

Designing a better experience for later life.

COMMUNITY DESIGN TOOLKIT



Transform Ageing is delivered by:



UnLtd 🛠







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Transform Ageing is a pioneering programme that aimed to improve people's experience of ageing through community, collaboration and design.

Over three years, the programme saw people in later life, social entrepreneurs and public sector leaders work together to explore challenges faced by ageing communities in the South West of England.

Through collaborative design techniques and social entrepreneurship, the programme put people in later life at the heart of the design process. Their insight and experience led to new products and services that directly met their needs.

Design Council

Design Council's purpose is to make life better by design. We are an independent charity and the government's advisor on design. Our vision is a world where the role and value of design is recognised as a fundamental creator of value, enabling happier, healthier and safer lives for all. That means better places, products and processes, which together lead to better performance.



This toolkit

This toolkit features a selection of design methods used by Design Council while working with communities in Devon, Cornwall and Somerset during Transform Ageing. We initially drafted the guidance for the four Transform Ageing Delivery Organisations to help them use our design methods in their communities. In places, that means this toolkit may assume you have used a design method before.

The design methods included have been:

- Authored by Design Council to meet a need at a point in time
- Adapted to achieve a particular outcome within a specific sector where design was under-used
- Adopted as globally recognised best practice methods.

Design Council's Framework for Innovation



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Our Framework for Innovation helps designers and non-designers across the globe tackle some of the most complex social, economic and environmental problems. It is a fundamental part of our work that enables us to support public, private and third sector organisations. Through design we transform the way they discover and define challenges and develop and deliver solutions.

At the heart of the framework for innovation is **Our Double Diamond** (see page 7) – a clear, comprehensive and visual description of the design process. Within it, ideas are created, explored and expanded in scope (divergent thinking) before being shaped and refined into the best idea or concept (convergent thinking). We arrange this process across four distinct stages: **Discover, Define, Develop and Deliver.**

The Double Diamond

The four stages of the two diamonds illustrate the critical design process steps and a sequence where 'exploring challenges' precedes 'developing solutions'.

We have categorised the design methods in this toolkit against the **Discover**, **Define**, **Develop**, **Deliver** phases of the Double Diamond, where they are commonly used. However, you can use most methods throughout all phases of the design process.

DISCOVER



The first half of the first diamond is the collaborative exploration of a question or challenge. It helps you understand, rather than assume what the problem is that needs addressing. You will speak to and spend time with people to gather a broad range of perspectives and uncover the root cause of a challenge and its associated problems and needs.

DEFINE



The second half of the first diamond helps you define the challenge in a different way. Analyse and refine the findings from the Discover phase to turn the insights into early ideas and opportunity areas. Your goal is to articulate both the problem and the opportunity into a clear brief that you can take forward for development.





The first half of the second diamond encourages you to develop ideas and concepts that address the newly defined problem by seeking inspiration from elsewhere and co-designing with a range of different people. You may test different ideas and solutions at a small scale. The iterative design cycle of 'make, test, learn' at this stage helps to improve the viability of your concepts and manage risk.

DELIVER



The second half of the second diamond involves you further testing a preferred solution and making improvements to maximise its success as it is delivered.

Four key principles

Our Framework for Innovation includes four key principles and a selection of design methods that you can adopt and use. It also identifies the engagement and leadership that you need to achieve significant and long-lasting change.

<u> </u>	

Be people centred Be inclusive and focus on people's lives, needs and wants to gain valuable insights and ensure projects respond to their

requirements.

03

04

Collaborate and co-create Include diverse perspectives, expertise and lived experience in the design process to gain unique insights and inspire truly original ideas.



Communicate (visually and inclusively)

Convey a concept or idea visually to accelerate a shared understanding and consensus in diverse stakeholder groups. **Iterate, iterate, iterate** Test insights and ideas throughout the design process to mitigate risk, identify new opportunities and potential solutions, and to meet your intended outcomes.

Design methods

Design methods help you identify, tackle and address challenges to achieve desired outcomes and create meaningful change.

This toolkit focuses on the methods that were used in Transform Ageing to surface the needs, wants and ideas of the people in the communities we worked with.







