

INTRO:

FIELD CHECKLIST

This Field Guide brings together the tools you'll need to lead successful group meetings and individual interviews.

Included in the Guide are exercises to complete before going into the field, tips for successful interviews, and a place to capture highlights from the interviews while they are still fresh in your mind.

» COMPLETE THE FOLLOWING:

- Worksheet: Recruiting Plan
- Worksheet: Research Schedule
- Worksheet: Identity, Power & Politics
- Worksheet: Group Interview Guide
- Worksheet: Individual Interview Guide

» FAMILIARIZE YOURSELF WITH:

- Tips: Observation
- Tips: Conversation
- Tips: Documentation
- Exercise: Community Characters
- Exercise: Resource Flow
- Exercise: Factors & Forces
- Exercise: Journey Of An Offering

» BRING WITH YOU:

- Picture Cards
- Camera
- Video Camera (optional)
- Pens & Markers
- Gifts for participants (optional)

RECRUITING

Recruiting the right participants is critical to success. Remember to recruit extremes and balance ethnic, class, and gender considerations.

Keeping track of the people you speak with can also be challenging. Use the worksheets to help keep a list of who you have spoken with and who you plan to speak with next.



For female participants, interviewers may need permission from male family members or community leaders.

» GROUP MEETING LOCATIONS

Example Group Meeting Location:
Village 1: Ansoung Commune of Kg Trabek District
Unique Characteristic: Seasonal Flooding

Village 1: _____

Unique Characteristic: _____

Village 2: _____

Unique Characteristic: _____

Village 3: _____

Unique Characteristic: _____

» INDIVIDUAL PARTICIPANT TYPES:

Example Participant Types:
Model Farmer
Average Farmer
Poor Farmer
Large family with farming land far from home
Female headed household

Participant types:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

RESEARCH

There are many things to juggle when you're out in the field. The more you plan ahead of time, the more smoothly the process will go. However, be prepared to adjust quickly; for example you might need to increase the number of facilitators if you show up and the group is twice as large as expected.

» **DATE**

Example:
7 June / 8:00 - 10:00 (including setup)

» **ACTIVITY**

Village 1 Group Meeting

» **TEAM LEADS**

2 Teams: Kan & Kimsan

» **DETAILS**

2 groups of 10 farmers / mixed gender

TIPS:

OBSERVATION

The in-context interview is a lengthy conversation (often 1.5+ hours) that explores the values, desires, frustrations, and aspirations of your interviewee. The conversation should:

Be long enough to make your interviewee feel like they are really being heard, and that allows them to go past their rehearsed “script”

Be focused enough so that you feel you are getting useful information to address your design challenge

Be general enough so that it feels like an open-ended conversation that can lead to unexpected insights

Generate a true back-and-forth so that it feels like a conversation and puts the interviewee at ease

Make the interviewee feel that the conversation is about them, not about the product, service, or organization you are representing



TIP

During observations, look for:

- » **Things that prompt shifts in behavior**
- » **Work-arounds and adaptations**
- » **Body language**
- » **Things people care about**
- » **Anything that surprises you**
- » **Anything that questions your assumptions about how the world works**
- » **Anything that you find “irrational”**

TIPS:

CONVERSATION

The things people say and what they actually do are often not the same thing. In-context observations are often useful for getting beyond what people say to understand what people do and feel.

In-context means being with people in their real settings, doing the things they normally do.

The stories that emerge from these encounters in the field show us new opportunities and inspire new solutions.

It is often very powerful to experience a process first-hand. Whenever possible, put yourself in the shoes of a customer and experience their activities directly.

For example:

- » Work with a farmer for a day in his or her field.
- » Live with a family in a village for a few days.
- » Help a retailer bring his or her product to market.



TIP

- » **Ask open-ended questions, or questions that require a longer explanation than one word.**
- » **Listen and be attentive, even if taking notes at the same time**
- » **Have a dynamic conversation, don't interview from a script**
- » **Allow long pauses**
- » **Ask naïve questions (even if you're the expert) to hear the explanation in their words**
- » **Don't correct people; understand their perceptions and why they may perceive things differently than you**

TIPS:

DOCUMENTATION

Capture everything you see, hear, smell, feel, and taste during the observation. It's important to capture the experience to bring back with you to the office and to share with team members who were not present.

Document the conversation with notes, photos, and/or recordings. In addition to your Field Guide, bring a digital camera and, if possible, a video camera or voice recorder.

Write down first interpretations of what's going on at the moment it happened; this critical information is often lost and difficult to remember later.

Immediately after the interview (or within 24 hours), jot down immediate big picture takeaways from the conversation using the Highlights page. The longer you wait, the more details and specifics may be lost.

It's often helpful to work with a partner—one person responsible for leading the interview while the other is capturing and documenting. Compare the experiences, perceptions, and interpretations of the two people, and feel free to switch roles every day or so.



TIP

When documenting capture:

- » **Personal details (family size, acreage, crops, location)**
- » **Direct, unfiltered quotes (and your immediate interpretations)**
- » **The expressions and feelings of the person, not just their words**
- » **Ways they interacted with others and things in the environment**
- » **Things they care about most**
- » **Moments or things that elicited emotional responses, positive or negative**

IDENTITY, POWER & POLITICS

Research with communities and individuals often involves issues of identity, power, and politics. To help think through these issues, answer the following questions:

» RACE & ETHNICITY

Are ethnic, racial, and/or tribal distinctions important in this community?

How might these issues affect the research and design challenge?

How will you deal with these issues in research?

» GENDER

Do women and men have unequal status in this context?

What activities within and outside the household do men and women do differently?

How might gender inequality affect the research and design challenge?

How will you deal with these issues in research?

» CLASS & INCOME

Are communities divided along class or income lines?

How might income and class divisions affect the research and design challenge?

How will you deal with these issues in research?

» THE DISEMPOWERED

Are any groups of people disempowered in this community (i.e. landless, children, disabled, etc)?

How might the perspectives of these groups affect the research and design challenge?

How might the research take into account the perspectives of the disempowered?

» THE ELITE

Who are the political or economic elites in this context?

How might their influence affect the research or design challenge?

How will you mitigate the influence of elites in research?

