

## Introduction

*Project Account* charts the process and methods used in a research project exploring groups and group behaviours within the context of the University of Cambridge and its institutional IT systems. The project has been a collaboration between Proboscis, the Centre for Applied Research in Education Technologies (CARET) and Crucible. It is one of four books by Proboscis outlining the methods (*Method Stack*), approach (*Project Account*), observations and insights (*Driving Insight*) and suggestions for new engagement methods that can inform co-design and user-centred design practices in software development for collaboration tools and services (*Catalysing Agency*).

In Autumn 2010 Proboscis was invited to collaborate with the Centre for Applied Research in Education Technologies (CARET) and Crucible at the University of Cambridge on a research project exploring the nature of groups and group behaviours within the context of the university's communities and the design of software platforms for collaboration. Over a period of five months we discussed the potential scope for the project and how an independent research organisation such as Proboscis could work in collaboration with a university organisation such as CARET.

The project got underway in early April 2011 and was planned in three distinct phases: Scoping, Exploration and Reflection. The Scoping phase took place during April and May; the Exploration phase took place during June and July and the Reflection phase from early August to late October 2011. *Agencies of Engagement* – this series of four books – is the public output of the project.

*Project Account* can be considered as a case study for anyone undertaking similar research and engagement work; it details our developed practices, how they were applied to this project, and how one might adapt when encountering the kinds of hurdles we experienced along the way.

Giles Lane and Hazem Tagiuri  
Illustrated by Mandy Tang

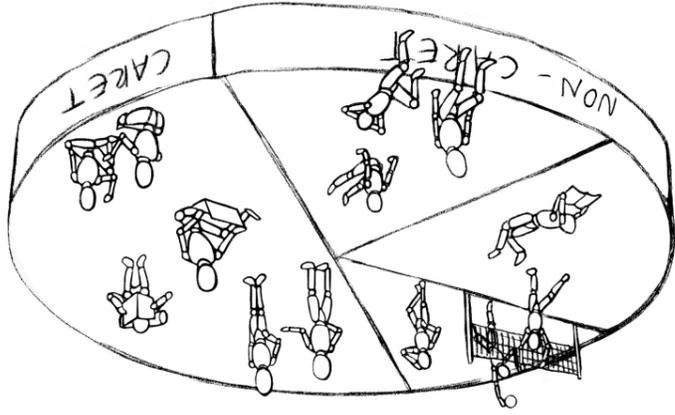
The key people involved in the collaboration have been:  
 Proboscis Alice Angus, Giles Lane, Frederik Lesage, Hazem Tagiuri, Mandy Tang  
 CARET Verity Allan, Anne-Sophie de Baets, John Norman  
 Crucible Alan Blackwell

## Co-Discovery Workshops

For the Exploration phase, we devised a series of "hands-on" workshops in order to share our conclusions from the scoping phase with CARET and test our hypotheses through a process of co-discovery. The workshops were designed to take place across three separate sessions with a mixture of CARET staff and external participants, with each set of exercises exploring one of the three disruptive hypotheses in detail.

Through these workshops we hoped to create a space (outside of existing structures) where CARET and potential collaborators could meet and take part in discussions, and demonstrate some working methods that could enable members of CARET to maintain channels of communication and collaboration with current and emerging groups.

It was also an opportunity to explore the extent of existing connections through the process of gathering participants, helping us to perceive CARET's degree of capability for community engagement directly.



## Hurdles

The process of devising ways to engage communities and test ideas will almost certainly encounter hurdles requiring a reappraisal of methods and adaptability. These are often very revealing about the communities being engaged and can be the source of important insights as well as tests of the flexibility of one's own methods. Hurdles therefore can be seen as important opportunities for learning how to adapt in similar situations, rather than barriers to proceeding.

We encountered several when trying to organise the exploration workshops which required the need for quick adaptation. A crucial component of the workshops was a mixture of CARET and non-CARET participants, in order to generate conditions analogous to the ones we experienced over the course of the scoping phase. Our aim was for CARET staff to make their own observations and gather insights we had already discovered for themselves – a process of co-discovery.

It's common for organisations operating on the fringes of larger entities and those with insular working practices to have difficulty engaging externally. Using the same groups of people when trying to do engagement work, consciously managing reputation and therefore being reluctant to make new affiliations and commit to projects, or simply a lack of knowledge, can all result in organisations lacking significant connections outside of themselves. Some of these factors contributed in this case, as CARET was unable to confirm enough external participants for the workshops for them to be viable.

As a result we adapted by condensing the three workshops into a single event and omitting the final set of exercises as there was no 'community' element present. These had been designed to demonstrate in a 'real' setting working methods of how to run co-creative and co-development community exercises around collaboration and the tools needed to support it. Nonetheless, the absence of external participants itself demonstrated co-discovery in practice – as CARET staff experienced this hurdle at first hand, so an awareness developed that there was no internal process currently in place to actively recruit new participants and that it had not previously been identified as any kind of priority.

From our own perspective, and with hindsight, we felt that engaging with a wider group of CARET staff from the very outset could have been beneficial for encouraging a greater investment in the process of recruiting participants and communicating the value of the planned workshops as a space to explore ideas and methods of co-design.



proboscis caret Agencies of Engagement  
**Project Account**  
 Giles Lane and Hazem Tagiuri

physical and digital versions. This was also a core value for the project's output, that it would be of value not just to CARET and Proboscis as documentation of what we achieved, but to others as a guide for developing their own engagement practices. It was therefore important that the results not be buried in a report but find articulation as a creative thinking and doing tool; these four books attempt this :

*Method Stack* describes a number of the engagement methods and practices used by Proboscis in our engagement work as well as other tools and sources of inspiration

*Project Account* (this volume) sets out the process used in the project as a case study for others to guide their own engagement practices

*Drawing Insight* illustrates the observations and insights of the project in a simple and accessible way

*Catalysing Agency* explores the need and concept for using a Catalyst to trigger meaningful engagement with wider communities



**Project Account**

Giles Lane & Hazem Tagiuri

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Published by Proboscis

Agencies of Engagement

A creative thinking and doing tool - four books to inform and inspire, authored as part of a collaborative research project by Proboscis, CARET and Crucible.