Tips for using this toolkit



- 01 Use Post-it notes. They are easy to move around and the small size forces you to be concise with your thoughts and ideas.
- **Only write one item/idea/concept per Post-it.** This helps you identify similarities and separate differences.
- **Use Sharpie pens.** They are easy to read in photos.
- 04 **Remember the design principle of collaboration.** All methods are designed to be used in groups and with the community.
- **Be visual.** Where possible use simple drawings to support your ideas and notes
- **Combine design methods.** Design methods shouldn't be used in isolation, explore using a series together.

Challenge Statements



Challenge Statements are collaborative and consensus-building. They can be used to help you explore and test the validity of a challenge. They often start with 'How might we...'

HOW THEY HELP

Challenge Statements help you assess the validity or definition of a challenge by asking **Why?** and **How?**

The '**Why**?' is to identify and explore the underlying causes of a challenge

The '**How**?' is to identify and explore potential responses to the challenge



'How might we...'s help you think divergently – creating opportunities rather than pre-determining the solution.

Don't allow the 'How might we...' phrases to be too broad

CREATE YOUR OWN

- **01.** Place a pre-prepared Challenge Statement in the left-hand box on the template
- **02.** Discuss **why** you need to address this challenge and write a post-it of each 'why'
- **03.** Place the more strategic 'whys' at the top and the more operational 'whys' at the bottom
- **04.** Discuss **how** you need to address this challenge and write a Post-it for each 'how'
- **05.** Place the more strategic 'hows' at the top and the more operational or granular 'hows' at the bottom
- **06.** Cluster the Post-its to identify common themes
- 07. Discuss whether the challenge statement needs to change based on the emerging themes
- **08.** Discuss and agree what short, medium and long-term steps you might take to address the challenge
- **09.** Write the steps in the three boxes to the right of the poster, starting with the phrase 'How might we...'

Challenge Statement: template





Stakeholder list



A Stakeholder list is a complete list of individuals or roles involved in the shaping, making, delivery, commissioning and use of the designed output.

HOW IT HELPS

A Stakeholder list helps you quickly understand the range of stakeholders involved in a challenge or project. You can rapidly develop a shared understanding of their needs and wants, which you need to consider and address. The list is a useful precursor to Stakeholder Mapping.

CREATE YOUR OWN

- 01. Identify groups of people who might have a stake in a challenge
- **02.** List as many different groups as you can in the 'Description' column of the template
- **03.** List as many people who might be connected to that group as possible in the '**Who**' column
- **04.** Complete the Extreme Users column (see page 16 for guidance)

TIPS

Be as broad in your thinking as possible. If your group of stakeholders is a GP surgery the '**Who'** may include GP, nurse, receptionist, patient, cleaner and more. This ensures you consider and design with everyone's needs in mind. **Stakeholder:** any role or individual who creates, delivers or uses the service

Stakeholder list: template





Understanding people



Understanding people is a method that helps you identify a range of users of a product, service or system to ensure that you design for everyone.

HOW IT HELPS

Understanding people helps you consider the widest range of needs when designing a product, service or system. It can lead to greater uptake or relevance of an idea and enable more inclusive and universal use.

HOW TO CREATE YOUR OWN

- **01.** Use the groups you have identified on your stakeholder list as a starting point
- **02.** Define the scope or range of users in that particular group in relation to the challenge
- **03.** Populate these in the Extreme User column on the Stakeholder List template (see page 14)
- **04.** Repeat for each list of stakeholders



Understanding people: framework





Research methods: Be-the-user



Be-the-user helps you gain experience of using products and services as others do. By adopting the mindset of a target user or customer. The activity should be as representative of the relevant product or service experience as possible.

HOW IT HELPS

Be-the-user is effective when done by different groups or teams from an organisation or who are working together on a project. It helps you gain insights that you might not otherwise have realised. It also allows you to see products or services in new ways, experience how another product works or service is delivered, and identify what works and what you could improve.

CREATE YOUR OWN

- **01.** Put yourself into the role of someone who is using a product or service
- **02.** Take notes and sketches (photos if appropriate) to help remember aspects of the service. Think about the different stages of using the product or service: before, during and after

03. Think about:

- People involved in using a product or delivering a service and what they do
- The space the service takes place in
- What information is available to people who use the product or service
- How other people involved contribute to an experience

Initial concept: IDEO, Design Council and others



TIPS

You can use this method on any product or service. It often helps you uncover significant positives or weaknesses of an experience that are relevant to the challenge you are addressing.