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords

NOTES

interpretations,
questions to follow up
& keywords



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU
OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU
OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU
OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU
OR MOST MEMORABLE QUOTES:

THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:



WORKSHEET:

HIGHLIGHTS

» DATE: » NAME:

» LOCATION:

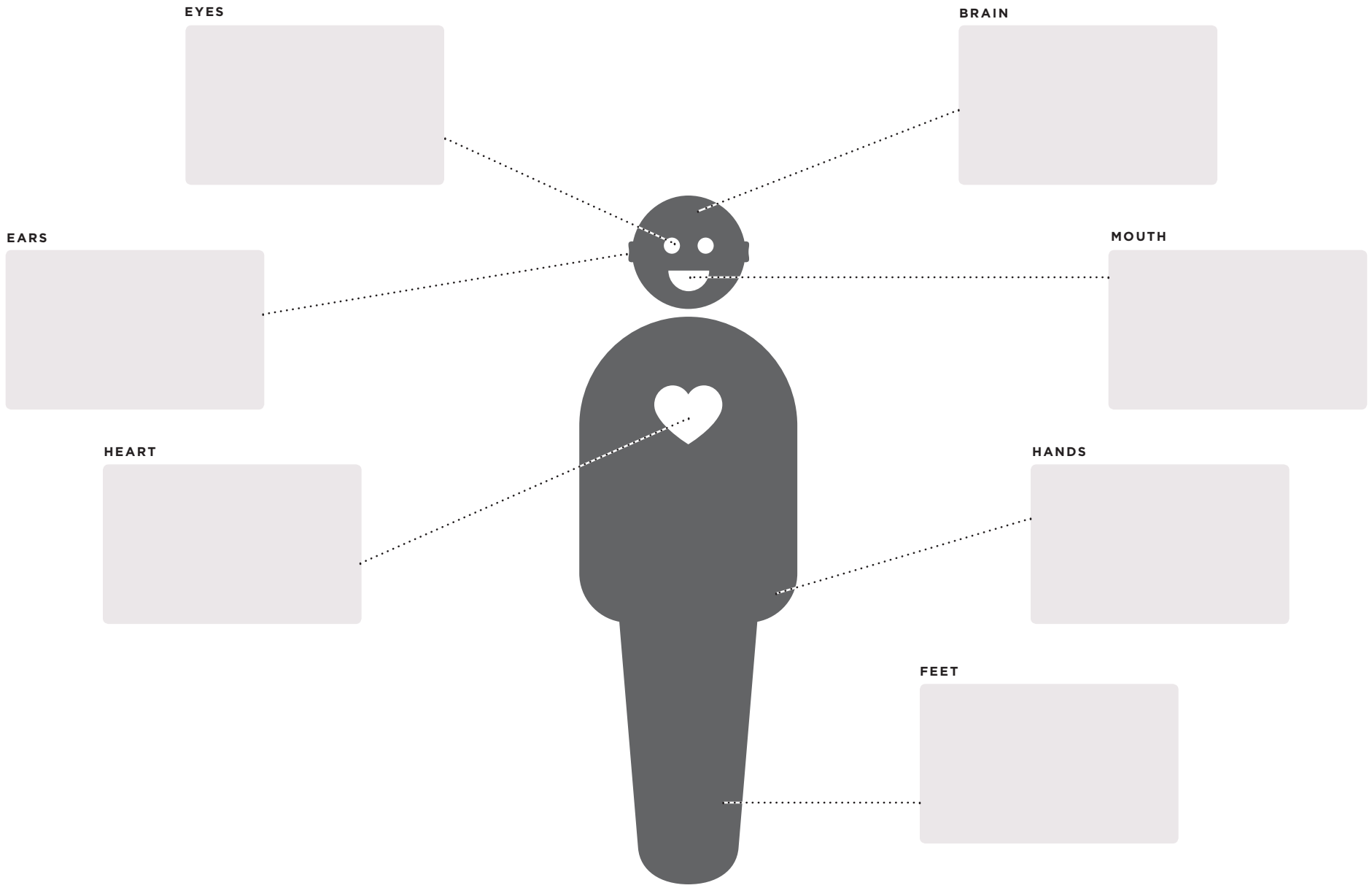
» TYPE OF ACTIVITY: Group Interview In-Context Immersion
 Individual Interview Other

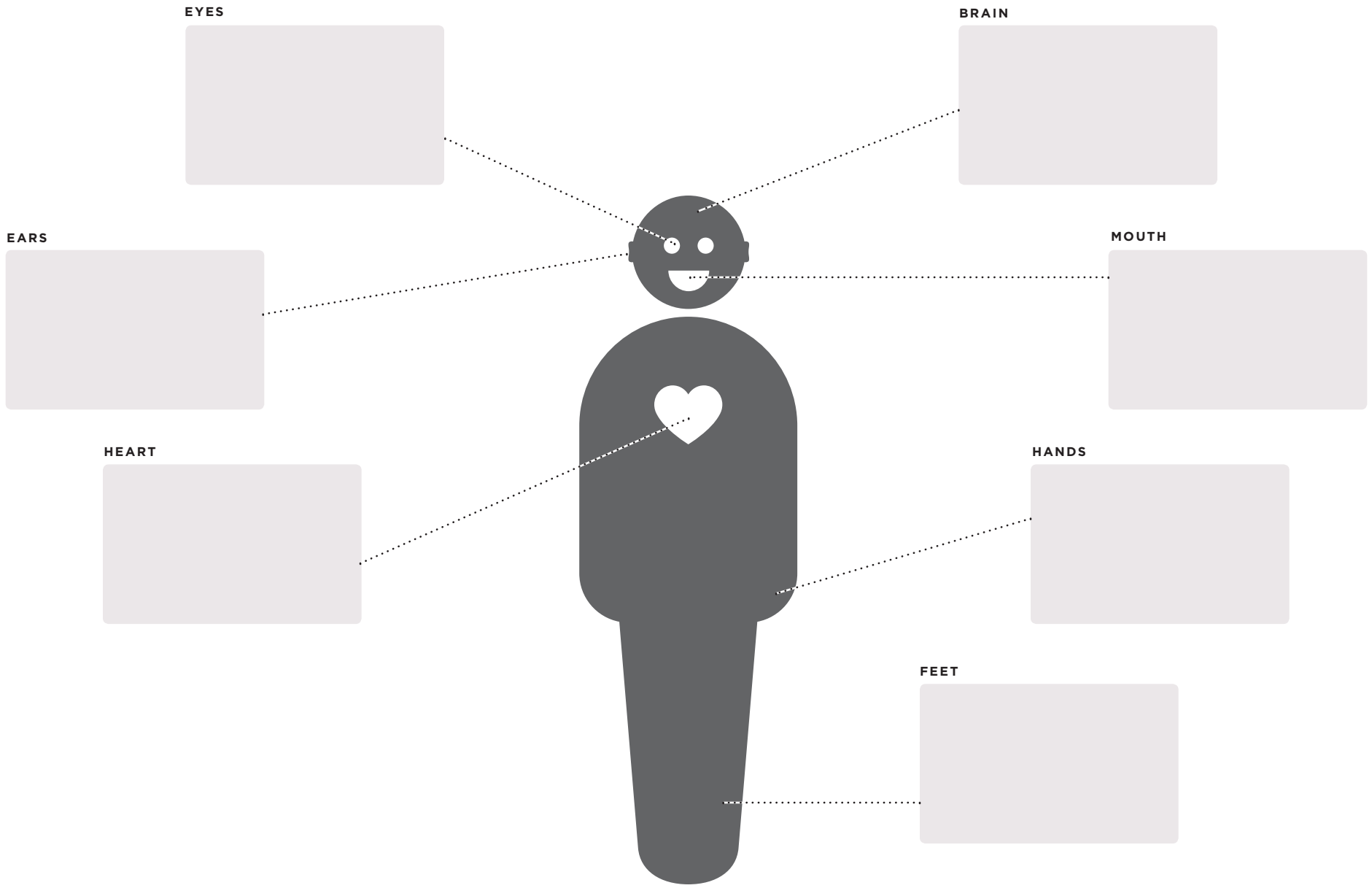
THINGS THE PARTICIPANT(S) SAID OR DID THAT SURPRISED YOU
OR MOST MEMORABLE QUOTES:

