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WRITING A DISCUSSION GUIDE

RECAP: WHAT IS DESIGN RESEARCH?

Design research is about learning from people in the context of their lives.

| Find Problems | Understand a Topic | Build Empathy |

DISCUSSION GUIDES

A discussion guide is a framework for a conversation.

A **script** is not the same as a **framework**.

Script	Framework
Fixed; the questions must be asked exactly as written	**Dynamic**; the questions can be asked using language that seems appropriate
Limiting; a facilitator has no ability to deviate	**Free**; a facilitator can shift topics freely and at their own volition
Comprehensive; the questions represent the entirety of the interview or session	**Incomplete**; the questions and speaking points represent conversation starters

DISCUSSION GUIDES

The main purpose of a discussion guide is to help you best use your time during research.

A framework allocates chunks of time for various topics and activities,
allowing you to best plan and utilize your limited time with a participant:

- Time is allocated based on business or strategy priority
- Sections force recall of research planning by the team
- Speaking prompts act as reminders to ensure that each topic is appropriate covered and addressed

DISCUSSION GUIDES

A secondary purpose of a discussion guide is to force self-roleplay.

When you create and revise a research plan, you force yourself to experience the session in your head; the creation and revision process is a form of roleplay:

- When you write a question or prompt, you begin to answer it in your own mind
- When you create workshop worksheets, you will inevitably think about how to use those worksheets
- By assigning time and sequencing to topics, you are forced to consider how the actual session will play out

DISCUSSION GUIDES

The anatomy of a discussion guide

Write the discussion guide in enough detail that another researcher can use it without discussing it with you.

Include:

1. Research goals
2. Participant profiles
3. Methodology overview
4. Verbal protocol
5. Material checklist

THE ANATOMY OF A DISCUSSION GUIDE

1. Research goals

Why are you conducting this research? This is not a list of hypotheses or things you expect to learn; instead, it's a description of your intention. Write this assuming that your reader has no real background of the research project.

Research Goals

We are conducting research in order to understand the perceptions and attitudes of students related to transferring from one college to another; our goals are to:

- **Understand** the way students work through transferring, including the work processes they use, the forms and documents they leverage, and the conversations they have with advisors and parents

- **Gain** empathy with students, in order to see the world through their eyes

- **Develop** rich qualitative data necessary to communicate the transferring process to non-student stakeholders

THE ANATOMY OF A DISCUSSION GUIDE

2. Participant profiles

With whom will you be conducting research? This is not a duplicate of the recruiting guide and screener; it's an overview and summary of those documents.

Participant Profiles

We will be conducting research with:

- College students at local community colleges in the Austin, Texas area who have initiated but not completed the transfer process to a four-year institution

- Students who have dropped out of community college within the last two years

- Non-traditional students who are older or working full-time

- (etc)

THE ANATOMY OF A DISCUSSION GUIDE

3. Methodology overview

What are the basic tools, processes, worksheets and artifacts that you will use during research?

Methodology

Our research leverages a form of inquiry that includes both open-ended questions and answers, as well as participatory design activities; these activities help participants express their emotions through provocations and structured exercises.

Specifically, we will:

- Participate in a structured but open conversation around educational attitudes

- Leverage a participatory timeline exercise to understand the processes students have used to begin and work through the transfer process

- Conduct an artifact review of various documents, websites, and other tools that participants have used during the transfer process

4. Verbal protocol

The verbal protocol is a word-for-word representation of what will be said. However, while this is scripted, the interviewer is free to deviate from the language, questions, and details.

This script includes the introduction materials, which dictate the various pragmatics of the session; it also includes interview questions and self-prompts for the interviewer.

Introduction

Thanks for taking the time to work with us today. This meeting should take about 2 hours. Before we get started, I have a brief consent form that I would like you to review and sign. This describes that we will be audio recording the session for our own notes and recollection, and, with your permission, taking pictures. Your name, face, and any other identifying information will be removed so you will be completely anonymous. It also describes that you will receive a $200 gift card as compensation for your time.

[sign]

Let me explain how our session today will work. First, we're going to ask you some brief questions about yourself and your experiences in school. Next, we'll work through several exercises and worksheets about your experiences as you think about what's coming after school.

THE ANATOMY OF A DISCUSSION GUIDE

4. Verbal protocol *continued*

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Script

Walkthrough: your post-high school artifacts

When we scheduled this appointment, we asked you to gather together any paperwork you have that describes what will happen after your transfer process. Were you able to locate those documents?

If no, move to exercise 4

Great, I would like to learn more about them. Can you walk me through what you have here?

Probe on artifacts:

• What is this document?

• Where did you get it?

• What has been the most useful part of this document for you? Why?

...

THE ANATOMY OF A DISCUSSION GUIDE

5. Material checklist

The material checklist is a reminder for the facilitator, listing the various forms, artifacts, and tools to bring to the session.

Materials

- This script
- Consent forms
- Blank timeline
- Audio recorder
- Extra recorder batteries
- Pens
- Laptop
- Camera
- Extra camera batteries

DISCUSSION GUIDES

Discussion guide best practices

✓ Things to include/consider	✗ Things to avoid
Include enough detail that someone else can read and follow the discussion guide without your help	**Don't treat the discussion guide like a fixed, static artifact.** You can change it on the fly during the session, based on what happens and how the participant reacts.
Include more questions than you think you will have time to ask	**Don't read from the guide during the session.** Familiarize yourself with it so you can glance at it and remember what to do next.
Write open-ended questions and prompts	**Don't summarize, abbreviate, or use incomplete ideas or thoughts in your written document.** You'll get confused during the session.
Role-play with another team member, to ensure that the session will go as you intend	**Don't assume that you'll be doing the research yourself.** Schedules change, emergencies happen, and someone else on your team may need to pick up where you left off.

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- thanks!

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