addition to specific contact information, the spreadsheet also provides some historical context, highlighting projects indicative of Design Thinking practices. Entities listed in the spreadsheet can be sorted by alphabetical order, location, related industry, or affiliation, enabling more efficient information retrieval by staffers. A keyword search is also available because of Excel's embedded search function.

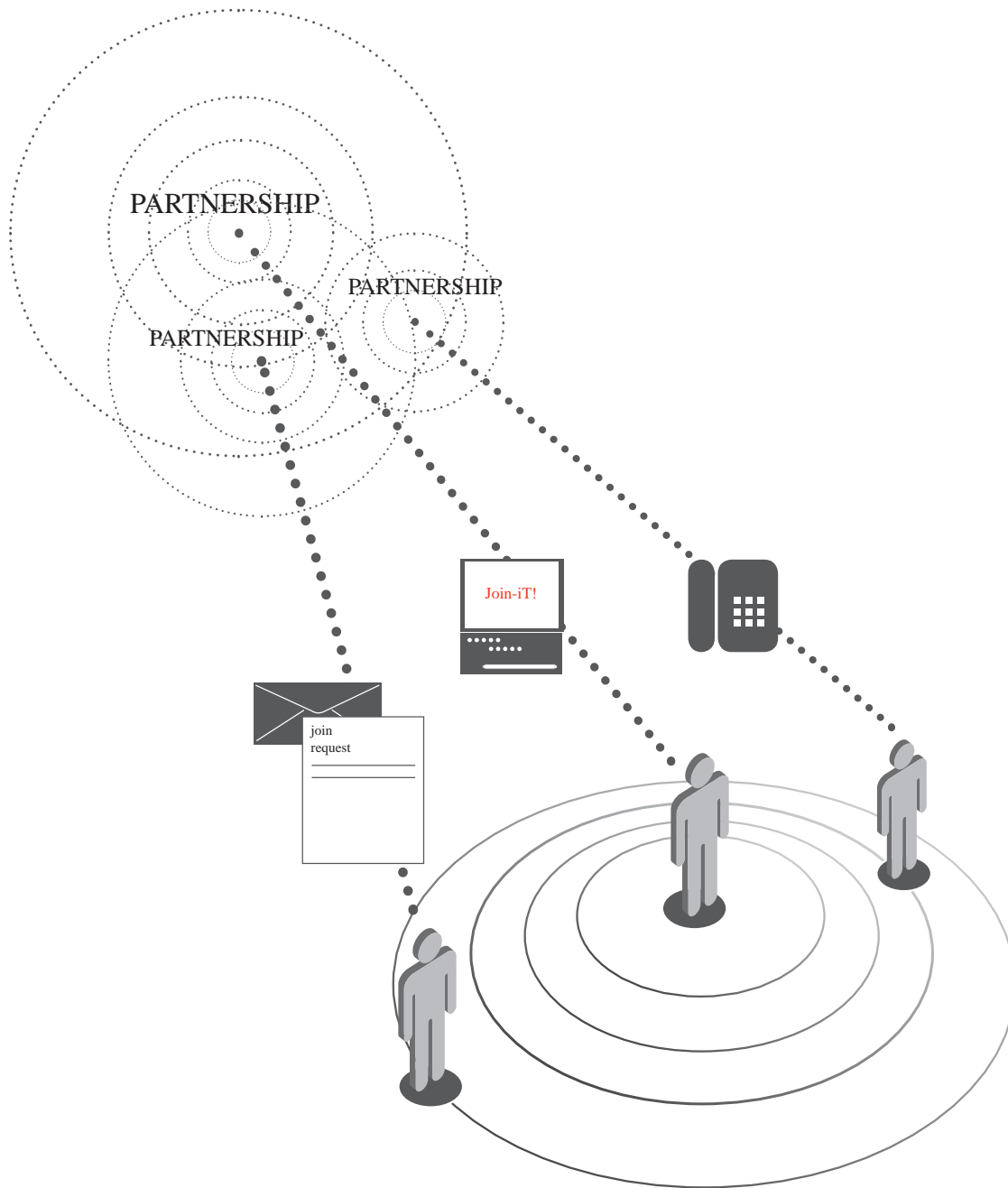
### ***Properties***

- A spreadsheet listing design-friendly entities
- Keyword search engine

### ***Features***

- Provides contact details of design friends
- Allows categorization of design friends according to different sorting criteria





Join-iT provides a variety of means for the campaign to solicit desirable partnerships. For example, the campaign could purchase numerous banner ads on both high traffic commerce and design-centric websites such as Core77, IDSA, Amazon, Yahoo!, and eBay, all of which are hyperlinked to a main partnering information page on the Campaign for Policy Design Synthesis portal site. Other campaign promotional materials like Powerful Articles and Evoc Send-in Package contain partnering request “buttons” that link to the partnering site as well. Paper request forms are also mailed out to target audience members, principally those connected with the business and design communities. Finally, a telephone number is provided for interested parties who have specific questions about the campaign and their desired level of involvement.

#### ***Properties***

- Partnership request program
- Online request buttons and banners, paper mail and email request forms, telephone information/solicitation service

#### ***Features***

- Allows interested entities to contact campaign staff any time
- Contributes to the establishment of partnerships via convenient inquiry/request services



## MediaXpert Alliance

MediaXpert Alliance enables the campaign and media-centric companies to exchange services in their respective areas of expertise in a mutually beneficial way. For example, a TV production company or advertising consultancy may design a media campaign specifically tailored to a target audience, selecting appropriate media channels, communications technologies, and impact monitoring schemes. In exchange for their efforts, they would receive free design consulting services (provided by campaign volunteers or partners).

### *Properties*

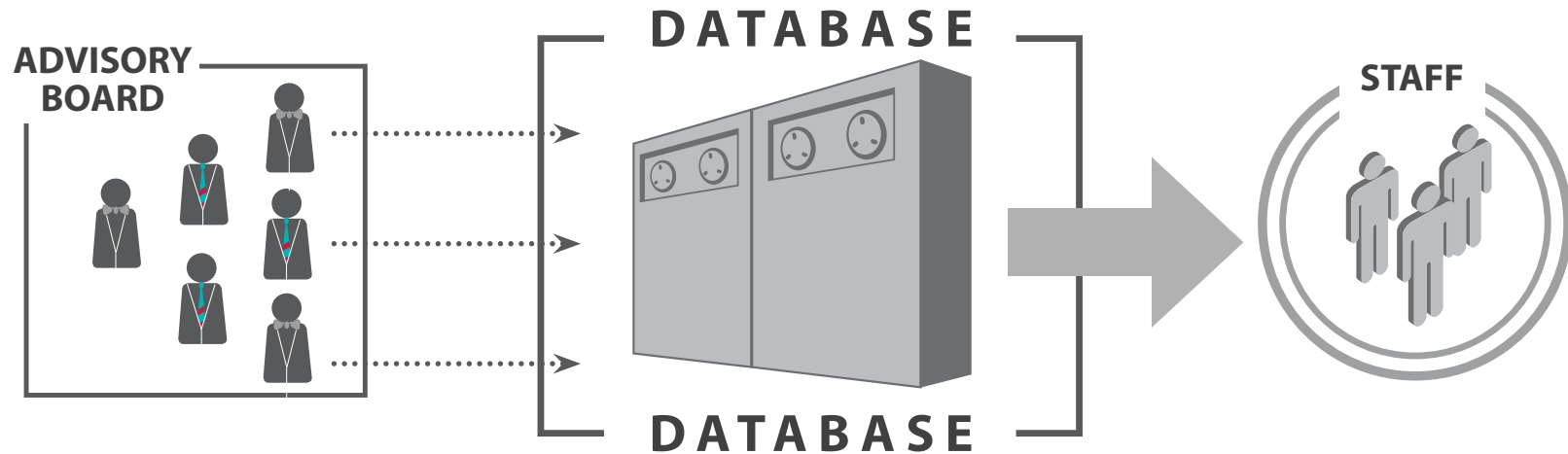
- Strategic partnership with specialized media companies

### *Features*

- Helps identify and select appropriate media channels/technologies







## Advisory Board DB

Advisory Board DB is a database of essential information on Advisory Board candidates. Derived from high-level brainstorming sessions and referrals from dependable sources, the list of prospective board members is accompanied by contact information, relevant job experience, an indication of whether the candidate has been contacted, and a measure of a his or her willingness to participate (if contacted). For further assistance in determining a candidate's desirability, embedded links in the database provide access to personal biographies and webpages.

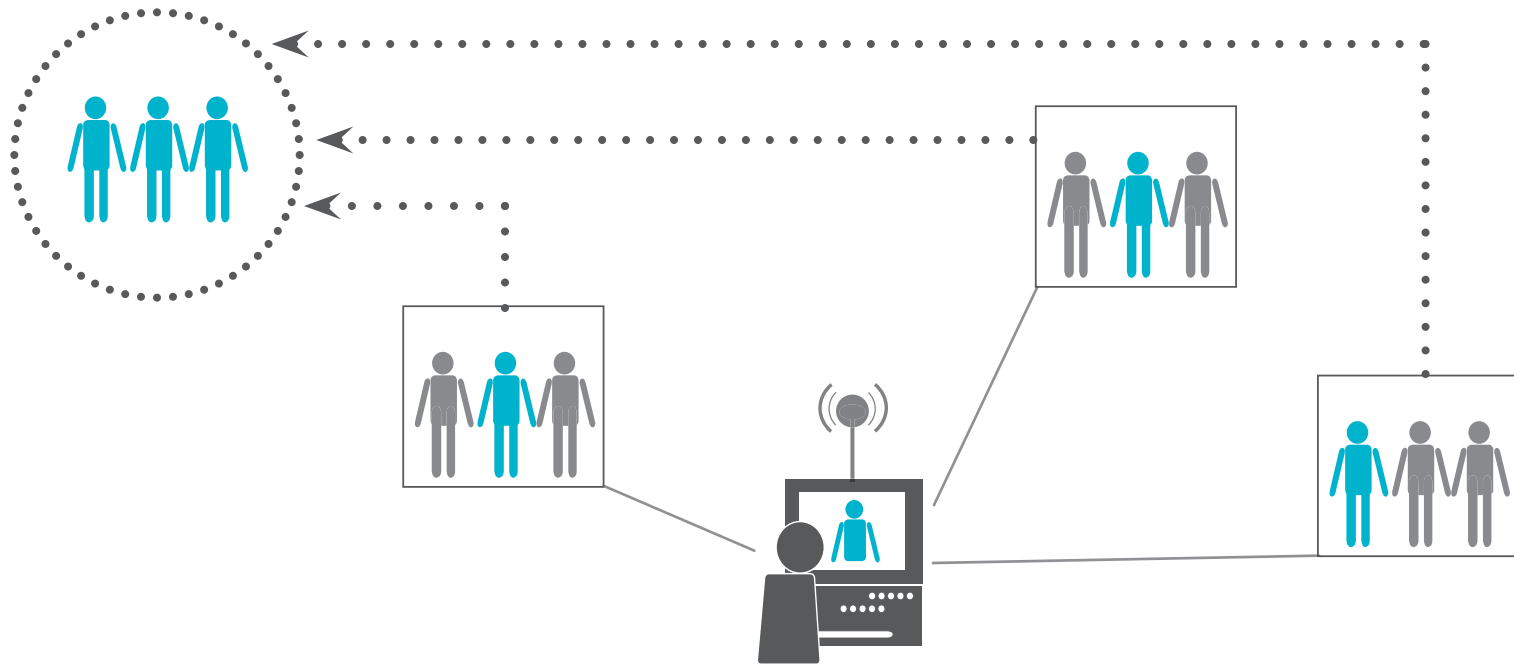
### *Properties*

- A database that contains specific information on desirable Advisory Board prospects

### *Features*

- Identifies desirable Advisory Board members, their contact details, whether they have been contacted, their willingness to participate (if contacted), and the areas where they would like to provide assistance (if any)





## **Volunteer Share**

Volunteer Share allows different sections of the campaign to share and trade volunteers to maximize the efficiency of human resources. The online trading system is supported by an advanced communication network across different campaign teams that can be accessed at any time in any place through any display terminal. Based on the information from Resource Manager (availability), Talent Database (qualifications), and Smart Match Database (fit), campaign leadership is able to move desired “cards” (with information specific to appropriate individuals to be traded) around to express their trading intentions (Interactive CardPlay). Messages will immediately be sent to relevant personnel for acceptance or rejection. Any change resulting from Volunteer Share trading will be forwarded to Resource Manager for an update. In addition to this trading system, a series of targeted incentive programs – financial awards, campaign-wide recognition, and professional training, for example – are provided to encourage volunteers to accept different temporary assignments.

### **Properties**

- An online trading system supported by an advanced communication network
- Incentive programs

### **Features**

- Identifies staffers by relevant skill, ability level, and availability
- Facilitates trading of staffers between teams



## **Multimedia RecruitID**



Multimedia RecruitID consists of several tools that can be used to facilitate the recruitment of staff members, according to need. More specifically, Talent Database contains desirable skill sets required by each team and keeps a record of current team skills. RecruitMe.com is a dedicated website used to collect volunteers' information through both questionnaires and resume submission. The information includes job experience, expertise, availability, and level of interest in the campaign. When coupled with the Talent Database, this information helps HR determine a candidate's qualifications. The 'fit' calculation can then be determined by Smart Match Engine.

The process should result in the selection of reasonably appropriate individuals. To fine-tune the selection of more "elite" candidates, a number of additional tools can be utilized. For example, the RecruitID Cocktail Party allows current staffers to meet candidates in person, Second Fiddle locates runners-up of design contests who may be interested in contributing, and Snowball Referrals produces internal recommendations from staff members. A Referral Incentive program helps to encourage recommendations by rewarding staff members whose referrals are hired.

Finally, to better manage the wealth of contact information as well as more easily locating candidates, Multimedia RecruitID offers the Contact Directory, a comprehensive spreadsheet listing all relevant information on potential staff members, volunteers, and retired specialists.

### ***Properties***

- Contact Database – contains contact info for potential staff and volunteers as well as retired specialists.
- Talent Database – contains skills needed by each team and current team skills
- RecruitMe Website for potential volunteers – provides ability to submit resume, fill out basic Personal Info Questionnaire, E-Harmony Questionnaires, and chat with HR staff
- Smart Match Database for submitted resumes, Personal Info Questionnaires, E-Harmony Work results, indicating tentative matches to open positions as well as a "fit" ranking
- Recruiting Reward incentives for recommending staff who are successfully acquired
- RecruitID Cocktail Party for meeting potential candidates for more senior level positions
- Second Fiddle – a DB of design contest runners-up

### ***Features***

- Locates talented volunteers and staff with appropriate skills to fill open campaign staff slots quickly and cost effectively



## Partner Pool



### Scenario

It is a busy recruiting season for the campaign which needs many talented individuals to help craft and launch this operation. Michelle, leader of the recruitment team, decides to “borrow” additional human resources from other teams through Volunteer Share. A few days later, Michelle receives several responses to her request for help. She chooses five qualified volunteers who are temporarily available.

Michelle assigns tasks to her new team members. New acquisitions Michael and Tracy are charged with processing partnership requests which were located through Join-iT. Processed requests will be forwarded to Kevin, who maintains the D-friend Yellow Pages, sorting the design-friendly entities contained therein to determine respondents’ most preferred contributions. Consequently, he is able to make informed recommendations of the partner candidates to pursue first to Michelle.

Other new team members, Andrea and Paul, are responsible for populating the MediaXpert Alliance with specialized media companies who can offer expertise in identifying and selecting targeted media channels and technologies. They consult D-friend Yellow Pages for potential leads.

In the meantime, Michelle focuses on expanding the existing Advisory Board. She examines candidates based on career experience data (referenced in the Advisory Board DB) in addition to considering advice from the existing board members. As she collects information about potential candidates, she updates the Advisory Board DB and identifies a list of interested partner candidates she intends to invite to the RecruitID Cocktail Party next month.

Meanwhile, the remaining team members collect applicant information via RecruitMe.com and store it in the Smart Match Database. The staffers then conduct a keyword search to sort out individuals with the desired skill sets indicated in the Talent Database. They examine and compare prospective volunteers qualifications, eventually suggesting candidates to Michelle. Through her effective use of Partner Pool, she can be confident that campaign executives will be pleased with her final selections.





# Conclusion



## Conclusion

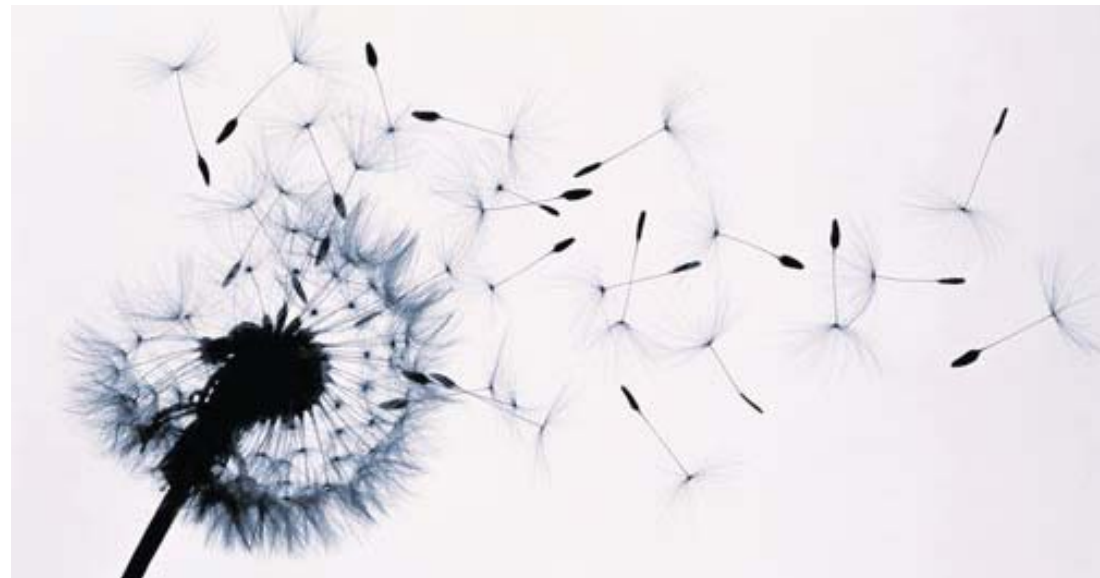


There is a growing awareness today that “our world society is presently on a non-sustainable course” (Diamond, 498). This recognition – reified by recent natural disasters such as Hurricane Katrina and the 2004 tsunami, manmade catastrophes such as the Chernobyl reactor meltdown and the World Trade Center attacks, and exploding population growth and consumption – is increasingly pressuring those in positions of power to adapt.

From the general public to the highest levels of government, many now recognize the need for more thoughtful, proactive, comprehensive policy development. While the general public demands explanations for the apparent lack of strategic planning, policy makers attempt to deflect blame. Clearly, the time is right for Design Thinking.

By learning from and employing the expertise of Design Thinkers who know how to make smart, strategic decisions, policy makers could ultimately develop policies which are proactive, holistic, and ultimately beneficial to their citizens.

To acquaint these leaders with the value of Design Thinking, the Campaign for Policy Design Synthesis was created. The Campaign’s primary goal is to expose influential leaders to its benefits, in terms they would understand and appreciate. The ten interrelated Campaign modules address areas of focus including campaign management, content research and creation, content delivery to target audiences, and the monitoring of campaign progress, all of which are vital to launching an effective campaign and ensuring its core message is well received by its intended audience.





## **Design Thinking**

*A Campaign for Policy Design Synthesis*

# ***Appendix***



## TABLE OF CONTENTS

<b>Charter</b>	<b>1</b>
<b>Defining Statements</b>	<b>9</b>
<b>Function Structure</b>	<b>32</b>
<b>Design Factors</b>	<b>35</b>
<b>Information Structure</b>	<b>68</b>
<b>Sample Working Form</b>	<b>80</b>
Activity Analysis Sheets	81
Solutions Elements	83
Means/Ends Analysis	85
Ends/Means	87
System Element Relationship	89
System Element Evaluation	91
System Elements	93



# *Charter*



# Design Thinking

## *A Campaign for Policy Design Synthesis*

### Charter

---

#### Background

In the 1980's, with the first comprehensive gathering of data on global warming, tangible effects of population growth began to be firmly associated with the actions of industrial society. Meeting the demands of a growing population for material goods was beginning to be seen as a two-way street. The concept of "better life" was beginning to look like a relative one--briefly better, relative to the past, but frighteningly better, relative to a very uncertain future.

Because few listened when something might have been done about it, we are now confronted with global warming as an observable, highly threatening fact. Like many other massive events, it took a long time to gain strength, and it will take longer to lose it. It is still in a strengthening pattern, and it is hard to see how that will change in the foreseeable future.

In spite of world-wide awareness, population growth also is still in an accelerating phase. The population of the world is now 6.46 billion and rising. Just 50 years ago it was 2.76 billion. Despite the fact that almost all developed nations are at replacement-level birth rates--or lower--world population is still on a steep incline because of high birth rates in developing countries. Before world population begins to level off, we can expect to see the number rise to over 10 billion--barring catastrophic events.

And catastrophic events are distinct possibilities, growing in probability every year, all because of population growth. A better life for a growing population--even eliminating poverty, as the September 2005 issue of *Scientific America* argues as a goal--means more energy to be produced and more resources to be processed. Without sustainability, this can only mean unchecked resource depletion and uncontrolled greenhouse gas emissions. Both will generate disasters at an accelerating rate.

Global population growth and the problems it has induced--from resource depletion to global warming--are arguably the most serious threats to our civilization. But as we finally commit to confronting them, technologies now just evolving will put awesome new capabilities at our disposal. We may yet be able to escape the worst ravages, perhaps even bring better quality of life to our descendants. The question is, will our political decision makers have the wisdom to avail themselves of the right tools at the right time? Will we be able to avoid the worst of projected disasters and make best use of the new technologies? Decision makers will need the best of creative thinking from the science community--and from a design community prepared to contribute.

The evidence is that decision makers are not using--or receiving--the full range of advice they need. Advice that offers proactive, constructive, creative options for action is not being heard. The design community must assume new responsibilities and reinvent itself to fill this void. In so doing, it will have to rethink matters of education, research and professional activity, and it will have to prove to leaders that design thinking is a critically valuable asset.



## Relevant Trends

Trends initiate by emerging technologies, changing environmental conditions, and evolving social change will have a real impact on the situation. Among some trends are:

### **Food Production on Land**

Food production for a growing population is an absolute requirement. In the last 50+ years, beginning with the green revolution. That virtually saved India from starvation, the rise in food production has outstripped population growth. But arable land per capita continues to decrease--by 2050, it will have decreased over 62% since the 1960's--and productivity cannot increase indefinitely.

### **Food Production at Sea**

The oceans, once thought to be a limitless food source, are fast becoming a depleted resource. Stocks of wild finfish and shellfish are declining alarmingly. The fishing industry is turning more and more to deep-water species to replace them, often with little knowledge of the biology of the replacement species.

### **Water Resources**

Already in many parts of the world, water supplies are reaching levels of insufficiency. Complicated by agricultural needs for irrigation and the needs of urban centers becoming megacities, the fresh water resources of our lakes, rivers and subsurface aquifers are subsiding. In 2003, 9,500 children were dying daily from insufficient or contaminated water supplies. One-third of the world's population, by some experts' analysis, live in water-stressed countries now, with two-thirds of the world to share their dilemma by 2050.