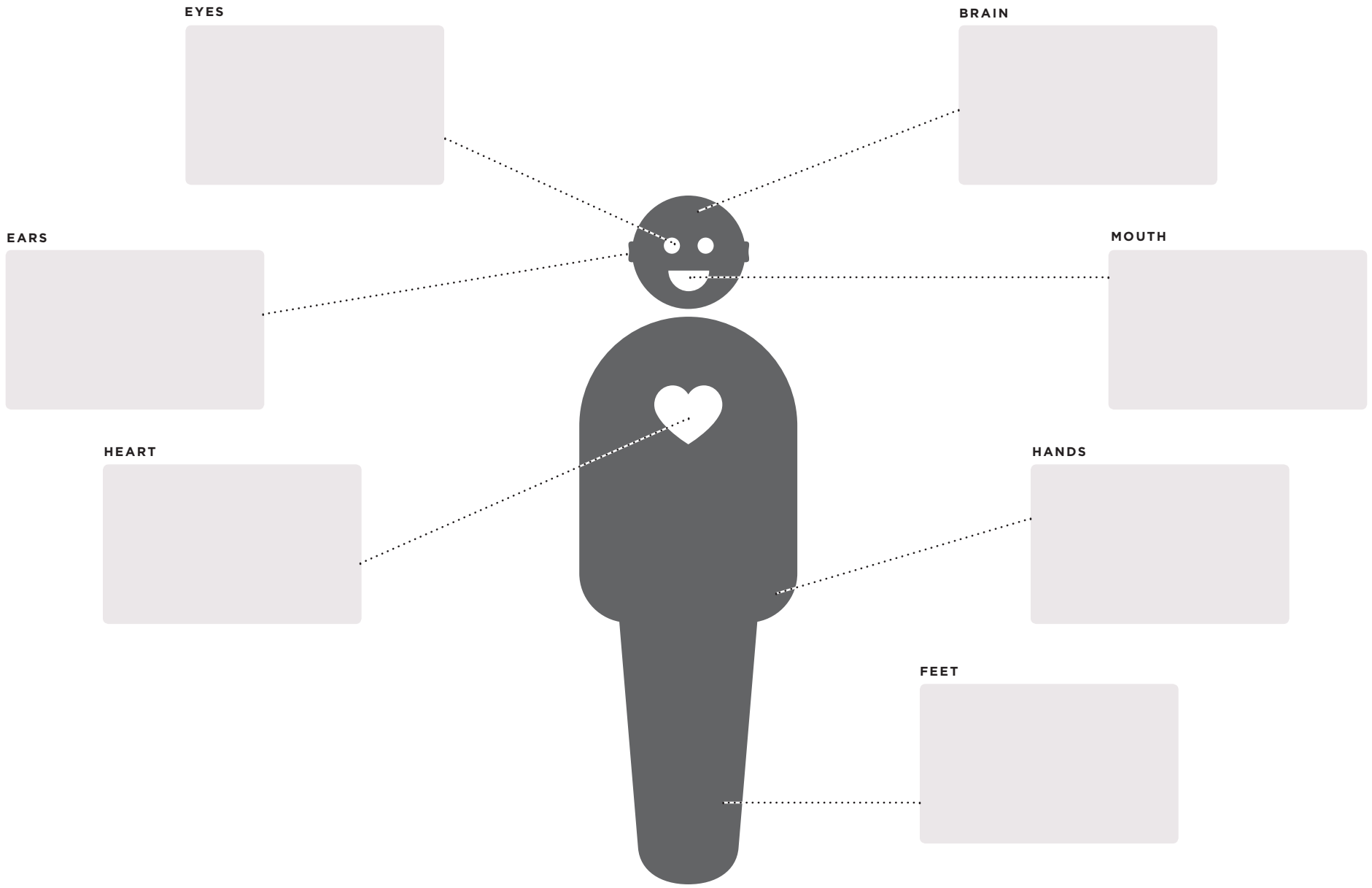
THINGS THAT MATTER MOST TO THE PARTICIPANT(S):