Research methods Interviewing: in context and out of context



Interviewing in context is a method for recording what people say they do and how they do it, within the context, location or environment that is relevant to the challenge or project. Ideally a face-to-face activity.

Interviewing out of context is a method for recording what people say they do, and how they do it, outside the context, location or environment that is relevant to the project. Ideally a face-to-face activity, it can also be remote.

HOW IT HELPS

Interviewing in context creates opportunities for you to gain insight into what people actually think, feel and do in relation to the challenge or project. It helps you identify hidden data and learn about people's needs and build empathy and understanding, which can inform the design process.

Interviewing out of context is an economical method for gathering data directly from people related to a challenge or project. It helps you engage in new ways with people connected with the challenge being addressed.

)-TIPS

"What people say they do, think they do, and what they actually do, are entirely different things"

Margaret Mead

Cultural Anthropologist (1901-1978)

Interviewing: in context and out of context Interview protocol template



Interview protocol

I AM		
YOU ARE		
TELL ME		
TELL ME MORE		
SHOW ME		
What do you like?	What don't you like?	What ideas or suggestions do you have?
Can you suggest anyone else I might talk to?	If I have further questions may I come back to you?	
		Thanks!

Research methods Journaling



Journaling is the documenting of an activity you are doing. Your journal can be a notebook, photographs, a blog or any other resource that can be interpreted when the activity ends.

HOW IT HELPS

Journaling allows you to capture more data over an extended period of time, than you would get from interviews. You also avoid the opportunity cost of using a researcher. It is a way of gathering in-depth qualitative information from users to develop understanding and empathy about other people's experiences. It gives you a sense of a user's life over a longer period of time.

CREATE YOUR OWN

- **01.** People can create journals based on the context of the project
- **02.** People tell their own lives in their own time, and explain what they do over a number of days or weeks or months
- **03.** Journals can be in many formats, but usually consist of some personal background information and a 'diary' format for capturing information over time



Research methods Fly on the wall



Fly on the wall helps you understand how people interact with the world around them, including services. It involves observing a user directly to identify and understand their needs.

You observe what people do and how they respond to or interact with a product, service or system whilst being as unobtrusive as possible.

HOW IT HELPS

Fly on the wall means you can identify new insights and opportunities that inform how you address a challenge or project. Fly on the wall often reveals what people actually do and provides insights that add to or counter the data from interviews.

BE A FLY ON THE WALL

- **01.** Identify a context or subject area to visit and explain how and why it is relevant to the challenge
- **02.** Prepare a guide outlining the planned observation, what you want to learn and the materials needed to capture observations
- **03.** Think about the people and activities and environment they are in
- **04.** Blend into the background and take on the role of objective bystander
- **05.** Look at the context from different vantage points
- **06.** Record findings through notes, photos and video follow GDPR guidance and safeguarding policies

Fly on the wall





TIPS

Spend time identifying the correct people to shadow and observe. In general, a relatively small group is sufficient as the aim is to get rich information and insights to drive the design process.

Shadowing involves spending time with the person over a number of hours or days and observing what they are doing and why. This might take place in one session or over a number of different sessions.

Getting immersed in a person's life helps you identify the barriers and opportunities they encounter, even those they are not explicitly aware of.

Experience Diagram



An Experience Diagram helps you analyse feedback on a service across a number of stages: before, during and after using it. It is often a follow-on activity to 'Be-the-user' (see page 17).

HOW IT HELPS

An Experience Diagram helps you identify the highs and lows of a service experience from the perspective of the user. You gain insights that help you develop strengths and address weaknesses.



TIPS

This method draws on the outputs of design research methods such as Fly on the wall and Be-theuser. These ground the Experience Diagram in real user experiences rather than an abstract notion of how a service works.

You identify the individual touchpoints with each stage – the people, information, products and spaces encountered. Links or gaps between touchpoints will reveal themselves as you develop the diagram.