### **Mineral Resources**

Mineral resources are approaching finite limits, exhausted in some locations, more difficult to extract in others. While supplies of some minerals are in immediate danger, others are under severe pressure. Oil is a resource of vital concern, with production expected to peak in this decade or shortly thereafter. The Hubbert Curve, long-used as a predictive tool in the petroleum industry, when coupled with modern corrective tools, predicts that we are reaching worldwide peak production now and face a reduction in production of approximately 3% per year very soon. Not only will that oil production have to be replaced as an energy source, additional energy sources will have to be found to keep pace with the population curve.

### **Population Movement**

In an interesting paradox, the countryside is becoming less--not more--inhabited as we add to the population. The people are moving from the country to the cities. As of this year, 2005, the world is more urban than rural for the first time. In the next fifteen years 300 million rural Chinese will move to the cities. In 1950, only two cities in the world, Tokyo and New York, were over 10 million in size. By 1970 there were 4 such megacities, and by 2003, there were 20. By 2015 there will be at least 22. In China alone there are between 100 and 160 cities with over 1 million inhabitants (America has 9, and Eastern and Western Europe together have 36). Cities are complex, sophisticated systems, but their managers will need all the skill they can command to deal with the great urban migration.

### **Climate Change**

Climate and weather patterns are changing. Some regions are simply getting drier or wetter, but the greatest damage will come from sustained, severe droughts and intense, prolonged flooding. The problem is the change: eco-systems confronted with wetter or drier conditions for periods far longer than the environment or its inhabitants are prepared.



### **Rising Ocean Levels**

Ocean levels are rising. Temperature rise under global warming is greatest at the poles, and polar melting is accelerating. Melting icebergs have little effect on rising water levels because the ice is already floating, but ice melting on land, such as in Greenland and Antarctica, will contribute to rising water levels, and the thermal expansion of water as it is heated a degree at a time will also contribute. The Intergovernmental Panel of Climate Change in its 2001 report, estimates a 45cm (18 inch) mean rise by the end of the century with a low estimate of 9 cm (3.5 inches) and a high estimate of 88 cm (35 inches). Many of the world's major cities are on ocean coasts or waterways close to oceans.

### **Storm Violence**

The increased heat energy created by global warming is feeding more violent storms. Storms over the water will increase in number and in violence. Storms over land, although less subject to the stimulation of ocean heat, will draw from the weather systems that build over the oceans and move readily onto land. All but the regions most remote from the coasts will be influenced. Category 4 and 5 levels can be expected increasingly for hurricanes, cyclones, typhoons and tornados.

### **Moving Ecological Zones**

On a longer scale, climate changes are moving the zones in which species can live. Warmer winters, earlier springs and hotter summers are changing key environmental characteristics crucial for species survival, even existence; and as ecological zones migrate northward (or southward in the southern hemisphere), they will do so at a pace too fast for plant species to follow. When species disappear, others dependent on them are also affected, and eco-systems disintegrate. Biodiversity will decrease and extinctions will take place.

### **Increasing Expectations**

The growing availability and capabilities of communications such as cellular telephones, satellite and cable TV, and the Internet across the country (and the world) are providing people with daily knowledge of living conditions, problems, avenues for fast communication between protectors and populace. They are also educating the populace on the state of conditions and creating expectations that both fuel demand and create willingness to change.

### **Internet Penetration**

Computer use and Internet access grow exponentially every year. Information of encyclopedic detail can be obtained more and more easily, and complex, sophisticated processes can be used remotely. Access to high-quality communications and sophisticated computer tools are increasingly available to individuals and groups anywhere. In the United States, Internet penetration has reached 67%.

### **Emerging Technologies**

The pace of technological change continues to accelerate, bring new science to commercial, institutional and industrial uses at an ever quickening pace. Most notable among many fields, major technological innovations can be expected in the new disciplines of molecular nanotechnology, robotics and the biosciences.

### **New Relationships**

Greater public mobility and access to information is changing the nature of association for many individuals and organizations. Organizations that once operated in isolation are now players in a common environment. Sometimes the emerging relationships are competitive, sometimes cooperative. New forms of relationship can be expected and created as conditions evolve.



## Project Statement

Using Structured Planning methodology, develop a proposal for a communication campaign to inform and convince governmental and institutional leaders of the value of design thinking for policy planning. The proposal should:

1. address opinions that high-level decision makers presently hold of design and the design community.
2. involve local, regional, national and international professional design organizations.
3. suggest means, as practicable, for active demonstration of the value of design thinking.

---

## Goals

*As general guidelines a proposal for a campaign to promote design thinking in policy making should:*

Consider both high- and low-tech media as they are appropriate.

Include ideas for content and structure--including procedures, policies, events, activities, organizational concepts and relevant relationships among them.

Explore revolutionary as well as evolutionary ideas.

Consider the educational process through which individuals and groups learn to work with and use elements of the system and its associated resources.

Accommodate all users of the system, from implementation to adaptations and provide for them in the design. Thoroughness is a step toward system integrity.

Consider potential costs and funding thoughtfully; the proposal should not incorporate unnecessary frills, but it should not sacrifice effectiveness for low cost.

Treat the design problem as design from the inside out; user operational needs come first, with every attempt possible made to satisfy them in some way, even when tough decisions must be made.

Conceive the properties and features of the communications process as a means to build trust and cooperation between schools, research institutions, professional organizations and the governmental and institutional leaders all will support.

Consider the project as one component of four demonstrating advanced design thinking and showing how it can be extended to decision making at the policy planning level.

*Overall the solution should:*

Assume that the proposal can be acted upon as it is conceived. Do not under propose on the assumption that a concept might be politically opposed.

Demonstrate what might be achieved. The value of the proposal is in its ideas, not its certain attainability. Ideas that might not be fully attainable under today's conditions may be incrementally achieved tomorrow--*if they are known*.

---

## Resources

Resources from the project will be:

### Physical:

The facilities of the Institute of Design, including Room 514 as general meeting space at the beginning of each class session, and 5th floor for team activities.

Computing support from the 5th floor computer facilities.

Equipment as necessary for ID resources.



**Financial:**  
None

**Human:**  
Planning Team:

**Seungho Chung**  
**Pam Nyberg**

**Dan Greene**  
**Ouyang Min**

**Randy MacDonald**

Project Advisor  
**Charles L. Owen**      Distinguished Professor Emeritus

## Schedule

The project will be conducted from August 30 to December 9, 2005.

Week	Phase	Activity	Product
1 Aug 30	Introduction	Introduce Project	
Sep 2	Project Definition	Develop Issues & Defining Statements	
2 Sep 6 Sep 9		<b>In-Progress Review</b>	Issues DefStates 1
3 Sep 13		Develop Modes and Activities of Function Structure	
Sep 16		<b>In-Progress Review</b>	DefStates 2 Fn Struc 2
4 Sep 20	Information Development <i>Action Analysis</i>	Generate Functions, Design Factors and Solution Elements	
Sep 23			
5 Sep 27 Sep 30		<b>In-Progress Review</b>	DefStates complete Fn Struc 2 DesFacs 1 SolnEls 1
6 Oct 4			
Oct 7	Information Development <i>Action Analysis</i>	Complete Functions, Design Factors and Solution Elements	
7 Oct 11 Oct 14			Fn Struc complete DesFacs complete SolnEls complete
8 Oct 18	Information Structuring <i>Interaction</i>	Score Solution Elements vs Functions	
Oct 21			



Week	Phase	Activity	Product
9 Oct 25	Structuring		RELATN input
Oct 28	Concept Development	Means/Ends Analysis	Information Structure
2 Nov 1 Nov 4		Ends/Means Synthesis	Named Information Structure
3 Nov 8			
Nov 15		<b>Presentation</b>	Initial System Elements
4 Nov 18	Communication	Refine final SysEls write report; complete illustrations	
Nov 22	<b>Thanksgiving</b>		
5 Nov 25 Nov 29			
6 Dec 2			
Dec 6			
7 Dec 9		<b>Final Presentation</b>	Illustrated Report

## Methodology

The project will be conducted using Structured Planning (See articles on the subject by Charles Owen at <http://www.id.iit.edu> under Research and Ideas: Papers). Also, see Charles L. Own. **Structured Planning. Advanced Planning for Business, Institutions and Government**, 2005.

## Methodology

Consider the following topics as initial issues to be investigated. Supplement them with additional issues as information is developed during the first phase of the project.

**Technology.** What approach should be taken toward the incorporation of available and emerging communication technologies.

**Adaptivity.** How should the elements of the campaign as a system be made to respond to evolving social, political, technological and environmental conditions?

**Partnerships.** What approach should be taken toward partnering with professional design organizations, suppliers of funding, political parties, education institutions, etc. ?

**Duration.** How long should the campaign be expected to last?

**Time of Introduction.** When should the campaign be ready for implementation?

**Means of Introduction.** How should the campaign be introduced to facilitate acceptance and implementation?



***Inter-organizational Relationships.*** How should relationships among professional design organizations be treated?

***Cost.*** How should costs and funding for the campaign be approached?

***Focus.*** What priorities should exist for reaching leaders of governmental and non-governmental institutions?

***Exclusivity.*** How should the problems of “not invented here” be approached in gainign the support of the national and international design community?



# *Defining Statements*



# Defining Statement

Issue Topic: **Strategy**

1

Project

**Campaign for Policy Design Synthesis**

Originator

Randy MacDonald

Contributors

Source/s

Team Deliberations

Question at Issue

What criteria should be used to select types of communication to be used in the campaign?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The communications should be selected based on a variety of factors such as cost, reach, effectiveness, and ability to show design thinking in action.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The communications should be selected based on what ever produces the most buzz around design thinking.

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The communications should be selected by a communications design consultant or marketing agency.

## Background and Arguments:

It is important that the criteria used to guide the selection of communications for the campaign be well thought out in order to ensure that the campaign effectively delivers the message that it intends to the target audience. With almost and endless array of different forms and channels of communication to choose from and very little knowledge of the target audience, a criteria must be up to the Herculean task of providing a means by which each communications can be assessed in order to determine whether or not it is a good fit for the campaign.

If the group cannot determine what communications would be appropriate for its message and audience, then they may be better served by hiring an outside consulting firm that specializes in communications design. Taking this route would give the campaign a more professional look and feel, have a better chance at reaching the target audience, and it would, if lucky, demonstrate design thinking in action. However, there are obvious drawbacks to this approach. To begin with, what criteria would be used to select a design firm? Additionally, design firms are expensive and the costs may not be able to be justified.

One example of a criteria would be for the group to decide on communication forms and channels that generate buzz around design thinking. This is certainly plausible--marketing groups do it all the time--it is not feat of imagination to come up with some examples, however, there are draw backs to this approach also. By trying to create buzz, the campaign may be perceived as superfiscal or just hype. Given the background that the group is working with and the seriousness of the issues, this may not be the criteria which the group should adapt.

Perhaps a more fitting criteria for the campaign would be as follows. First, determine the target audience (see the Defining Statement that addresses Focus) for the communications. This would require some amount of research. Then, determine what channels are available to reach this target audience. For example, NPR is a good channel for reaching a certain educated cross-section of the population, and college lecture tours might be another example of a channel that would reach a more academic population. Next, determine what forms of communications would resonate most with the target audience. Perhaps, one teacher from ID would be a good candidate to talk on NPR about design, while another teacher from ID might be more effective at giving a speech on design at a university. Finally, any criteria for choosing a communications must include cost effectiveness (see Defining Statement: Cost). A cost vs. benefit analysis should be included because it demonstrates to the project sponsors that their financial resources are not being mismanaged.



# Defining Statement

Issue Topic: **Focus**

2

Project

## Campaign for Policy Design Synthesis

Originator

Randy MacDonald

Contributors

Dan Greene  
Pam Nyberg  
Min Ouyang  
Seungho Chung

Source/s

Team deliberations

Question at Issue

**What priorities should exist for reaching leaders of governmental and non-governmental institutions worldwide?**

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

The communications campaign must narrow its focus and place priority in convincing individuals and groups who are most likely to bring about change in the world for the least amount of resource expenditure.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The communication campaign should place priority in directly targeting leaders of governmental and non-governmental institutions worldwide.

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The communication campaign should not place any priority in choosing a target; it should include all people worldwide.

### Background and Arguments:

As with any political campaign, the success or failure of the communications campaign will largely depend on its focus. If the focus is misguided or not adequately narrowed, the campaign will waste valuable time and resources directing its message toward the wrong people.

Accordingly, the campaign must not initially focus on people, who even if convinced of the value of design thinking, have little power to promote its value. Although it is certainly a noble goal to educate all of the value of design thinking, initially the campaign must be disciplined and set its priority on those people who are politically and/or socially engaged and have the power to affect others.

While the campaign might be tempted to place a high priority on directly targeting high-level governmental and nongovernmental leaders worldwide, this would also be unwise, and must not be done. High level leaders certainly play a significant role in producing real change in both policy and opinion and this makes them an attractive target for the campaign, however the effort required to capture and convince them of the value of design thinking would involve significant time and persistence because many other causes compete for their attention.

To achieve the best results, the campaign must initially place priority in directing its message toward groups and individuals who play the greatest role in bringing about change and who are most accessible and receptive to the campaign's message. Examples of such a target would include, but not necessarily be limited to: members of academia, opinion leaders, members of non-profits, business leaders, political leaders, various "friends of design", and influential members of rapidly growing societies in locations such as China and India. Once these individuals and groups "come on board", the campaign will have more vocal advocates who can concentrate on raising the awareness of the benefits offered by design thinking for those in high-level positions.



# Defining Statement

Issue Topic: **Cost**

3

Project

**Campaign for Policy Design Synthesis**

Originator

Randy MacDonald

Contributors

Source/s

Team Deliberations

Question at Issue

How should costs and funding for the campaign be approached?

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

The campaign proposal must incorporate a means to obtain the financial resources necessary to launch an effective campaign.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The campaign proposal should incorporate a means to obtain the financial resources necessary to launch an effective campaign.

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

The campaign proposal must incorporate a means to obtain the minimum amount of financial resources required to launch the campaign.

## Background and Arguments:

A campaign proposal which does not provide a thoughtful solution to obtaining financial resources will be ineffective. The goals prescribed in the project charter are very ambitious and certainly some amount of financial resources will be required in order to accomplish them. Most likely, the more financial resources the campaign obtains, the more effective it will be in promoting design thinking. Therefore, the total cost of running a strong campaign should be calculated, then the group should put a significant amount of energy into coming up with a solution to raise at least that amount of money.



# Defining Statement

Issue Topic: **Adaptability**

4

Project

**Campaign for Policy Design Synthesis**

Originator

Randy MacDonald

Contributors

Source/s

Question at Issue

How should elements of the campaign as a system be made to respond to evolving social, political, technological and environmental conditions?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Elements of the campaign system must be sensitive to change and evolution in relevant conditions and must be responsible for alerting campaign managers of these developments.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Elements of the campaign system should be sensitive to change and evolution in relevant conditions and should be responsible for alerting campaign managers of these developments.

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

Elements of the campaign system must be sensitive to change and evolution in relevant conditions and must be empowered to change the campaign in accordance with these developments.

## Background and Arguments:

The social, political, technological and environmental conditions that the campaign was originally design to work within will invariably evolve. Without the proper elements in place to monitor and respond to these developments, the campaign risks becoming out-of-touch and unable to accomplish its goals.

To solve this problem, elements should be put in place to better inform and equip the campaign so it can adapt to the developments in the campaign climate. Such elements would be in charge of monitoring all social, political, technological and environmental conditions that affect the campaign.

It may be argued that since the monitoring elements have the best understanding of the campaign climate, that they should also have the power to initiate change in the campaign direction. This position should not be taken because it does not address issues of specialization. The monitoring elements have skills appropriate for monitoring change but they do not have the skills required to manage the campaign or create content for the campaign.

Therefore, a protocol which states that the monitoring elements must monitor developments in the campaign climate and report their findings to management should be drafted. With these findings, management should, in turn, provide the campaign content creators with the appropriate information to require to change campaign content. With this process in place, the campaign can adapt to changes in the campaign climate with relative seamlessness.



# Defining Statement

Issue Topic: **Adaptability**

5

Project

**Campaign for Policy Design Synthesis**

Originator

Pam Nyberg

Contributors

Source/s

Question at Issue

What approach should be taken to make the campaign adaptable to different audiences?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

A generic framework should be developed with modular expandability which considers audience type (e.g. public, government, etc.), language spoken, and societal issues critical to particular geographical regions

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

A universal campaign should be developed which would be used for all audiences and would deliver a consistent message, the only variance being language

## Background and Arguments:

Before the days of Object-Oriented code, computer programmers used to construct programs which contained every line of code they'd need to execute various functions. As a result, these programs were sometimes very large, requiring significant memory, they were incredibly time consuming to build, and they were complex to debug/optimize. However, once Object-Oriented code became a reality, it was received with great enthusiasm. Chunks of code could then be pulled from "code libraries" and quickly assembled to construct programs. Since these small modules could easily be optimized, the program logic was greatly simplified, and the time to build the program was greatly reduced.

Similarly, the construction of this campaign should leverage a generic framework and allow for modular expansion. Since the campaign will be global, it will need to be delivered in multiple languages. Modules would be used to tailor the material by audience and by issue, ensuring content relevancy and appropriate levels of content depth and breadth.

An alternative approach would be to construct a universal version of the campaign which would be delivered to all audiences and would vary only by language. The benefits of this approach are minimal maintenance upon program completion and content consistency. On the other hand, a universal campaign would be incredibly time intensive to develop and would have low audience relevancy.

Given the rather significant shortcomings of the alternative position, the recommended approach would be to pursue a modular campaign which would maximize relevancy to all audiences and improve the chance of Design Thinking support and adoption by policy makers.



# Defining Statement

Issue Topic: **Communication**

6

Project

**Campaign for Policy Design Synthesis**

Originator

Pam Nyberg

Contributors

Source/s

Question at Issue

How should we approach defining “Design” for max agreement among prof associations and for max understanding among public, businesses, and government?

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

Must assemble representatives from prof associations to define “Design” and then create a media campaign that effectively communicates the definition to different parties through specialized channels

Alternative Positions

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

Must assemble representatives from prof associations to define “Design” and then create a media campaign that effectively communicates the definition to all parties through one channel, with more info being available for businesses and government to reference

## Background and Arguments:

Because this campaign to elevate Design Thinking is being developed to benefit the Design field and because the field’s interests are represented by professional organizations, it seems reasonable to assume that the major professional associations would want to be involved in defining Design for the masses. By providing a definition that the public can easily comprehend, the concept and value of Design become more accessible and more accepted by them. As an example, consider the success that Target has experienced by way of their ‘Design for the Masses’ philosophy and ad campaigns.

Of more debate is the approach that should be used to communicate the meaning of Design to all constituencies. The preferred approach is to develop a tailored media campaign for each group, leveraging channels appropriate for each group. Conveniently, this approach will reach individuals in business and government through multiple channels since they’re both citizens and special audiences, presenting them with slightly different perspectives in each channel. This approach also ensures that special audiences will be exposed to the campaign through channels they already frequent.

The alternative position supports the creation of a media campaign which communicates with all parties through a single channel. The risk with this approach is that it won’t resonate as strongly with some viewers as it does with others because it doesn’t have the same level of relevancy. Although additional material would be available for those in business or government, extra effort would be required on their part to access and review this material on their own.

As such, it is recommended that a multiple channel approach be used to educate desired audiences about “Design”, to achieve maximum reach and maximum relevancy in the process.



# Defining Statement

Issue Topic: **Partnership**

7

Project

**Campaign for Policy Design Synthesis**

Originator

Min Ouyang

Contributors

12 Sep., 2005 Pam Nyberg  
27 Sep., 2005 Randy MacDonald  
Pam Nyberg  
Dan Greene  
Seoung Chung

Source/s

Question at Issue

How should the campaign partner with professional design organizations so as to gain further support from them?

Position

- ☐ **Constraint** To maximize the efficiency and impact of the campaign, the staff should seek out partnerships that will be mutually beneficial.
- ☒ **Objective**
- ☐ **Directive**

Alternative Positions

- ☐ **Constraint** Only large influential design organizations should be considered so as to efficiently reach and convince
- ☒ **Objective**
- ☐ **Directive**
- ☐ **Constraint** Any professional design organization who wants to contribute to the campaign is welcome regardless of its scale
- ☒ **Objective**
- ☐ **Directive**
- ☐ **Constraint** No professional design organization should be involved considering their competitiveness in essence against this campaign.
- ☒ **Objective**
- ☐ **Directive**

## Background and Arguments:

Contributing to the increasing awareness of the power of design thinking, events (e.g. workshops, conferences, seminars, competitions, etc) and articles have been presented globally by pioneering advocates (e.g. Philips Design, Motorola, Institute of Design, Fast Company, BusinessWeek, DMI, etc.). Among them are active professional design organizations (e.g. Design Council, IDSA, AIGA, etc) which gather opinions and case studies from the field, academia and the corporate world. Considering the goal of the campaign, it raised an issue of how best to leverage the experience and influence of these design peers.

One stance which could be taken involves excluding these professional design organizations because to some extent they are our competitors by sharing a similar goal and the same audience. Any partnership with them might risk the danger of losing the originality of any campaign initiative. This could be detrimental to sustaining the campaign success in the long run.

Alternative stances maintain that it is helpful to gain support from these design organizations. One approach is to only partner with large influential design organizations. They are established in the field. This is beneficial for extending the reach of the campaign and more likely to have the attention and blessing from high-level decision-makers. The drawback is envisioned concessions to the established authority which puts the campaign on a relatively passive position. The other approach is to open the door to any professional design organization who wants to contribute to disseminating the value of design thinking. In spite of wisdom and power of the crowd, the campaign is inevitably confronted with the challenge of management and implementation.

In contrast, a mutually beneficial and adaptively flexible partnership stays away from either concession or inefficiency. It takes into account not only partners' influence but their unique knowledge, expertise, experience, and interests as well as supporting needs of the campaign and realizing win-to-win benefits. Furthermore, the campaign brings in new strategic partners and takes out unsatisfactory ones in a progressive and organized manner. In this way, the campaign is always in control and able to actively respond to any evolving conditions. This adaptive approach can ensure the reach and penetration of the campaign as well as its impact on policy making.



# Defining Statement

Issue Topic: **System Adaptivity**

8

Project

**Campaign for Policy Design Synthesis**

Originator

Min Ouyang

Contributors

12 Sep., 2005 Pam Nyberg  
27 Sep., 2005 Randy MacDonald  
Pam Nyberg  
Dan Greene  
Seoung Chung

Source/s

Question at Issue

How should elements of the campaign as a system be made to respond to evolving social, political, technological, geopolitical,

Position

☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

A unique self-learning system must be developed so as to enable the campaign to proactively drive expected changes in contextual conditions.

Alternative Positions

☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The anticipatory capability should be built into the campaign system so that it's able to actively response to evolving contextual conditions.

☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

A defensively responsive system should be designed so as to reliably adapt to evolving

☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The campaign system should remain a closed system to take 'No Change' as the way to respond to any evolving conditions in the

## Background and Arguments:

As the saying goes, everything is changing except change. So are the conditions our campaign has to deal with to achieve its ultimate goal. Since adapting to changes isn't an unexplored territory for human beings, there are thousands of referential precursors out there for the campaign to learn from. However, it does raise a strategic question of which way to go for the campaign to be as successful and far-reaching as possible.

A desirable approach is to develop a proactive system that can not only adapt to but impact its context through self-learning. Self-learning includes discrete learning and continuous learning. The former mechanism collects and integrates evolving contextual information into the system to develop advanced strategies/tactics. The latter, otherwise, strengthens or weakens the existing system elements through real-world practice to internally enhance the system. In this way, the campaign system works not only as a passive respondent but also as a proactive game rule maker who leads/influences the trend in an expected way. Target is a good case in point using design innovation and customer engagement as its weapon for success. Apple is another case in point having created its own Mac OS to compete against the Windows OS, having established its unique Mac interface, and having pioneered the digital music service through iTunes. Only through proactive adaptivity can the campaign maintain a long-term success and significantly influence policy-making.

There are alternative approaches such as building the anticipatory capability into the system and developing a defensively responsive system. In spite of being able to predict changes and be ready for them, the former approach is passive to some degree and is still trying to react to the external world. In the latter approach, the system is case-sensitive and structured to passively defend itself in a discrete way. As to the closed system, the disadvantages lie in the confined internal information communication and limited impact on the external world, which is the ultimate goal of the campaign. In summary, these approaches are pretty passive and wouldn't be as powerful in elevating the campaign to a policy impact level.



Project

**Campaign for Policy Design Synthesis**

Originator

Min Ouyang

Contributors

12 Sep., 2005 Pam Nyberg  
 27 Sep., 2005 Randy MacDonald  
 Pam Nyberg  
 Dan Greene  
 Seoung Chung

Source/s

Chuck, Jones. Interviewed by  
 Chuck Salter, June, 2005. Fast  
 Company.

Question at Issue

How should we leverage the publicity generated by  
 companies who have a strong design presence in the

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

Both corporate design publicity (successful  
 and unsuccessful) and the public's perception  
 of it must be considered to ground the cam-  
 paign initiative.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Both successful and unsuccessful publicity  
 generated by strongly design-driven com-  
 panies should be leveraged to ground and  
 exemplify the campaign initiative.

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Only the successful publicity generated  
 by companies who have a strong design  
 presence in the public should be leveraged  
 to ground and exemplify the campaign  
 initiative.

## Background and Arguments:

Looking across industries, a few big names have strongly demonstrated the power of design thinking through their remarkable success in the marketplace such as BMW, Apple, Nike, Dyson, Samsung, Sony, Philips, Procter & Gamble, Whirlpool, etc. Therefore, rather than start from scratch, it would be beneficial to leverage their current publicity accomplishments to ground and consolidate the campaign initiative. Not surprisingly, all of the publicity efforts by these individual giants didn't provide one comprehensive and well integrated story. In addition, publicity itself is always a two-way interaction between message senders and recipients, which oftentimes leads to a gap between both parties. As such, both the companies' publicity efforts and the public's response to those efforts must be considered!

To make one comprehensive, well integrated design-focused story for the campaign, attempts must be made to the establish a consolidated picture of major publicity practices: what is common across these design-oriented companies, what are their individual focuses, what makes successful

publicity, what leads to failures, what's missing there, etc. By using this information, the campaign can be built on a solid foundation and align with the directions these design-oriented players are heading. This is a most efficient way to gain support and develop pervasive publicity for the campaign.

In addition to messages/content to be publicized, interaction between companies and the public plays a role in generating desirable and powerful publicity. Affected by both subjective and objective factors, recipients usually can easily misinterpret a message from the sender. So efforts should be made to smartly publicize the campaign in a desirable way so that it's accepted by both the public and companies who have a strong design presence in the public. In this way, we are able to ground and consolidate the campaign by ensuring that two important audiences are well considered.



# Defining Statement

Issue Topic: **Public Awareness**

10

Project

**Campaign for Policy Design Synthesis**

Originator

Min Ouyang

Contributors

12 Sep., 2005

Pam Nyberg

12 Sep., 2005

Charles Owen

Source/s

Question at Issue

What approach should be taken to the development of an appropriate and actionable educational program for

Position

☐ **Constraint**

☒ **Objective**

☐ **Directive**

A generic framework with modular expandability should be developed to enable an efficient and tailorable public awareness program.

Alternative Positions

☐ **Constraint**

☒ **Objective**

☐ **Directive**

A universal public awareness program should be developed to reach a wide variety of audiences efficiently with consistency of message.

☐ **Constraint**

☒ **Objective**

☐ **Directive**

Tailorable public awareness program of customized communication modules should be developed to optimize communication effectiveness.

## Background and Arguments:

Despite becoming a buzz, 'design thinking' remains an underdefined term to most people. As a consequence, education on the subject will be an important step in the campaign. The problem will be to introduce and define the subject. However, those who will be addressed by the campaign differ considerably--from professionals with widely different backgrounds who work in design, planning and decision-making positions, to a general public of the concerned from all walks of life.

Under these conditions, both a universal approach to public awareness and a tailored approach have pros and cons.

The universal approach would develop a general communication package for all audiences. Once the program was established, no further effort would be needed. Despite its welcome consistency and easy management, low audience relevancy impairs this approach. In addition, the resources needed to design and implement an inclusive program require effort that is inevitably wasted on irrelevant audiences, unnecessarily slowing the campaign's effects.

The tailorable approach would develop individual communication packages to address specific audiences in ways that expose them to the topics of concern at levels of depth and breath appropriate to their understanding and interest. With focused content, the implementation of programs can be much more efficient in resource deployment and audience relevancy. The tradeoff is a loss of consistency of communication and a somewhat weakened reach for the campaign.

To maintain communication/resource efficiency and still be responsive in a timely way to the campaign, the preferred strategy should be a combination of the best of the two approaches. On one side, a generic framework (with fundamental components of an awareness program and guiding principles for expansion) would provide a common platform to maintain consistency of communication. On the other hand, modular expandability in the format of add-on components would help to build strong empathy with audiences through tailored communications (e.g. responding to variations in knowledge depth, concern for topics, ways of communication, etc.). It also would prevent unnecessary effort wasted on irrelevant content and would optimize the use of resources.



# Defining Statement

Issue Topic: **Perception**

11

Project

**Campaign for Policy Design Synthesis**

Originator

Min Ouyang

Contributors

Source/s

Question at Issue

What approach should be taken to shift the public perception of design from an aesthetics-related field to a systematic approach to tackling a broad range of issues?

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

New definition of design as well as successful demonstrations should be widely publicized to refresh and flesh out the public's perception of design thinking.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

A broader interpretation of 'design' should be developed so as to respond to the campaign initiative.

- ☐ **Constraint**  
☐ **Objective**  
☒ **Directive**

The campaign ought to replace "design" with a new term more specific to the overall initiative.

## Background and Arguments:

The word 'design' typically conjures up images of cool posters, fancy cellphones, curvy sports cars, and fashionable clothing. But these products and graphics are no longer able to describe the boundaries of design's playing field. Actually, logistics systems, the Internet, organizations, even strategy...all of these are tangible outcomes of design thinking, too. Ironically, deeply rooted in the tradition, people are not aware of design thinking while living with it everyday. Therefore, the public's bias toward design must be refreshed to enable a bottom-up penetration, which can lead to the impact of design thinking on policy making.

One approach is to develop a new interpretation where design is broadly defined and goes beyond styling and fashion. In this way, this new definition can well respond to the campaign initiative and better addresses design's nature in the 21st century. Another alternative approach is to replace the word 'design' with a new term to indicate the nature of today's different design tasks. However this might diverge from the essence of creative/innovative thinking or fail to suggest the way of thinking like a designer or leave out the implication of design's connections with users.

However, according to the theory of perception, it's helpful for people to refresh their established mental models or build new ones if they are able to repeatedly see how a new thing works. Therefore, it is far from enough to only develop a new definition of design without supporting examples. The recommended approach is to supplement the new definition with successful demonstrations of design thinking. These demonstrations can be products, services, interviews, diagrams, case studies, documentaries, and etc. The ultimate goal of these demonstrations is to reinforce the campaign initiative and tangibly substantiate what design thinking is, what design thinking does and what people can benefit from design thinking. In this way, it is possible that the public will shift their perception of design from an aesthetics-related field to a systematic approach to tackling a broad range of issue. As such, the government might realize the power of design thinking and elevate it to a policy level.



# Defining Statement

Issue Topic: **Duration**

12

Project

**Campaign for Policy Design Synthesis**

Originator

Seungho Chung

Contributors

09/12/2005 Pam Nyberg  
09/27/2005 Daniel Greene  
Randy MacDonald  
Ouyang Min

Source/s

Team Deliberations

Question at Issue

How long should the campaign be expected to last?

Position

- ☒ **Constraint**  
☐ **Objective**  
☐ **Directive**

The campaign must be continued until a design advisor is appointed or a design council is established by high priority governor for policy creation advisement.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The campaign should be ended when enough momentum has been generated that serious discussions have begun with government regarding the appointment of an advisor or design council.

## Background and Arguments:

The primary purpose of a campaign is to promote an agenda for change. In the case of political campaigns, campaign workers' efforts don't cease until the polls close on Election Day. Up until that point, they are still avidly supporting their candidate, hoping to influence any remaining 'undecided' voters.

Similarly, the campaign to support the use of Design Thinking in policy creation shouldn't terminate until there's clear evidence that the campaign message has been heard, understood, digested, and has motivated action. The desired result of this campaign would be the appointment of a design advisor or the establishment of a design council to advise government on policy development decisions. Although the campaign's focus and tactics may change over time, its goal should remain constant since innovative solutions to societal issues won't surface through the current governmental policy making process.

Alternatively, the campaign could be ended when serious interest is shown by high level governmental figures regarding the value Design Thinking could have for them. At that point, a select group of core team members and participants from professional design associations could engage in more intense discussions with them to help them establish design personnel's role in policy making circles. (By this time, the public, as well as institutions and corporations will have been exposed to the relevant campaign details so it'll be appropriate to focus on the gatekeeper to policy development, the government.) The one primary disadvantage to this approach is that the buzz could lose momentum if the discussions are extremely time consuming. If this were to happen, advocates on both sides might lose their jobs, accept different jobs, or lose interest in the movement, all of which would significantly affect the impact the campaign could generate.

With this rather significant shortcoming in mind, it is recommended that the campaign continue until figures in government begin appointing design professionals to policy making roles and begin establishing their responsibility in the policy development process.



# Defining Statement

Issue Topic: **Strategy**

13

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

What approach should be taken toward the incorporation of available and emerging communication technologies?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**
- An appropriate balance of established and new mediums should be efficiently employed.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**
- Priority should be given to the latest technologies.

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**
- More established mediums should take precedence.

## Background and Arguments:

The employment of communications technologies is an essential component to any effective campaign. To maximize the reach and penetration of the associated pitch, mediums should be chosen that are appropriate for target demographics.

The staying power and effectiveness of traditional communications tools such as newspaper articles, radio, magazine ads, and TV commercials is undeniable. Firmly entrenched in American culture and familiar to those of nearly all generations, they have track record of influence, making their inclusion in the campaign mandatory. Better yet, these mediums have aged well and remained relevant with younger users. Unfortunately, they have remained relatively expensive to distribute nationally and may become cost prohibitive depending on budget.

Alternatively, newer computer-based communication tools that have quickly gained momentum in recent years are cheaper to produce and distribute than traditional mediums. Flash ads, banner ads, and streaming video, for instance, all have successfully proven their ability to raise capital and awareness of current issues, as exemplified by popular internet based companies like Google and Yahoo! Other more interactive tools like email and weblogs -- unparalleled in their ability to provide realtime feedback to the content creators -- can even be used free of charge. These would enable campaigners to make necessary changes more quickly and effectively. Furthermore, content created expressly for computer and internet viewing can easily be "ported" to traditional communication mediums, saving time and money.

Ultimately then, it is both economical and practical to initially create campaign communication materials for low cost internet distribution. Subsequently, these can be modified and delivered to a more traditional but necessary offline audience.



# Defining Statement

Issue Topic: **Focus**

14

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

How should the campaign organizers determine what high-level decision makers' current attitudes are towards design thinking?

Position

- ☐ **Constraint** Campaign organizers ought to question highlevel  
☒ **Objective** decision makers regarding their current attitudes  
☐ **Directive** toward design thinking.

Alternative Positions

- ☐ **Constraint** Past and current government initiatives,  
☒ **Objective** legislation, projects should be examined for  
☐ **Directive** evidence of design thinking.
- ☐ **Constraint** Campaign organizers ought to question highlevel  
☐ **Objective** decision makers regarding their current  
☒ **Directive** attitudes toward design thinking.

## Background and Arguments:

Any organization seeking to apply a specific philosophy and make systemic changes to a long established beauracracy needs to evaluate that beauracracy's opinion of its philosophy before attempting to sell so that elements of the campaign can be effectively prioritized. For example, if it was determined that high level decision makers had little knowledge of design thinking, than the campaign promoting it might need to focus heavily on educating these officials about design thinking, its relevance to policy making, and its benefits. In the case that officials were discovered to have a low opinion of design thinking, promoters might concentrate on public relations, leveraging the public to sway their elected officials.

There two major approaches through which a campaign may assess high decision-makers views of design thinking. A direct approach may allow campaign researchers to circumvent problems related to semantics or one's inability to articular his view of the subject. By closely analyzing publically available documents relating to initiative, legislation, and active projects, those familiar with the trappings of design thinking should be able to determine the extent of its utilization or the absence thereof.

The easiest method of determining a decision maker's opinion of decision thinking -- or any issue for that matter-- would be to ask him directly, saving the campaign time and removing the guesswork from their process. Because obtaining direct access to a specific high-level official may be extremely difficult, however, a more realistic approach would involve seeking out a close surrogate or



# Defining Statement

Issue Topic: **Strategy**

15

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

What steps should be taken to shift the public perception of design from an aesthetics-related field to an effective, systematic approach to tackling a broad range of issues?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

The campaign should encourage design institutes and consultancies to increase their visibility in order to inform the public of design's broader scope.

Alternative Positions

- ☐ **Constraint**  
☐ **Objective**  
☒ **Directive**

The campaign ought to replace "design" with a new term more specific to the overall initiative.

## Background and Arguments:

The word "design" typically conjures up images of clean-lined mp3 players, curvy sports cars, and tasteful home decor. Relatively few outside of industry and the design world itself realize that designers are currently contributing to everything from toy manufacturing to urban planning. If a campaign hoping to elevate the role of designers to the government policy making level is to have any chance of succeeding, the public must begin to view designers as far more than glorified sketch artists.

Because the design moniker seems so intrinsically linked to the common stereotypes, campaigners may choose to consider replacing it with a different term altogether. Choosing to call these new policy makers "innovation strategists" or "systemic planners" may be more appropriately associated with their actual tasks; however, the "wow factor" resulting from the products many people associate with designers will be lost.

Instead the campaign should seek out design institutions and consultancies currently practicing and teaching design methods directly applicable to the kinds of sweeping challenges with which the government is regularly tasked. In exchange for publicity and promotion, these schools and outfits could leverage their resources -- namely academic and industry conferences, media contacts, and mainstream publications -- to simultaneously promote themselves and the campaign.

With enough publicity, the public may consequently begin to associate design with innovative thinking and thus, hold it in higher regard.



# Defining Statement

Issue Topic: **Focus**

16

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

What approach should be taken in developing a style or mindset that will effectively communicate its message to its target audiences.

Position

- ☐ **Constraint** The campaign should develop an accessible generic style that can be modified to better conform to a particular audience.
- ☒ **Objective**
- ☐ **Directive**

Alternative Positions

- ☐ **Constraint** The campaign should adopt one style that is inherently relevant to all audiences.
- ☒ **Objective**
- ☐ **Directive**

## Background and Arguments:

Any serious business venture or campaign must adopt a particular style as a way not only create an identity but to convey the essence of its message to audiences. Apple Computer, for instance, has successfully developed a sleek, minimalist signature that permeates its branding graphics, product design, and corporate culture, suggesting to consumers that its products are classy, thoughtful, and easy to use.

The challenge of communicating a core message becomes more difficult when more than one kind of audience is targeted, straining both financial and creative resources. Because time and money may be tight, organizers of the Campaign for Policy Design Synthesis must therefore develop a style that resonates with the public and high-level government audiences quickly and economically.

While a one-size-fits-all style would be most the cost effective and expeditious solution, differences in audience perception and taste could render it ineffective. A style catering to a public's appetite for ten second soundbites, chic graphics, and catchy slogans may not be transferable to a level of government inured to complex protocols, text heavy documents, and legislative jargon.

A more judicious approach would necessitate a generic base style -- emphasizing simplicity and elegance -- that could easily be modified or embellished to better suit the target audience. For example, a touch of high tech gloss could be added to web ads to accommodate an attention deficient public, or perhaps more sophisticated language would make case studies more appealing to government officials. Still, the campaign must not stray too sharply from its core style so as to avoid muddling its overall message and confusing its identity.



# Defining Statement

Issue Topic: **Strategy**

17

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

How can the campaign promote the idea of design thinking as “cutting edge” in order to build public enthusiasm?

Position

- ☐ **Constraint** The latest audio-visual and communications
- ☒ **Objective** technologies should be linked to design
- ☐ **Directive** thinking and used in promoting the campaign.

Alternative Positions

- ☐ **Constraint** The campaign ought to sell the idea that design
- ☐ **Objective** thinking itself is “cutting edge” technology.
- ☒ **Directive**

## Background and Arguments:

Although people rarely want to be perceived as out of touch with modern culture, it is a virtual certainty in some regards. With rapidly changing fashion trends, music styles, and art, it is difficult and expensive to keep pace. Furthermore, each generation forms strong bonds with its own cultural elements as well as certain manners, expressions, and idiosyncrasies that make change difficult and often undesirable. There is, however, a relatively new factor in the realm of popular culture that can serve as a “hipness” equalizer -- high technology. No more affordable than ever -- from internet-capable PCs to mp3 players -- its appeal spans generations. More than just fashion statements, the latest gadgets can lend an air of superiority to even the most culturally disconnected. Technology has become the sorcery of the day, and to the benefit of its purveyors, a source of endless speculation and enthusiasm.

To leverage this sense of excitement, advocates of a campaign to promote the idea of design thinking could choose to pitch the concept itself as cutting edge technology. This might not jibe with the public, however, due to the fact that most associate technology with material objects rather than concepts or philosophies. Ironically, the campaign can spin this otherwise unfortunate situation to its advantage by celebrating the most state-of-the-art devices as outgrowths of design thinking while simultaneously using them to promote the cause. To maximize the impact with public audiences, the devices themselves should be relatively unknown as well as spectacular enough to attract large crowds and generate ongoing buzz. Ideally, they would be display technologies suitable for use during an televised interview, speech, or demonstration. Specific “cutting edge” examples might include IO2 Technology’s Heliodisplay screenless projection device, Teleportec’s Range video conferencing system, and Sharp’s stereoscopic LCD display.



# Defining Statement

Issue Topic: **Strategy**

18

Project

**Campaign for Policy Design Synthesis**

Originator

Dan Greene

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Seungho Chung

Source/s

Team Deliberations

Question at Issue

What should be done to ensure the campaign is perceived by the public, businesses, and government as unbiased?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

In promoting the campaign, special attention should be given to issues that are less likely to be politicized.

Alternative Positions

- ☐ **Constraint**  
☐ **Objective**  
☒ **Directive**

Steps ought to be taken to ensure the campaign is not beholden to special interests or corporate entities, despite funding arrangements.

## Background and Arguments:

There are few matters in American culture more polarizing than politics, as evidenced by the still lingering bitterness of last two Presidential elections. From climate to military operations to energy sources, issues are being increasingly politicized, with the tone of debate shifting from healthy and spirited to venomous and incendiary. Furthermore, continual infighting between the two major political parties and their supporters is provoking legislative gridlock -- with dire social, economic, and humanitarian consequences in some cases.

In this hyper-political climate where the mere mention of a contentious issue can immediately link one to a certain political inclination, an effort to introduce a new player into the realm of government policy formulation would certainly be met with a degree of skepticism by those at opposing ends of the political spectrum. It would therefore behoove campaigners to focus on trends that are considerably less divisive than the typical "hotbutton" issues, making the idea of elevating designers to policy makers more palatable to a broader audience.

For such a far reaching campaign to be sustained, however, it must be sufficiently funded. Because the vast capabilities of design are unknown to much of the public, a grass-roots oriented drive is unlikely to raise enough capital in the short-term. Consequently, campaign organizers will have to solicit wealthy individuals, businesses, and organizations, inevitably creating the perception among some that the campaign is beholden to its financiers. To maintain credibility and minimize accusations of bias, fundraisers should seek out a diversified field of sponsors representing a broad range of interests and political persuasions.

With a bipartisan consensus built towards pursuing issues that are universally considered to be in need of address, the campaign can focus on promoting the benefits of applying design thinking to these challenges. More contentious issues can be tackled once the policy design synthesisists are securely in place.



# Defining Statement

Issue Topic: **Time of Introduction**

19

Project

**Campaign for Policy Design Synthesis**

Originator

Seungho Chung

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Dan Greene

Source/s

Team Deliberations

Question at Issue

When should the campaign be launched?

Position

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Campaign development should begin immediately, and it should be launched as soon as possible, assuming it follows a thoughtful design process.

Alternative Positions

- ☐ **Constraint**  
☒ **Objective**  
☐ **Directive**

Campaign development should begin immediately, on a grass roots level, so the campaign can be quickly launched, having used minimal financial and person- nel resources.

## Background and Arguments:

Recently, Korean design has become very popular within its country's border, fueled by young Korean consumers who have developed a great interest in design. As demand for design continues to grow, many Korean companies have focused efforts on building their capabilities in the area. However, if Korean companies had focused on building design departments in the 1970's, they might not have seen the same return on their investment since citizens weren't demanding well designed objects at the time.

Similarly, because growing numbers of multi-national companies are focusing on design as a way to distinguish themselves in today's global marketplace, consumers worldwide are becoming more knowledgeable about the field. Granted, their understanding of design is primarily focused on aesthetics. Nevertheless, there couldn't be a better time to launch a campaign about the value of design thinking.

Since campaigns of such magnitude do take significant time and money to properly execute, this effort wouldn't be rushed. Instead, care would be taken to ensure that it delivers the intended message to its desired audiences, with the goal of becoming a participant in policy development.

Alternatively, the campaign could be launched at a grass roots level to expedite its arrival to potentially interested parties. However, because design is trying to acquire a seat at the policy development table, they shouldn't risk being seen as unprofessional or unsophisticated when it comes to campaigning.

As such, it's recommended that they launch their campaign once it's been carefully constructed...and not before.



# Defining Statement

Issue Topic: **Partnership**

20

Project

**Campaign for Policy Design Synthesis**

Originator

Seungho Chung

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Dan Greene

Source/s

Team Deliberations

Question at Issue

How should problems of “not invented here” be approached in gaining the support of the national and international design community?

Position

- ☐ **Constraint** We should take a positive attitude for gaining the support of national and international design community.  
☒ **Objective**  
☐ **Directive**

Alternative Positions

- ☐ **Constraint** We should assume the attitude of an onlooker about national and international design community with “NIH” .  
☒ **Objective**  
☐ **Directive**

## Background and Arguments:

Overcoming the “NIH syndrome” is our first and most important task.

For successful campaign, we need close cooperation with diverse design associations. However, it is very hard to gain support of them. If we get a support from design communities with “NIH” syndrome, our campaign may be confronted with almost insurmountable difficulties. for that reason, we have to closely connect with these design communities in advance .and we have to cope with the problem of “NIH”.

Undisputably, we should connect with various design communities before we introduce our campaign.

However, some international and national design communities may reject our proposal or participating in our campaign as companion. To overcome this problem, we should approach indirectly because of reducing the opposition to a minimum. For example, it should be a very good way to hire an “arbitrator” who is gaining the respect from all national and international design communities. The arbitrator should transmit the objective of our campaign. Also, he/she should get support of them. That is, hiring the “arbitrator” can easily gain a support from design communities which are uncooperative or unfriendly about our campaign. In the other respect, to gain a support, we should take up a positive attitude. For example, our campaign leader will appoint uncooperative community as an important post such as board member. Some campaign members may worry that such solution may give rise to serious confusion on our campaign. However, I believe that these conflict view should give a good chance to enrich our campaign.

It is very hard to make a foe supporter. Equally, It is a very hard to get a support from all national and international design communities. However, we have to overcome the difficulty since our campaign should be achieved by unified design communities which are not limited by “NIH”. Such direct and indirect approach should be an efficient way to change unfriendly attitude into strong support.



# Defining Statement

Issue Topic: **Profit**

21

Project

**Campaign for Policy Design Synthesis**

Originator

Seungho Chung

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Dan Greene

Source/s

Team Deliberations

Question at Issue

What approach should be taken to balance the campaign strategy to meet the needs of corporate stakeholders?

Position

- ☐ **Constraint** Campaign should emphasize that both long-term value and short term profit are possible
- ☒ **Objective** when Design Thinking is applied.
- ☐ **Directive**

Alternative Positions

- ☐ **Constraint** Campaign should emphasize long term benefits
- ☒ **Objective** over short term profit to those who apply Design Thinking
- ☐ **Directive** methods. Directive

## Background and Arguments:

Because of the emphasis placed by stockholders and analysts on companies' short term projections and results, it's perfectly logical for them to focus on issues which have relevance for them in the immediate future. However, since long term strategy development determines the future health and direction of their company, it shouldn't be dismissed as of secondary importance.

To help counteract this engrained mindset, the campaign to promote Design Thinking must not only acknowledge companies' concerns regarding short term financials but it must also demonstrate that Design Thinking can help corporations plan intelligently for the future, leading to even greater profits. Potential outcomes would include more fact based product/service development decisions, strategic roadmaps, and expanded service opportunities.

As an example of this campaign element's importance, the Korean government has made an effort to promote Design as a competitive advantage to improve the export rate since 1990. Although the project had the support of corporations and design institutions, they did not achieve the desired result. Corporations did not want to spend money to grow design ability because they didn't think it'd be profitable for them in the short term. No evidence had been provided to convince them.

An alternative approach would involve promoting long term benefits over short term profits. Granted, this perspective would publicize an aspect of design that very few companies understand or consider. However, since they're very profit driven, this argument could very likely fall upon deaf ears.

As a result, the campaign should aim to sell Design Thinking as an effective approach which will provide long term value as well as short term profits, aspects that are both critically important and relevant to corporations and their stakeholders.



Project

**Campaign for Policy Design Synthesis**

Originator

Seungho Chung

Contributors

13 Sept., 2005

Min Ouyang  
Randy MacDonald  
Pam Nyberg  
Dan Greene

Source/s

Team Deliberations

Question at Issue

How should the campaign be introduced to facilitate acceptance and implementation?

Position

- ☐ **Constraint** The campaign should be introduced by  
☒ **Objective** based on “strong & horn blowing campaign activity” and “minimize the side effect”  
☐ **Directive**

Alternative Positions

- ☐ **Constraint** The campaign should be introduced for  
☒ **Objective** limited people and target.  
☐ **Directive**

## Background and Arguments:

We have prepared our campaign for a long time. So, we are introducing the campaign now. However, we have to approach carefully for gaining acceptance and implementation. To get more effective result of campaign, we should introduce “design campaign” as based on two main keys.

1. Strong and horn blowing campaign activity.
  2. Minimize the side effects such as repulsiveness and misgiving.
- Such 2 main keys should accelerate acceptance and implementation.  
 “Strong and horn blowing campaign activity”

We know that every products are advertised through various methods and media for announcing their own value. Similarly, our campaign will be introduced through diverse mass media if possible. We should treat “Design thinking campaign” as valuable product. To this end, our campaign should be advertised not only through mass media but also through detailed advertisement technique. For example, we can inform people ‘design thinking campaign’ through “well-known and friendly character” since this promotion can be easily accepted to them. On the other hand, we should hire a professional and get him/her to announce our campaign high-positioned people such as governor and policy maker. Such campaign activities which are diversified and detailed should obtain a strong support from all levels of society.

“Minimize the side effects such as repulsiveness and misgiving.”

It is natural that an social activity raise side effects such as repulsiveness and misgiving. These may be affect to facilitate acceptance and implementation. We should lay emphasis on minimization worry about our campaign. We cannot be gained acceptance for the introduction of campaign so long as people look at suspiciously with doubtful eyes. So, we obviously explain people the result which is obtained from campaign. We should present the affirmative result of campaign. We should clearly protest governor how design campaign change our society affirmatively. And we should affirm to the public how design campaign enhance the quality of people’s life. Consequently, the most important key to facilitate acceptance and implementation is gaining people’s support and trust which are based on strong belief.



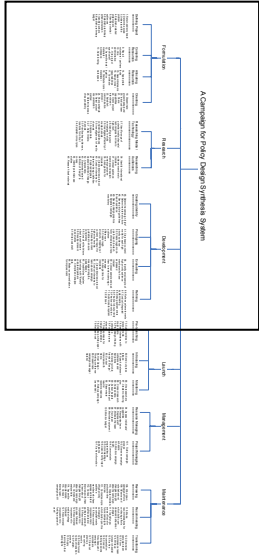
# *Function Structure*



# A Campaign for Policy Design Synthesis

## Function Structure | October 24, 2005

### A Campaign for Policy Design Synthesis System



#### Formulation

##### Defining Project

1. Retain advisory board
2. Determine scope
3. Understand the problem
4. Establish detailed project goals
5. Identify potential volunteers
6. Establish preliminary schedule/education
7. Identify partners
8. Establish preliminary budget

##### Compiling Resources

9. Recruit volunteers / partners
10. Hire administrative
11. Hire project specific staff
12. Assemble tools / materials / workspace
13. Seek funding

##### Allocating Resources

14. Appropriate funds
15. Assemble teams / responsibilities
17. Coordinate
18. Distribute tools / workspace

##### Orienting

19. Disseminate project background
20. Introduce team
21. Share capabilities
22. Orient project
23. Develop communication

##### Researching Media / Technology

27. Identify range of potential media channels/ technologies from low to high tech
28. Identify precursor technologies
29. Investigate effectivity of media channels, considering audiences
24. Share schedule
25. Select project documentation method
26. Determine areas of responsibility
31. Analyze data
32. Select media
33. Prioritize key audiences, locations for roll out
34. Establish roll-out plan

#### Research

##### Researching Audiences

36. Identify international audience members to interview
37. Contact audience members and explain project
38. Arrange time for interviews
39. Create interview protocol
40. Conduct interviews to determine design definition
41. Explore designers' defined definition of design
42. Explore designers' defined definition of design
43. Determine desired definition of "design" to convey
44. Identify potential case studies
45. Research book materials

##### Creating Identity

46. Determine campaign "style"
47. Determine internal culture for each audience
48. Develop style guidelines for each audience
49. Develop style graphics
50. Establish campaign vocabulary

##### Prototyping

51. Storyboard content/ media for each high priority audience
52. Create rough mock-up of each audience form of media and note differences
53. Create rough structure, mapping out content and layout for each audience
54. Develop content guidelines to ensure consistency
55. Consult with advisors about launch issues
56. Develop relevant case studies
57. Write book draft

##### Evaluating

58. Identify small sample of high priority audience members who have expressed interest
59. Contact sample and ask them to review campaign message
60. Arrange time for interviews
61. Create interview protocol
62. Conduct interviews to learn about campaign message strengths, weaknesses
63. Usability test system technology with "friendly" volunteers/partners
64. Compile and analyze data
65. Make recommendations for improvement

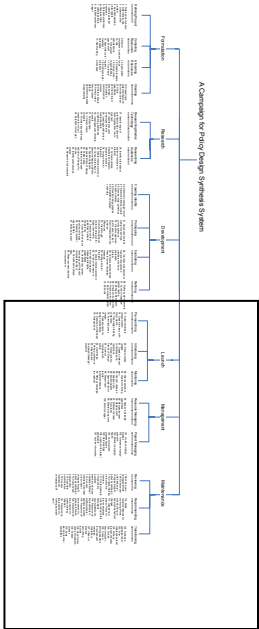
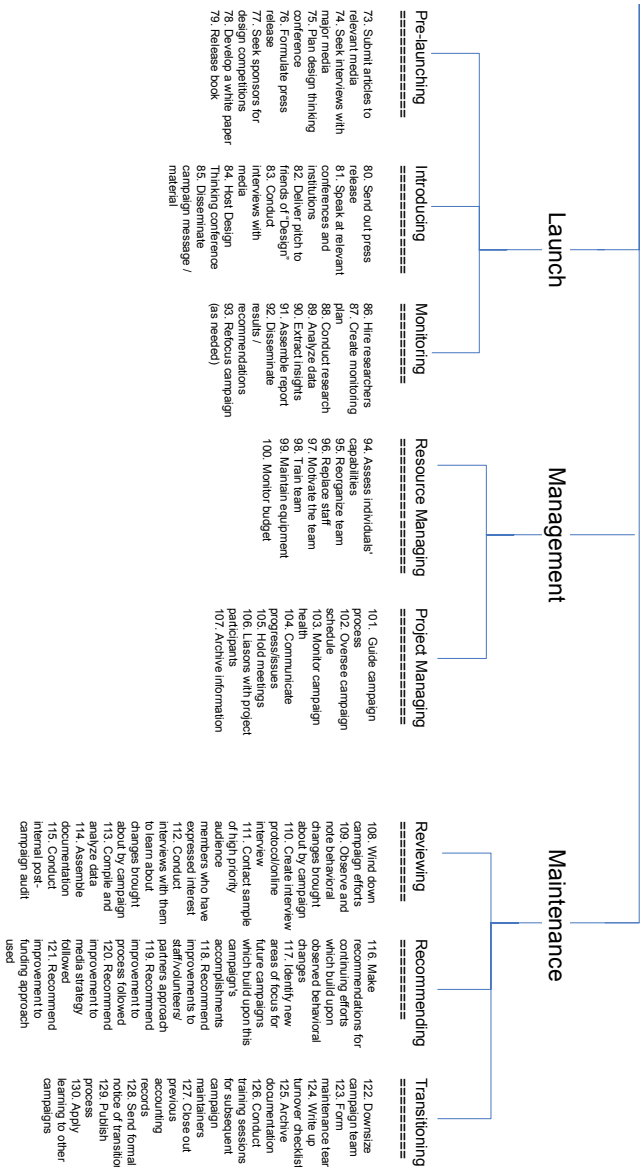
##### Refining

66. Refine system elements
67. Conduct integrated system testing
68. Develop plan errors
69. Finalize roll-out priority
70. Finalize roll-out plan
71. Build modular system
72. Edit book



# A Campaign for Policy Design Synthesis

## Function Structure | October 24, 2005





# ***Design Factors***



# Design Factor

Title: **No means to determine what resources will be required for the campaign**

1

Project **Campaign for Policy Design Synthesis**

---

Mode **Formulation**

---

Activity **Defining project**

---

Originator **Randy MacDonald**

---

Contributors **Team Deliberations**

Score/s

Associated Functions

Determine required resources

Determine project scope

Establish project duration

Determine project scope

Establish detailed project goals

Observation

When the team meets to define the project it will be important that they understand what resources will be required to reach their goals for the campaign.

Extension

As with any project, resources will certainly be required in order to run a successful campaign. The question is what type and how many resources will be required to successfully run the campaign agreed on in the initial project definition phase? This question is very difficult to answer for a group that has little or no experience running a campaign.

As with other problems of this nature, it can be solved in a variety of ways, the campaign members can: research campaign costs; hire outside assistance ; or try to recruit an experience volunteer.

Design Strategies

Conduct research on the cost of running a communications campaign to determine what resource will be required.

Identify experienced persons who could advise the campaign group during the project defining process.

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Internet based RE-search

☐ Request proposal

☐ Mentor ID

☐ Outside consultant



# Design Factor

Title: **Insufficient Understanding of Design Thinking to Write a Book on the Topic**

2

Project	<b>Campaign for Policy Design Synthesis</b>
Mode	<b>Development</b>
Activity	<b>Prototyping</b>
Originator	<b>Randy MacDonald</b>
Contributors	<b>Team Deliberations</b>

## Associated Functions

Storyboard content/media for each high priority audience  
 Create rough mockups for each low tech form of media and note audience differences  
 Create rough structure, mapping out content and layout for higher tech media  
 Develop content guidelines to ensure consistency  
 Consult with advisors about launch issues  
 Develop relevant case studies

## Observation

The campaign can advance its message by publishing a book on the benefits of design thinking; however, it must first acquire a proper understanding of design thinking in order to write such a book.

## Extension

A book that promotes the value of design thinking would be a invaluable tool for the campaign in general. A book is a good way to make money and get people to change their mind on a topic. Additionally, a good book on design thinking would give the campaign legitimacy because it would demonstrate that the campaign has a point-of-view on design thinking and is able to demonstrate it through the use of compelling argumentation, illustrative examples, and sophisticated style.

## Design Strategies

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

Research design thinking	<input checked="" type="checkbox"/> DT research & definition group
Compile good examples demonstrating the power of design thinking	<input checked="" type="checkbox"/> Powerful examples database
Collect illustrations, renderings and photographs that demonstrate power of design thinking	<input checked="" type="checkbox"/> Powerful images library
Decide on appropriate style of design book	<input checked="" type="checkbox"/> Graphic design department
Identify respected names in the design field to endorse book	<input checked="" type="checkbox"/> Famous designer ID
Identify editor, publisher, and printer	<input checked="" type="checkbox"/> Publishing service ID



# Design Factor

Title: **Insufficient Experience with Management to Effectively Organize Team**

3

Project	<b>Campaign for Policy Design Synthesis</b>
Mode	<b>Formulation</b>
Activity	<b>Defining project</b>
Originator	<b>Randy MacDonald</b>
Contributors	

Score/s

Associated Functions

Determine required resources

Determine project scope

Establish project duration

Determine project scope

Establish detailed project goals

## Observation

Knowledge of and experience with organizing and managing teams and resources is important to assure a successful campaign. If the campaign does not have a person or group in place to advise it on how best to set-up an effective organization and management system during the project definition phase, then the campaign risks almost certain failure.

## Extension

It is assumed that during the campaign formulation phase a variety of activities will take place: the project will be defined, resources will be compiled; and resources will be allocated. Thus, a meeting will probably be scheduled to define the project: its structure, mission, organization, etc. During his meeting, several key staff members who generally agree with the campaign's mission and possibly a board-of-directors will determine, among other things, how the campaign will be organized and managed. Without any certainty whether or not there will be any experts in attendance who have sufficient knowledge and experience in managing and organizing projects and teams, the campaign team would be responsible to rely on their own knowledge. This may be the only option available, but by taking it the campaign risks failure because without proper organization and management, no team can be expected to perform to its potential. To avoid, this scenario, the campaign team could first try to recruit an individual or group to act as an advisor during the project definition phase so that the campaign at least knows what steps need to be taken in order to put together an effective campaign team.

## Design Strategies

Identify experienced person in charge of the campaign who could advise on issues of management and organization.

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Resource Check

☐ Provide training

Identify experienced persons who could advise the campaign group during the project defining process.

☐ Mentor identification

☐ Outside consultant



# Design Factor

Title: **The Range or Extent of the Project is Unrealistic**

4

Project **Campaign for Policy Design Synthesis**

---

Mode **Formulation**

---

Activity **Defining project**

---

Originator **Randy MacDonald**

---

Contributors

Score/s

Associated Functions

Determine required resources

Determine project scope

Establish project duration

Determine project scope

Establish detailed project goals

Observation

The team must decide what a realistic range or extent is for the project.

Extension

The ultimate goal of the communications campaign is to persuade people who make decisions on policy that there is value in design thinking and that it should be synthesised with policy. The question is: what should be the scope of the campaign? Should it be small or large? Local or global?

If the campaign had unlimited time and resources these questions would be easy to answer, however, in order to make realistic decisions the team must make them while keeping constraints in mind.

Design Strategies

Determine potential cost of project

Determine potential benefits of extending campaign to various targets

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Team discussion

☐ Outside consultant

☐ Research campaign fundamentals

☐ Research target pros/cons



# Design Factor

Title: **No Means to Determine Appropriate Style for Campaign**

5

Project **Campaign for Policy Design Synthesis**

---

Mode **Development**

---

Activity **Creating identity**

---

Originator **Randy MacDonald**

---

Contributors

Score/s

Associated Functions

Asses individual capabilities  
Recruit staff  
Assemble the team  
Motivate the team  
Train the team  
Maintain equipment  
Monitor budget

Observation

Style is a difficult thing to agree upon--especially for a campaign promoting the value of design.

Extension

The style of a campaign is one of the most important factors that will determine its success or failure. And since style is so closely related with design in the mind of most the general public, it is even more important for a Campaign for Policy Design Synthesis to determine a style that reflects and embodies what is best in design thinking.

With so much importance given to the style of the campaign, a means must be in place in order to decide on the style. Without such a means, a style will certainly be chosen but it will most likely be determined by the most "politically" inclined within the group and not by those who are most aesthetically inclined.

Design Strategies

Create a design competition in which graphic designers enter examples of style manuals for the campaign.

Have each member of the campaign management team pitch a certain design style and have the team vote on the best three.

Head of design for campaign determines most appropriate style

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ StyleManul Competition

☐ DesignManual by Democracy

☐ Style by rank



# Design Factor

Title: No Means to Assess Capabilities of Staff

6

Project **Campaign for Policy Design Synthesis**

Mode **Management**

Activity **Resource Managing**

Originator **Randy MacDonald**

Contributors

Score/s

Associated Functions

Assess individual capabilities

Recruit staff

Assemble the team

Observation

A means must be in place assess the capabilities of future and current staff members.

Extension

Management and optimization of human resources are critical to the success of the project. Capabilities are difficult to access and too much time and money spent on evaluations can be counterproductive. However, in order to properly staff teams so that they accomplish their goals, some system must be devised.

As a first step, a database could be compiled listing the skills and experiences of each of the staff members. This would allow management to review and meet to decide who should go on what team. After some time, an evaluation system could be put in place in order to determine the skills and/or deficiencies of the staff members. Once people were assessed, training could be given to those staff members who are deficient in mandatory skills.

Design Strategies

Assemble staff skills database

Create staff review system

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☐ Staff skill search

☐ Resume online

☐ Formal review

☐ HR update

Version 1

Date: 09/14/05

Date of first version: 09/14/05



# Design Factor

Title: **Low Efficiency at Information Assimilation**

7

Project **Campaign for Policy Design Synthesis**

Mode **Management**

Activity **Orienting**

Originator **Min Ouyang**

Contributors

Source/s

Google search,  
“Cognitive Load Theory”,  
“Memory”.  
<www.wikipedia.org>  
<coe.sdsu.edu>  
13 Sep. 2005

Associated Functions

Introduce team  
Share capabilities  
Disseminate project background  
Orient project intent/vision  
Share project schedule  
Determine areas of responsibilities  
Establish communication protocol  
Select project documentation methods

Observation

Because of overwhelming information at the meeting and the inherent limitations of human memory, it becomes extremely difficult to assimilate all the information in a short period of time.

Extension

Meetings are aimed at communicating and sharing ideas. So is any kick-off meeting that features a busy agenda. To give a flavor of the project and to establish a common understanding, a wealth of information is inevitably imposed in a short period of time on attendees ranging from diversified team capabilities to complicate project schedule, from questions at issue to protocols (e.g. communication protocol, documentation protocol, etc.) to be agreed by the project team.

According to Atkinson and Shiffrin(1968), only a portion of the information would be passed from a short-term store (roughly lasts 30-45s) to a long-term store while the majority would be neglected or forgotten. And Miller(1956) even found that short-term memory is limited to seven chunks of information at the same time. Sweller(1994) argued that efficient information/knowledge acquisition is related to types of cognitive load(intrinsic, germane, and extraneous cognitive load) on human brain requires a connection to the schematic structures of long term memory.

So it's important to figure out an approach to enhance the efficiency of information assimilation.

Design Strategies

Prioritize messages to be conveyed  
Identify appropriate load and format of information to be conveyed  
Enable iterations of information

Enhance the way of communication

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☐ Content Navigator

☐ Intelligent meeting tailor

☐ Digital recording system

☐ Warm-up/Follow-up meeting highlights

☐ Poker cards

☐ Meeting role-play

☐ Supplementary visuals



# Design Factor

Title: No Means to Note Behavioral Changes

8

Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Reviewing**

Originator **Pam Nyberg**

Contributors

Source/s  
Personal Observation

Associated Functions

Observe and note behavioral changes brought about by the campaign

## Observation

Relevant change in behavior must be observed in order to deem the campaign a success, but this is difficult since the behavior in which we're most interested isn't easily observed initially.

## Extension

Campaigns are conducted with the intention of motivating a particular behavior. For example political campaigns are conducted with the express intent of getting their candidate elected. Measures are taken throughout the campaign to determine voter mindset, but the real indicator of success occurs on Election Day when voters select which candidate will be the winner. This type of campaign has a very clear outcome when it draws to a close.

In contrast, our campaign's goal is to motivate policy makers to include Design in policy development. This goal, because of its lack of urgency to many figures in government, will probably take much longer to achieve. To measure progress, therefore, smaller goals must be set and monitored to determine whether any progress is being made toward the larger goal.

## Design Strategies

Send quick surveys to key audience members regarding impact of campaign in their jobs and in policy development

Recruit volunteers in academia, design associations, and government to monitor and report changes resulting from campaign efforts

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☐ Impact Survey

☐ Change-in-Action Database

☐ Design Thinking in Progress Newsletter

☐ Change Agent Monitors

Version

1

Date: 09/13/05

Date of first version: 09/13/05



# Design Factor

Title: **Funding Priorities Difficult to Determine**

9

Project **Campaign for Policy Design Synthesis**

Mode **Formulation**

Activity **Allocating Resources**

Originator **Pam Nyberg**

Contributors

Score/s

Personal Observation

Associated Functions

Appropriate funds  
Assemble teams  
Assign responsibilities  
Coordinate logistics  
Distribute tools/materials/workspace

Observation

Prioritizing distribution of funds is difficult when the actual amount of funds available isn't known yet.

Extension

Typically, when funds are allocated to a project, the actual amount of money available for the project is known, having been included in an annual budget. Since a specific project budget is identified upfront, distributing dollars amongst the project's activities is relatively straightforward, especially if the new project bears similarity to past projects. In that case, available funds can be similarly distributed among critical categories.

In the case of our campaign, however, it's not clear how fruitful our fundraising efforts will be. As such, we're not sure how much money we'll have to distribute among the various activities or how we should prioritize allocations.

Design Strategies

Create a matrix containing all funding categories and weight each category. When a dollar amount is entered into the funding total, amounts are automatically assigned to each category.

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☐ FundingAllocator



# Design Factor

Title: **No Means to Determine which Resources would be Most Suitable for a Project**

10

Project **Campaign for Policy Design Synthesis**

Mode **Formulation**

Activity **Compiling Resources**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Recruit volunteers/partners  
Identify admin support  
Recruit Advisory Board  
Recruit trainers/facilitators  
Recruit project-specific staff

Observation

Project success is highly dependent on the quality of team members and their ability to work effectively together.

Extension

When hiring for open positions, companies use a range of techniques to determine whether candidates would be well suited for a particular job. In addition to traditional interviews, companies may have candidates take a personality test, a strengthfinder test, submit a sample project on a given area of focus, or solve a series of puzzles, for example.

During the interview process, companies will typically have various people meet the candidate to discuss various topics, with the intent of determining whether that individual meshes with the team members he/she is meeting.

The primary goal, in the end, is to create a highly functional team capable of achieving challenging goals.

Design Strategies

Have project-specific staff and admins take strengths test so their talents can be bestleveraged

Identify participants who work well together using web based questionnaire

Identify volunteer contacts that could beuseful during campaign

Find volunteers interested in project

Locate professionals who could serve ascampaign advisors

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☐ Strengthsfinder Test

☒ E-Harmony Work

☒ Contact Database

☒ Volunteer Locator

☒ CampaignPro Locator



# Design Factor

Title: **Campaign Technology Can't be  
Evaluated Onsite**

11

Project **Campaign for Policy  
Design Synthesis**

Mode **Development**

Activity **Evaluating**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Usability test system technology  
with "friendly" volunteers/partners

Observation

Being onsite when testing web campaign  
functionality won't always be viable.

Extension

Many global audiences must interact with prototype web campaign material to determine its relevance. However, due to cost and time constraints, it won't always be possible to have campaign researchers on site to conduct the sessions. As such, other technology must be employed to assist in the evaluation process.

Design Strategies

Invest in usability testing and logging  
software which can be used to conduct  
evaluations remotely. (Can also do  
audio and video recording if users have  
a mike and/or webcam.)

Webcasting could also be used in lieu of  
the video/audio recorder

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☐ Morae Recorder

☒ Morae Remote Viewer

☒ Morae Manager

☒ Microphone

☒ Webcasting

Version **1**

Date: 09/13/05

Date of first version: 09/13/05



# Design Factor

Title: **Message/Material is Filtered Out  
by Spam Filters**

12

Project **Campaign for Policy  
Design Synthesis**

Mode **Launch**

Activity **Introducing**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Disseminate campaign message /  
materials

## Observation

To effectively reach desired audiences, the campaign must be able to provide material to individuals without being sidetracked by spam filters.

## Extension

Given the plethora of information received through email and snail mail everyday, it's no wonder that people are motivated to filter unnecessary information from important details. As such, publicizing our campaign through email seems prone to failure since the publicity efforts could appear as spam to many spam filters.

To combat this drawback which is inherent in "push" campaigns, we should investigate approaches that encourage individuals to investigate our materials while in an online location they chose to visit. This tactic, better known as a "pull" approach, is typically more successful in generating engagement and commitment, according to web marketing doctrine.

## Design Strategies

Post design thinking article and link to campaign website in design friendly locations (e.g. IDSA website, BusinessWeek Innovation site, DMI website, etc.) and in places where influential audiences would typically look (e.g. MIT Technology Review, Scientific American, etc.)

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☒ Power of Design Thinking Article

☐ Campaign Website

☐ Campaign Website Link



# Design Factor

Title: **Difficult to Determine Most Desirable Sub-Topics**

13

Project **Campaign for Policy Design Synthesis**

Mode **Launch**

Activity **Pre-Launch**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Plan design thinking conference

Observation

To ensure strong attendance at the design thinking conference, relevant topics must be presented by respected speakers.

Extension

In preparation for the design thinking campaign launch, this design thinking conference is being held to generate interest. The goal is to attract the attention of influential individuals and members of the media who have an interest in design and want to learn more about its value in solving larger problems.

In order to generate the desired turn-out, topics and speakers of interest must be scheduled to motivate attendance by high profile audiences.

Design Strategies

Contact high profile, desired attendees and invite them to conference. Ask them to go online and indicate what keeps them up at night, what they'd like to learn about, and who they'd like to see at the conference.

Online responses are automatically tallied for desired speakers and topics.

Contact those requested speakers and locate others, as needed, to present on

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ RedCarpetRequest

☐ SpeakerTopicTallier

☐ LecturerLocator



# Design Factor

Title: No Means to Assess Capabilities of Staff

14

Project **Campaign for Policy Design Synthesis**

Mode **Fomulation**

Activity **Allocating Resources**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Assemble teams  
Assign responsibilities

Observation

It's difficult to assign people to teams such that the teams are balanced and able to perform their functions effectively.

Extension

When trying to staff multiple teams at one time, it's challenging to ensure that all teams are equally balanced with talented, appropriately skilled people. Instead, time pressures could motivate recruiters to assign new team members to those teams who need headcount quickly, as opposed to carefully matching new member skills with team needs.

In other cases, team leaders might not specifically identify the skills they need an individual to have or they might discover that their requirements were too stringent, excluding all individuals who applied for consideration. In these circumstances, team leaders must take extra care to more deeply profile the most critical skills needed by their teams.

Additionally, potential team members may prefer to be involved with particular teams, because of their personal interests. In some cases, the teams they most want to join might not be in need of their skills. When this occurs, there needs to be a mechanism to ensure high motivation, despite their not being assigned to their first choice of teams.

Design Strategies

Craft a skill profile for each team member, including areas of interest and photo

Develop a profile database, identify necessary team skills, assess current staff skills against team needs, and define each team's remaining personnel needs

Hold "draft" to select appropriate team members and to generate excitement amongst the team

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Team Member Trading Cards

☐ Team Profile Database

☐ Team Member Draft

Version 1

Date: 10/11/05

Date of first version: 10/11/05



# Design Factor

Title: **No Means to Collect Case Studies in a Uniform Formate**

15

Project **Campaign for Policy Design Synthesis**

Mode **Development**

Activity **Prototyping**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Develop relevant case studies

Observation

There's no easy way to quickly collect corporate case studies for the campaign in a uniform format.

Extension

One of the major components of our campaign material will be case studies which demonstrate corporate success when applying design thinking. Although companies typically have case studies of their most successful projects, everyone's format differs. Since the campaign project group is primarily volunteers, the goal is to streamline processes, where possible, to ensure maximum productivity.

Design Strategies

Create a web-based case study wizard that companies can use to submit their cases

Provide a keyword search function to expedite staff location of relevant case studies for a given audience

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Case Study Wizard

☐ Keyword Search

☒ Searchable Case Study Database



# Design Factor

Title: **Contact Information can't be Located for Key Audience Members**

16

Project **Campaign for Policy Design Synthesis**

---

Mode **Research**

---

Activity **Researching Audiences**

---

Originator **Pam Nyberg**

---

Contributors

Score/s

Associated Functions

Identify international audience members to interview  
Contact audience members and explain campaign purpose

Observation

Locating contact information for prominent or popular individuals can be very difficult.

Extension

Individuals who hold prominent political and corporate positions as well as those working in culturally popular fields (e.g. movies, gaming, etc.) take special care to ensure that they can't easily be contacted by the general public. They take these precautions for several reasons: to maintain distance from critics as well as supporters, to protect their privacy, to ensure personal safety, and to more easily manage their time.

In countries outside the U.S., protection of one's personal contact information is much easier because of stricter privacy legislation. Therefore, when trying to reach prominent individuals for discussions, significantly more effort is required to do so.

Design Strategies

Contact individual's respected friends or associates for a referral

Promise an approach to the individual's most pressing problem if granted access

Contact a respected member of that country's media and ask for an introduction, with the promise of an exclusive story on the discussion, if anything materializes

Use Google

Use an internet search firm

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Valued Network Introduction

☐ Tough Problem Solver

☐ Quid Pro Quo Intro

☐ Google Search

☐ People Finder

Version **1**

Date: 09/13/05

Date of first version: 09/13/05

51



# Design Factor

Title: **Difficult Finding Available Time on Key Audience Member's Schedule**

17

Project **Campaign for Policy Design Synthesis**

---

Mode **Research**

---

Activity **Researching Audiences**

---

Originator **Pam Nyberg**

---

Contributors

Score/s

Associated Functions

Contact audience members and explain campaign purpose  
Arrange time for interviews  
Conduct interviews to determine design direction

Observation

Finding available time in prominent individuals' schedules to interview them is difficult.

Extension

When working with others, one of the biggest challenges is scheduling time for discussions. In the case of influential individuals, this issue becomes exponentially more complex since they have many more demands on their time. For this reason, these individuals typically have administrative assistants or agents to schedule their meetings. As such, our ability to contact them will depend on their interest in our topic, the value we can provide to them, and the relationship we can build with their administrative assistants, if they rely exclusively on them to manage their time.

Design Strategies

Use an automated scheduler that has access to yours and your key audience member's schedule to set up a meeting

Send a desirable "gift" to their assistant to facilitate a meeting appointment

"Buy" time on their schedule by providing a given number of free consulting hours to help them with a pressing issue.

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☐ Microsoft Office Calendar

☐ Greasing the Wheels Gift

☒ Buying Time



# Design Factor

Title: **No Interviewers are Fluent in Language**  
**Key Audiece Member**

18

Project **Campaign for Policy Design Synthesis**

---

Mode **Research**

---

Activity **Researching Audiences**

---

Originator **Pam Nyberg**

---

Contributors

Score/s

Associated Functions

Contact audience members and explain campaign purpose  
Arrange time for interviews  
Conduct interviews to determine design direction

Observation

Team members might not speak the language of a key audience member, a critical consideration since this is a global campaign and global feedback is needed to ensure relevance.

Extension

(No further detail perceived as being necessary.)

Design Strategies

Hire/recruit an interpreter

Use machine translation software that can translate written text from one language to another

Use web video software combined with translator

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☐ Translation.net Translators

☐ Translation.net Machine Translation

☒ Web Video Translator

Version **1**

Date: 09/13/05

Date of first version: 09/13/05



# Design Factor

Title: **Unclear How to Best Determine Campaign "Style"**

19

Project **Campaign for Policy Design Synthesis**

Mode **Research**

Activity **Researching Media and Technology**

Originator **Pam Nyberg**

Contributors

Score/s

Associated Functions

Determine campaign "style" and how it should be delivered to various audiences

Observation

Campaign must be thoughtfully designed so its message is relevant and appealing to the target audiences.

Extension

In preparation for the design thinking campaign launch, this designthinking conference is being held to generate interest. The goal is to attract the attention of influential individuals and members of the media who have an interest in design and want to learn more about its value in solving larger problems.

In order to generate the desired turn-out, topics and speakers of interest must be scheduled to motivate attendance by high profile audiences.

Design Strategies

Create different campaigns based on peoples' views and have people select the campaign they see based on the view they hold from the campaign website

Request visitors to vote on effectiveness of message

Inform the campaign videos by identifying hot issues that are relevant to a given audience

Solution Elements *Specify status:* ☐ Existing ☐ Modified ☐ Speculative

☐ Choose-Your-Own-Campaign

☐ CampaignTallier

☐ Thumbs Up/Thumbs Down Voting

☐ CurrentIssueSearch



# Design Factor

Title: **No Criteria to Evaluate Different Media and Technology Channels**

20

Project	<b>Campaign for Policy Design Synthesis</b>	Score/s	Associated Functions  Identify range of potential media channels/ technologies from low to high tech Investigate effectivity of media channels, considering audience Investigate cost of media channels
Mode	<b>Research</b>		
Activity	<b>Researching Media and Technolgy</b>		
Originator	<b>Pam Nyberg</b>		
Contributors			

## Observation

In order to evaluate the appropriateness of media and technology channels for particular audiences, criteria must be established to facilitate decision making.

## Extension

Given the campaign's limited financial resources, decisions involving appropriate media and technology channels must be fact-based. This attention to data should help to ensure that the money spent yields the most value/dollar.

If decisions are based on intuition instead, the chance that inappropriate channels or technology could be selected is greatly increased. Resulting situations could include choosing media that doesn't resonate with particular audiences or overspending on one technology which limits other channels that could have been exploited with that audience for additional reach.

## Design Strategies

Determine benefits of potential media options

Determine most appropriate media channels for audiences

Minimize cost of chosen media channels

Solution Elements *Specify status:* ☐ Existing ☒ Modified ☐ Speculative

☐ MediaTypeEvaluator

☒ MediaChannelProfiler

☒ MediaAuction



# Design Factors

Title: **Inefficiency at Responding to Changing Conditions**

21

Project **Campaign for Policy Design Synthesis**

---

Mode **Management**

---

Activity **Project Manageing**

---

Originator **Min Ouyang**

---

Contributors

Scorce/s  
 <www.abc.net.au>  
 30 September, 2005  
 Clayton M.Christensen,  
 Scott D.Anthony, Erik  
 A.Roth.  
 Seeing What's Next. Boston:  
 Harvard Business School  
 Press, 2004

Associated Functions  
 Monitor project health  
 Guide campaign process

## Observation

Campaign can be vulnerable to fast shifting conditions, which results from shortage of a reliable mechanism to manage uncertainties.

## Extension

Contextualized in a fast changing society, the campaign is always confronted with uncertainties such as flux of information in the context, shifting mindsets in audiences, come-and-go campaign staff, advancing communication technology, and etc. Therefore, the campaign can suffer from the inability to manage uncertainties such as the staff's shortage of knowledge in coping with shifting conditions, a late reaction to adversity, inappropriate strategies toward changes, and etc.

The disaster of Hurricane Katrina could be a good case in point where the government isn't well prepared to adequately respond to unexpected natural disaster. This has incurred significant loss of lives and properties. The other good case in point is the defeat of shortsighted Western Union (WU) by AT&T. Being the industry incumbent, WU didn't anticipate the impact of new telephone wires. Neither did it notice the early warning signal from the latter challenger.

To sustain fast shifting conditions, a reliable mechanism must be built up to help understand uncertainties and better manage changes.

## Design Strategies

Identify drivers behind changing conditions and their impacts

Develop a self-learning mechanism to assist in problem-solving/strategy-making

Build an open-source database to gather precursor strategies toward changes

## Solution Elements *Specify status: [E] Existing [M] Modified [S] Speculative*

- ☒ Professional analysts
- ☒ Change vectors anaylsis/charting software
- ☒ Campaign doctor
- ☒ Electronic bulletin board
- ☒ Information forager
- ☒ Advisory board
- ☒ Campaign encyclopedia
- ☒ Campaign activity log



# Design Factors

Title: No Way to Assess if the Selected Research Methods/tools are Most Suitable

22

Project **Campaign for Policy Design Synthesis**

---

Mode **Maintenance**

---

Activity **Monitoring**

---

Originator **Min Ouyang**

---

Contributors

Source/s  
Personal Observation

Associated Functions  
Create monitoring plan  
Conduct research

## Observation

Unless there is in-depth knowledge of abundant research methods/tools, it is very difficult to sort out the most suited ones to well monitor the campaign.

## Extension

Thanks to information technology, tremendous research methods/tools are now available and highly accessible. Meanwhile, knowledge transplant from one discipline to another has significantly added to this rich inventory.

Different research methods/tools have both strengths and shortfalls. Their applications are limited by research requirements and constraints as well. In addition, even the same pool of data will come to totally different conclusions by using different research methods/tools.

However, no one can be a Jack of all trade. People often tend to addict to only some of the items in the methods/tools inventory and employ them in different applications. They gain great insight of these methods/tools yet don't understand other methods/tools very well.

To well monitor the campaign and obtain valid/informative results, it is necessary to find a way to enable systematic assessment and recommendation of appropriate candidates out of current ocean of research methods/tools.

## Design Strategies

Identify criteria/constraints/requirements for research methods/tools selection

Enable a recommendation mechanism

Build up an assessment mechanism

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

- ☐ ID kitchen sink
- ☐ Team deliberation
- ☐ Professional researchers
- ☐ Campaign doctor
- ☐ E-match system
- ☐ E-measure system (rating, review)
- ☐ Assessment software



# Design Factor

Title: **Effective Storyboarding Expensive and Time Consuming**

23

Project	<b>Campaign for Policy Design Synthesis</b>	Source/s	Associated Functions
Mode	<b>Development</b>	<a href="http://www.storyboardartist.com/artist.html">http://www.storyboardartist.com/artist.html</a>	Storyboard content/media for each high priority audience
Activity	<b>Prototyping</b>	<a href="http://www.powerproduction.com/">http://www.powerproduction.com/</a>	Develop relevant case studies
Originator	<b>Dan Greene</b>	<a href="http://www.frameforge3d.com/">http://www.frameforge3d.com/</a>	
Contributors	<b>N/A</b>	Personal Observation	

## Observation

In order to effectively communicate ideas through storyboarding, coherent artistry is essential. Unfortunately, the services of a competent illustrator or storyboarding professional can be expensive and require more time than is available.

## Extension

Telling a story or explaining a sequence of events for planning or presentation purposes can be challenging for even the most seasoned professionals, especially when those in attendance are preoccupied with a multitude of competing tasks. Storyboarding can be a compelling planning method because good illustrations can clarify information, make the portrayed events seem more dynamic, and add emotional layer often missing from text-only presentations.

The fact that not all storyboards are created equal is mainly a function of the illustrator's skill, namely his ability to appropriately balance realism and gestural components. Because finding the right artist (whether in-house or hired from outside the campaign) can be time consuming and expensive, a number of alternatives should be explored. Fortunately, current state of the art technologies offer those in need of storyboarding expertise some affordable options.

## Design Strategies

Assemble public images into storyboards with photo-editing and document design

Use commercially available storyboarding software

Stage situations and take photos, replacing the need to illustrate

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Adobe Photoshop + InDesign Storyboarding

☐ StoryBoard Artist / StoryBoard Quick / FrameForge 3D

☐ SureAids



# Design Factor

Title: **Not Enough Qualified Original team Members Remaining**

24

Project **Campaign for Policy Design Synthesis**

Mode

**Maintenance**

Activity

**Transitioning**

Originator

**Dan Greene**

Contributors

**N/A**

Source/s

Personal Observation

Associated Functions

Downsize campaign team

Form maintenance team

## Observation

As the campaign winds down, too many essential members of the team vacate their positions, leaving unqualified workers to carry on operations.

## Extension

Whether fully successful or not, a campaign often has a second life following its official end. Organizers may decide that the initiative they sought to promote may be even more effective as a permanent movement or organization. For example, 1992 independent U.S. Presidential candidate Ross Perot turned his unsuccessful run into a political organization (United We Stand America) that sought to promote the ideals espoused during his campaign.

Attempting faithfully and accurately maintain the same core ideas, themes, and goals of the prior campaign may be difficult, however, when its key and most competent staffers have vacated their positions. While adequate manpower may remain, new leaders may lack the qualifications of their predecessors. A number of current and novel methods can help remedy the problem. Some involve consulting knowledge bases or individuals for help in resolving specific issues while other require locating and hiring new individual to assume certain roles.

## Design Strategies

Have workers consult predecessors' experiences

Retain best team members in online advisory role

Outsource qualified prospects from similar campaigns

Create intelligent, interactive software that serves an advisory role.

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☐ Experience Database

☒ Online advisors

☐ Elance

☐ AdvisoWare



# Design Factors

Title: **Incomplete info/knowledge transition from one to another**

25

Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Transitioning**

Originator **Min Ouyang**

Contributors

Source/s

Google search, "knowledge transfer", "information architecture".

<www.wikipedia.org>, 26 Sep. 2005

Jose Carlos Teixeira. Applying Design Knowledge to Create Innovative Business Opportunities. Institute of Design, Illinois Institute of Technology, Chicago

Associated Functions

Form maintenance team

Write up turnover checklist

Archive project documentations

Conduct training sessions

## Observation

Because information/knowledge transfer is usually complicated by many factors, it becomes difficult for the takeover party to obtain a complete project package from the handover party.

## Extension

There are many factors that have been challenging the info/knowledge transition such as language, bias, geographical difference, areas/levels of expertise, prior exposure to relevant fields, way of representing content, human beings' inherent limitations on message processing, inability to articulate one's tacit knowledge(embedded in individual experience and involves intangible factors such as personal beliefs, perspectives, and value systems (Nonaka&Takeushi 1995, 59)), and etc.

Consequently, the handover party might unconsciously leave out information/knowledge that is considered to be informative and helpful by the takeover party. The takeover party might probably fail to capture important pieces by the handover party. This incomplete transfer from one party to another inevitably affects efficiency and results in rounds of back-and-forth work between the information/knowledge owner and the corresponding requestor.

To better carry on the campaign and keep its very flavor, efforts must be made to enhance the information/knowledge flow from the project team to the maintenance team.

## Design Strategies

Actively involve multiple parties to identify what needs to be transferred

Ensure availability of key info/knowledge owners for future consultation

Reliably and efficiently externalize one's tacit knowledge

Build up an explicit info system to facilitate info filing and retrieval

## Solution Elements

Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Do-it-together checklist

☐ Knowledge management team

☐ Electronic bulletin board

☐ Seminar/Workshop/Training sessions

☐ Knowledge visualization methods

☐ Campaign portal



# Design Factor

Title: **Funds insufficient to purchase all necessary tools, materials, and workspace**

26

Project **Campaign for Policy Design Synthesis**

Mode **Formulation**

Activity **Allocating Resources**

Originator **Dan Greene**

Contributors  
16 Sept., 2005 **Dan Greene**

Source/s  
www.skype.com

<http://www.google.com/talk/>  
<http://www.webex.com/>

<http://www.hotoffice.com/product/benefits.htm>

<http://www.howstuffworks.com/gadget48.htm>

Personal Observation

Associated Functions

Appropriate funds

Distribute tools /materials / workspace

## Observation

There are not enough funds to purchase adequate tools, materials, and workspace to fulfill staff requirements.

## Extension

In the early stages of organization, a campaign can encounter significant barriers to progress in allocating resources due to a lack of sufficient funds. In attempting to set up an adequate central office (or offices) for its staff, for instance, organizers may find that they cannot afford enough computers, phone lines, printers, desks, cubicles, and officespace to satisfy the daily demands of the operation.

To avoid cost overruns and debts (anathemas to many campaigns), a number of free and low-cost tools -- both hardware and networking solutions -- can be utilized. On the networking side, free and fee-based VoIP systems can provide stereo quality communication, enhancing interaction and efficiency while allowing coworkers to operate outside of an office. On the hardware side, specialized devices exist that allow one computer to be converted into two separate workstations, reducing computer costs as well as power consumption. In the case of a workspace shortage, more "bargain basement" approaches like stacking cubicles could be used maximize square footage.

## Design Strategies

Implement online workspace alternatives —

Turn single PCs into two —

Physically maximize workspace —

Insert online donation links on campaign-related webpages —

Share/trade materials with nearby businesses/offices also in need —

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Virtual Office

☐ PC Duplicator

☐ Bunk Desk

☐ Paypal/ Amazon Donation Buttons

☐ WorkShare



# Design Factor

Title: **Distance limits attendance of VIPs**

27

Project **Campaign for Policy Design Synthesis**

---

Mode **Launch**

---

Activity **Introducing**

---

Originator **Dan Greene**

---

Contributors **N/A**

Source/s  
<http://www.business2.com/b2/web/articles/0,17863,513577,00.html>  
<http://www.teleportec.com/technology.html>  
 Personal Observation

Associated Functions  
 Host “design thinking” conference

Observation  
 Efforts to generate publicity through signature events are often hampered by the inability to gather all the right people at the right place at the right time.

Extension  
 The launch of any campaign is its time of greatest visibility. While press releases, advertisements, and downloadable documents may comprise the foundation of a publicity effort, an official conference that draws the most influential members of a specialized community can set the media world abuzz. When the field of prospective luminaries spans the globe as it does in the design world, however, it is likely that many will be no-shows due to distance related issues. Any hype surrounding the event may fizzle as a result.

To counter this problem, event organizers may now turn to a variety of optical and internet systems that will not only elevate the event experience for attendees by delivering the best speakers in the field, but will also captivate the mainstream media with its technological novelty and impressive roster.