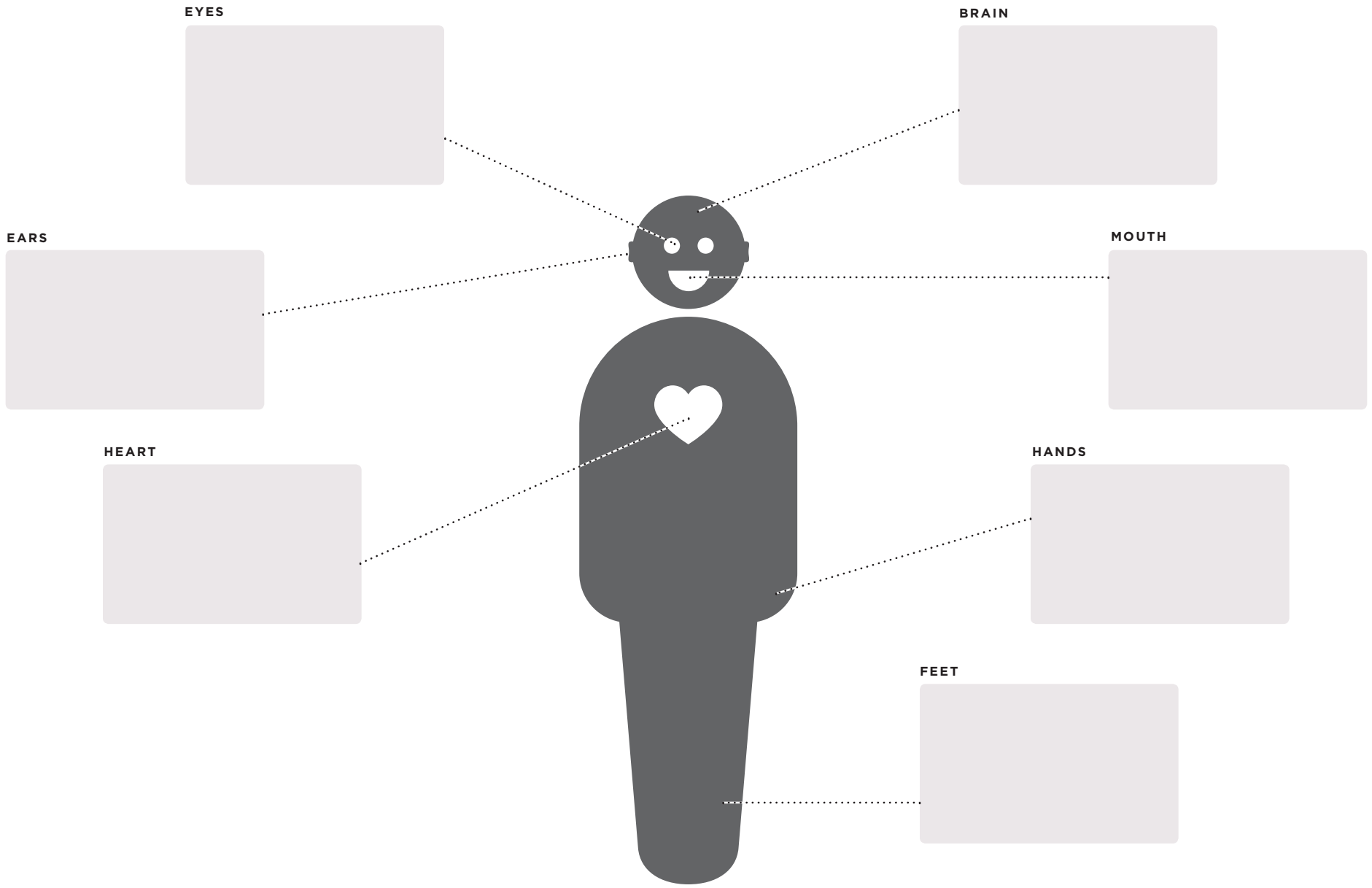
MAIN THEMES OR LEARNINGS THAT STOOD OUT FROM THIS INTERVIEW:

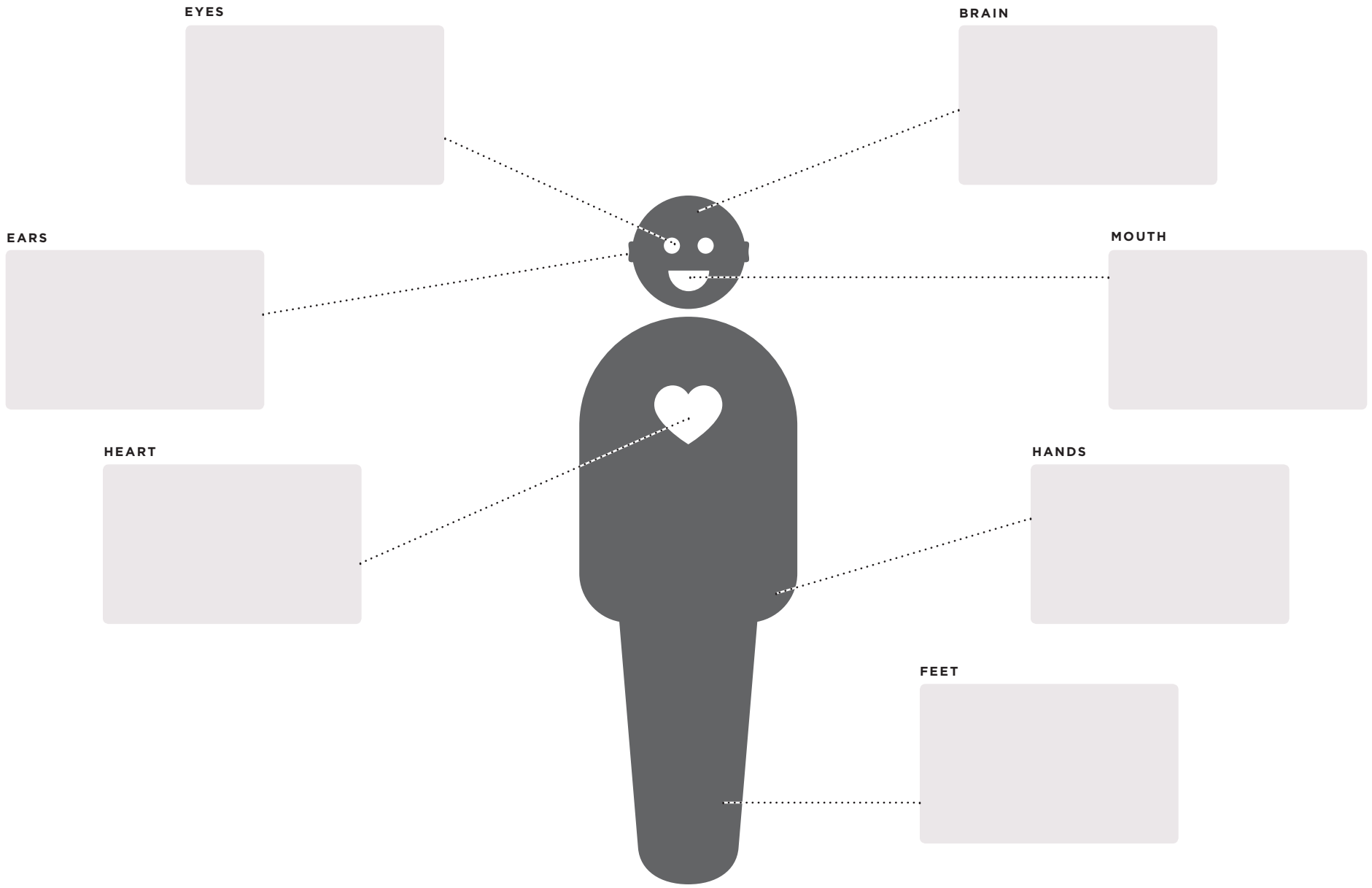
NEW TOPICS OR QUESTIONS TO EXPLORE IN FUTURE INTERVIEWS:





