CREATE YOUR OWN

- **01.** Break down your experience into a series of 8 10 steps
- **02.** Transfer the steps onto Post-its (one step per Post-it)
- **03.** Plot each step against the 'How it made you feel' section of the Experience Diagram poster. Was it a positive, neutral or negative experience
- **04.** Think broader than the experience. When did you first become aware of the service? What was your experience after the service?
- **05.** Discuss and agree the key moments or points in the service experience that need to be improved







Pen Portraits



A Pen Portrait is an informal description of a person or group of people that covers a wide range of variables and focus on their attitudes and lifestyle.

Pen Portraits are also known as personas. You can develop and share them with others involved in a project to build understanding and consensus of the needs, issues and preferences of users in relation to the challenge.

HOW THEY HELP

Pen Portraits give you a better understanding of an existing or intended target audience. You can use them to recruit the right kind of participants for a user research project. The activity brings to life key concerns, needs and wants of a target audience, helping to align an organisation's understanding of that audience.

CREATE YOUR OWN

- **01.** Following user research, identify the stakeholders that are critical to success
- **02.** Complete the persona template by noting the persona's needs, goals and aspirations beneath the sketch
- **03.** You may also conduct in-depth interviews with these stakeholders and analyse the resulting data to summarise their motivations, preferences and needs



TIPS

Personas are only as good as the information and research behind them. Primary research is always best.

Don't develop too many personas for a project. Focus on the target group - 3 or 4 personas work well.

Don't base personas on known individuals as this can influence your understanding.

Try putting a face to personas - this helps make insights visible and memorable.





	Age (if known):	:"	Marital status:	ation:	Interesting quote:			
icing Name:	Age (ii	Location:	Marita	Occupation:	Intere	33		
Pen portrait introducing								

Cover story mock-up



Cover story mock-up is where you present a story on a newspaper's front page describing the successful implementation of an idea and its future impact.

HOW IT HELPS

This method builds engagement around a challenge or an idea by explaining its need or benefit. It helps to build consensus and shared understanding of what success might look like, and to support progressing in an aligned direction. It is also useful as a prototyping method to test with key stakeholders and get feedback.

CREATE YOUR OWN

- **01.** Think of a catchy title for the idea and write an attention-grabbing sentence as a headline onto the Cover story mock-up poster
- **02.** Draw an image to illustrate the vision and "How success will be reported in five to ten years' time"
- **03.** Describe the challenge that has been overcome, solution that has been adopted and the impact of the idea and quotes or testimonials

TIPS

Choose a newspaper that is relevant to the context you are working with, such as a publication that key stakeholders are likely to read or relate to.

Cover story mock-up: template



2027	<i>.</i>	

Location:

Initial concept: LUMA institute

Alternative Worlds



Alternative Worlds is a method which draws inspiration from organisations, products and services where similar problems may already have been solved. This method follows the brainstorming rule that all ideas are valid!

HOW IT HELPS

Alternative Worlds challenges you to look at other organisations, individuals, groups or initiatives to see how they might normally approach a given issue. You get familiar with the idea of thinking beyond the usual sector or organisation and to identify common principles that may still apply at prototyping stages.

CREATE YOUR OWN

- **01.** Think about how organisations in other sectors or domains might approach the challenge
- **02.** Ask: "How would 'X' solve this?"
- **03.** Come up with as many ideas as possible and think about multiple alternative worlds
- **04.** Remember, the idea is to be as creative as possible and all ideas are valid at this stage



TIPS

Think of organisations, initiatives, groups who may hold similar principles, values or deal with similar pressures but work in different contexts. This will help you think of ideas beyond your current limits.

Alternative Worlds: example



Designing a new operating theatre: learning from a team that fit four tyres in 1.92 seconds **in a risky environment**





Initial concept: LUMA institute

Creative Matrix



Creative Matrix is a time bound and structured approach to brainstorming that increases the volume, focus and usefulness of outputs.

HOW IT HELPS

Creative Matrix helps you formulate new ideas that draw on diversity of experience, expertise and lived experience. It mitigates the pitfalls of basic brainstorming, lack of focus and the presence of dominant personalities.

TIPS

Encourage participants to put at least one idea in each box, and to write down everything they think of. It is important to only capture one idea per Post-it.

Give a time limit as it is possible to generate dozens of ideas in 15 minutes.

Before discussing, try to generate ideas individually to avoid being influenced by others. This ensures all unique ideas are captured and participants are not influenced.

CREATE YOUR OWN

- **01** Prepare the template:
 - Drawing from the Challenge Statements method (see page 11), place three 'How might we...' statements in each of the three boxes along the top of the matrix
 - Drawing from the 'Stakeholder list' method (see page 13) select three important stakeholders. Place these in the left hand column of matrix
- **02.** At the intersection of each row and column, think of an idea that might address the challenge as well as the needs of the stakeholder
- O3. Ask other people or teams to contribute ideas to the matrix and use different colour Post-its to show how many additional ideas have been contributed

Alex Faickney Osborn's rules of brainstorming apply:

- Withhold criticism and judgement
- Encourage wild ideas
- Quantity over quality
- Build on the ideas of others
- One conversation at a time
- Be visual!







Clustering and Theming



Clustering helps you group data under categories. Theming is where you assign the right title or theme to a cluster – it works best as a group activity.

HOW IT HELPS

Clustering helps you identify patterns of activity, interest and insights. You can build understanding and agreement on the commonalities.

Theming helps you create a clear summary of what the cluster is describing. You can then communicate the overarching themes to others and surface emerging opportunity areas with consensus.

CREATE YOUR OWN

- **01.** Layout all of the captured ideas
- **02.** Pick one idea to start and then look for those that are related
- **03** Sort all of the ideas into clusters
- **04.** Sort large clusters into sub-groups
- **05.** Label the final clusters
- **06.** Delineate the clusters and highlight connections between them

TIPS

Group by theme or idea, not colour.

Avoid more than six Post-its in a cluster. You can normally break large clusters into more themes.

The theme heading for each cluster should 'speak for itself'. Try to include a verb.

Clustering and Theming: examples





Initial concept: LUMA institute
Round Robin



Round Robin is where you critique and evolve ideas by passing them from person to person in a team.

HOW IT HELPS

Round Robin helps you to start thinking creatively and collaboratively to develop strong ideas. This method allows team members to generate ideas without being influenced by any one person. It helps make sure everyone takes part and avoids having strong characters dominate the conversation. It also encourages those less likely to participate feel more confident to share their ideas.



TIPS

The purpose of the activity is to encourage creative and collaborative thinking. Be as creative and as critical as possible.

CREATE YOUR OWN

- 01. In groups of at least three, each person takes a Round Robin template
- **02.** In the first box, write the challenge you want to address
- **03.** In the second box, write or draw an innovative solution to this challenge
- 04. Pass the template to a new person, who should writes or draw three reasons why the product, service or idea will fail
- **05.** Again pass the template to a new person. This person writes or draws a way to address the outlined failures in the most creative way possible
- **06.** Gather, collate and discuss all the ideas

Round Robin: template



TRANSFORM AGEING	Challenge: Location:
How might we	
Proposed product or se	ruice
Proposed product of se	in vice
Why the product or ser	vice will fail
The best transformation	nal product or service

Prototyping



Prototyping allows you to test ideas and gather feedback on potential solutions.

There are many different methods for prototyping. Some such as role play emphasise acting out a service experience, others focus on creating mock-ups of products or environments.

HOW IT HELPS

Prototyping can help you manage risk and allow stakeholders to see, touch or even use a concept to provide feedback. It can enable deeper and more useful insight, which reduces time spent pursuing the wrong approach.

HOW TO PROTOTYPE

The following methods are just a few examples of how to approach prototyping a product or service. Don't forget to experiment and iterate based on what would work for your situation.

The idea is to prototype and test early and often. The more cycles of 'make, test, learn' you go through, the more you are able to iterate and improve your design.

TIPS FOR ALL TYPES OF PROTOTYPING

- 01. An important part of prototyping is gathering feedback and learning. Don't be afraid of doing things wrong or getting negative feedback. It's all part of the learning process and can help you get to the solution quicker.
- 02. Understand what you need to test and how you're going to test.
- **03.** Document your work through video or photos to communicate the insights learned. This allows you to share the user testing and feedback with other stakeholders.
- 04. Rough prototypes better to be quick, dirty and early rather than slow, perfect and late.
- 05. Use 'just enough' technology to get going such as PowerPoint to mock-up software and cardboard to mock-up interiors.
- **06.** You should ideally test with potential users of the service, which may happen over a number of hours, days or weeks.

Prototyping: methods



MAKE IT: ROUGH AND READY

A rapidly built model of a new idea to gather early feedback.



Design Council prototype: Whittington Hospital Pharmacy



TIPS

It's useful to identify which part of the product or service you are prototyping

Use low cost material to mock things up

It can be helpful to test a product or service where people will use it.

Prototyping: methods



SERVICE BLUEPRINT

This is a way for you to visually map out people's experiences and the touch points of a service, alongside an organisation's behind the scene's input, such as employee activity or processes.



TIPS

Think about the different parts of a service blueprint as a front stage, such as the users' parts to play. The backstage might be the staffing, infrastructure or the technology needed to make things happen.

A service blueprint helps you see the interaction between the front and back stages, so you can make links and understand dependencies

ROLEPLAY

Roleplay is a simulation technique that helps you see through the eyes of people using your product or service to learn what they are experiencing.



TIPS

Give people roles ahead of the session. Think about what roles are needed to simulate the experience accurately.

Decide on scenes and storylines beforehand, and use storyboarding to capture scenes and the lessons you learn.

Create props, and or use objects around you

PRODUCT/ SERVICE COLLATERAL

Create mock-ups of items that will exist alongside the new idea: packaging, web pages, instructions, or a leaflet that explains your product or new service. This helps you to design, test and iterate the collateral before production.



Design Council prototype: Kids Connect

Prototyping: methods





STORYBOARD

Storyboarding allows you to visualise or share a person's experiences of a service or product. You can show the key interactions and scenarios that will be part of the future process or service.

A storyboard is essentially a sequence of images and captions that show key elements and interactions.

Drawings or pictures on storyboards don't need to be perfect. It's creating a work in progress that others can respond to and build on.) - TIPS

Identify which part of the product or service you are prototyping.

Use low-cost materials to mock things up

Test in the place where a product/service will happen

Rose, Thorn, Bud



Rose, Thorn, Bud is where you categorise data as positive, negative and having potential. You can use it as an activity to get rapid visual feedback or as part of a group exercise to interpret data.

HOW IT HELPS

Rose, Thorn, Bud accelerates the organising, sharing and interpretation of information or data. It provides an effective method for quickly identifying patterns in information that can be translated into emerging themes.

As a design method, it is best used with colour-coded Post-it notes:



Pink = Rose: highlights/ successes/quick wins/ compelling



Blue = Thorn: challenge/ difficulties/concerns/risks



Green = Bud: New ideas that could blossom with support

CREATE YOUR OWN

- **01.** Write a single important point on a Post-it note using the key: pink = positive; blue = negative, green = has potential.
- **02.** Bring all feedback together to analyse. It may be helpful to cluster and theme the feedback to draw out new insights.



TIPS

It's not about coming up with solutions, but gathering specific feedback. Help people resist the temptation to write solutions.

Use as a group exercise to build common understanding and collaboratively develop ideas and solutions.

Initial concept: Scout Movement



Further reading

The Design Process: What is the Double Diamond? bit.ly/2wbyCJf

Design thinking – The Movement for Community-led Development bit.ly/2vnp9hF

Design Thinking Isn't Always the Answer bit.ly/2UKX8v2

Service Design in Practice 'Insights from nine case studies bit.ly/2OPt5hM

Useful film clip bit.ly/3bzFqjQ

Design Methods for Developing Services: An introduction to service design and a selection of service design tools bit.ly/37e8j1S

Nesta's DIY Toolkit, Design, Impact and You (2014) Funded by Rockefeller Foundation bit.ly/2SR4XNh

Nesta's Develop Your Skills (updated regularly), presents tools, reports and resources organized around seven stages of innovation nesta.org.uk/develop-your-skills

The IDEO Human Centred Design Toolkit (2009) ideo.com/post/design-kit

The IDEO Field Guide designkit.org

The NHS Institute for Improvement and Innovation Experience-based Design (EBD) toolkit (2009) bit.ly/2SojgK9

The Danish Government's cross-ministerial innovation unit MindLab has published its Methods Cards mind-lab.dk/en/methods

The Frog Collective Action Toolkit bit.ly/37n7Fiq

Luma Institute: Innovating for People: Handbook of Human centred methods luma-institute.com/

Bite-sized design tools to spark creativity and collaboration designkit.org/resources/9

IDEO Design Kit designkit.org/methods/45





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