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**Axes of Enquiry**

Biographies	Can we think of groups as having biographies of their own? When does a group form? Do they have trajectories?
Typologies	How might we come to understand and classify the vast amount of groups present? Do different groups exhibit different behaviours?
Rhythms and Activity	Do groups and group activities have rhythms of use? How might we discover what patterns groups follow?
Patterns	How do people create, share and discover groups, and the tools and services that groups use?
Discovery	Who creates and manages groups? What are the structures in place?
Barriers & Disruption	Do groups have barriers to entry? Who establishes these barriers? Can they be disrupted?
Affiliation & Belonging	How linked are groups to having a sense of belonging within life at Cambridge?
Hearsay & Rumour	What part do hearsay and rumour play within university life? Are they useful connectors?

**Framing**

To prepare for a project, we conduct an internal framing exercise which helps us map out potential methodologies, tools, outputs and the outcomes that we aim to achieve.

For the CARET research collaboration, we began with an open brief to explore groups and group behaviours in a university setting to generate new insights that could inform I.T. design. To contain this potentially huge area of research, due to the sheer amount of groups within the university, we focused on how to gain a better understanding of how people create and maintain (or not) groups, rather than what kinds are currently in place.

We discussed avenues for exploration based on preliminary information we had gathered, and started to outline the form of a final output – a publication that would serve as a “thinking tool”, composed of knowledge and skills, that could be used to incite and aid further engagement.

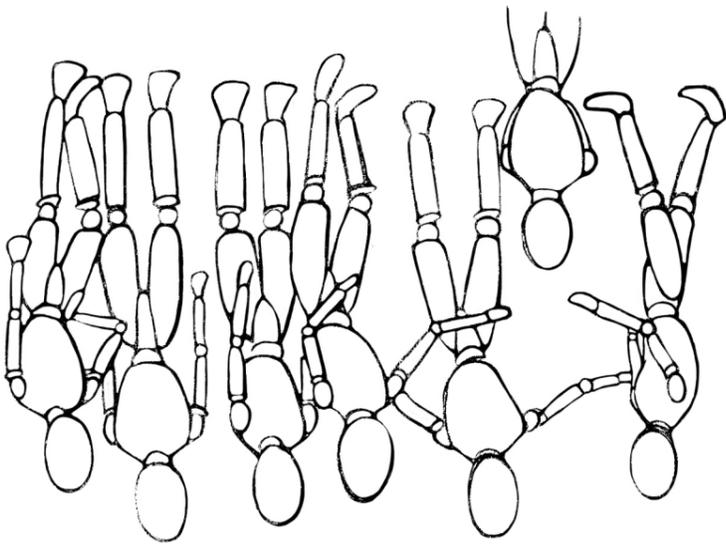
By drawing on methods we’ve used in the past, we decided that ethnographic observations and interviews as well as creative workshops would be suitable strategies to conduct research and stage interventions in this context. The findings from these would help us generate “uncommon” insights into behaviours and practices that would inform and shape the final publication.

In this period we also defined the phases of the project:

- Scoping** conduct a brainstorming session with CARET staff to devise a suitable collaboration process and identify sample groups to work with. Use research methods to gather insights that will generate “disruptive hypotheses”.
- Exploration** test the disruptive hypotheses through interventions and exploratory projects, using creative and sociological methods, drawing on our previous experience of developing technological platforms for different communities. Share methods and processes with CARET staff to create opportunities for knowledge/skills transfer.
- Reflection** create a final output reflecting on the project as a whole to stimulate debate and aid engagement within the university community.

The point of the Catalyst would be to devise an effective mechanism for CARET to move beyond familiar user centred design practices, that often involve establishing personas and group typologies, towards a *co-design* model that is based on engagement with *actual* groups and individuals. Our discussions had considered the contribution that roles such as interaction design and user research could make, but the Catalyst was seen to occupy a different space between these existing disciplines. An emphasis on being able to achieve effective community engagement was seen as a pre-requisite and would also require exploring talented individuals from professional disciplines outside the usual scope of academia, such as community development and other more exotic fields where boundary crossing is a key component.

(alongside some other materials) for the *Catalysing Agency* book. rounded outline of the tasks, skills and personal qualities required that forms the basis need to perform, the skills and experience the Catalyst would require, and what positive personal qualities the right person might have. From this discussion we developed a more

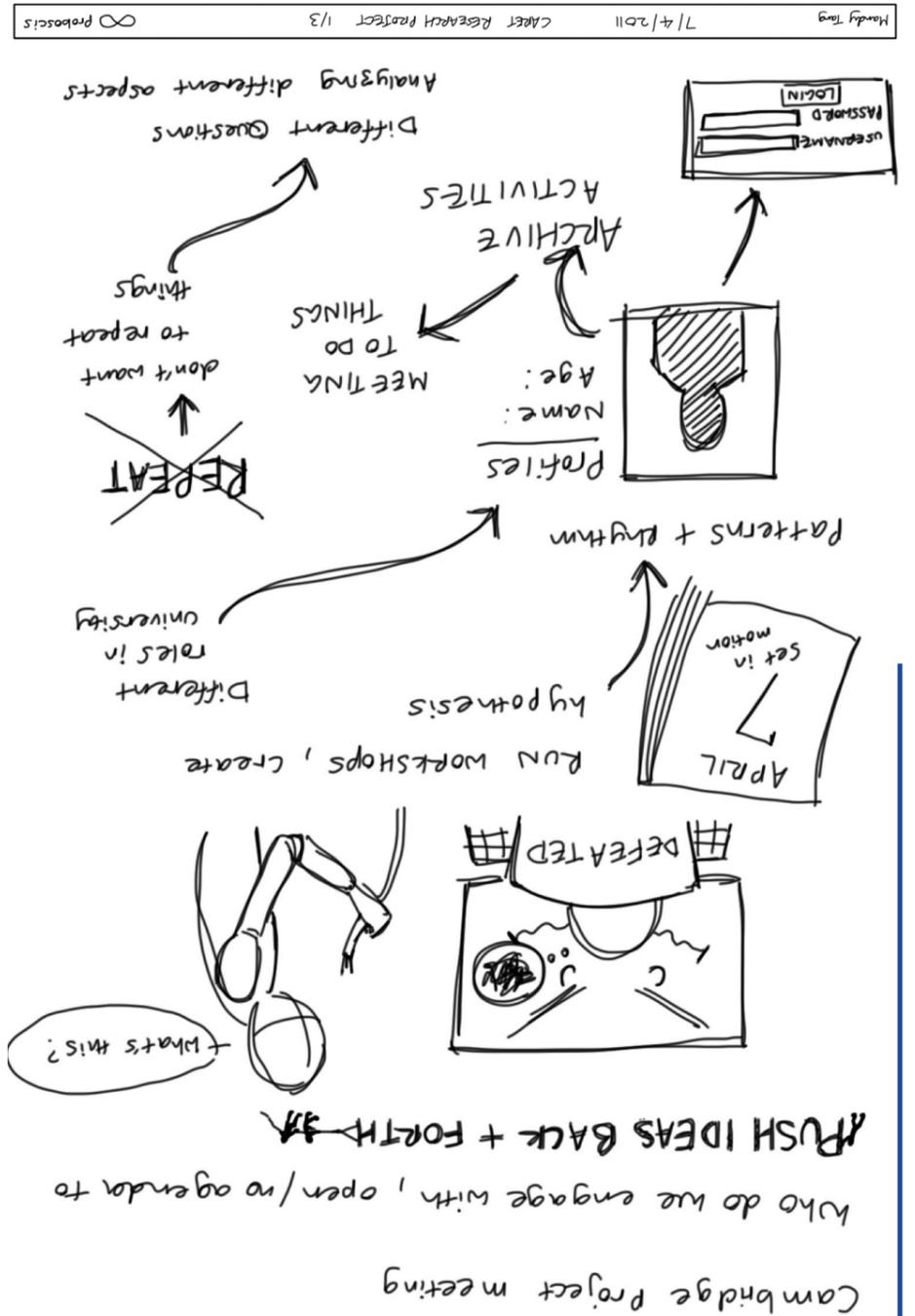


## Agencies of Engagement



The four books in this series collectively titled, *Agencies of Engagement*, have been created using Proboscis' self-publishing platform, bookleeter.com. This is a unique hybrid between the digital and physical, creating versions of the books that can be read online or downloaded, printed out and made up into hand-made booklets on standard office/domestic printers. It also provides an option for short run professionally printed and bound versions to be inexpensively produced. We have developed this platform as a key element in our concept of *public authoring* and the creation of simple tools for sharing knowledge and experience.

We believe in creating and using tools that reflect our values and practices – making use of them in our projects and research enables us to embody this ethos in the ways in which we collaborate with our partners and share the outcomes. The structure of each of the four books has, at its core, our desire to inspire others and to illustrate ideas and practices – sharing not just the fruits of our work, but the processes and methods which we have employed. Publishing the books with bookleeter enables the potential for the insights and observations, methods and practices to resonate widely both through sharing



## Immersion

At the outset of a project it is important to become immersed within the culture and context of the communities being engaged – attempting to explore the issues and structures underpinning them, to develop appropriate ways of engaging people.

As the launchpad for our immersion within the world of CARET and Cambridge we held a group brainstorm with Alan Blackwell and key staff from CARET. Our aim was to reconcile our expectations and queries (articulated through the Axes of Enquiry) with their in-depth knowledge of the systems and diverse groups within the university. We learnt of the complicated structures in place and their intricate and overlapping connections, as well as the importance of an individual's sense of attachment to the university and organisations within. Constantly shifting technology and the tension between analogue and digital tools, were also important themes that emerged from this encounter.

The insights gained from the brainstorm enabled us to think beyond the initial Axes of Enquiry and rapidly refine our research questions – gaining an understanding of the complexity of the university system and individual roles within and across it.

It was important to us to create visual notation as documentation of the process alongside traditional notes, using the process of drawing to illustrate concepts that were often intangible and to be able to think about them in innovative ways. Mandy Tang, our project artist, created the following pages from her visual notation of the meeting. These were used by us extensively in devising the scoping exercises that followed.

We saw this agent as someone who could operate semi-independently of CARET, whilst directly engaging with groups they are working with – a *Catalyst* to precipitate change. We were led to this conclusion by observing that whilst many of the team members of CARET were open to and amenable to engaging in new practices of co-design with different groups and types of users across the university, they needed some external influence to bring them outside of the container that is the culture and practices of CARET. This would need to be a process which did not become static or too rigid in operation – therefore we felt that this should be a person who could not only precipitate changes in engagement practices, but also become the conduit for new connections.

- generate situations of co-discovery or mutual exchange between CARET staff and other people in Cambridge.
- build new and potentially lasting relationships with communities of practice in and around Cambridge without draining the time and resources from existing CARET staff.
- take risks and explore uncomfortable situations without endangering CARET's own standing within the University and wider community.

Based on our findings from the Scoping and Exploration phases and following the workshop, we identified a need for a particular kind of new resource for CARET. This resource, identified as a person not a process, would ideally be able to act as an intermediary, or change agent, and would be empowered to:

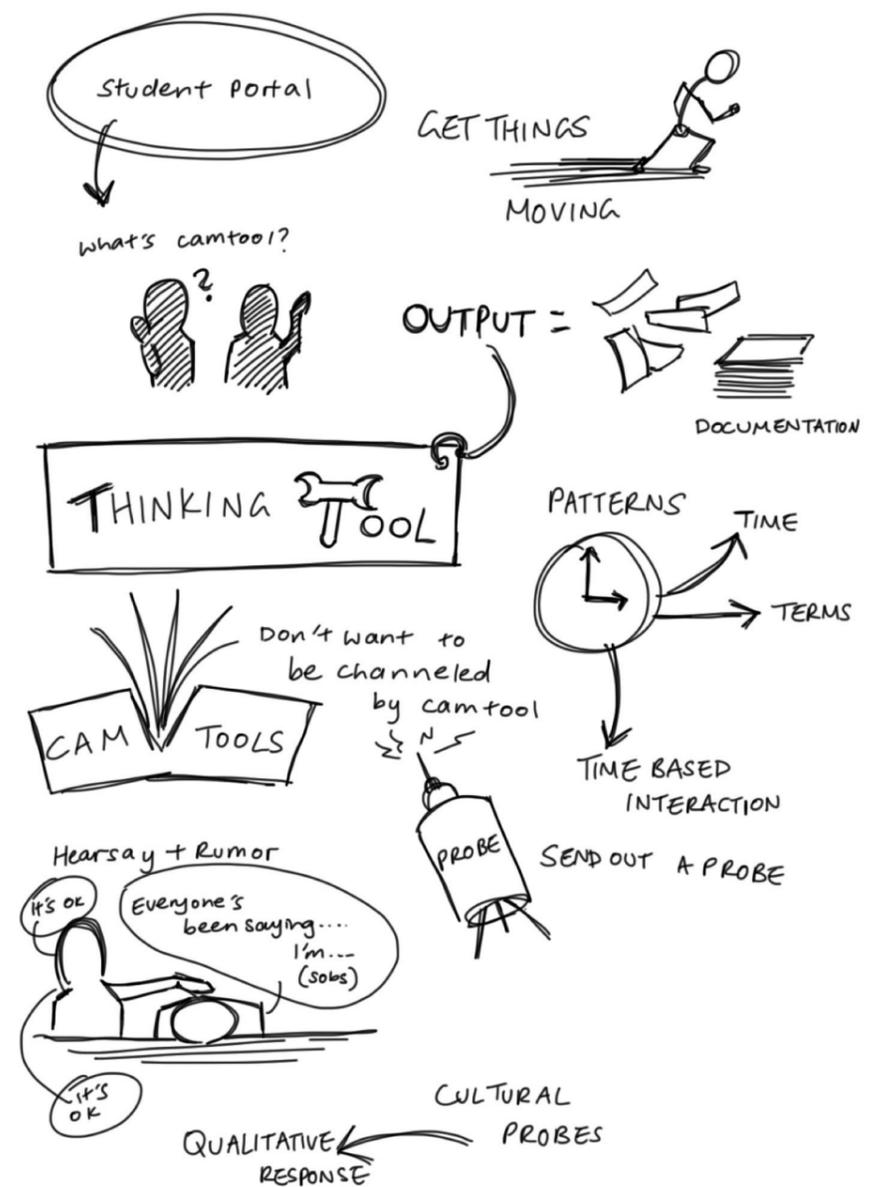
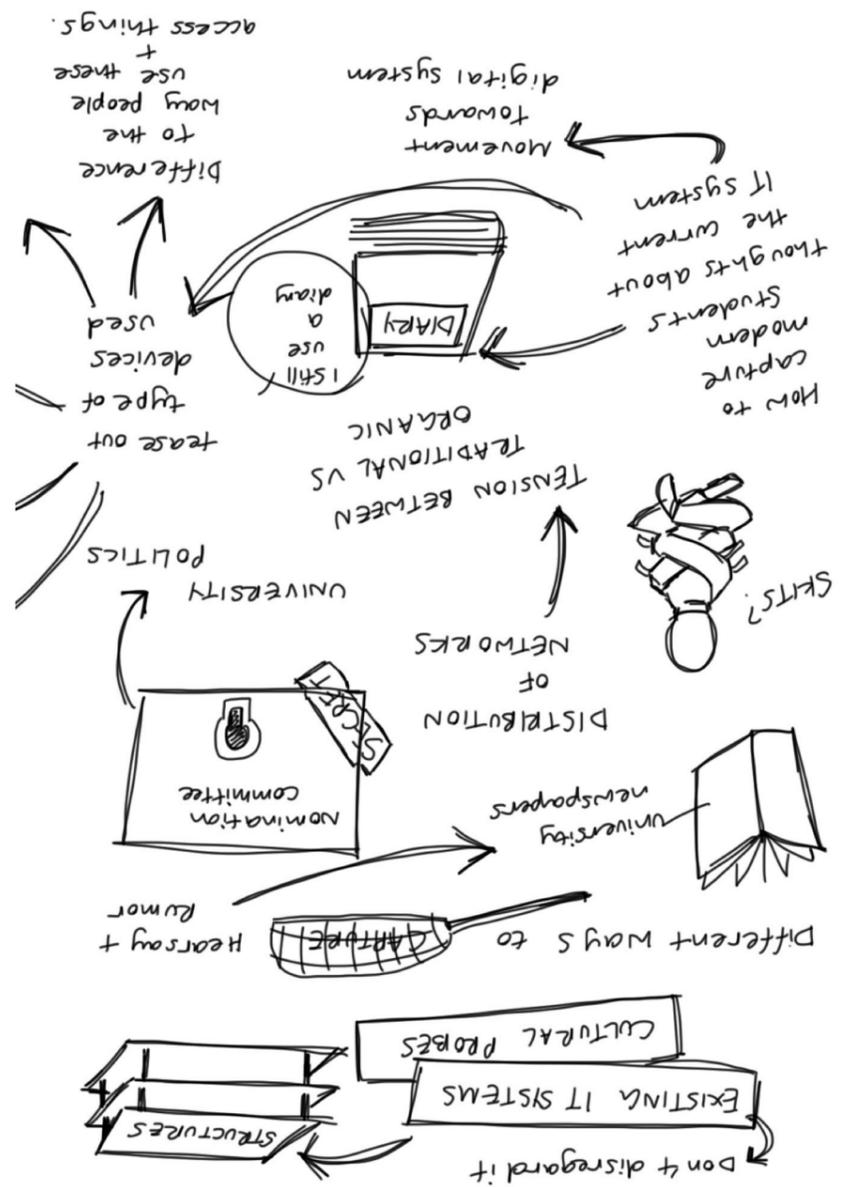
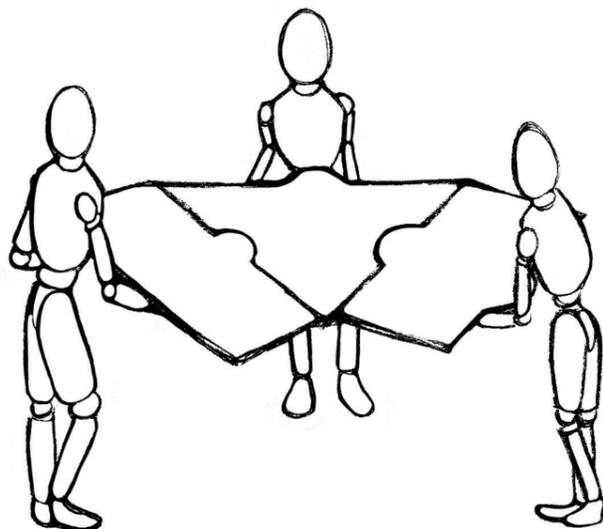
## Pulling Strands Together

## Mapping Out the Catalyst Process

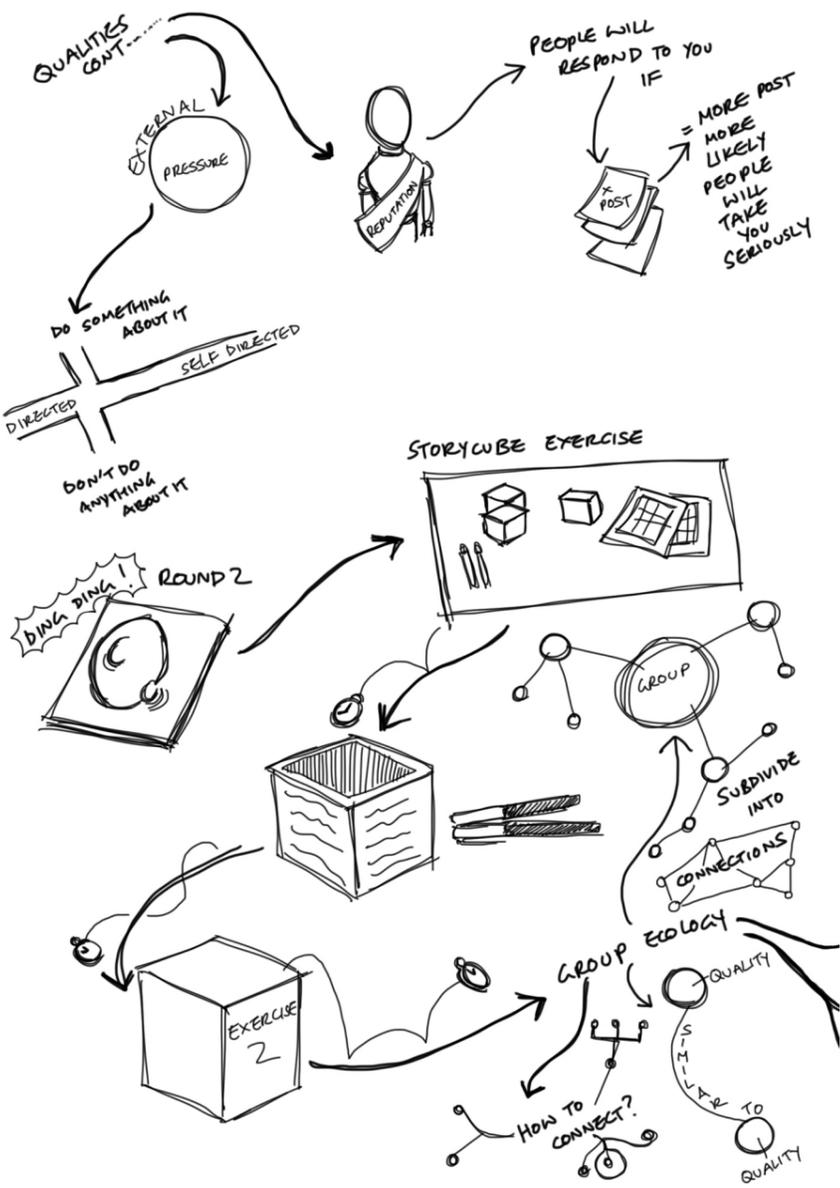
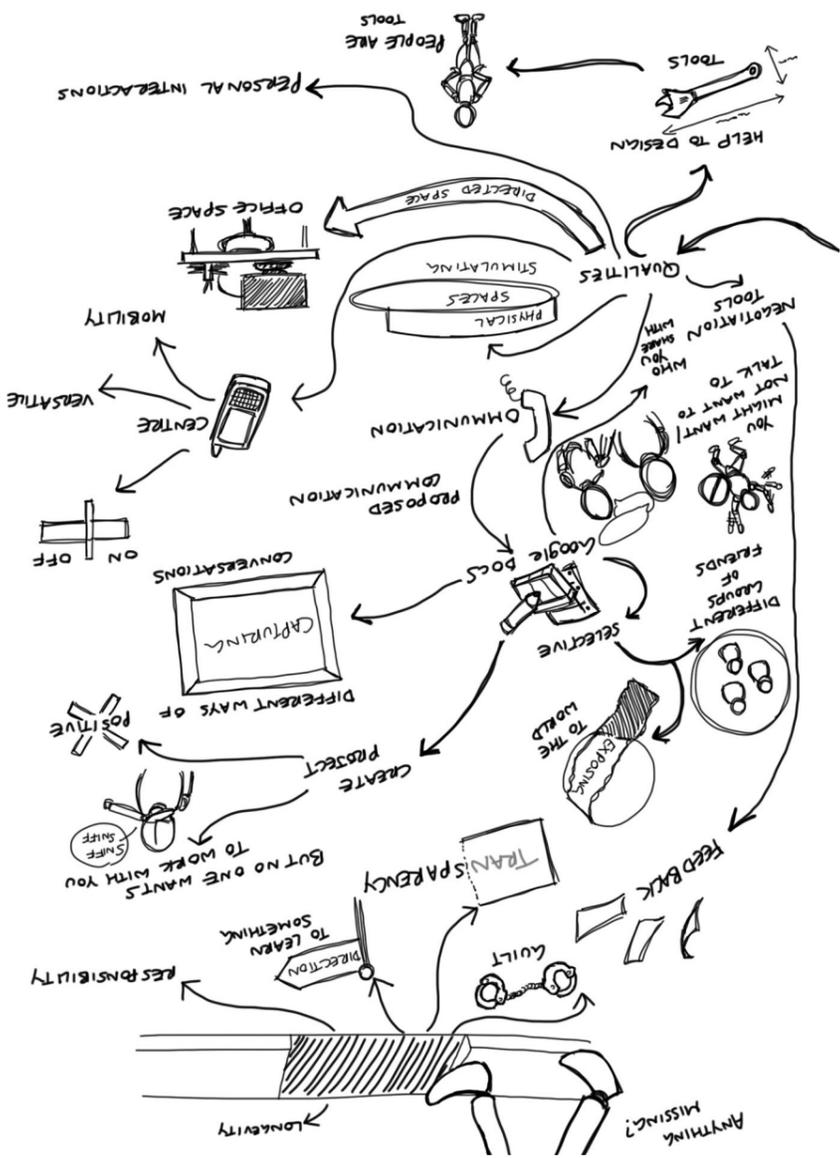
The Reflection phase of the project has been, in many ways, the most important – a sustained period of looking back on all that we had experienced and discovered in order to draw it all together into an output that could be acted upon.

Early on in the project we had identified the need for the project's main output to be something like a handbook or toolset that could serve not just as a record of what was done but also as a means of knowledge and methods transfer. It would need to share our observations and insights, detail our developed practices and approach, and suggest new engagement methods, all beneficial both to CARET and those wishing to do similar engagement work. We decided upon a set of four books that together would map out these practices and observations, as well as to focus on our main recommendation. Creating these four books was thus the main impetus for carrying out our period of reflection.

Alongside this we needed to draw together the concept of the Catalyst that had emerged from the Exploration phase and work this into the books, and the one in particular that would focus on the Catalyst role as a new engagement method (*Catalysing Agency*). In order to refine what a Catalyst would be and how they would work both with CARET and the groups they are involved with, we held a meeting with Alan Blackwell of Crucible, and John Norman, director of CARET. The meeting discussed what tasks the Catalyst would







Mandy Tang 18/07/2011 CARET WORKSHOP 2/3 Proboscis

## Devising the Scoping Exercise

Reflecting on what we learnt from the initial brainstorm, we began to devise a scoping exercise to gather impressions and material, using these to define the disruptive hypotheses and identify scenarios where we could creatively intervene in a meaningful way during the Exploration phase.

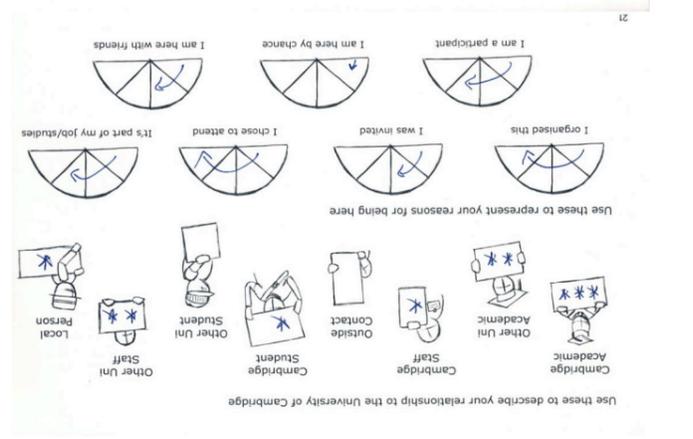
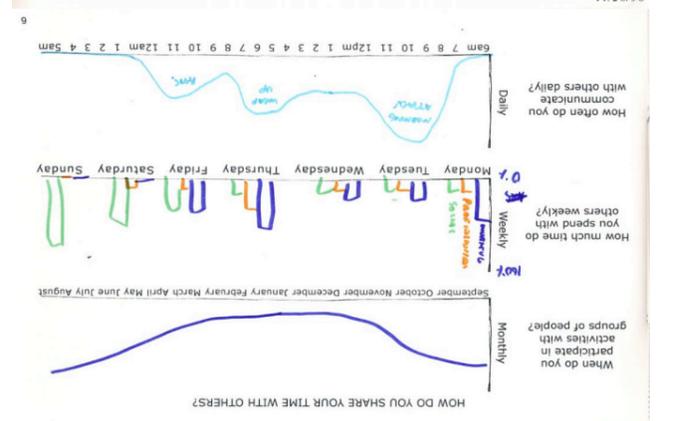
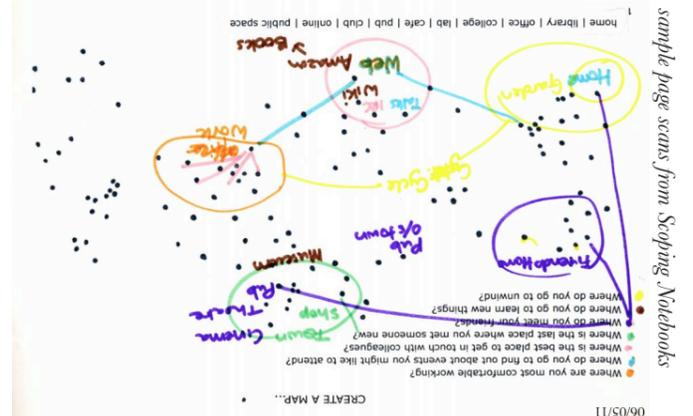
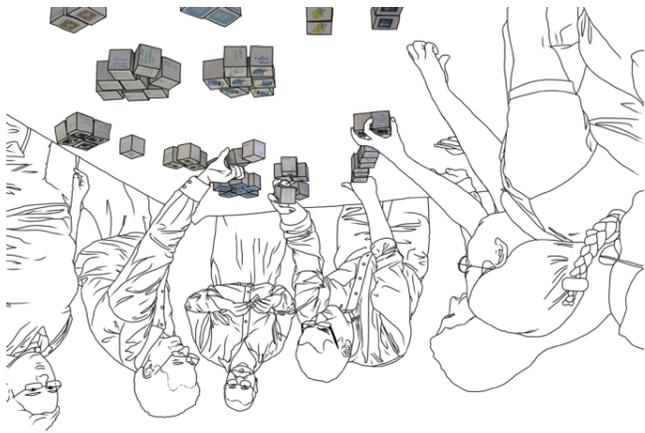
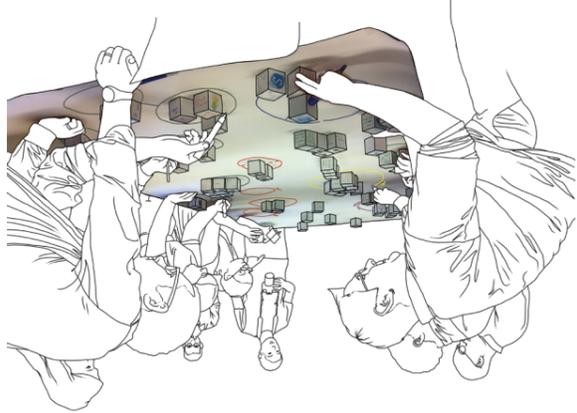
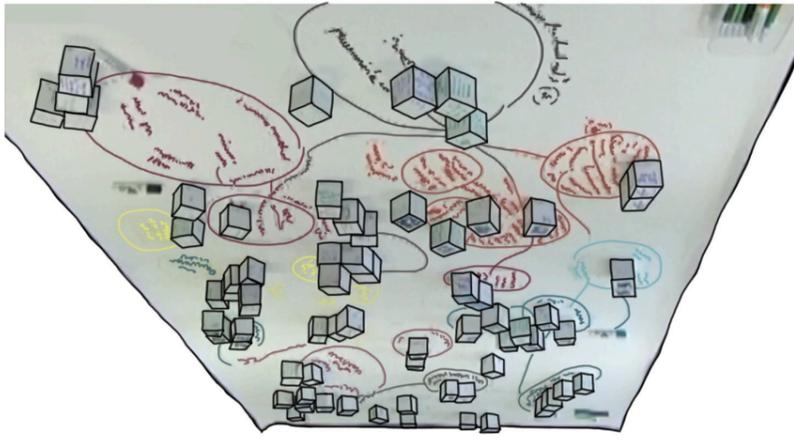
We proposed to create personal "scales of attachment", so that people could draw and map out the nature of their individual and group relationships to the university and to each other. The process of making visual marks, rather than rigid, quantitative data, would enable them to answer in a flexible and open way, yielding different creative and interpretative responses, whilst providing valuable conversational insights.

We created a series of notebooks containing diagrams to complete - visual scales where people could plot the intensity, frequency and location of their numerous relationships, map their daily activities, and show how they gained information about events and things in and around Cambridge.

CARET is uniquely placed within the university, so its staff were the perfect candidates to be our first participants - we would then work outwards to other places. It was also a way to test CARET's external links to other parts of the university.

It was initially difficult to gather a diverse range of participants, as our "outsider" status was a hurdle in contacting and persuading academics and university staff beyond the CARET team. Fortunately, one of our collaborators, Alan Blackwell of Crucible, had a considerable degree of influence that overlapped many departments, and was able to vouch for us and champion our cause along the way. The role of the "gatekeeper" - able to establish and communicate the legitimacy and value of our attempts at engagement within a community - is an essential component in gaining trust and cooperation. The scoping exercise indicated that more access to external gatekeepers for CARET staff would be beneficial in developing deeper links with other parts and members of the university.





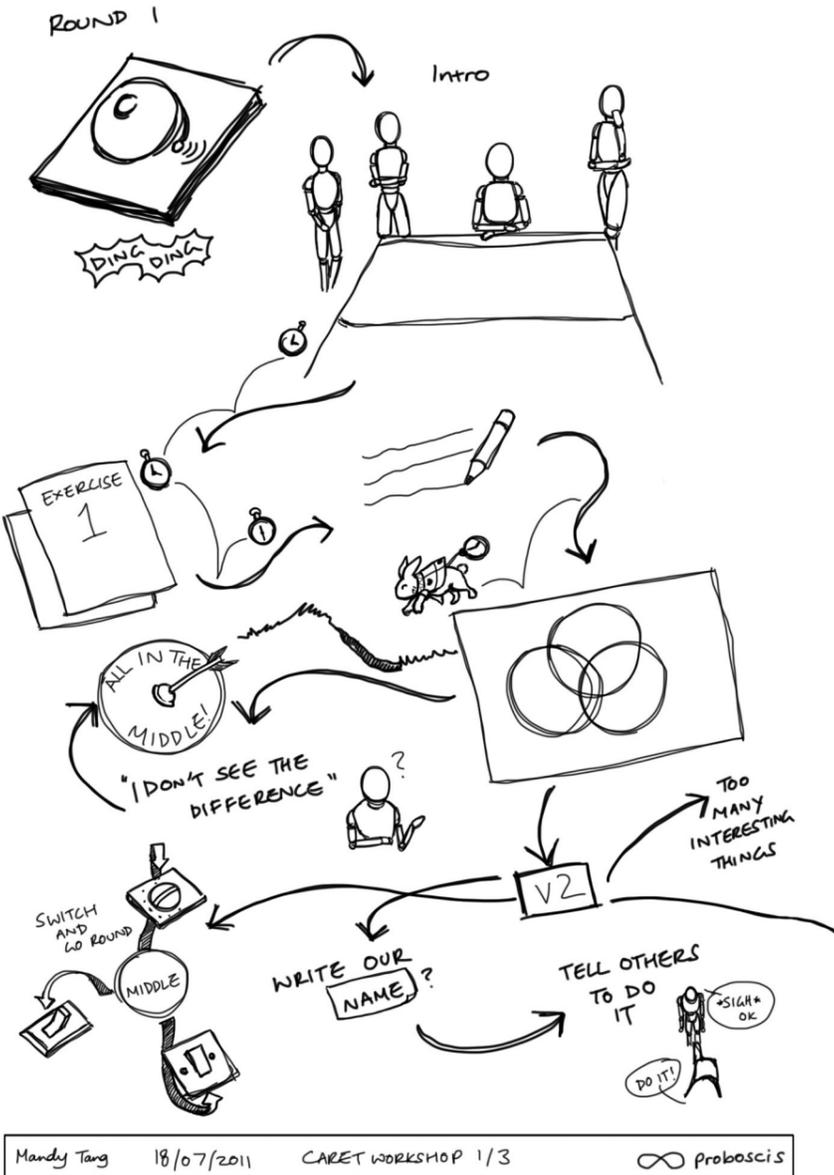
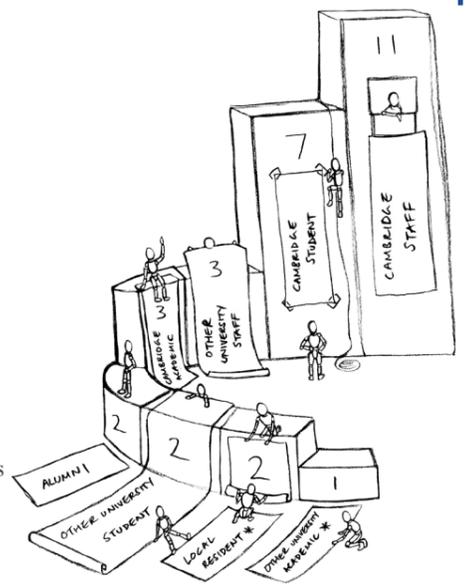
## Analysing the Scoping Exercise

The scoping exercise provided a rich set of observations that were analysed statistically (as well as sociologically) by our team ethnographer, Frederik Lesage, displaying some of the rhythms of group activities within academic life and the methods and tools people mostly use to find out about events and activities. More importantly, by analysing in detail how they completed the diagrams, we were able to discern some patterns and themes.

By encouraging participants to answer the questions in their own way using a variety of coloured pens and adapting the diagrams to suit their lives, often imposing their own constructs and rules, we witnessed creative and original methods that revealed as much about people as the actual content of their answers. However, a handful of people voiced concerns over the theoretical and methodological framework of the scoping exercises, and were slightly confused and frustrated whilst trying to complete them. It was important for people to be able to openly challenge the design, and this mode of exchange is vital to gather opinions and explore issues surrounding systems for engagement.

The multiple facets of peoples' lives and how they overlap were also revealed, by the way participants often compartmentalised their responses to distinguish between their work and personal life, and different groups and interests. This might have been in part due to the questions being particularly specific, but the tactics people employed to counter this were highly revealing and informed our later research.

The conversations that took place during the scoping exercise were also critically important in understanding the relationships that the individuals had to CARET and to many of the other groups active within the university.



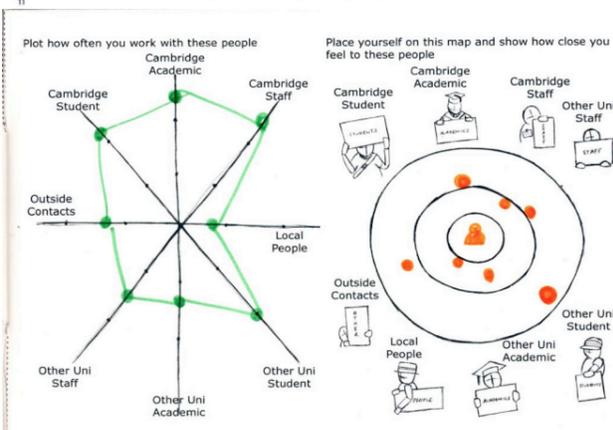
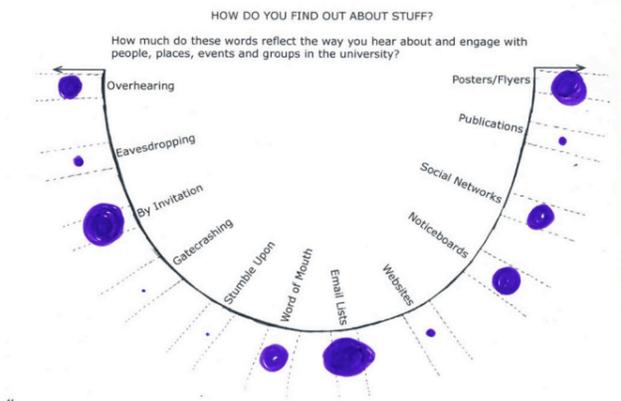
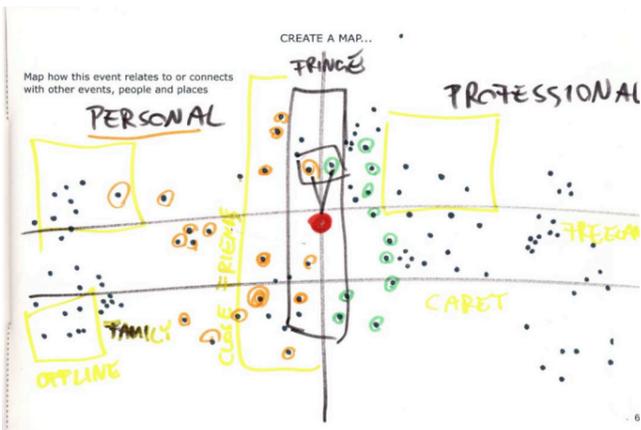
Mandy Tang 18/07/2011 CARET WORKSHOP 1/3 ∞ Proboscis

## Disruptive Hypotheses

The scoping exercise rewarded us with a considerable amount of information and observations, as well as the unique experiences and perspectives of participants. The output of the scoping phase was three "disruptive hypotheses" which we would test during the following Exploration phase and which we aspired would generate 'uncommon insights' into the problems of designing software collaboration tools.

1. That a consensual model of behaviour driven access to systems like CamTools would better reflect the needs and practices of collaboration than the existing top down, hierarchical system of permissions.
2. That people come with digital media 'baggage', i.e. other services and tools with which they are familiar and comfortable, especially where they are global or universal systems (i.e. not limited to their relationship to Cambridge). The 'enclosed' nature of standalone collaboration tools isn't reflective of the free floating nature of how people now share and collaborate online.
3. That collaboration tools require a different development model placing greater emphasis on co-creative community facilitation during the process. This could help sit them within the wider context of personal online ecologies to hopefully streamline traditional user support requirements.

The scoping phase also refined the project's focus, from concentrating on the nature and identities of groups, to how CARET could engage better with them in the design process. Rather than attempting to reduce the complexity of groups through creating personas or typologies, the key problem emerging was how to understand and engage with actual groups and where this might be possible.



## Insights from the Workshop

Whilst the co-discovery workshop was limited to CARET staff only and not a wider sample of Cambridge community members as we had hoped, it still provided a critical space which identified several critical insights and opportunities for innovation, as a result of testing the hypotheses and discussions throughout:

- we defined the qualities that are present in productive spaces for collaboration, and learnt that the validation of personal activity as part of work, is highly important to individuals in building a sense of confidence in their work and recognition of their own initiative.
  - we demonstrated the diverse range of both analogue and digital tools and services individuals are familiar with, and prefer, to access information, connect with others and get things done.
  - we discovered institutional tools are problematic as in many cases access to them is highly contingent on place and context – content in not often shareable with colleagues outside of the university or portable to non-university systems once a user has left the university itself.
- There were clearly indicated gaps between the diverse tools and services being used within the university, and opportunities for bridging them:

- **Discovery** of services and tools most appropriate for a specific task or project
- **Aggregation** of tools and services
- **Curation** of content across multiples services and platforms.

The workshop exercises involved writing and drawing as key components of their collaborative and participatory nature, using large sheets of prepared paper as well as Probosci's StoryCubes. Manifesting ideas, services, exchanges and transactions as physical objects helped break the discussions out of familiar ways of representing or visualising them which led to a final discussion that indicated a strong degree of co-discovery had actually taken place among the participants.

Our project artist, Mandy Tang, was also present to capture visual notation of the event; the following pages present her drawings and notations.