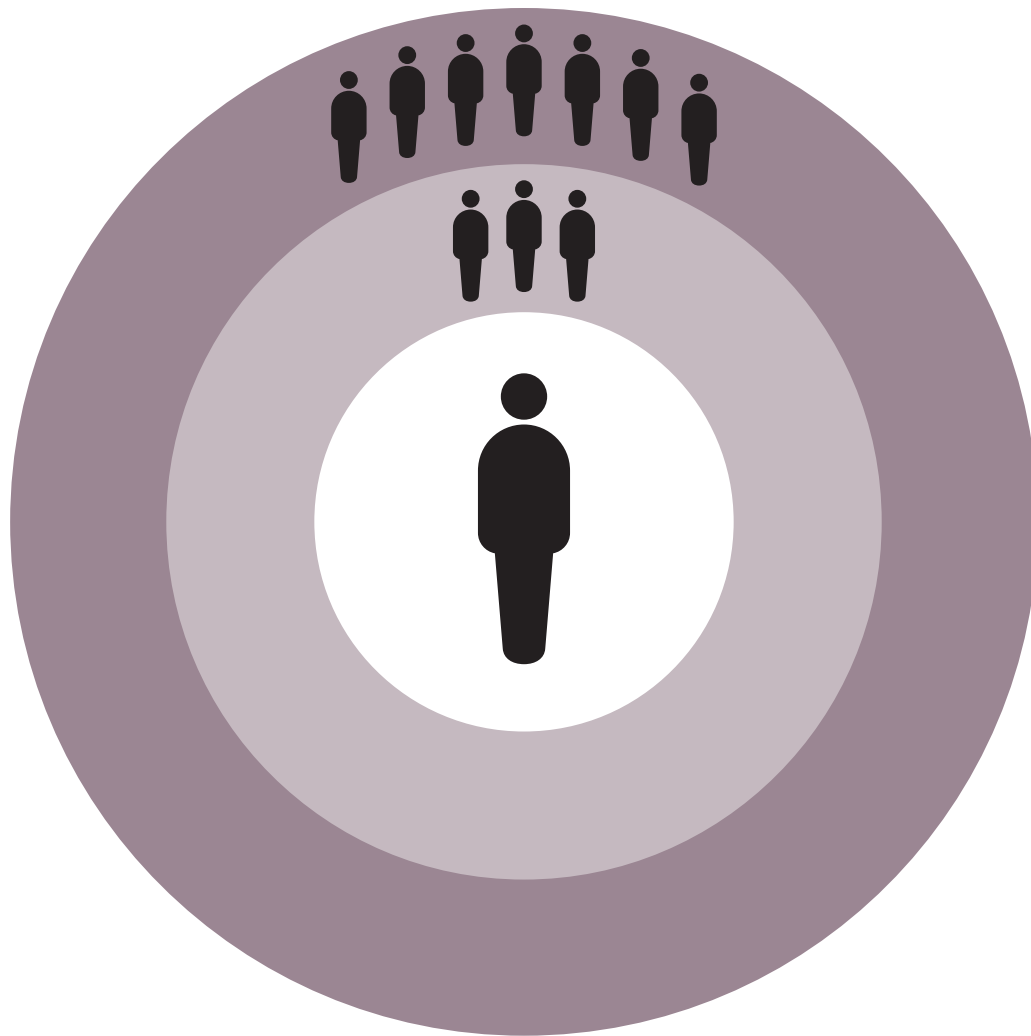


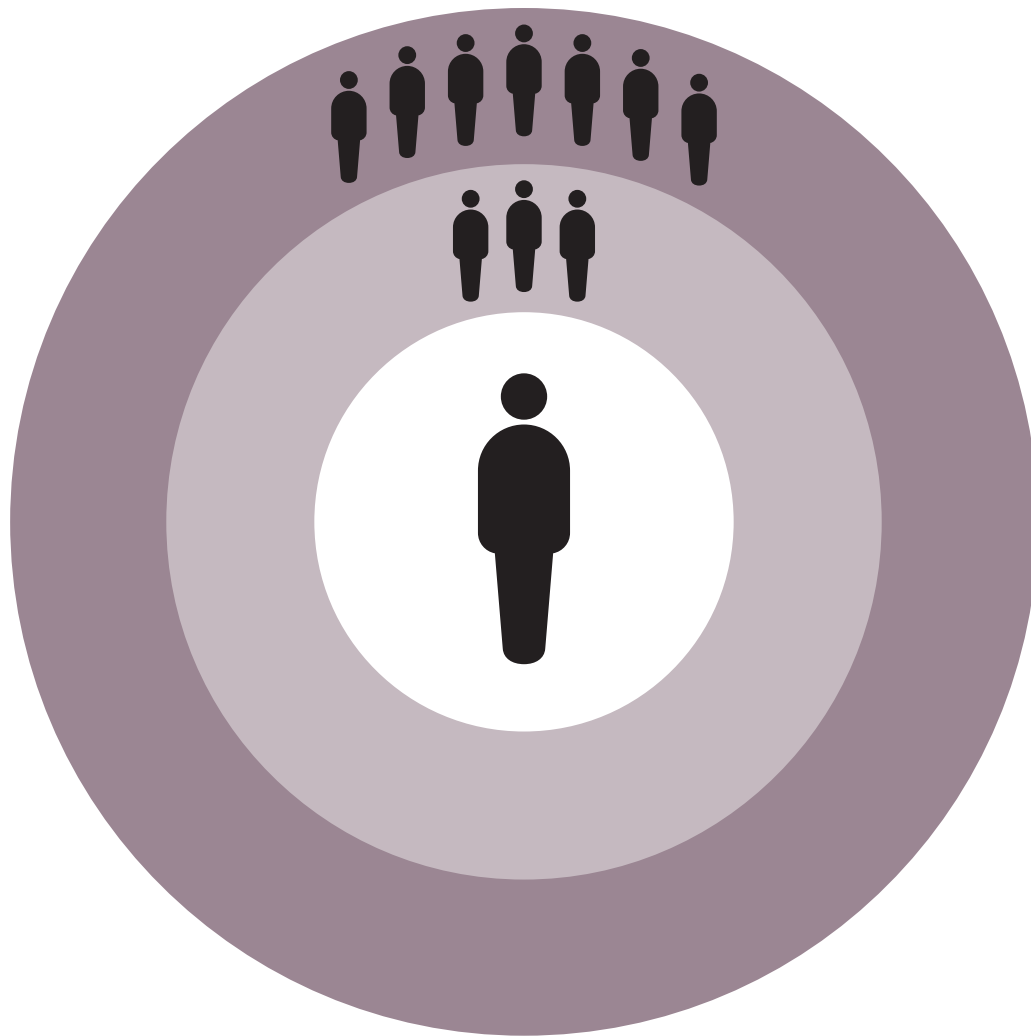


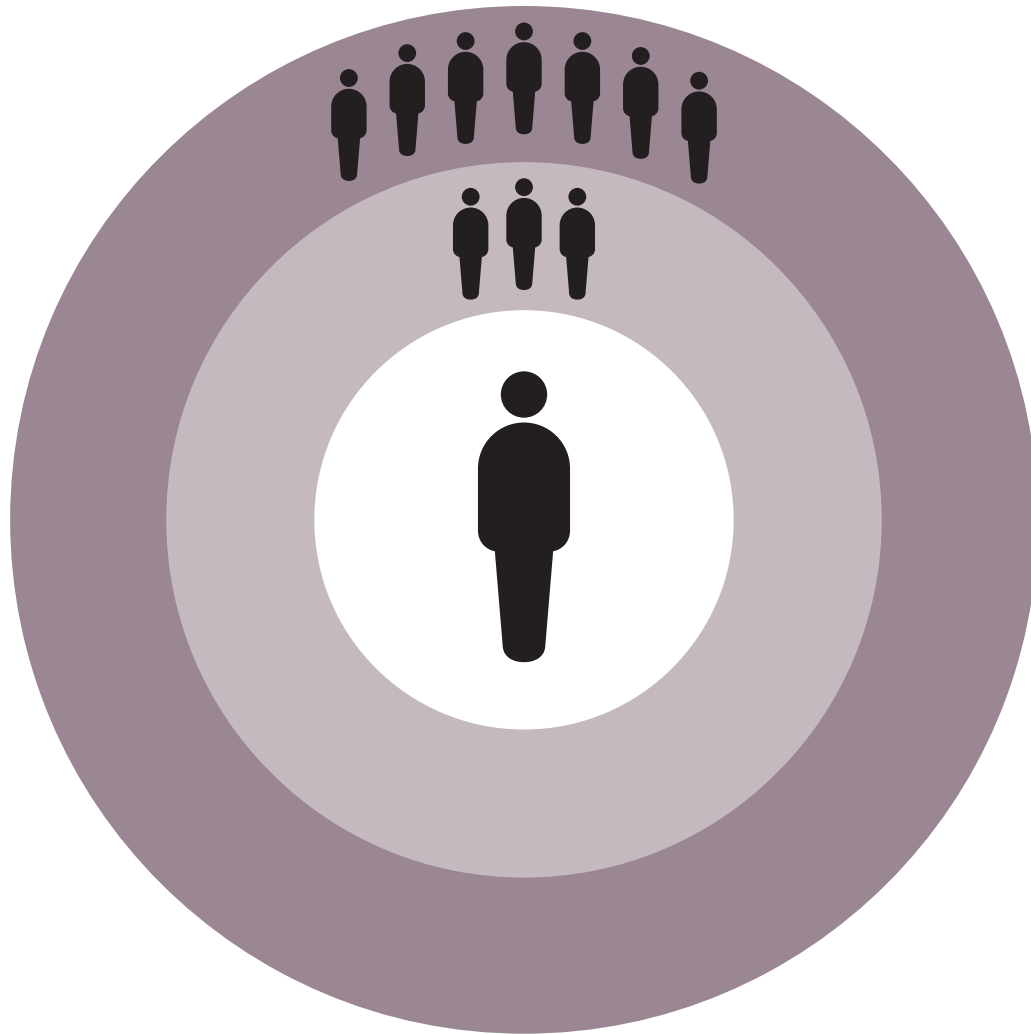


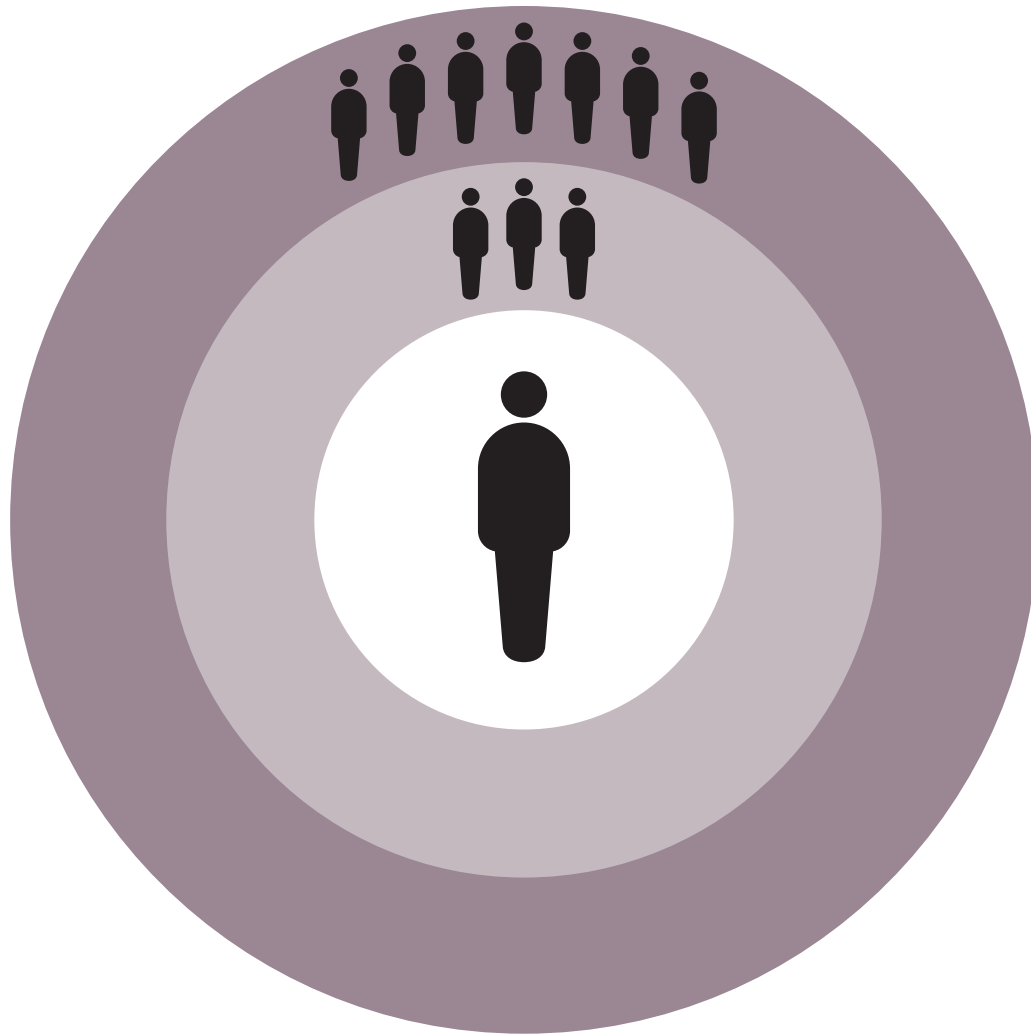


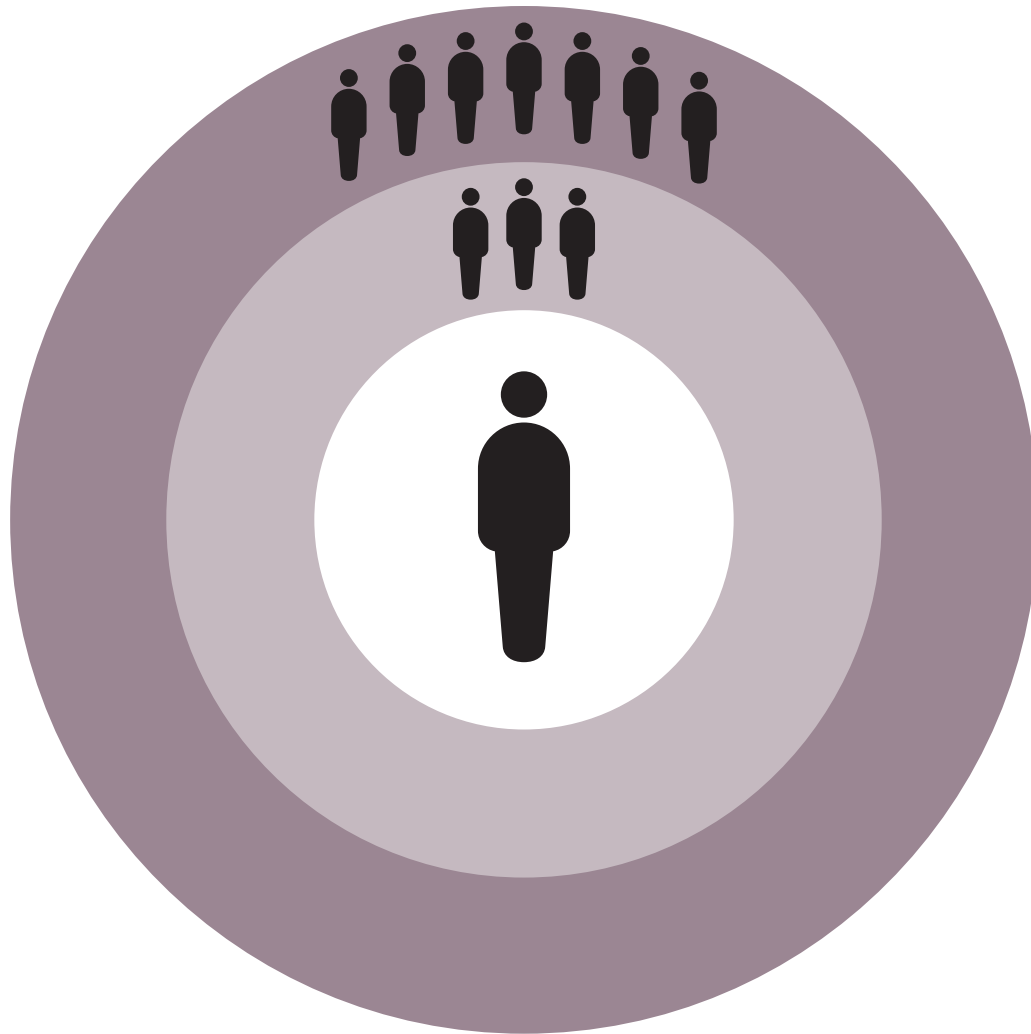