Design Strategies

Deliver speakers virtually ————

Make conference internet only ————

Incorporate telepresence ————

Substitute an ongoing weblog that deals with design thinking ————

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Teleportec

☒ Virtual Conference

☒ Augmented Conference

☐ DesignThink Blog



# Design Factor

Title: **Documentation and Data Not Returned**

28

Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Reviewing**

Originator **Seungho Chung**

Contributors

Score/s

Associated Functions

- Compile and analyze data
- Assemble documentation

## Observation

Our campaign has been prepared and progressed smoothly.

Now, we have to compile and assemble data for reviewing. However, many documents and data are missing.

## Extension

What is the best way to judge an event?

You should find newspaper, book and magazine.

It is natural that we find all of recorded materials, data and documentation, for reviewing. Also, we should make an effort to manage data or documentation which are reliable source to review our campaign.

If we neglect gathering our valuable data, our campaign was remembered as a common campaign. In addition, we can't identify new areas of focus for future campaigns which build upon this campaign's accomplishments.

So, we must draw up a plan for the management and maintenance of data.

## Design Strategies

Form a plan for the management of documentation and data in advance.

Manage and assemble documentation and data strictly.

Determine an effectual solutions of distribution and gathering.

Solution Elements Specify status: ☐ Existing ☐ Modified ☐ Speculative

☐ Change Agent Monitors

☐ Documentation Manager

☐ Unification through internet.

☐ Diversification through internet



# Design Factor

Title: Unable to Get Expected Results from Interview

29

Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Reviewing**

Originator **Seungho Chung**

Contributors

Score/s

Associated Functions

-Create interview protocol/online interview

-Conduct interviews with them to learn about changes brought about by campaign

Observation

How can we get expected result from interview? We have to consider about creating and conducting interview.

Extension

Reviewing stage is very important role not only in campaign but also all of activity.  
For reflecting on the result of campaign, reviewing is conducted by many ways such as interview and survey.  
Interview is effective way to review. It is the best direct way to reflect, assess and review. However, we have to prepare for some risk. Through interview, we should not get appropriate result because unsuitable interview process may cause unexpected result and a misjudgement. So, we have to prepare for interview thoroughly. If our interview is not verified by all participants, it must be nothing but illusion.

Design Strategies

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

Clear interview method.

☒ Data Analysis Software

Create clear goal of interview in advance

☐ Design Thinking in Progress Newsletter

Consider interview process.

Version 1

Date: 09/11/05

Date of first version: 09/11/05



# Design Factor

Title: **Have Difficulty to Recruit with Limited Funds**

30

Project **Campaign for Policy Design Synthesis**

---

Mode **Formulation**

---

Activity **Compiling Resources**

---

Originator **Seungho Chung**

---

Contributors

Score/s

Personal Observation

Associated Functions

Hire project specific staff  
Recruit volunteers / partners

## Observation

The campaign for design thinking needs not only volunteers but also specialist. Well-trained staffs are the most important resources in managing campaign.

## Extension

We have a problem to find appropriate people. Also, we are not sure about their ability. So, we should hire and recruit people with wide experience as possible. But, we have not data to find experienced people. In addition, we have not sufficient funds for paying to specialist. Solving these problems, we should make "finding retired specialist" which web-site for retired specialist who has wide experience in specific fields.

## Design Strategies

Have difficulty to recruit in limited  
No means to find members  
"who is able staff"

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Employment of Retired Specialist



# Design Factor

Title: **Have Difficulty Scheduling Time to Meet**

31

Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Evaluating**

Originator **Seungho Chung**

Contributors

Score/s

Personal Observation

Associated Functions

Arrange time for interviews

Observation

To evaluate a campaign, we have to meet interviewees. However, we may have a trouble to meet them on time.

Extension

Meeting with people who evaluate our campaign is a very important process. However, we have a some problem to arrange time for interview. Some interviewees who will give well-meant advice may reject our request because of their busy schedule. Also, they may postpone interview since they will have more an important meeting than the interview. The interview cannot be arranged on time by circumstances.

Design Strategies

Arrange precise time for interviews

Check interviewees' schedule

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ Real time schedule monitoring



Project **Campaign for Policy Design Synthesis**

Mode **Maintenance**

Activity **Reviewing**

Originator **Seungho Chung**

Contributors

Score/s

Associated Functions

Compile and analyze data

Observation

How can we judge the result of a campaign? Profit? people's backing? We cannot get any guidelines for reviewing or evaluating.

Extension

The goal of reviewing is maintenance. That is, this process give a campaign viability. Without any reviewing, maintaining a campaign is impossible.

If we manage a business, we easily analyze the result such as losses and gains. Because many corporations as well as small shops review their outcome through generated tools or guidelines such as a balance sheet. Anyone can't raise an objection about a result.

However, our campaign cannot have a guidelines for analyzing. How to analyze data? Profit? Satisfaction? Some volunteers or sponsor raise an objection about a analyzing. Clear guidelines for analyzing eliminate users'( all staff, sponsor, volunteers, etc) mistrust and defiance.

These guidelines should be desinged in advance. Clarified and identified goals are good resources to set guidelines. Also, some

Design Strategies

Determine clear goals and task in advance.

Identify personal task and responsibility.

Clear analyzing Method

Hire specialist for a fair analyzing.

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

☒ The articles of association

☒ A standing committee.

☒ Professional Researchers

☐



# Design Factor

Title: **Insufficient Resources**

33

Project **Campaign for Policy Design Synthesis**

---

Mode **Formulation**

---

Activity **Compiling Resources**

---

Originator **Seungho Chung**

---

Contributors

Score/s

Personal Observation

Associated Functions

Assemble tools /materials /workspace

Observation

Managing the campaign needs material resources. Basically, a lot of money is apportioned to buy things. We need workplace, desk and chair. However, the budget of campaign is limited. We should save money which was given by sponsor and people. In addition, many resources will be dumped when campaign is ended. How can we save not only money but also valuable materials?

Extension

Donation system is operated as two components.

1. Expensive resources( Ex.work place, Car)

These resources can be donated by our sponsor. Some sponsors who are unable to raise fund for the campaign willingly accepts our suggestion. We just notice the name of donator on our web site.

2. Recycling material resources

Recycling is an important slogan in global.

People agree with our policy. We can be obtained many useful resources with low budget or nonpayment. In addition, these policy is good advertisement way indirectly. We can contact with People who is interested on conservation of nature and recycling. In addition, the campaign can get a strong support from them.

Design Strategies

Solution Elements Specify status: ☐ Existing ☒ Modified ☐ Speculative

Assemble tools /materials /workspace

☒ Donating used-resources

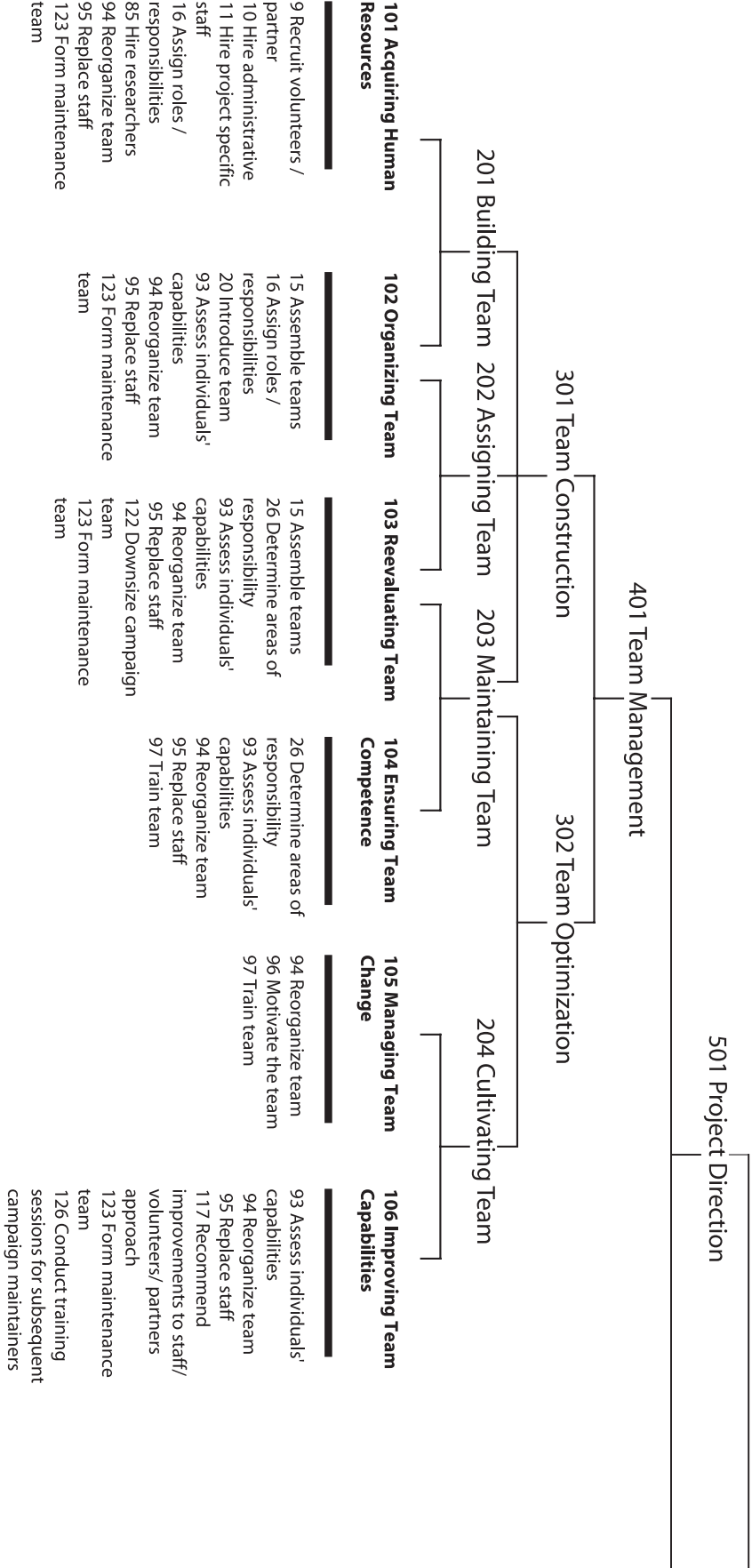


# ***Information Structure***



# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

## Information Structure 28 October, 2005





601 Project Management	
------------------------	--

\_\_\_\_\_

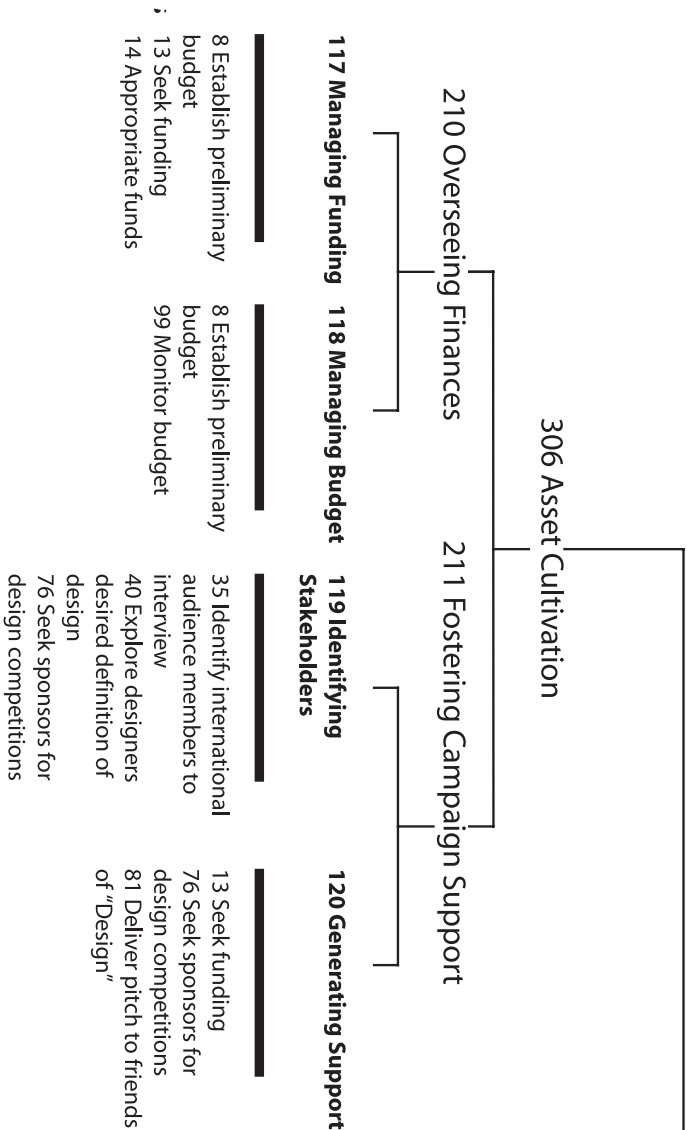
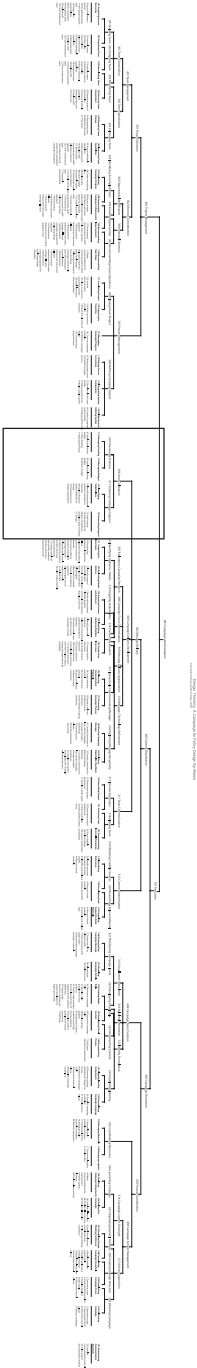






# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

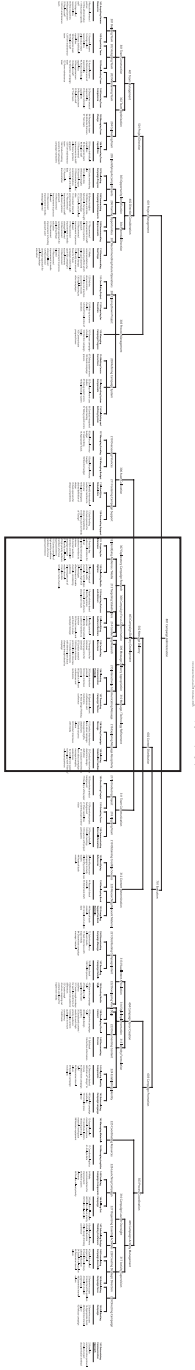
## Information Structure 28 October, 2005





# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

Information Structure 28 October, 2005



## 801 Campaign Administration

### 502 Message Delivery

### 602 Content Distribution

#### 403 Campaign Delivery Development

#### 307 Exploratory Campaign Research    308 Campaign Focus Determination    309 Message Delivery Appropriation    310 Message / Technology Refinement

#### 212 Identifying Audience / Media    213 Targeting Stakeholders    214 Conducting Research    215 Interactively Communicating Message    216 Exploring Message Receptivity

##### 121 Preparing for Interviews

##### 122 Evaluating Media Options

##### 123 Acquiring Partners and Advisors

##### 124 Identifying Audience Members

##### 125 Conducting Interviews

##### 126 Planning Communication Protocols

##### 127 Promoting Campaign Themes

##### 128 Sharing Campaign Message

##### 129 Soliciting Stakeholder Feedback

33 Prioritize key audiences, locations for roll out

27 Identify range of potential media channels / technologies from low to high tech

1 Retain advisory board  
7 Identify partners  
54 Consult with advisors about launch issues

5 Identify potential audiences  
35 Identify international audience members to interview

37 Arrange time for interviews  
59 Arrange time for interviews

38 Create interview protocol  
60 Create interview protocol  
80 Speak at relevant conferences and institutions

80 Speak at relevant conferences and institutions  
83 Host Design Thinking conference

61 Conduct interviews to learn about campaign message strengths, weaknesses  
79 Send out press release

39 Conduct interviews to determine design definition  
61 Conduct interviews to learn about campaign message strengths, weaknesses

36 Contact audience members and explain campaign purpose

30 Investigate cost of media channels, considering audiences

58 Contact sample and ask them to review campaign message

109 Create interview protocol/online interview

111 Conduct interviews with them to learn about changes brought about by campaign

82 Conduct interviews with media

62 Usability test system technology with "friendly" volunteers/partners

57 Identify small sample of high priority audience members who have expressed interest

31 Analyze data

32 Select media channels

110 Contact sample of high priority audience members who have expressed interest

110 Contact sample of high priority audience members who have expressed interest

110 Contact sample of high priority audience members who have expressed interest

110 Contact sample of high priority audience members who have expressed interest

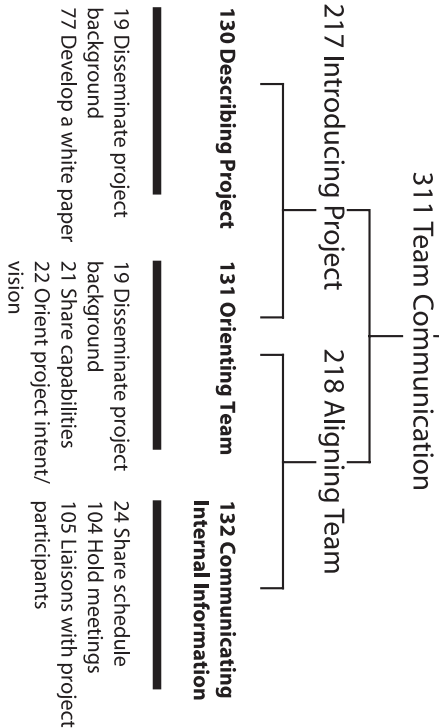
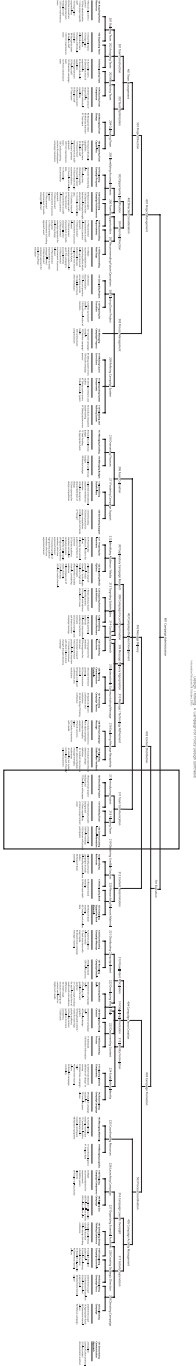
110 Contact sample of high priority audience members who have expressed interest

110 Contact sample of high priority audience members who have expressed interest

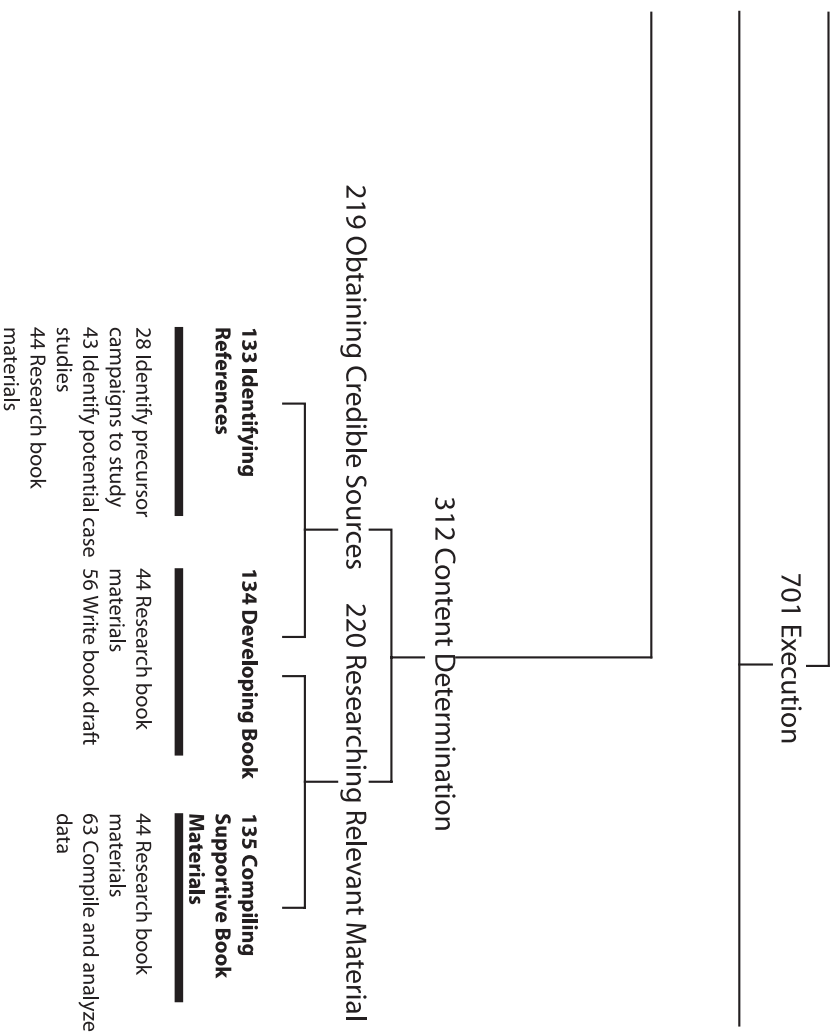


# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

## Information Structure 28 October, 2005



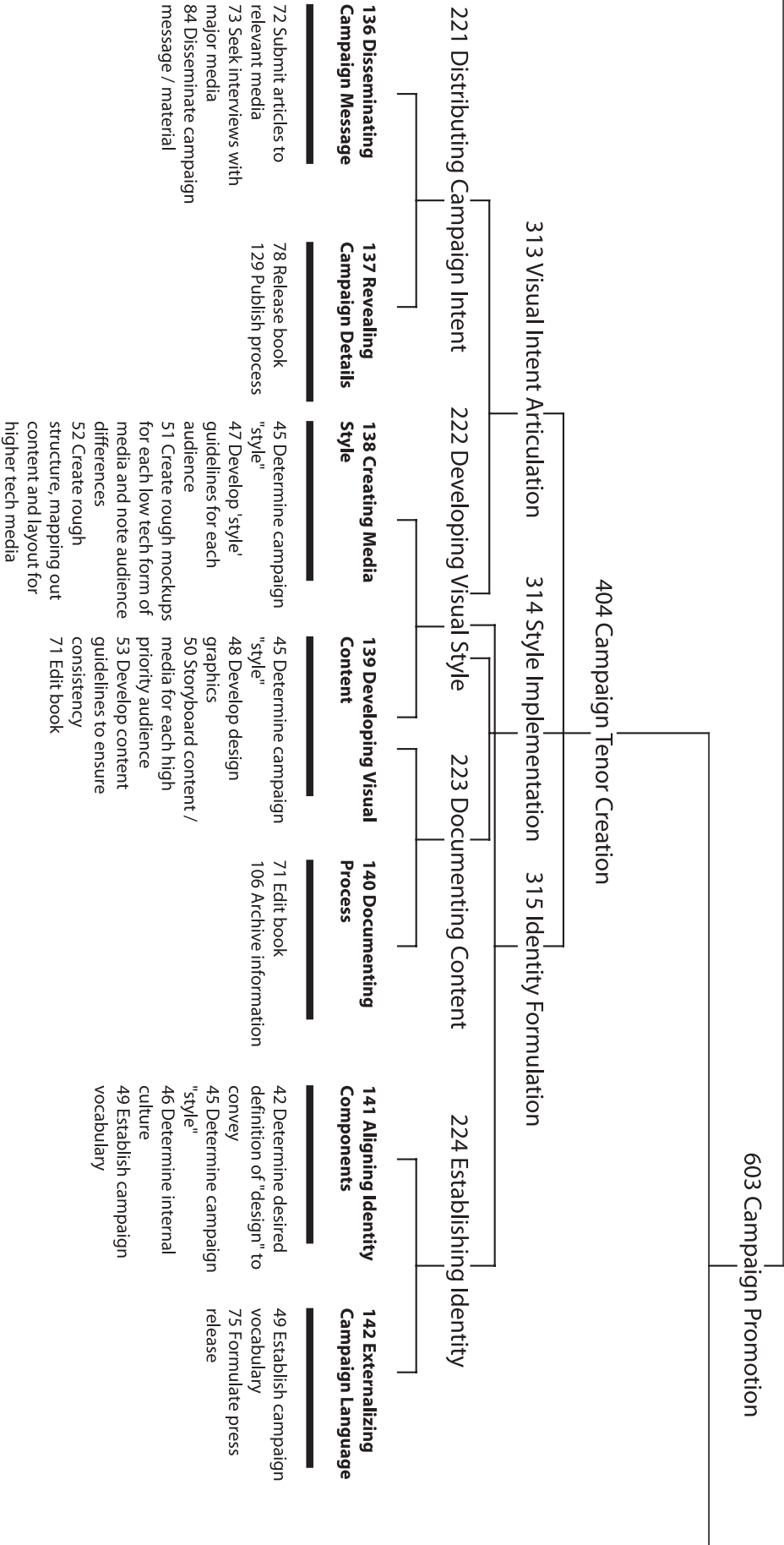


[illegible]



# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

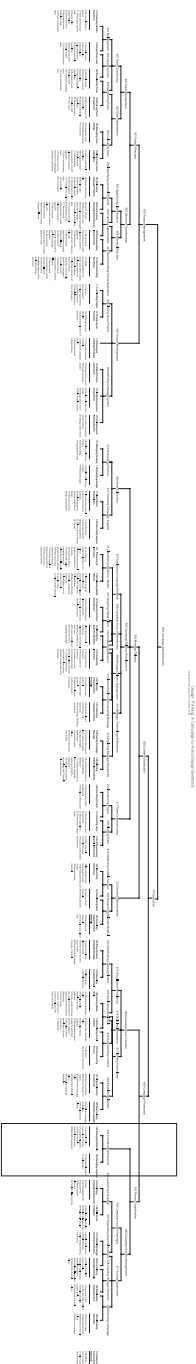
Information Structure 28 October, 2005





# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

Information Structure 28 October, 2005



## 225 Coordinating Resources

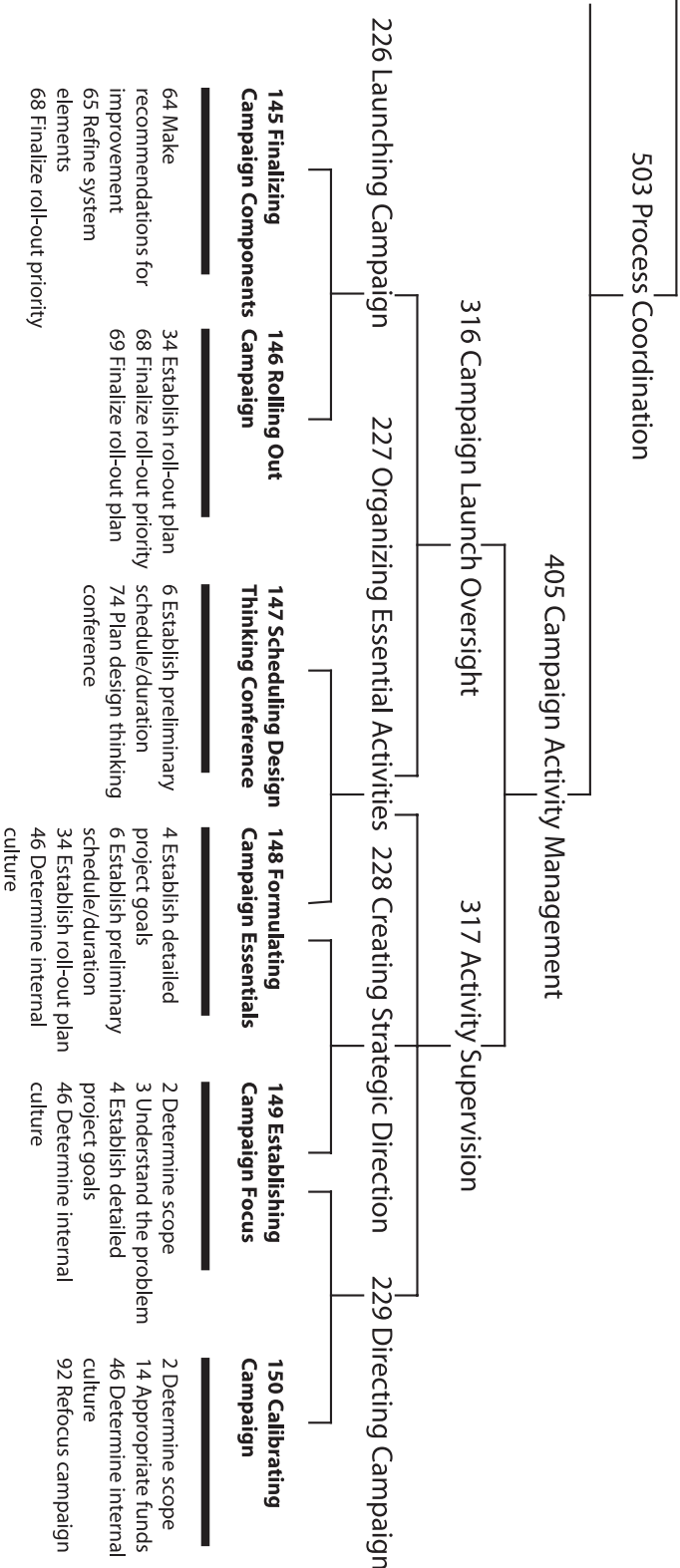
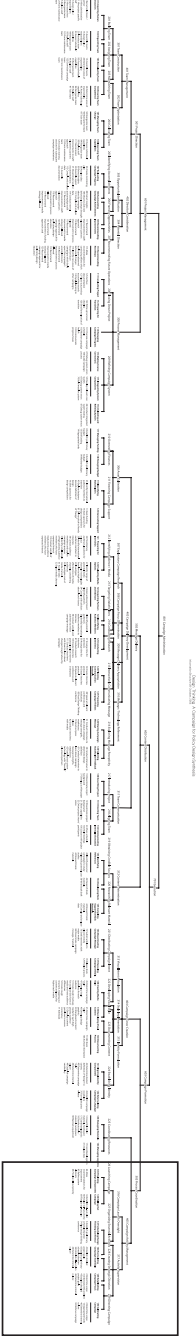
**143 Managing Materials**     **144 Managing Logistics**

12 Assemble tools / materials /workspace	17 Coordinate logistics
17 Coordinate logistics	41 Analyze data
18 Distribute tools / materials /workspace	
88 Maintain equipment	



# A CAMPAIGN FOR POLICY DESIGN SYNTHESIS

Information Structure 28 October, 2005





# ***Sample Forms***



# Activity Analysis

Activity: **Prototyping**

1

Project **Campaign for Policy Design Synthesis**

Mode Development

Originator **Pam Nyberg**

Contributors

Scenario

After findings and recommendations have been shared in the Researching stage, Prototyping begins to develop the desired message and content, based on those findings and recommendations.

Users (*Players*)

Campaign staff  
Volunteers  
Campaign advisors

System Components (*Props*)

Email  
Telephone  
Internet  
Influential campaign precursors  
Research database/tools  
Prototyping materials/tools  
Project intranet  
Partner extranet

Environmental Components (*Set*)

Campaign headquarters  
Campaign web site  
Global partner/volunteer sites  
Political climate  
Economic climate

Functions

51. Storyboard content/media for each audience

52. Create rough mock-ups for each low tech form of media

53. Create rough structure, mapping out content and layout for higher tech media

54. Develop content guidelines to ensure consistency

56. Develop relevant case studies

55. Consult with advisors about launch

Associated Design Factors

Don't have appropriate content for each audience  
Staff/volunteers don't have necessary skills

Content guidelines aren't closely followed

No means to collect case studies in a uniform format  
Companies won't submit case studies for inclusion

Advisors unavailable for consultation

Version

1

Date: 09/13/2005

Date of first version: 09/13/2005

81



# Activity Analysis

Activity: **Researching Media/Technology**

2

Project **Campaign for Policy Design Synthesis**

Mode **Development**

Originator **Pam Nyberg**

Contributors

Scenario

Initial research is conducted to understand media channels and technology that might be best suited for the campaign.

Users (*Players*)

Campaign staff  
Volunteers  
Campaign advisors

System Components (*Props*)

Email  
Telephone  
Internet  
Influential campaign precursors  
Analysis tools/frameworks  
Project intranet

Environmental Components (*Set*)

Campaign headquarters  
Campaign web site  
Global audience sites  
Global partner/volunteer sites  
Political climate  
Economic climate

Functions

27. Identify range of potential media channels/technologies from low to high tech

28. Identify precursor campaigns to study

29. Investigate effectivity of media channels, considering audiences

30. Investigate cost of media channels

31. Analyze data

46. Determine campaign "style" and how it should be delivered to various audiences

Select media channels

Prioritize key audiences, locations for roll out

Establish roll-out plan

Associated Design Factors

No criteria to evaluate different media and technology channels

Campaign precursor details unavailable

Effectivity data regarding different channels is unknown

Cost data can't be accessed for different media channels

Conflicting views on desired campaign style

Unclear how best to deliver content to audiences

Unclear how to best determine campaign style

Disagreement on priority of appropriate audience/location

No criteria established to assist in prioritization

Key milestones have questionable timing



# Solution Element

Status:

☐ Existing  
☐ Modified  
☒ Speculative

Case Study Wizard

1

Project

**Campaign for Policy Design**

Mode

**Development**

Activity

**Prototyping**

Originator

**Pam Nyberg**

Contributors

Description:

This tool allows corporations and consultants to submit case studies for inclusion in the campaign. The benefit is that, by using this tool, the case studies are all created in a uniform format that reflects the desired flavor of the campaign. Keyword Search and Searchable Database functions are included to make location of desired topics quick. During the campaign, a forward facing feature could also be provided for visitors of the site.

Source (if existing or modified)

Properties — *what it is:*

- Website which allows text and image uploads
- Case study text searchable by keyword using searchable database for both internal and public facing sites

Features — *what it does:*

- Prompts corporations/consultants to upload case studies in uniform format
- Gives campaign developers ability to search case studies so they can select appropriate cases, depending on the audience and geographical region
- Gives public ability to search case studies during and after the campaign as ongoing examples of design thinking

Associated Function/s

56. Develop relevant case studies

Source Design Factor/s

20. No means to collect case studies in a uniform format

Version

1

Date: 09/13/2005

Date of first version: 09/13/2005



# Solution Element

Status:

☐ Existing  
☐ Modified  
☒ Speculative

Choose-Your-Own-Campaign

2

Project

**Campaign for Policy Design**

Mode

**Development**

Activity

**Researching Media/Technology**

Originator

**Pam Nyberg**

Contributors

Description:

Different campaign approaches are created for key audiences. Audience members view the approaches and vote for their favorite, indicating whether the message was effective.

Source (if existing or modified)

Properties — *what it is:*

- Website with different campaign videos
- Quick pre-video questionnaire
- Web tally to count visitors
- Quick post video vote

Features — *what it does:*

- Presents visitors with different campaign videos they can watch and asks them to select the video most associated with their perception of design
- Requires visitors to categorize themselves into audience groups by having them complete a quick pre-video questionnaire
- Tallies number of visitors to each video to help determine which videos are most popular
- Encourages visitors to rate effectiveness of video using a quick thumbs up-thumbs down vote at the end

Associated Function/s

46. Determine campaign "style" and how it should be delivered to various audiences

Source Design Factor/s

5. No means to determine appropriate style of campaign

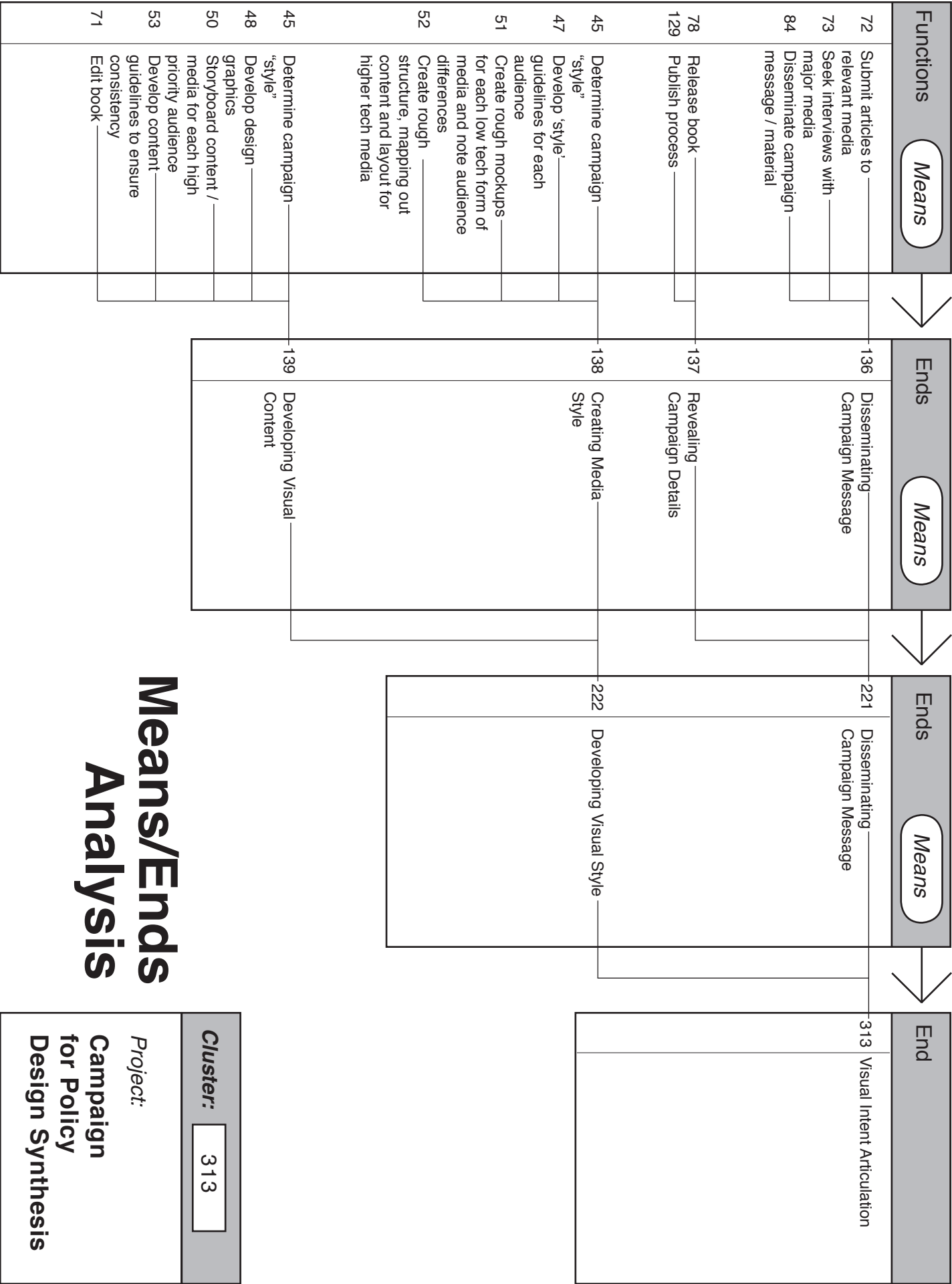
Version

1

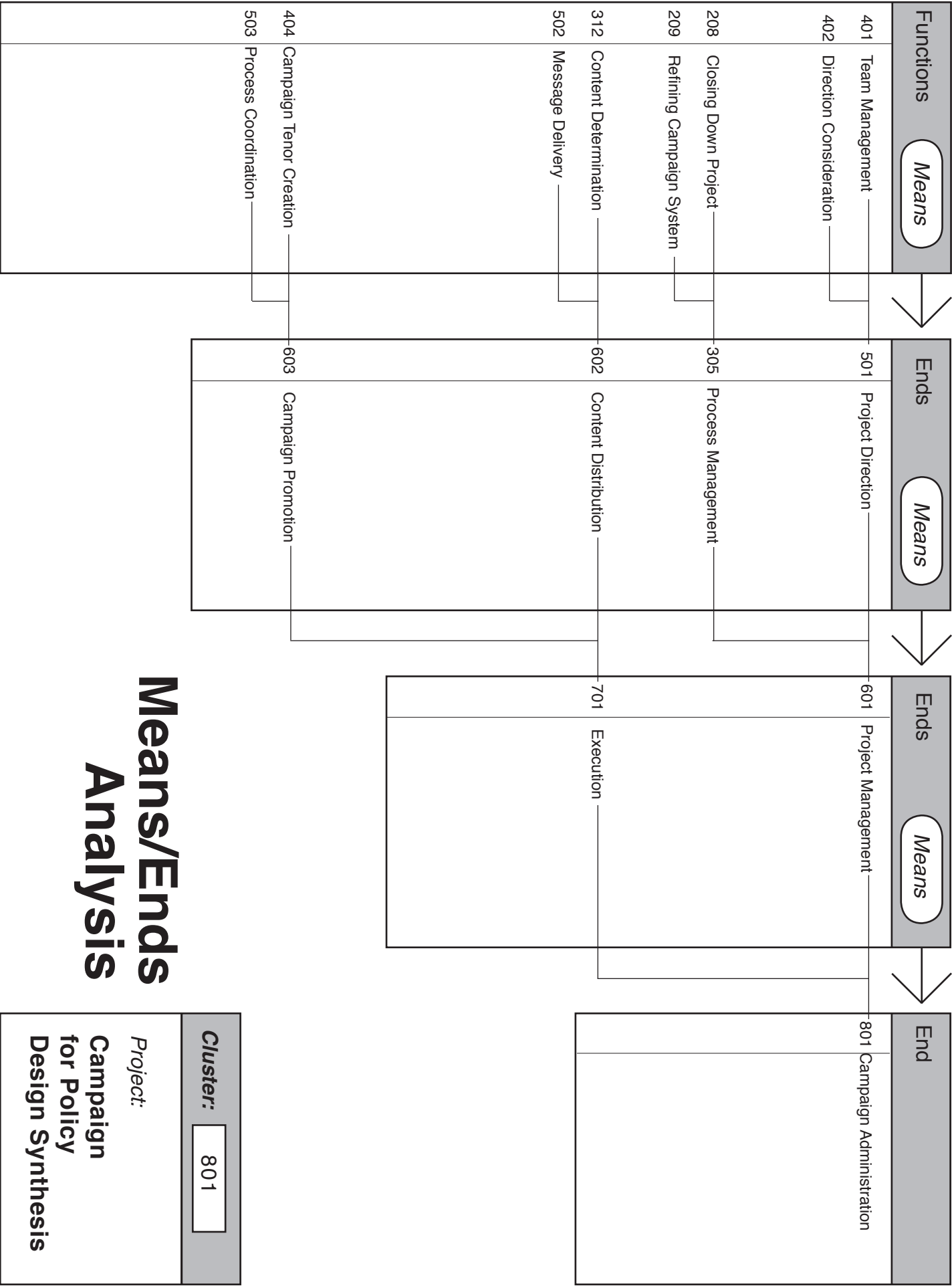
Date: 09/13/2005

Date of first version: 09/13/2005

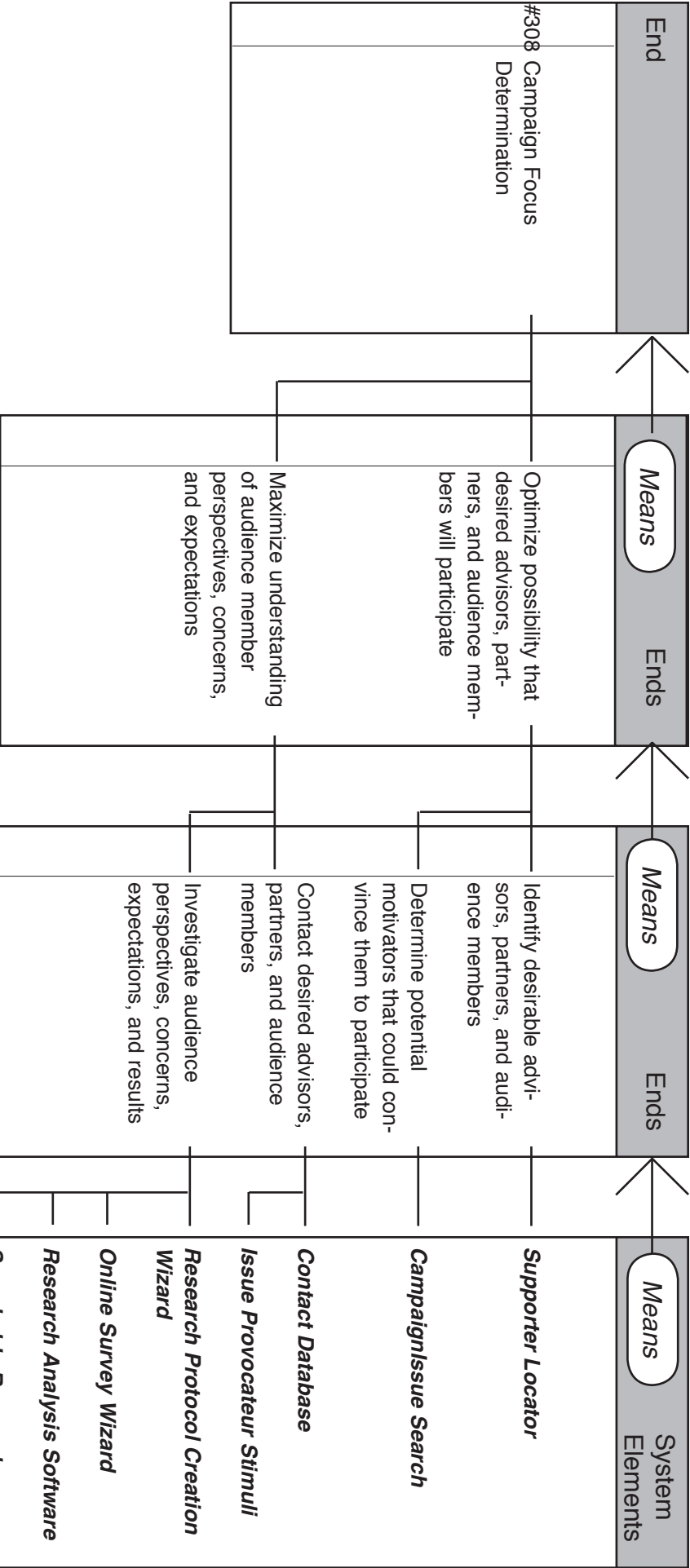










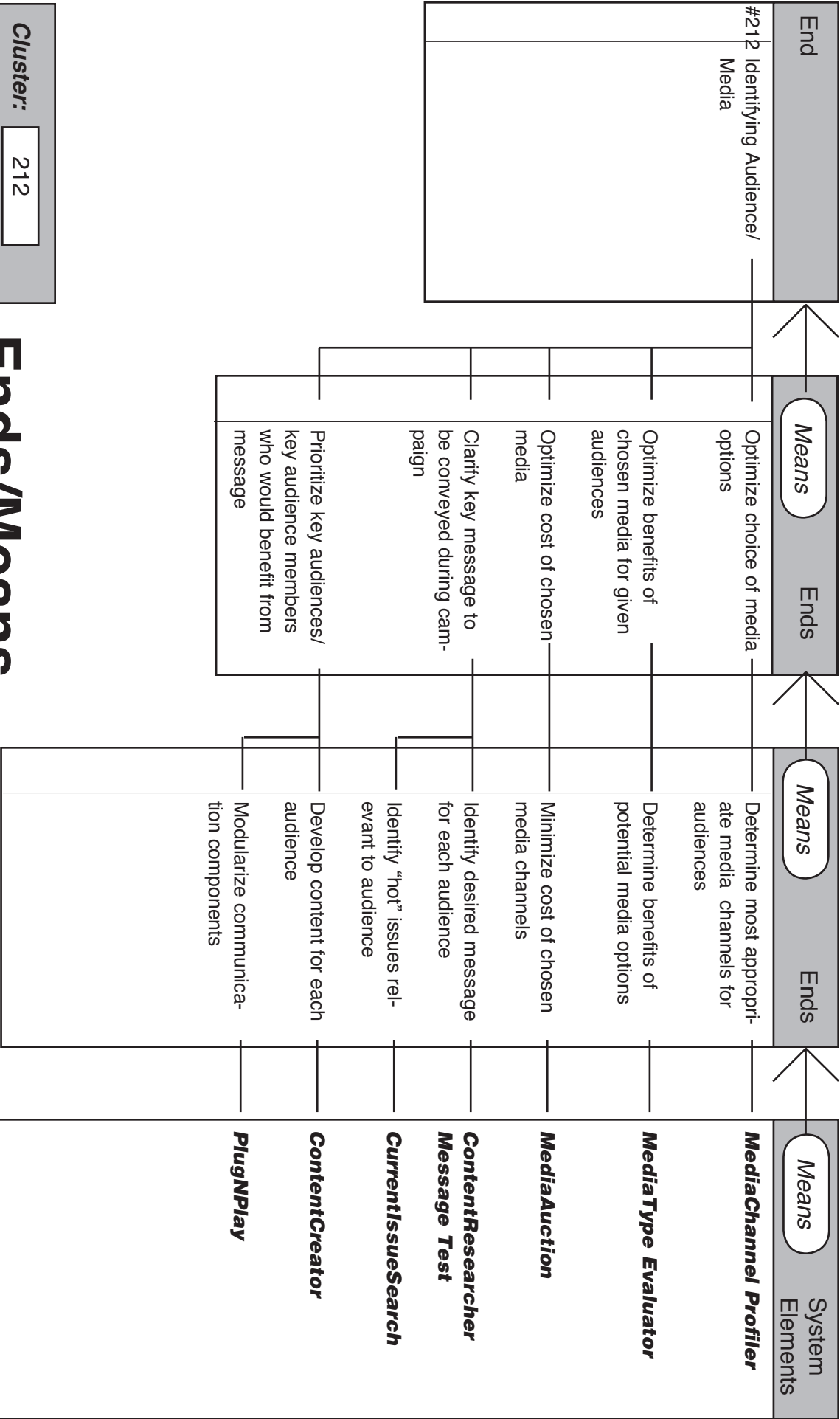


# Ends/Means Analysis

**Cluster:** 308

**Project:**  
Campaign for Policy Design Synthesis





# Ends/Means Analysis



# System Element Relationships

1	Impressario	<div>score2</div> <div>Impressario manages Outreach and provides feedback on its performance.</div>			
2	Cross Trainer	<div>score3</div> <div>CosTrainer provides training for Outreach to make connections with partners.</div>	<div>score1</div> <div>Cross Trainer provides training so that Recon can perform its duties of gathering information. Recon in turn provides research on training staff.</div>		<div>Score</div> <div>3. Critical Relationship</div> <div>2. Strong Relationship</div> <div>1. Slight Relationship</div> <div>0. No relationship</div>
3	Content Kangaroo	<div>score1</div> <div>Outreacher provides people for Content Kangaroo to gather interviews, stories, etc.</div>	<div>score3</div> <div>Research Policy fundamentals can determine if Buying Time is a useful element.</div>	<div>score0</div> <div>Content Kangaroo reacts to the input of Delta Progress.</div>	
4	Stylus Operandi	<div>score2</div> <div>Outreacher and Stylus Operandi work together to acheive relationships and appearances that are in alignment with campaign strategy.</div>	<div>score1</div> <div>Recon collects data that appropriately fits with Stylus Operandi</div>	<div>score0</div> <div>Stylus Operandi is sensitive to feed back from Delta Progress in order to decide if it should continue to keep its mode of style.</div>	<div>score0</div> <div>SoapBox uses several physical and nonphysical contributions from Stylus Operandi in order to bring its message to the target audience.</div>

Outreacher	Recon	Delta Progress	SoapBox	
System Elements	5	6	7	8



# System Element Relationships

- Score
- 3. Critical Relationship
  - 2. Strong Relationship
  - 1. Slight Relationship
  - 0. No relationship

1	Impressario	<div>score3</div> <div>CrossTrainer is a tool whereby Impressario trains staff to operate according to predetermined standards and protocols.</div>				
2	Cross Trainer	<div>score2</div> <div>CrossTrainer trains members of CrossTrainer</div>				
3	Content Kangaroo	<div>score2</div> <div>CrossTrainer produces training workshops appropriate for people managing content.</div>	<div>score0</div>			
4	Stylus Operandi	<div>score2</div> <div>Stylus Operandi informs Cross-Trainer of campaign style and what staff should understand about maintaining that style. CrossTrainer trains members of Stylus Operandi.</div>	<div>score1</div> <div>Stylus Operandi informs Content Kangaroo on how content should be organized and managed and what content to locate. Content Kangaroo works with Stylus Operandi on a database.</div>	<div>score0</div>		<div>score0</div>
System Elements		CrossTrainer	Content Kangaroo	Stylus Operandi	Media Dashboard	
		<div>2</div>	<div>3</div>	<div>4</div>		<div>5</div>
System Elements						



# A Campaign for Policy Design Synthesis

## System Element Evaluation Against Functions | Media Dashboard

	Features				
	1	2	3	4	5
Functions	001	RetainAdvisoryBoard			
	002	DetermineScope			
	003	UnderstandProblem			
	004	EstablishProjGoals		■	
	005	IdentifyKeyAudiences			■
	006	EstablishSchedule			■
	007	IdentifyPartners	■	■	■
	008	MakeReimBudget	■	■	■
	009	RecruitVoisPartners			
	010	HireAdminStaff		■	
	011	HireProjectStaff			
	012	Find ToolMaterialsSpace			
	013	SeekFunding			■
	014	AppropriateFunds			
	015	AssembleTeams	■	■	■
	016	AssignRoles		■	■
	017	CoordinateLogistics		■	■
	018	GiveToolMaterialsSpace			■
	019	ShareProjBackground			
	020	IntroduceTeam			
	021	ShareCapabilities			
	022	ShareProjVision			
	023	CreateCompProtocol		■	
	024	ShareSchedule			
	025	SelectDocumentApproch	■	■	■
	026	DetermineRespAreas	■	■	■
	027	IdentifyMediaChannls			■
	028	FindExampleCampaigns	■	■	
	029	ResimbedChannelEffectiv	■	■	■
	030	ResimbedChannelCost	■	■	■
	031	AnalysesData		■	
	032	SelectMediaChannels	■	■	■
	033	PrioritizeAudiences			
	034	MakeRoll-outPlan	■	■	
	035	RecruitInfluAndMembr			
	036	ContactAudMembers			
	037	ArrangeShterlyTime			
	038	CreateInterviewGuide			
	039	CreateInterviewDesDefn		■	
	040	FindDesignerDesDefn			

Features					
	1	2	3	4	5
Functions	041 AnalyzeData				
	042 PickFinalDesDefn				
	043 IdentifyCasesStudies				
	044 ResearchBookMats				
	045 PickCampaignStyle				
	046 DetermineCampCulture				
	047 MakeStyleGuides				
	048 MakeDesignGraphics				
	049 EstablishCampVocab				
	050 StoryboardContent				
	051 CreateMockups				
	052 CreateHiTechStructur				
	053 MakeContentGuids				
	054 ConsultWithAdvisors				
	055 DevelopCaseStudies				
	056 WriteBookDraft				
	057 IdentifyAdAndSample		■		
	058 ContactedSample				
	059 ArrangeInterviewTime			■	
	060 CreateInterviewGuide				
	061 ConductInterviews			■	
	062 UsabilityTestsSysTech				
	063 CompileAnalyticsData				
	064 MakeResearchRecom				■
	065 RefineSysTComponents				
	066 IntegrateSysTesting				
	067 DebugSysErrors				
	068 FinalizeRPriority				
	069 FinalizeROplan				
	070 BuildmodularSys				
	071 Editbook				
	072 SummarizeContentMedia		■	■	
073 SkinViewmedia		■	■	■	
074 PlanId-ThinkingConf					
075 Fompressrelease		■	■		
076 Skdcontestpsor					
077 Developw-paper					
078 Releasebook					
079 Sendpressrelease					
080 SpeakatconfInst					

Features					
	1	2	3	4	5
Functions	081	Pitchbdsignfrend			
	082	Cdutrthvnewmedia	■		■
	083	Hostd-thinkingconf		■	
	084	Disseminatenmsg			
	085	Hireresearchrs			
	086	Createmonitorplan			
	087	Conductresearch			
	088	Analyzedata			
	089	Extradightsights			
	090	Assembletereport			
	091	Disseminateresults			
	092	Refocuscampaign	■	■	
	093	Assessscapabilities			
	094	Reorganizesteam		■	
	095	Replacestaff			
	096	Motivateetheteam			
	097	Trainteam			
	098	Maintainequipment			
	099	Monitorbudget			■
	100	Guideteam-process			
101	Overseeschedule				
102	Monitorcam-health				
103	Commuprogres&issue				
104	Holdmeetings				
105	Liasonparticipiant				
106	Archiveinformation				
107	Windowdowncamerfor				
108	Observebehaviorchgs				
109	Createintvw&photo		■		
110	Confit&spionembr				
111	Intvw&photochange			■	
112	Complete&analyzedata				
113	Assembledoc				
114	Conductpostcamaudit				
115	Roomed&thueffits				
116	Identifynewfocus	■	■	■	
117	Roomdimp&pt&osp				
118	Roomdimp&pt&prcs		■		
119	Roomdimp&pt&strategy			■	
120	Roomdimp&pt&dz&ed&uat				

Features					
	1	2	3	4	5
121		■			
122					
123					
124					
125					
126					
127					
128					
129					
130				■	



# A Campaign for Policy Design Synthesis

## System Element Evaluation Against Functions | Outreacher

Functions	Features				
	1	2	3	4	5
	001	RetainAdvisoryBoard	■		■
	002	DetermineScope		■	■
	003	UnderstandProblem		■	■
	004	EstablishProjGoals			
005	IdentifyKeyAudiences				
006	EstablishSchedule		■	■	■
007	IdentifyPartners		■	■	
008	MakeFrelimBudget		■	■	
009	RecruitVoIsPartners		■		
010	HireAdminStaff	■			■
011	HireProjectStaff				
012	FindToolsMaterialsSpace				
013	SeekFunding				
014	AppropriateFunds		■	■	■
015	AssembleTeams			■	
016	AssignRoles				
017	CoordinateLogistics				
018	GiveToolsMaterialsSpace				
019	ShareProjBackground				■
020	IntroduceTeam				
021	ShareCapabilities			■	■
022	ShareProjVision				
023	CreateCommProtocol				■
024	ShareSchedule				
025	SelectDocumentApprch				
026	DetermineRespAreas				■
027	IdentifyMediaChannels				■
028	FindExampleCampaigns				
029	ResMedChannelEffectiv				
030	ResMedChannelCost				
031	AnalyzeSDData				
032	SelectMediaChannels				
033	PrioritizeAudiences		■		■
034	MakeRoll-outPlan				
035	RecruitInmAudMemb		■	■	
036	ContactAudMembers	■			■
037	ArrangeInterviewTime				
038	CreateInterviewGuide		■		■
039	ConductInterviewDesDefn		■		
040	FindDesignerDesDefn	■	■		

Functions	Features				
	1	2	3	4	5
	041	AnalyzendData			
	042	PickFinaIDesDefn			
	043	IdentifyCasesStudies		■	■
	044	ResearchBookMats			
045	PickCampaignStyle				
046	DetermineCampCulture				
047	MakeStyleGuides				
048	MakeDesignGraphics				
049	EstablishCampVocab				
050	StoryboardContent				
051	CreateMockups				
052	CreateHITechnStructur				
053	MakeContentGuids				
054	ConsultWithAdvisors			■	■
055	DevelopCasesStudies				■
056	WriteBookDraft				
057	IdentifyndAudSample	■			
058	ContactndSample		■	■	■
059	ArrangeIndnterViewTime		■		
060	CreateIndnterViewGuide			■	■
061	ConductIndnterviews			■	
062	UsabilityTestsSystTech				
063	CompliancyzendData				
064	MakeResearchRecomm				
065	RefineSystComponents				
066	IntegratedSystesting				
067	DebugSystemerrors				■
068	FinalizeROPriority				
069	FinalizeROPlan		■		
070	Buildmodularsys				
071	Editbook		■		
072	Summatelomedia				
073	Skritviewmedia				■
074	Plannd-thinkingconf				
075	Formpressrelease				
076	Skidcontestspsor			■	
077	Developw-paper				
078	Releasebook			■	■
079	Sandpressrelease				
080	Speakatconf&inst				

Functions	Features				
	1	2	3	4	5
	081	Pitchtdesigntrend		■	
	082	Cdntiviewwmedia		■	
	083	Hostd-thinkingconf			
	084	Disseminatmsg			
085	Hireresearchers				
086	Createanmonitorplan		■		
087	Conductresearch			■	
088	Analyzedata				
089	Extracdnsghts			■	■
090	Assemblereport				■
091	Disseminateresults				
092	Refocuscampaign				■
093	Assesscapabilities				
094	Reorganizeeam				
095	Replacestaff				
096	Motivatetheeam			■	
097	Trainteam				
098	Maintainequipment				
099	Monitorbudget				
100	Guidecam-process				■
101	Overseeschedule				
102	Monitorcam-health				
103	Comnuprogres&issue				■
104	Holdmeetings				
105	Lasonwparticipant			■	■
106	Archiveinformation				■
107	Windowncametfor				■
108	Obsvbehaviortlgs				
109	Createinviewpocol				■
110	Contlistpionembr			■	
111	Inviewaboutchange			■	
112	Complie&analyzedata				
113	Assembledoc				
114	Conductpostcamaudit				
115	Recomend&ueeffits			■	
116	Identifynewfocus				■
117	Recomdnptrosyp			■	
118	Recomdnptroses				
119	Recomdnptmstrategy				■
120	Recompblicizeducal				

Functions	Features				
	1	2	3	4	5
	121	Roomdnptfunding			
	122	Downsizecam-team			
	123	Formaintennceeam			
	124	Writovrchecklist			
125	Archivedoc				
126	Trainntenan&session			■	
127	Clozacamntirecord				
128	Sendtranslnotice				
129	Publistpprocess			■	
130	Applylearning				■



<b>System Element</b>		<b>E M S</b>	<b>Content Kangaroo</b>	<b>1</b>
Originator <b>Pam Nyberg</b>	SuperSet Element(s) None		Related Elements Recon	
Contributors <b>Seungho Chung</b> <b>Dan Greene</b> <b>Randy MacDonald</b> <b>Min Ouyang</b>				
Sources N.A. (new concept)	SubSet Content Creator PlugNPlay Content Warehouse			

#### Description

Content Kangaroo is comprised of three sub-elements which work together to achieve the following functions: to develop campaign content for various media types, to store and reference previously conducted research and reference materials, and to facilitate flexible content creator by enabling standardized content modules to be plugged into a skeletal architecture.

#### Properties

##### Examples:

- StoryBoard Quick software
- Web-based Case Study Wizard
- Style templates library for various media types
- Architecture which relies on object-oriented code to enable plugging relevant content modules into a skeleton template
- Database that contains the results of research and

#### Features

##### Examples:

- Allows team to create quick functional storyboards for a low price by staging situations and photographing them
- Allows companies to submit their case studies in a common format
- Leverages skeleton templates for web content and animations to encourage compatibility and consistency
- Utilizes common integration connectors to simplify integration process
- Allow staff to access information, videos, images and ideas on the topic of design and policy to create appropriate messages for dissemination



**Fulfilled Functions**

- 28 Identify precursor campaigns
- 44 Identify potential case studies
- 45 Research book materials
- 51 Storyboard content for each relevant audience
- 52 Create rough mock-ups for each media type to be used
- 53 Create rough structure for higher tech media
- 54 Develop content guidelines
- 56 Develop relevant case studies
- 57 Write book draft
- 66 Refine system components
- 67 Conduct integrated system testing
- 68 Debug system errors
- 71 Build modular system

**Associated Design Factors****Discussion**

Running an effective campaign requires several key elements to be successful. First and foremost, one must identify the target audience(s). After establishing the individuals to be targeted with a message, appropriate, consistent content must be generated which resonates with their experiences.

Knowledge management is another critical element which contributes to an effective campaign. Information will be gleaned during research activities that must be captured, and inspirational reference materials will be identified for use during the development process. Additionally, campaign materials will be stored and referenced when preparing public facing communication content for presentations, press releases, articles, etc.

To address these content creation and management needs, Content Kangaroo was established to encapsulate all required functionality. This system is comprised of three sub-elements. Content Creator is used to develop campaign content for various media types and key audiences. Content Warehouse is used to store and reference previously conducted research, previously created public facing materials, and examples of strong communication pieces from other campaigns or public service efforts. PlugNPlay facilitates flexible content creation by enabling standardized content modules to be plugged into a skeletal architecture.

In the initial stages of campaign development, Content Warehouse would be used to store relevant Design Thinking articles, images, video, and examples. Not only would these artifacts be used to inspire and inform campaign development, but their creators could be contacted for further information and potential partnership opportunities.

As audience and media research is conducted, Content Warehouse would store the resulting data as well as the data analysis and synthesis results for use in crafting campaign modules for each key audience.

In the initial stages of content development, the team would rely heavily on Content Creator, leveraging its creative brainstorming offerings with the goal of identifying compelling campaign directions, based on the previously conducted research.

Concurrently, companies would be encouraged to share case studies which demonstrate solid design thinking with the campaign, for use as examples of thoughtful design. These case studies would be submitted through Content Creator's web based case study wizard, to ensure that all submissions are in a consistent format.

Once audience and media research data have been analyzed, the findings would be used to inspire content creation. To expedite the process, drag-n-drop templates would be available within StoryBoard



Quick software to accommodate novices, giving them the ability to create professional quality storyboards in a short time. As a complement, SureAids would give teams the ability to create functional storyboards by encouraging them to stage situations and capture them on film. Both of these tools could be used in conjunction with Apple's media creation software. Standard document creation software like InDesign or the Microsoft Suite of products would also be provided within Content Creator.

The structural requirements of each content module are dictated by PlugNPlay. This platform architecture includes a skeletal architecture with standardized connectors, allowing any number of modules to be connected together. The benefits of this object oriented approach are modular compatibility, ability to swap modules into and out of the architecture, and simplified integration process.

Once the campaign launch nears, Content Warehouse audience and media research results would be leveraged to inform the creation of public facing materials. Content such as articles, presentations, press releases, white papers, etc. would be crafted to generate interest and enthusiasm in the campaign.

## Scenario

Having always been fascinated by policy development and seeing this as a perfect opportunity to strengthen his resume, Carson applied for and was granted a 6 month internship within the Campaign for Policy Design, an especially exciting opportunity since this group had just formed and was in a very early project phase.

After going through orientation, Jaime, his manager requested that he do a broad based search for relevant material on design thinking, including articles, images, video, interviews, etc. that could be used as inspiration for the campaign. As he located media, he stored them in the Content Warehouse multimedia database. Carson also noted any relevant companies or individuals who could serve as future references for campaign staff.

Given his talent for facilitating discussions, Carson

was asked to be a brainstorming mediator several weeks after his initial start date. In preparation for an upcoming brainstorm, he sifted through the recommended tools and approaches noted in Content Warehouse, selecting several that seemed especially appropriate to campaign style creation.

Several months later, Carson was asked to work on content creation with several other interns and full time campaign staff. After several meetings with campaign researchers in which they presented research findings and implications, Carson and the other content developers began structuring the desired campaign content for key audiences and appropriate media types.

For these efforts, the team relied heavily on the offerings contained within Content Creator. Graphic designers used document creation software and previously created template layouts to generate physical campaign materials while interns leveraged StoryBoard Quick and SureAids to create initial storyboards, examining different message approaches. In parallel, several experienced designers prepared the structure that would support the content modules. They rolled in test case studies, as well as examining other forms of media that would need to be created for online applications. Fortunately, Content Creator's web based case study wizard ensured that all submissions were consistent and reflected the desired architecture, as defined initially by the system architect.

The structural requirements of each content module had been dictated early in the project by Sabrina, the system architect, using an object-oriented application called PlugNPlay. The beauty of this platform architecture is that, depending on the audience being targeted, modules could be swapped into and out of the structure, with minimal effort. As such, all content creators on the team, including Carson, were trained on the procedure required to create modules and the rationale for this approach.

Although his internship was drawing to a close, Carson was asked to begin assembling a presentation that would eventually be delivered at a series of



<b><i>System Element</i></b>		<b>EMS</b>	<b>Content Creator</b>	<b>2</b>
Originator <b>Pam Nyberg</b>	SuperSet Element(s) Content Kangaroo	Related Elements PlugNPlay Content Warehouse		
Contributors <b>Seungho Chung</b> <b>Dan Greene</b> <b>Randy MacDonald</b> <b>Min Ouyang</b>				
Sources N.A. (new concept)	SubSet Element(s) None			

#### Description

A system of tools used to develop campaign content for various media types and key audiences, with an emphasis on efficient content creation by users with a range of expertise levels.

#### Properties

- StoryBoard Quick software
- SureAids which uses live people, a digital still camera and photo editing software to create quick storyboards
- Web-based Case Study Wizard for use by companies submitting case studies
- Searchable multi-media library
- Document creatoin software
- Style templates library for various media types

#### Features

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>• Allows novices to quickly compose professional quality storyboards</li> <li>• Allows team to create quick functional storyboards for a low price by staging situations and photographing them</li> <li>• Allows companies to submit their case studies in a</li> </ul> | <p>common format</p> <ul style="list-style-type: none"> <li>• Serves as repository for relevant multi-media library</li> <li>• Leverages sophisticated drag-n-drop functionality to facilitate quick content creation in templates</li> <li>• Provides set of techniques for generating creative ideas related to a focused messag</li> </ul> |
|---|---|



## Fulfilled Functions

- 51 Storyboard content for each relevant audience
- 52 Create rough mock-ups for each media type to be used
- 53 Create rough structure for higher tech media
- 54 Develop content guidelines
- 56 Develop relevant case studies
- 57 Write book draft
- 66 Refine system components
- 72 Edit book
- 76 Formulate press release
- 78 Develop a white paper

## Associated Design Factors

---

## Discussion

Reference **Content Kangaroo** discussion.