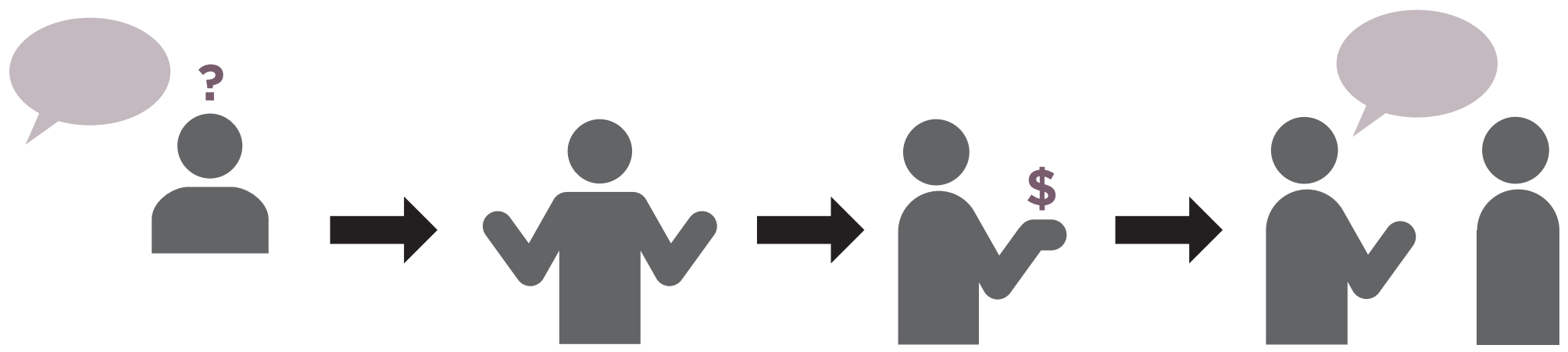


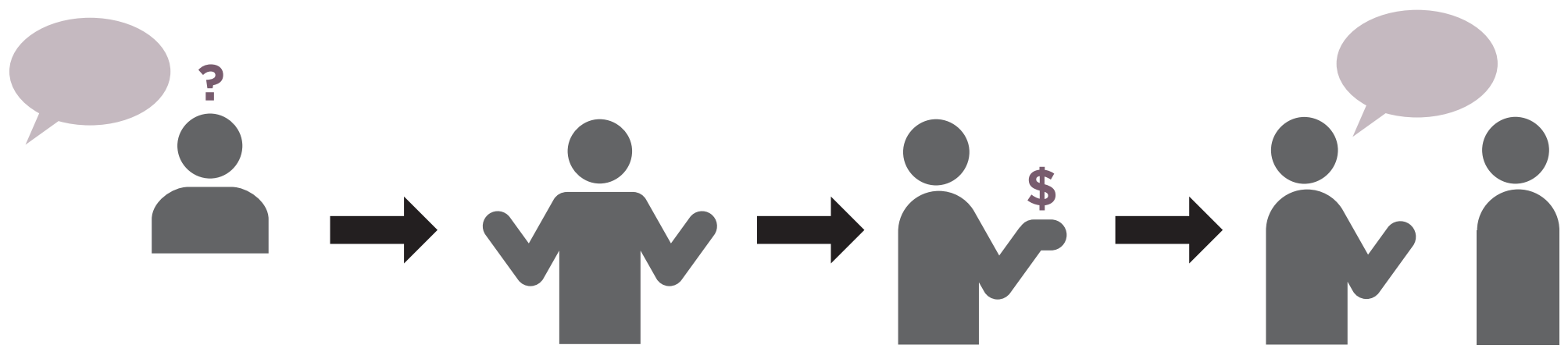


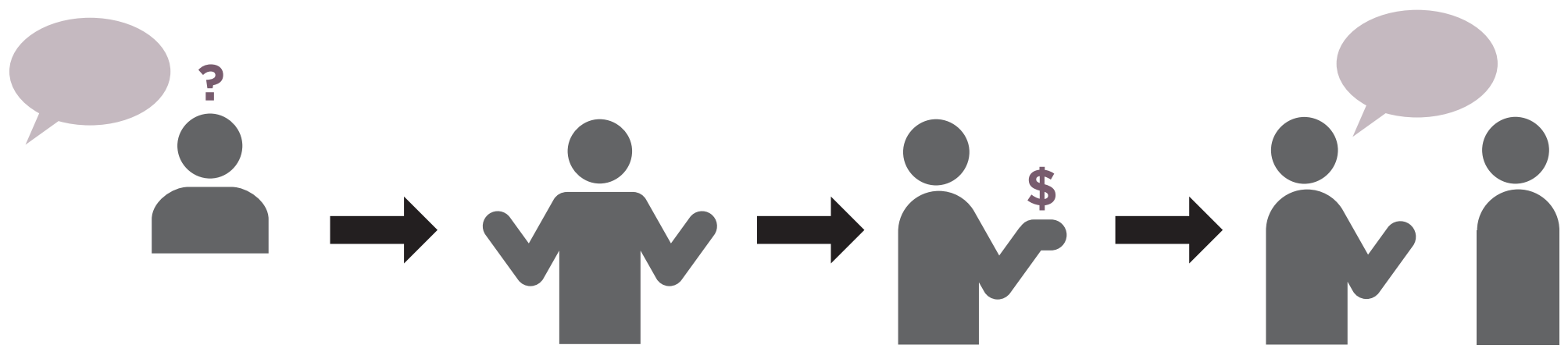


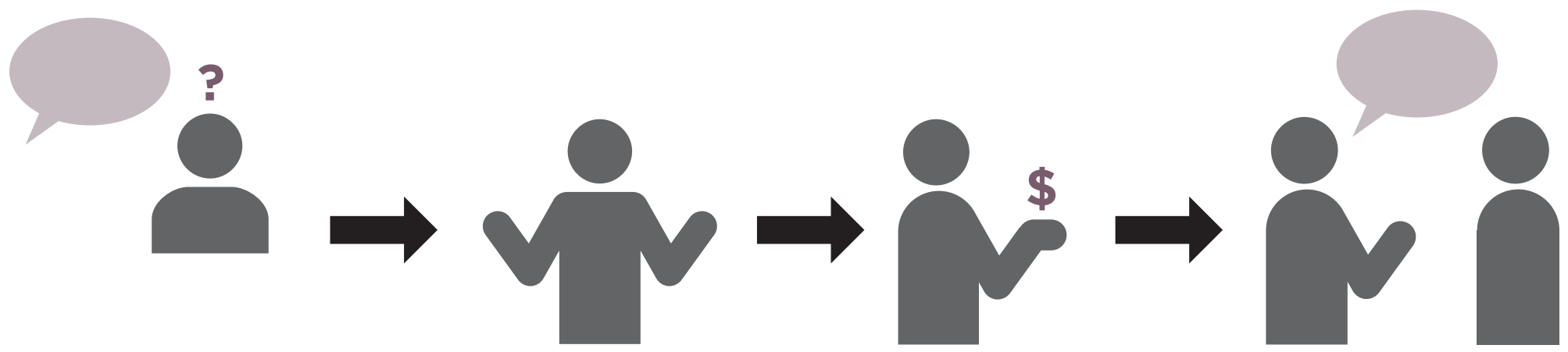


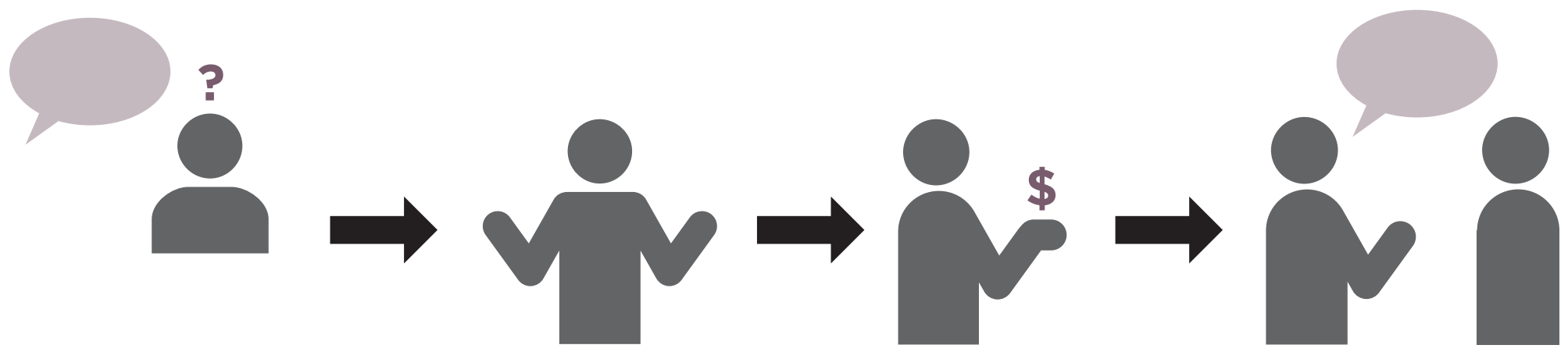












WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP:

WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP:

WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP:

WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP:

WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP:

WRITE YOUR

INTERVIEW GUIDE

- Group Interview
- Individual Interview

» OPEN SPECIFIC:

» GO BROAD:

» PROBE DEEP: