TE RERE KĀHUI

CONNECTING WHĀNAU HAPŪ & IWI

A Rōpū Tīkanga Māori

Membership database toolkit

Prepared by 24-7 Consultancy Limited and Ipansophy Limited™

OUR **STORY**

Te Rere Kāhui is a creative activity aimed at understanding the current and future digital information needs of rōpū tikanga Māori (Transl. Māori business entities and Trusts, whānau, hapū and iwi) so as to develop tools, policies and protocols to help create optimal register information systems.

This design toolkit is an initial product of the very first Te Rere Kāhui pilot that was funded by Te Puni Kokiri and completed in 2017. As such, what is presented in this book is but the first step in a much longer journey.

Today, Māori creation, use and control of digital information are an essential basis for achieving the aspirational goals set by the members of Māori organisations. To achieve empowering outcomes of this kind, an urgent need exists to reclaim our Māori cultural identity and reframe many of the practices, policies and protocols that have been used in the past, by both Māori and non-Māori organisations, to collect and use personal information relating to whānau and Māori communities. This Te Rere Kāhui reclaiming and reframing goal responds to a number of emerging concerns.

First, in the past, Māori have often been denied access to the personal information they have provided or it has been collected and used in ways that do not meet their needs or preferences. It is not unusual for Māori register members to find it difficult to understand just how they have directly or indirectly benefited from the collection and/or use of their personal information that was requested as part of Māori register creation or other information gathering activities (e.g. statistical analysis).

> **"The Government's data about Māori should not be hidden away in various state sector silos, especially as there is enormous potential to use the data to identify and respond to opportunities and support Māori development."**

it difficult to understand just how they have directly or indirectly benefited from the collection and/or use of their personal information that was requested as part of Māori register creation or other information gathering activities (e.g. statistical analysis).

Second, instead of seeing tangible benefits, whānau and Māori communities often perceive a real and immediate risk that the personal information they provide will be used for mana-diminishing, cultural stereo-typing and profiling activities (NZ data futures forum 2014). In the past, problems of this kind have (i) diminished the mana and well-being of Māori communities and (ii) contributed towards the creation of long–term societal impressions that have a strong positive feedback in terms of influencing further mana–diminishing outcomes. Thus, there would seem to just grounds for concern about just how personal information provided by whānau or Māori communities is used – once it is beyond their immediate protection and care.

Third, a further concern for whānau and Māori communities is that the collection, storage and ongoing use of their personal information, often does not occur in ways that give effective expression to kawa, kaupapa and tikanga. Instead, there has been a tendency to view the collection, storage and use of personal information by whānau and Māori communities, and even businesses as a 'value free' activity.

The use of these so–called 'value free' data collection methods are often justified on economic efficiency grounds (i.e. a cost minimisation strategy). When organisations use 'market–economic' thinking of this kind they overlook, or choose to ignore the fact that 'cost-saving' is not necessarily the most important, or the only wellbeing goal held by whānau and Māori communities. By contrast, a commitment to kaupapa-based design method positions the design process in a Māori cultural wellbeing and survival context/orientation that will have far-reaching, positive benefits for rōpū tikanga Māori.

Finally, in the past the New Zealand government requested personal information from rōpū tikanga Māori, only to then hide it away under lock and key in various state sector silo's, medical and research institutions. Data management practices and policies of this kind deprived whānau and Māori communities access to control over, or use of their personal information in ways that could have support Māori development, entrepeneurial and innovation aspirations. Thankfully, the New Zealand government's recent adoption and gradual implementation of 'open data' policies is assisting in remedying problems of this kind.

Te Rere Kāhui is a project that aims to achieve a number of goals including: (i) understanding the current and future 'Māori register' data needs of Māori organisations, (ii) developing standards to create the optimal data register system for Māori organisations and (iii) exploring how a data framework can be collectively created by Te Rere Kāhui participants. This project is also an effort to work with rōpū tikanga Māori to ensure that data for and about Māori is used in collaborative ways that create value for Māori communities. Too often Māori relevant data is analysed and interpreted by providers of services to Māori for their own purposes. With government's emerging 'open data' policy, potential now exists for collaboration and co-production of Māori relevant data by sharing government and private data with rōpū tikanga Māori. To achieve outcomes of this kind, this project aims to work with participating rōpū tikanga Māori to co-create appropriate policies and protocols for sharing, using and adding value to data that is coordinated across government, private and Māori institutional contexts. Te Rere Kāhui has the potential to become a 'game changer', a way to support rōpū tikanga Māori that will potentially have far reaching benefits that support Māori cultural survival and wellbeing.

It will be important to work with rōpū tikanga Māori to develop ways to create, share and use register data that (i) gives appropriate expression to kawa, kaupapa and tikanga, (ii) is guided by the preferences of register members both now and as they change in the future and (iii) empowers whānau along with Māori communities and businesses to pursue and realise their moemoea supported by evidence-based decision making.

We see this design toolkit and creative activity as a way to support rōpū tikanga Māori.

CONTENTS

AD HOC TO KAUPAPA **CENTRED DESIGN**

This version of the toolkit is designed to take our Rōpū Tikanga Māori them from an ad-hoc design process (see illustration) to a register by design process (see illustrations), it adopts a kaupapa-based design philosophy that has drawn inspiration and guidance from the published writings of our Māori pūkenga in the Western Academy and a pilot Te Rere Kāhui research project that will be published along with this design toolkit in 2017.

Although this touches on kaupapa centred design to fully integrate a Kaupapa-Tikanga based design philosophy this would require further investigation outside the scope of this pilot project. We have developed a basic illustration of what that journey might look like and how the expression of kawa, kaupapa tuku iho and tikanga me ōku tūpuna could be incorporated by rōpū tikanga Māori.

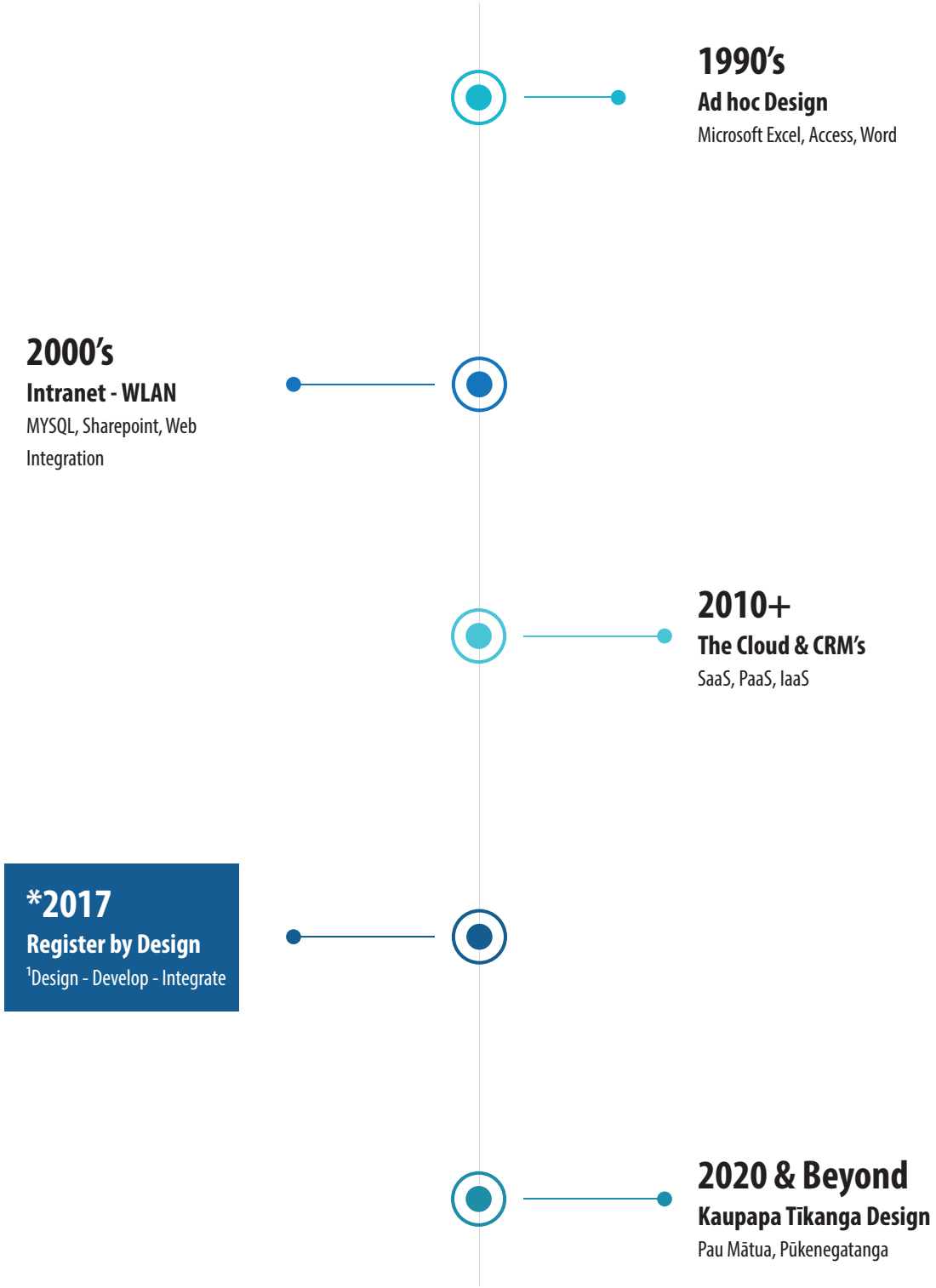
We know the Kaupapa-Tikanga approach to design was employed by our tūpuna with great success. Both oral and written narratives of the design experiences of our tūpuna indicate that they had a capacity for auahatanga (Transl. creativity), mōhiotanga (Transl. experiential learning), māharahara (Transl. thinking), hoahoa (Transl. planning) and whakapūmau (transl. making) that made possible the survival and wellbeing of both tangata and whenua.

(refer to illustrations on page7, 8 & 9)

NOTES

REGISTER DESIGN FRAMEWORKS **TIMELINE**

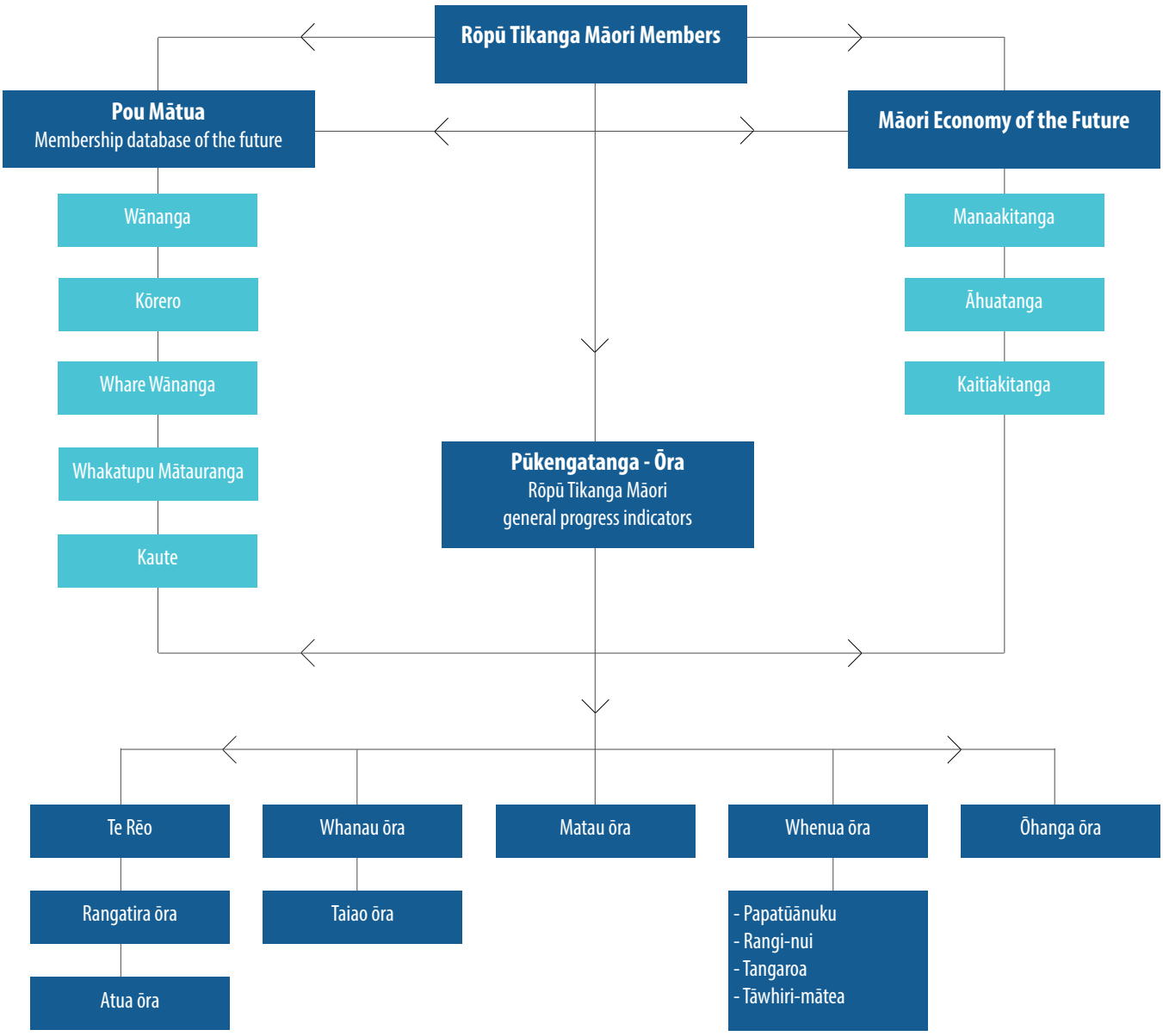
The timeline below is a simple illustration of the technology employed since the mid 1990's and the frameworks for the past present and potential future



[1] This toolkit is centred on this approach for membership database design

KAUPAPA TIKANGA **DESIGN**

The illustration touches on a potential framework that could be incorporated into register designs of the future. This toolkit does not venture into this territory in great detail as a) would require further research with Rōpū Tikanga Māori on a national scale and b) further workshops with these entities are needed to develop such a framework. The illustration on page 10 further highlights the level of resourcing and time that would be needed for a Rōpū Tikanga Māori to implement such a framework.



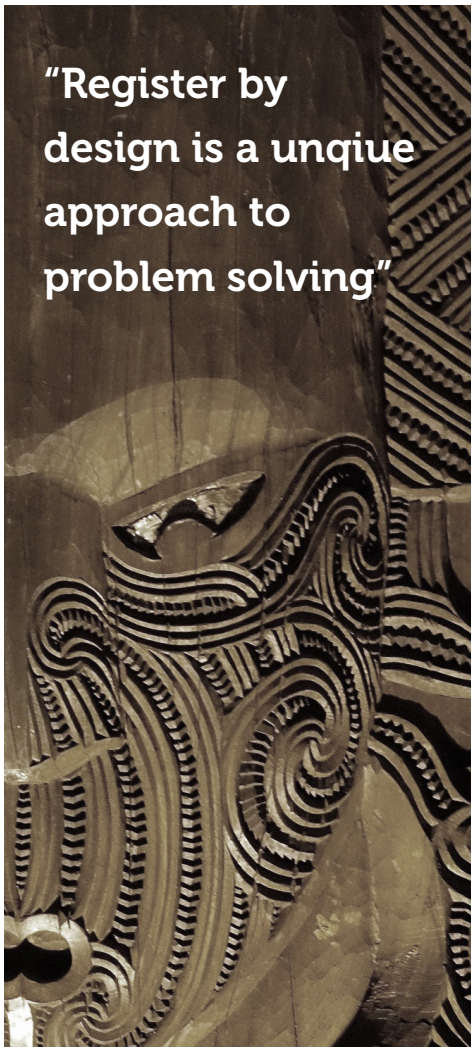
COMPARISON OF THE THREE **FRAMEWORKS**

The below illustration takes a comparative look at the three different frameworks

	Ad Hoc Design	**Register By Design**	**Kaupapa Tīkanga**
Outcomes	**1995 - 2015**	**2016 - 2020**	**2020 +**
Time horizons - For development and implementation	20 years	1 - 5 years	10 years +
Risks associated with things going wrong	High	Low - medium	Low
Total direct monetary cost	Low - medium	Medium	High
Development time required to complete	1 - 2 years	2 -3 years	10 years +
Methodology	Technology & efficiency drivers	Mixed methodology	Kaupapa Māori
Goal oreintating	Establishment	Accurate, robust, efficient	Aspiration based
Likely hood of need for major updates / changes	High	Medium - high	Low
Likely level of use	Daily / annual	Daly / annual	24/7
Backups & security	Low - medium	Medium - high	High
Rate of growth of knowledge / informative / data	Low - medium	Medium - high	Exponential
Effectively expresses kawa / kaupapa / tīkanga	Low - medium	Medium	Kaupapa based
Effectievly expresses the changing preferences of rōpu tīkanga māori	Low - medium	Medium	Whānau / Hapū / Iwi driven
Gives effective and enduring expression to whakapapa	Low	Medium	Whakapapa based
Adoption of emerging technology	Low	Low - medium	High
Integrates all forms of emerging digital media	Low	Low - medium	High
Responsive to emerging economic / social / ecological concerns	Low	Low - medium	Relative
Data sovereignty	Medium	Medium	High
Stimulates education, employmeny and creative activity	Low	Medium	High
Educational and creative activity	No	No	Yes
Economic orientation	Beneficiary based	Beneficiary based	Stakeholder based
Internal capacity development	Low	Medium	High
Strategic policy instruments	Low	Medium	High
Contribution to Māori cultural survival	Low	Low - medium	High
Contribution to whānau Māori wellbeing	Low	Low - medium	High

THE PROCESS FOR **REGISTER BY DESIGN**

This toolkit is centred on a register by design framework



DESIGN

In this phase, you'll learn how to better understand your people. You will hear their aspirations, and get smart on your design challenge for your membership database.

DEVELOP

You will make sense of everything that you've heard, generate ideas, identify opportunities for design, and test and refine your solutions.

IMPLEMENTATION

Now is your chance to bring your solution to go-live. You'll figure out how to get your idea to developers and how to maximise its value to all relevant stakeholders.

Register by design is a unique approach to problem solving, one that can occasionally feel more like madness than method but you rarely get to new and innovative solutions if you always know precisely where you're going. The process is designed to get you to learn directly from people, open yourself up to a breadth of creative possibilities, and then zero in on what's most desirable, feasible, and viable for the people you're designing for. You'll find yourself frequently shifting gears through the process, and as you work through its three phases you'll swiftly move from concrete observations to highly abstract thinking, and then right back again into the nuts and bolts of your prototype. Its called diverging and converging. By going really big and broad during the development phase, we dream up all kinds of possible solutions. But because the goal is to have a significant impact for your people, we have to then identify what, among that constellation of ideas, has the best shot at really working. You'll diverge and converge a few times, and with each new cycle you'll come closer and closer to a market-ready solution.

THE PROCESS FOR **REGISTER BY DESIGN**

Trust the Process even if it feels uncomfortable.

Designing a Membership database isn't a perfectly linear process, and invariably has its own **contours and character.**

But no matter what kind of design challenge you've got, you'll move through three main phases: Design, Develop, and Implementation.

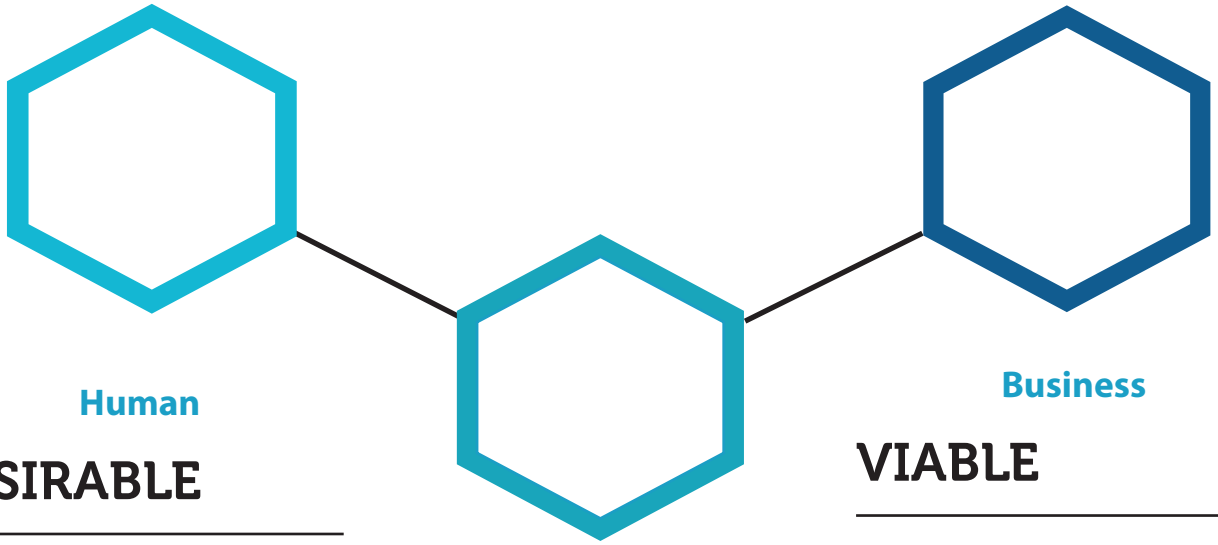
By taking these three phases in turn, you'll build deep empathy with the communities and individuals you're designing it for; you'll figure out how to turn what you've learned into a chance to design a new solution for your people; and you'll build and test your ideas before finally putting them out into the world.

Kaupap-centred design has been used around the world to tackle a vast array of design challenges, and fits perfectly with Māori organisations.

CREATE **REAL IMPACT**

This tool kit is to help you arrive at solutions that are desirable, feasible, and viable. By starting with your people, their aspirations (financial freedom), fears (data sharing), and needs (jobs, education), you can quickly uncover what's most desirable. But that's only one lens through which you will look at your register solutions.

Once you have determined a range of solutions that could appeal to the people your looking to serve, you then start to home in on what is technically feasible to actually implement and how to make the solution financially viable. It's a balancing act, but one that's absolutely crucial to designing membership database solutions that are successful and sustainable.



Human

DESIRABLE

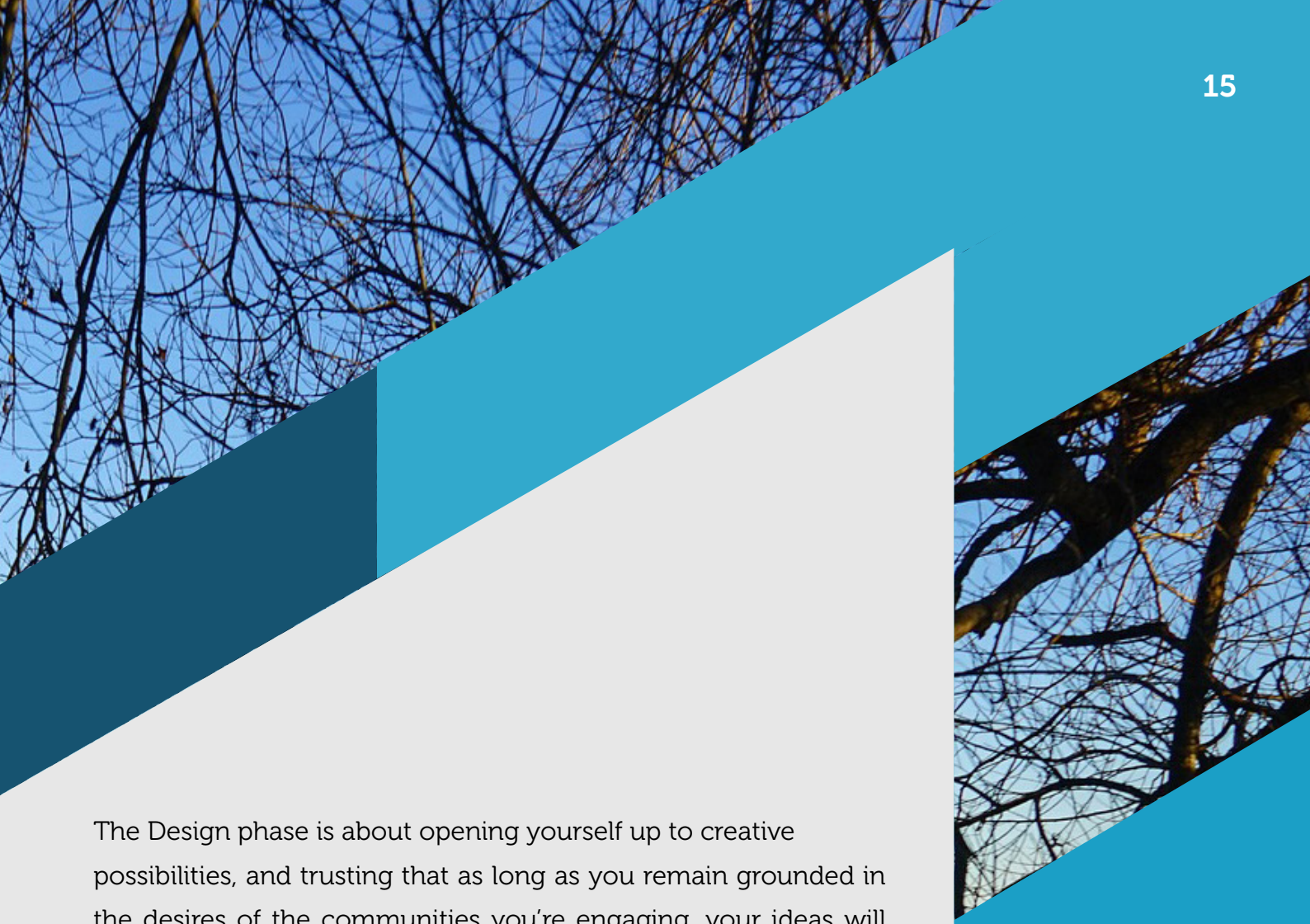
Business

VIABLE

Technology

FEASIBLE

PHASE 1
DESIGN



The Design phase is about opening yourself up to creative possibilities, and trusting that as long as you remain grounded in the desires of the communities you're engaging, your ideas will evolve into the right solutions.

You'll build your team, get smart on your challenge, and talk to a variety of people. You may already have a database in place but there is no reason why you can't start at this stage.

THIS PHASE WILL HELP YOU ANSWER

How do I get started?
How do I conduct an interview?
How do I keep people at the centre of my project?
What are other tools I can use to understand people?

IN THIS SECTION

Phase 1 - Design

NOTES

FRAME **YOUR DATABASE DESIGN**

Properly framing your database design is critical to your success. Here's how to do it just right.

Getting the right frame on your design challenge will get you off on the right foot, organise how you think about your solution, and at moments of ambiguity, help clarify where you should push your design. Framing your design is more art than science, but there are a few key things to keep in mind. First, ask yourself: Does my challenge drive toward ultimate impact, allow for a variety of solutions, and take into account context? Dial those in, and then refine it until it's the challenge you're excited to tackle.

STEPS

01 Start by taking a first stab at writing your design challenge. It should be short and easy to remember, a single sentence that conveys what you want to do. Phrase these as questions which set you and your team up to be solution-oriented and to generate lots of ideas along the way.

02 Properly framed design challenges drive toward ultimate impact, allow for a variety of solutions, and take into account constraints and context. Now try articulating it again with those factors in mind.

03 Another common pitfall when scoping a design challenge is going either too narrow or too broad. A narrowly scoped challenge won't offer enough room to explore creative solutions. And a broadly scoped challenge won't give you any idea where to start.

04 Now that you've run your challenge through these filters, do it again. It may seem repetitive, but the right question is key to arriving at a good solution. Try to come up with five possible solutions in just a few minutes. If so, you're likely on the right track.

TIME
90 minutes
DIFFICULTY
Hard
WHAT YOU'LL NEED
Pen, Frame Your Design Challenge worksheet
PARTICIPANTS
Design team

FRAME YOUR DESIGN **WORKSHEET**

It's rare that you'll frame Your database design just right on the first try; You will often go through a number of revisions and lots of debate as you figure out precisely how to hone the problem we're looking to solve.

What is the problem you're membership database is trying to help solve

Eg Getting accurate data to help us Improve the lives of our people

Take a stab at framing it as a design question.

Eg How might this database improve the lives of our people

Now, state the ultimate impact you're trying to have.

Eg We want our people in low income communities to thrive

What are some possible solutions to your problem?

Eg Targeted Education, Health and social programs for these communities

CREATE **A PROJECT PLAN**

You need to create a plan. This gives you a chance to think through all the logistics of your project, and even though they're bound to change as things progress, you'll be in much better shape if you can plan for what's ahead. Reflect on your timeline, the space you'll work in, your staff, your budget, what skills you'll need, trips you'll take, and what you'll need to produce. Getting a good handle on all of this information can keep you on track.

STEPS

01 A good place to start is with a calendar. Print out or make a large one and put it up in your workspace. Now mark key dates. They could be deadlines, important meetings, travel dates, or times when your team members are unavailable

02 Now that you've got a sense of your timeline, look at your budget and staff. Do you have everything that you'll need? If you foresee constraints, how can you get around them?

03 You'll need to get smart on your topic before you head into the field. Who should you talk to now? What will you need to read to be up to speed on your challenge?

04 Answer questions like: When should my team head to the Marae? Will my team make one visit or two? Will our partners be visiting? Will we need to physically make something? How much time, money, and man-power will we need to produce it?

05 Your project plan will change as things evolve, and that's perfectly OK. You can always amend things as you go but make sure that you're really thinking through your project before you start.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pen, paper, Post-its, calendar
PARTICIPANTS
Design team

START **THE BUSINESS CASE**

As you solidify your ideas and start to test them, you'll also need to remain cognisant of your business case. This simple sheet asks you key questions like what's it going to cost, what are key partnerships you'll need to forge, and what resources are vital to getting the job done.

STEPS

01 Print out a Business case template for each of your team members.

02 Sit down with your team and start to fill out the sections of the Business Case. When you fill it out the first time, expect for there to be holes. It's okay not to know exactly how everything will work

03 You may need to pause filling out the sheet to get more information.

04 Like everything else, you'll refine it throughout the project

TIME
1 - 8 hours
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Business Case template
PARTICIPANTS
Design team

BUSINESS CASE **WORKSHEET**

Business Case

Registration database

Designed for: Iwi Org

Designed by: Iwi Mgt

Key Partners	**Key resources**	**Key activities**	**Value Proposition**	**Suppliers**
Lawyers Management Finance IT Provider Affiliated Hapū Affiliated Marae	People Supplies Meeting Rooms			
Costs			**Channels**	**Stakeholders**
Prototype Build ongoing Resgister Team			Events Social Media Website Phone calls	

NOTES

BUILD **A TEAM**

An interdisciplinary mix of thinkers, makers, and doers is just the right combination to tackle any design challenge.

Kaupapa-centred design works best with cross-disciplinary teams. You could put members of your staff to work on the database, but if you also throw someone from governance, an IT geek, an external advisor into the mix, you're going to bring new modes of thinking to your team. It's smart to know what kind of talent your team will need.

STEPS

01 First, assess how many team members you'll need, your staff's availability, and when your project should start and end.

02 Look at the core members of your team and determine what they're good at and what they're not so good at.

03 Is there a clear technical capability that you'll need but don't currently have maybe a solutions architect, remember that you can always add a team member for a shorter period of time when their skills are most important.

TIME
60 minutes
DIFFICULTY
Hard
WHAT YOU'LL NEED
Pen, paper
PARTICIPANTS
Project founder

KORERO

Register by design isn't just about talking to a lot of people, it's about talking to the right people. Build a strategy now so that your hui really count.

Before you start talking to the people you're designing for, it's important to have a strategy around who you talk to, what you ask them, and what pieces of information you need to gather. By planning ahead, and tracking who you talk to once you've done it, you can be sure to have the right balance of experts and laymen, as well as a full range of behaviours, beliefs, and perspectives.

STEPS

01 As you start to determine who you want to talk to, think about a variety of factors: age, gender, location. Who do you really need to hear from?

02 Wānanga can be a highly useful tool and also help you identify who you might like to speak more with in an individual Interview.

03 Refer to Extremes and Mainstreams to make sure that you're talking to a broad spectrum of people.

TIME
30 - 60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, paper
PARTICIPANTS
Design team

INTERVIEW

There's no better way to understand the hopes, desires, and aspirations of those you're designing for than by talking to the Kanohi ki te Kanohi.

Interview is really the crux of the design phase. Interview is about getting to the people you're designing for and hearing from them in their own words. Interviews can be a bit daunting, but by following these steps below you'll unlock all kinds of insights and understanding that you'll never get sitting behind your desk. Whenever possible, conduct your Interviews in the person's space. You can learn so much about a person's mindset, behaviour, and lifestyle by talking with them where they live or work.

STEPS

01 No more than three research team members should attend any single Interview so as to not overwhelm the participant or crowd the location. Each team member should have a clear role (i.e. interviewer, note-taker, photographer).

02 Come prepared with a set of questions you'd like to ask.

03 Make sure to write down exactly what the person says, not what you think they might mean. This process is premised on hearing exactly what people are saying.

04 What you hear is only one data point. Be sure to observe the person's body language and surroundings and see what you can learn from the context in which you're talking. Take pictures, provided you get permission first.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, paper, Interview Guide worksheet
PARTICIPANTS
Design team, person you're designing for

INTERVIEW GUIDE **WORKSHEET**

Open General

What are some broad questions you can ask to open the conversation and warm people up?

How are you connected to organisation?

Are you involved in Marae, Hapū, Kura, activities

what challenges do you face ...?

what does an optimal register look like to help realise your aspirations

What does good data look like?

How should we best capture this data?

What ways can we reduce data entry error?

Can we improve data sharing internally and externally?

How can we visualize this data for our planning needs?

It's time to communicate with iwi members – how can I do this efficiently?

Can we better streamline the mail out process and reduce my retuned mail rates?

What are the legal issues that we need to consider?

How can I lock certain information to ensure privacy?

Then Go Deep

What are some questions that can help you start to understand this person's hopes, fears, and ambitions?

How are you connected to organisation?

Are you involved in Marae, Hapū, Kura, activities

what challenges do you face ...?

what does an optimal register look like to help realise your aspirations

What does good data look like?

How should we best capture this data?

What ways can we reduce data entry error?

Can we improve data sharing internally and externally?

How can we visualise this data for our planning needs?

It's time to communicate with iwi members – how can I do this efficiently?

Can we better streamline the mail out process and reduce my retuned mail rates?

What are the legal issues that we need to consider?

How can I lock certain information to ensure privacy?

BRAIN**STORM**

Energise your team and drum up innovative ideas.

Before you start talking to the people you're designing for, it's important to have a strategy around who you talk to, what you ask them, and what pieces of information you need to gather. By planning ahead, and tracking who you talk to once you've done it, you can be sure to have the right balance of experts and laymen, as well as a full range of behaviours, beliefs, and perspectives.

STEPS

01 Pass out pens and Post-its to everyone and have a large piece of paper, wall, or whiteboard on which to stick them.

02 Review the Brainstorm Rules before you start.

03 Pose the question or prompt you want the group to answer. Even better if you write it down and put it at the top of the paper, wall, or whiteboard.

04 As each person has an idea, have her describe to the group as she puts her Post-it on the wall or board.

05 Generate as many ideas as possible.

TIME
30 - 60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, a large sheet of paper or whiteboard
PARTICIPANTS
Design team, partners, community members

BRAINSTORM **RULES**

Seven little rules that unlock the creative power of a brainstorming session.

We've all been in Brainstorms that went nowhere, the goal isn't a perfect idea, it's lots of ideas, collaboration, and openness to solutions. The last thing you want in a Brainstorm is someone who, instead of coming up with ideas, only talks about why the ones already mentioned won't work. Not only does that kill creativity, but it shifts the group's mindset from a generative one to a critical one. The only way to get to good ideas is to have lots to choose from.

STEPS

01 Defer judgement. You never know where a good idea is going to come from. The key is to make everyone feel like they can say the idea on their mind and allow others to build on it.

02 Encourage wild ideas. Wild ideas can often give rise to creative leaps. When devising ideas that are wacky or out there, we tend to imagine what we want without the constraints of technology or materials.

03 Build on the ideas of others. Being positive and building on the ideas of others take some skill. In conversation, we try to use " yes, and..." instead of "but."

04 Stay focused on the topic. Try to keep the discussion on target, otherwise you may diverge beyond the scope of what you're trying to design for.

05 One conversation at a time. Your team is far more likely to build on an idea and make a creative leap if everyone is paying full attention.

06 Be visual. In Brainstorms, we put our ideas on Post-its and then put them on a wall. Nothing gets an idea across faster than a sketch.

07 Go for quantity. Aim for as many new ideas as possible. Crank the ideas out quickly and build on the best ones

TIME
60 minutes
DIFFICULTY
Easy
WHAT YOU'LL NEED
Print out the Brainstorm Rules
PARTICIPANTS
Any partners or people you're designing for who are relevant

KORERO **STARTERS**

Korero Starters put a bunch of ideas in front of a person and seek to spark their reactions.

Conversation Starters are a great way to get a reaction and begin a dialogue. The idea here is to suggest a bunch of ideas around a central theme to the people you're designing for and then see how they react. The ideas you generate for your Conversation Starters are totally sacrificial, so if they don't work, drop them and move on. The goal here is to encourage creativity and outside-the-box thinking from the people you're designing for.

STEPS

01 Determine what you want the people you're designing for to react to. If you want questions regarding finance, income or saving on your registration form to help you develop an iwi based saving program you might come up with a bunch of korero starters around banks and saving.

02 Now come up with many ideas that could get the conversation started. What is the saving program of the future, the traditional saving plan. Come up with a list of ideas like this to share with the person you're designing for.

03 Once you're with the person you're designing for, start by telling them that you're interested in their reactions to these Korero Starters. Some may be silly, some may be absurd, you're only looking to get their opinions.

04 As the person you're designing for shares their take on your Korero Starters, be open to however they interpret the concepts. When one of them strikes him or her, ask more questions. You can learn a lot about how they think and what they might want out of your solution.

TIME
30 - 60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, notebook
PARTICIPANTS
Design team, people you're designing for

METHOD **IN ACTION**

Conversation Starters.

This Method is a great way to open a person up to creative thinking and to then learn more about their attitudes about the subject. An example of how this method could be used

A Rōpū Tikanga Māori is wanting to design a formal savings tools for low-income members of their community.
Korero starters could be how members felt about banks. By presenting them with very basic ideas about banks and then soliciting a response, the team could come up with some pretty compelling insights.

You could learn that some Maori think banks are only about corporates and big money," and don't care about the little guy. Another person could tell the team that they want their money working in the community, a benefit that he did not think would happen if it were sitting in a foreign owned bank.

Remember that the goal is to get people talking. If the person you're talking to doesn't have much of a response to one, move right onto the next. Keep going until you find something that works, then keep the conversation going with open-ended questions. This is also a chance to get people thinking creatively so feel free to ask outlandish questions to keep the conversation flowing.

WĀNANGA

You can come to a quick understanding of a community's life, dynamics, and needs by conducting a Wānanga.

Though a Wānanga may not offer the depth of an individual korero, it can give you a compelling look at how a larger set of the people you're designing for operates. The best Wananga seek to hear everyone's voice, get diverse opinions, and are strategic about group makeup. For example, an all-female group might give you insight into the role of women in the organisation whereas a mixed group may not. If you're looking to learn quickly what is valuable to a community, Wānanga are a great place to start.

STEPS

01 Identify the sort of group you want to talk with. If you're trying to learn something specific, Governance and management, Hapū by Hapū, Marae by Marae organise the group so that they're likely to have good answers to the questions that you've got.

02 Convene the Wānanga, perhaps a shared community space that all can access..

03 In a Wānanga, be certain to have one person asking the questions and other team members taking notes and capturing what the group is saying.

04 Come prepared with a strategy to engage the quieter members of the group. This can mean asking them questions directly or finding ways to make the more vocal members of the group recede for a moment.

05 Wānanga are a great setting to identify who you might want to go deeper with in a co-design session.

TIME
½ a day to a 2 full days
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, paper, camera
PARTICIPANTS
At least 2 members of the design team, 7-10 people or more you're designing for

RESEARCH

Getting up to speed on your challenge is crucial to success in the field.

During the design phase, you need to be talking with people about their challenges, ambitions, and constraints. But as you move through the design phase, there will be moments where you'll need more context, history, or data a Wānanga style hui can afford. Social sector challenges can be really thorny, which is why secondary research, whether done online, by reading books, or by crunching numbers, can help you ask the right questions

STEPS

01 Once you know your database design challenge, it's time to start learning about its broader context.

02 Try to find recent innovations in your particular area. They could be technological (open data, IoT), behavioural (Social Media), or cultural. Understanding the edge of what's possible will help you ask great questions.

03 Take a look at other solutions other similar organisations have done. Which ones worked? Which ones didn't? Are there any that feel similar to what you might design? Any solutions that have inspired you to make one of your own?

04 Because interviews can be highly subjective, use your research to get the facts and figures you'll need to understand the context of your design challenge.

TIME
1 - 2 days
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Internet, pen, notebook, research materials
PARTICIPANTS
Design team

KORERO **WITH EXPERTS**

Experts can fill you in quickly on a topic, and give you key insights into relevant history, context, and innovations.

Though the crux of the design phase is talking with the people you're designing for, you can gain valuable perspective by korero with experts. Experts can often give you a systems-level view of your project area, tell you about recent innovation successes and failures and offer the perspectives of rōpu tīkanga māori, government, or non government organisations. You might also look to experts for specific technical advice.

STEPS

01 Determine what kind of expert you need. If you're working with data, perhaps a data specialist or a solutions architect (technical advice), lawyer (privacy laws & data sovereignty), govt agency (what data do they hold that you want) other iwi register teams.

02 When recruiting your experts, give them a preview of the kinds of questions you'll be asking and let them know how much of their time you'll need.

03 Choose experts with varying points of view. You don't want the same opinions over and over.

04 Ask smart, researched questions. Though you should come prepared with an idea of what you'd like to learn, make sure your game plan is flexible enough to allow you to pursue unexpected lines of inquiry.

05 Record your expert korero with whatever tools you have. A pen and paper work fine.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, camera, notebook
PARTICIPANTS
Design team, expert

DEFINE **YOUR COMMUNITY**

Consider the broad spectrum of people who will be touched by your design solution.

Before you dig into your in-context research, it's critical to know who you're designing for. You're bound to learn more once you're in the field, but having an idea of your target audience's needs, contexts, and history will help ensure that you start your research by asking smart questions. And don't limit your thinking just to the people you're designing for. You may need to consider government agencies that hold data on your people, non government organisations, other businesses, or other iwi you might want to share data with or not!

STEPS

01 With your team, write down the people or groups that are directly involved in or reached by your database. Are you designing for the eligible members of your organisation only? For Marae? , for Hapu? For affiliated organisations? To plug into government databases? Write all the groups down on Post-its and put them on a wall so you can visualise your audience.

02 Now add people or groups who are peripherally relevant, or are associated with your community.

03 Think about the connections these people have with your database. Who are the champions? Who are the questioners? Who do you most need on your side? Add them to the wall.

04 Now arrange these Post-its into a map of the people involved in your challenge. Save it and refer to it as you move through the design phase.

TIME
60 minutes
DIFFICULTY
Easy
WHAT YOU'LL NEED
Pen, paper, Post-its
PARTICIPANTS
Design team

EXTREMES AND **MAINSTREAMS**

Designing a database solution that will work for everyone means talking to both extreme users and those squarely in the middle of your community.

When recruiting people to Korero to go after both the big broad mainstream and those on either extreme of the spectrum. An idea that suits an extreme user will nearly certainly work for the majority of others. And without understanding what people on the far reaches of your solution need, you'll never arrive at answers that can work for everyone. More importantly, talking to people at the extreme end of your product or service can spark your creativity by exposing you to use cases, hacks, and design opportunities that you'd never have imagined.

STEPS

01 Think about all the different people who might use your solution. Extremes can fall on a number of spectrums and you'll want variety. Maybe you'll want to talk to someone who lives alone and someone who lives with a large extended family. Maybe you'll want to talk to both the elderly and children. Each will offer a take on your register that can spur new thinking.

02 Be sensitive to certain extremes when you interview them. They may often be left out of discussions like these so make them feel welcome and let them know that their voices are critical to your research.

TIME
30 - 60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, notebook
PARTICIPANTS
Design team, people you're designing for

EXTREMES AND **MAINSTREAMS**

Though extreme users can spur all kinds of new thinking, make sure that your particular challenge leads you to more nuanced extremes. Here's just a basic example of thinking across the spectrum.

"A Rōpu Tīkanga Māori is working on getting whakapapa data for their register to help with the verification process. They want to talk with hapū for their ideas. What constitutes an extreme user will vary, but your commitment to talking with them shouldn't.

One decision maker from a Hapū of the rōpu tīkanag māori thinks whakapapa data shouldn't be held by the iwi and the hapū wants to do the verifications and tell the iwi verbally that that person is a qualified member of the iwi.

One decision maker from another Hapū wants the iwi to hold all the whakapapa data for them and also do all the verifications as well as hold copies of appropriate documents for verification (birth certificate, passport) … which of these ideas is extreme which of these ideas is mainstream?

FIND **THEMES**

As you share your learnings with your team, patterns and themes are likely to emerge. Here's how to spot and make sense of them.

STEPS

01 Gather your team around your Post-its from previous sessions. Move the most compelling, common, and inspiring ideas to a new board and sort them into categories.

02 Look for patterns and relationships between your categories and move the Post-its around as you continue grouping. The goal is to identify key themes and then to translate them into opportunities for design.

03 Arrange and rearrange the Post-its, discuss, debate, and talk through what's emerging. Don't stop until everyone is satisfied that the clusters represent rich opportunities for design.

04 Identifying these themes will help you create frameworks and write design principles.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Your Post-its and boards from previous sessions
PARTICIPANTS
Design team

CREATE **INSIGHT STATEMENTS**

A critical piece of the design phase is plucking the insights that will drive your design out of the body of information you've gathered.

You've heard a lot from a lot of different people, downloaded learnings, and identified key themes from your research. The next step in the synthesis process is to Create Insight Statements, succinct sentences that will point the way forward. Insight statements are incredibly valuable as they'll help you frame How Might We questions and give shape and form to subsequent Brainstorms. It's not always easy to create them, and it will probably take some work editing them down to the three to five main insights that will help you drive toward solutions.

STEPS

01 Take the themes that you identified in Find Themes and put them up on a wall or board.

02 Now, take one of the themes and rephrase it as a short statement. You're not looking for a solution here, merely transforming a theme into what feels like a core insight of your research. This is a building block, not a resolved question.

03 Once you've done this for all the themes, look back at your original design challenge. Sift through your insight statements and discard the ones that don't directly relate to your challenge. You only want three to five insights statements.

04 Take another pass at refining your insights. Make sure that they convey the sense of a new perspective or possibility. Consider inviting someone who is not part of your team to read your insight statements and see how they resonate.

TIME
60 minutes
DIFFICULTY
Hard
WHAT YOU'LL NEED
Pens, Create Insight Statements worksheet your work from Find Themes
PARTICIPANTS
Design team

WORKSHEET CREATE INSIGHT STATEMENTS

Write Your Design Challenge

Our design challenge is to make our registration database, secure, user-friendly, and be relevant

Theme: Member Verification

Insights

Our members want an easy process to be verified

Our Members don't want to come to office to be verified

Our members want to be able to access their information online

Our members don't want to share their data with government

Theme: Housing

Insights

Our members want affordable housing

Our Members want warm housing

Our members want to own their own house

Theme: Education

Insights

Our members want us to help with paying for education

Our members want us to help them with providing education programs

Our members want to learn Te Reo

HOW **MIGHT WE**

Translate your insight statements into opportunities for design by reframing them as "How Might We" questions.

By Finding Themes and Creating Insight Statements you've identified problem areas that pose challenges to the people you're designing for. Now, try reframing your insight statements as How Might We questions to turn those challenges into opportunities for design. We use the How Might We format because it suggests that a solution is possible and because they offer you the chance to answer them in a variety of ways. A properly framed How Might We doesn't suggest a particular solution, but gives you the perfect frame for innovative thinking.

STEPS

01 Start by looking at the insight statements that you've created. Try rephrasing them as questions by adding "How might we" at the beginning. Use the worksheet.

02 The goal is to find opportunities for design, so if your insights suggest several How Might We questions that's great.

03 Now take a look at your How Might We question and ask yourself if it allows for a variety of solutions. If it doesn't, broaden it. Your How Might We should generate a number of possible answers and will become a launchpad for your Brainstorms.

04 Finally, make sure that your How Might We's aren't too broad. It's a tricky process but a good How Might We should give you both a narrow enough frame to let you know where to start your Brainstorm, but also enough breadth to give you room to explore ideas.

TIME
60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Insight statements, pens, Create How Might We Questions worksheet
PARTICIPANTS
Design team

CREATE **HOW MIGHT WE QUESTIONS?**

Create How Might We Questions

Insight: Our members want an easy process to be verified

How might we create easy process for members to be verified

Insight: Our members want to own their own house

How might we help our members buy a house for their whanau

Insight: Our members want us to help with paying for their education

How might we help make education opportunities affordable for our members

NOTES

CREATE **FRAMEWORKS**

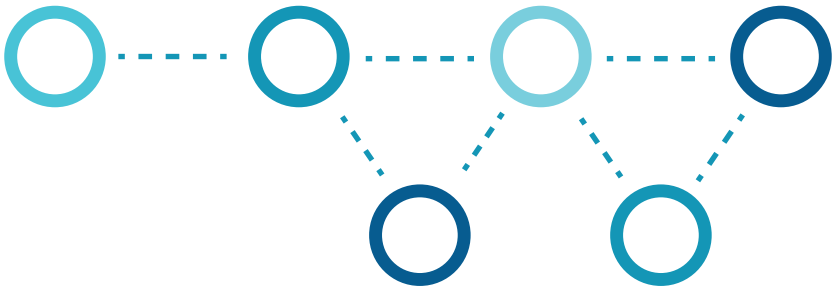
A framework is a visual representation of a system and a great way to make sense of the experience or data you are collecting. Use them to highlight key relationships and develop your strategy.

Journey Map

A journey map, allows you to visualise a process beginning to end. This simple framework will help you to more easily imagine the entire flow of a users experience, whether it's how the database may work or all the touchpoints of a members' journey with the organisation. This doesn't need to be an in-depth, detailed representation, but rather a quick-and-dirty way of thinking out how a process unfolds.

Relational Map

A relational map is used to see how different datasets relate to one another. This type of framework can organise some of what you've learned during the Inspiration phase, visualise how things connect, and help you to find patterns.



TIME

60 - 90 minutes

DIFFICULTY

Hard

WHAT YOU'LL NEED

Pens, Post-its, paper

PARTICIPANTS

Design team

DESIGN **PRINCIPLES**

As you build out your ideas, you'll notice that certain unifying elements are starting to guide the design. Here's how to recognise them.

Design Principles are the guardrails of your solution—quick, memorable recipes that will help keep further iterations consistent. These principles describe the most important elements of your solution and give integrity and form to what you're designing. Odds are, they will align with the themes you found earlier in the Ideation phase. You'll also find that they'll evolve as you design things, so don't be afraid to revise them. Keep them short and memorable.

STEPS

01 Look at your most important Post-its and what you came to in Finding Themes in particular.

02 Consider the core principles underpinning those themes. Frame these as positive statements that might tell you how and what to design. Remember, Design Principles operate as a group, and it's likely that you'll need to identify several.

03 Look at the Design Principles you've come up with. Are they short and to the point? Do they describe just one idea? Try to avoid overly complicating them. If it feels like there are multiple ideas going on, break them into smaller parts..

04 Review your Design Principles and make sure they cover the key aspects of your solution. Modify any that don't.

05 Be ready to revise your Design Principles as you start to build prototypes. Some Design Principles won't reveal themselves until you've actually designed and tested something, but once you spot them they'll become essential.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, your work from Find Themes
PARTICIPANTS
Design team

OUR DESIGN **PRINCIPLES**

Data is Safe & Secure

Accessible anytime anywhere

We only collect the data we need to help us help you

User friendly

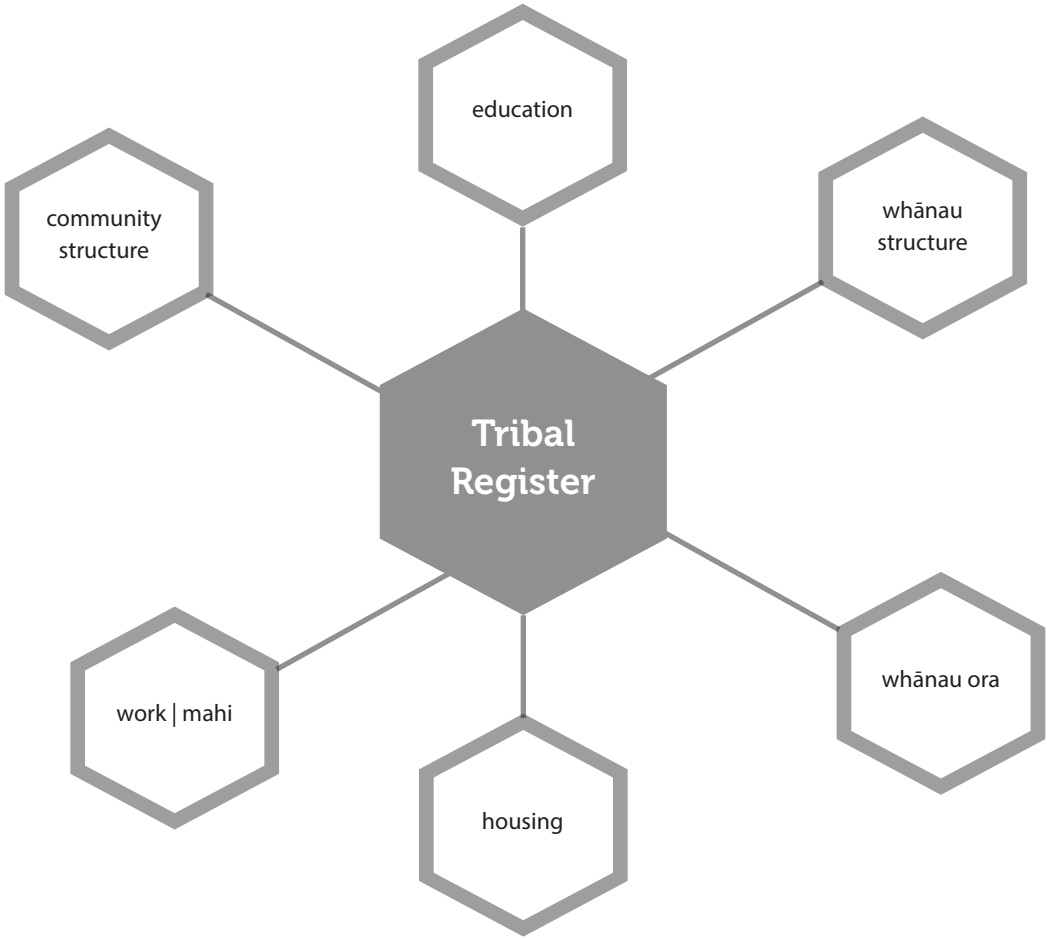
Focused on members needs

Data sovereignty

WHY DO WE NEED GOOD **DATA FLOW**

By organising and visualising what data you want to collect and use, you'll see how it comes in, goes out, and opportunities for more efficiency in the system.

A Data Flow of is an exercise you can try while you're conducting kōrero or wananga. It consists of listing or better, drawing every question on your registration form and how this data is wanting to be used.



TIME

30 minutes

DIFFICULTY

Easy

WHAT YOU'LL NEED

Pens, Data Flow worksheet

PARTICIPANTS

Design team, person you're designing for.

DATA FLOW **WORKSHEET**

Registration sheet sample questions

DATA IN	DATA OUT
Qualification Statements Hapū/Marae Whakapapa/ Whangai?	Verification Progress
Community Structure, Culture & identity Name, Age ,Sex, Marital Status Dependants, Whakapapa, Birthplace, Religion	Census
Location Usual residence	Location of qualified members Targeted strategies by location
Work Employment status, Occupation, Business owner, Drivers licence	Targeted employment programs Skills policy and planning
Education & Training Highest qualification, Post school qualification Study participation, Te reo proficiency	Targeted education programs Grants policy and planning
Income Personal income	Targeting assistance to where needed
Families & households Extended families Household composition	Housing policy Whānau ora
Housing Own/Rent, Internet access, Insulated weekly rent or mortgage paid	Housing Policy
Health & Wellbeing Smokers, Disabilities, Drugs and Alcohol	Whānau Ora

NOTES

REVIEW YOUR **REGISTRATION FORM**

*** Indicates required field**

*Name		
*Principle Hapū		
*Principle Marae		
*Title	Mr | Mrs | Miss | Master | Other	
*Surname		
*First Name		
Middle name(s)		
*Gender	Male | Female	
*Date of Birth	Day | Month | Year *eg. 12|07|1974*	
Marital Status	Choose the statement that best describes your current legal status *(Use your most recent marriage or civil union were appropriate).* • I have never legally married and never legally registered in a civil union • I am divorced or marriage / civil union has been dissolved • I am a widow / widower or surviving civil union partner • I am permanently separated from my legal partner • I am legally married • I am legally registered in a civil union	
*Home Phone	Work Phone	*Mobile Phone
Email Address		
*Postal Address	Street Number | Flat Number | Street Name / RD number | Suburb or Rural Locality | City, Town or District | Country | Postal Code *Instructions will be clear that a postal address is required as well as road numbers being required for RD addresses.*	
Household	Mark as many options as you need to show all the people who live in the same household as you. • My legal husband or wife • My legally registered civil union partner • My de facto, boyfriend or girlfriend • My mother and/or father • My son(s) and/or daughter(s) • My brother(s) and/or sister(s) • My flatmate(s) • Other (for example grandparents, boarder) • None of the above, I live alone	
Household Numbers	How many people live at your primary residence? • Adults • Children (aged 18 and under)	

REGISTRATION **FORM**

Household Ownership	What best describes your current permanent place of residence • I currently rent my house or am a boarder • I own my own home • I live in a whānau owned home • Other: *(Please specify)*
Employment Status *(school leavers only)*	Unemployed | Full time paid employee | Self-employed | Working in a family business without pay | Part time paid employee | Retired
Un-employment Status *(only if unemployed)*	Are you currently seeking paid employment? **Yes** | **No**
Current Occupation *(Occupation)*	
What is your highest secondary school qualification?	• None • NZ School Certification or National Certificate level 1 or NCEA level 1 • NZ Sixth Form Certification or National Certification level 2 or NCEA level 2 or NZ UE (pre 1986) • NZ Higher School Certificate or Higher Leaving Certificate or NZ Bursary / Scholarship National Certificate level 3 or NCEA level 3 or NZ Scholarship • Other secondary school qualification gained in NZ • Other secondary school qualification gained overseas
Qualification [4 fields will be provided for answers]	List all the highest qualifications you have obtained outside of secondary school
Current Study Status	Are you currently attending, studying or enrolled at school or anywhere else: • Full-time (20 or more hours) • Part-time (less than 20 hours) • Other
Disability	Do you live with the effects of significant injury, long term illness or disability? **Yes** | **No**
Disability Description	If yes, how would you describe your impairment, disability or long term medical condition
Te Reo Māori Skills	How would you best describe your understanding of Te Reo Māori ? • None • Can understand and speak some words • Can understand and speak some sentences and phrases • Can understand and speak with some confidence • I am fluent in the language
Other Languages	In which other languages could you have a conversation about everyday things? (Choose all that apply) • English • Samoan • New Zealand Sign Language • Other *(please specify):*
Religion	What is your religion? • No religion • Christian • Buddhist • Hindu • Muslim • Jewish • Other *(Please specify):*

REGISTRATION **FORM**

*** Indicates required field**

*Declaration	I do solemnly and sincerely declare: • The information I have given is true and complete as far as I know • That I am a member of one of the valid Hapū and Marae included in on this form • That the Whakapapa included in this form is true and correct. • I undertake to update this information if and when my circumstances change. • I have read and consent to the privacy policy (included in this form) for the information I have supplied *I acknowledge that the information contained in this form provided by me to organisation name here is subject to the Privacy Act 1993; and that by signing this form I agree that to organisation name may use this information to maintain its whakapapa records, tribal register, voting rolls, contact databases and any other purpose which organisation name considers reasonable, whilst performing its statutory role.*
* Signature	
*Date	
Privacy Flag	
Office Use Only	
Data Input Completed on :	*eg. 12/07/2017*
Data Entry Completed By	*eg. 12/08/2017*
Signature	
Kaumātua Name	
Date	*eg. 12/08/2017*
Whakapapa Form	In which other languages could you have a conversation about everyday things? (Choose all that apply) • English • Samoan • New Zealand Sign Language • Other *(please specify):*
Privacy Statement	PRIVACY STATEMENT IN RELATION TO APPLICATION TO BE ENROLLED ON to organisation name REGISTER • The information is obtained principally for: • The purpose of distribution of settlement proceeds • To assist in the administration of to organisation name matters, including elections to to organisation name • The identification through whakapapa of members entitled to settlement benefits. **Use of this information** 1. Applications for registration on the register must be verified by ……. For validation purposes, the application forms will be ……... No copies will be made. Validation can be arranged by to organisation name staff **2. Demographic information will be used and shared for any purpose considered reasonable by to organisation name** 3. Enquiries regarding registration and information from the register should be made to the organisation name. The tribal register is available for inspection at to organisation name offices,

NOTES

THE PRIVACY **ACT**

It is also recommended that you have correct knowledge of the Privacy Act 1993 and what that means for you as a collector of individuals personal details. You will need a privacy policy document created with plain wording so that all staff are aware of their obligations.

We have summarised the general principles of the act below for your reference. These principles should be taken into account when reviewing and agreeing on the new registration form as well as the concepts covered in the security protocols of your register.

Overview

The privacy act controls how 'agencies' collect, use, disclose, store and give access to 'personal information'. Personal information is information about identifiable, living people. An agency is any organisation that collects and/or holds personal information. The act has twelve information privacy principles.

Principle 1 – Purpose of collection

Information should only be collected for a lawful purpose within a function or activity of the agency. The information collected within the registration form must meet the defined functions of the organisation collecting data.

Principle 2 – Source of Information

The agency must collect information directly from the individual concerned except for certain cases as outlined in the act itself.

Principle 3 – What to tell an individual

The agency shall take such steps (if any) as are, in the circumstances, reasonable to ensure that the individual concerned is aware that; the information is being collected, the purpose of the collection, the name and address of the agency, if the collection of the information is required under law, the consequences (if any) of not providing the requested information, the rights of access and correction to the information.

Principle 4 – Manner of collection

Collection must not be unlawful or by means that are unfair or intrusive to an unreasonable extent upon the personal affairs of the individual.

Principle 5 – Storage and security

An agency that holds the information must ensure that the information is protected by such safeguards as is reasonable in the circumstances to take against loss and unauthorised access use or modification and other misuse of the information Where information is given to other parties as part of the function of the agency, everything reasonable must be done to prevent unauthorised use or disclosure of the information from those parties.

Principle 6 – Access

The agency must confirm to an individual if they hold their information and what information they hold. They must also give access to that information if requested or allow for correction of that information by the individual. The act contains clauses where this access can be refused as well as other provisions around the access of the information.

Principle 7 – Correction

The individual can request correction of the information or an indication attached to the information that a correction was sought but not made. The agency should also inform the individual about any correction request made by them and the outcome of such a request.

Principle 8 – Accuracy

The agency shall not use that information without taking reasonable steps to ensure the information is accurate, up to date, complete, relevant and not misleading.

Principle 9 - Retention

The agency shall not keep the individual's information for longer than is required for the purposes for which the information may lawfully be used.

Principle 10 - Use

If information was collected for a purpose, the agency cannot use that information for another purpose unless it is publicly available already, been authorised by the individual and various other exceptions listed in the act.

Principle 11 - Disclosure

Personal information shall not be disclosed to a person or body or other agency unless it is within the purposes that the information was collected, it is already publically available, it is to the individual themselves, is authorised by the individual or other exceptions listed in the act.

Principle 12 – Unique identifiers

The agency should not assign a unique identifier unless it is necessary for the agency to carry out its functions efficiently. It should not assign a unique identifier that has been assigned to that individual by another agency unless the agencies are associated legally. All reasonable steps must be taken to ensure unique identifiers are assigned only to individuals whose identity is clearly established.

The agency should not require the individual to disclose any unique identifier unless it is related to the purposes and function of the collection and agency.

COLLECTING INFORMATION UNDER THE **PRIVACY ACT**

In New Zealand, the collection of personal information is governed by the Privacy Act 1993. The Privacy Act contains a number of "Privacy Principles" which relate to the collection, storage and use of personal information.

In relation to use, the Principles provide (in summary):

(1) The collection of personal information must be for a lawful purpose connected with the function / activity of the business, and must be necessary for that purpose;

(2) The information must be collected directly from the individual concerned, unless:

- The information is publicly available;
- The individual concerned has authorised the collection of the information by someone else; or
- The information is anonymous (i.e. not in a form in which the individual concerned can be identified)

(3) Where information is collected directly from the individual, reasonable steps have been taken to ensure that the individual is aware of:

- The fact that information is being collected;
- The purpose for which the information is collected;
- The intended recipients of the information;
- The right to access and correct any personal information held.

(4) Information must not be collected by unlawful means or by means that, in the circumstances, are unfair or intrude to an unreasonable extent upon the personal affairs of the individual;

(5) An individual is entitled to obtain confirmation as to whether or not personal information about them is held, where it is held, and have access to that information.

USING INFORMATION UNDER THE **PRIVACY ACT**

Information resources can enable competitive advantages. However, little value or competitive advantage can be lawfully obtained from information which cannot be used.

Businesses using unlawfully obtained personal information (in the hope that no one complains) risk investigation by the Privacy Commissioner, referral to the Human Rights Review Tribunal and civil proceedings. Potential liability extends to both employee and employer.

The Privacy Principles provide that:

(1) Before using personal information, the business must have taken reasonable steps to ensure that the information is accurate, complete, relevant and not misleading;

(2) Personal information is not to be held for longer than is required for the purposes for which the information can be lawfully used;

(3) Personal information obtained in connection with one purpose, shall not be used for any other purpose, except in limited circumstances;

(4) Unique identifiers (ie. user IDs) may not be assigned to personal information unless necessary to enable the business to carry out its functions. The disclosure of personal information is also restricted under the Privacy Principles to a few discrete exceptions, the most fundamental being that the individual has provided consent to that disclosure.

Many aspects of the Privacy Act are now outdated and do not reflect emerging data collection technologies. The practical realities of online advertising, as well as services such as hosting, cloud and disaster recovery, mean that personal data is now being collected by several parties, including services providers that have no direct contact with the consumer, nor the ability to communicate with them.

CONSENT

Under the Privacy Act, individuals may consent to:

- The collection of personal information otherwise than in accordance with the Privacy Principles;
- Personal information being collected from third parties, as opposed to directly from the individual;
- The information being used for purposes other than the purpose for which it was originally collected; and
- The disclosure of the information to third parties.

The obligation to obtain consent prior to the use of personal information is not however limited to the Privacy Act. Obligations requiring consent also arises under:

(a) Confidentiality, both contractual and at common law;

(b) The Unsolicited Electronic Messages Act 2007; and

(c) The Fair Trading Act 1986.

With large scale information collection practices now occurring on a daily basis, businesses need to be vigilant in ensuring that documented, forward thinking consent has been obtained, otherwise the value of the information held may be seriously diminished.

DATA **MATCHING**

As a result of rapidly emerging online and EDM (electronic direct marketing) technologies, the number of businesses engaging in data matching is increasing.

Assuming that the customer data held by the business has been lawfully collected, a number of key issues arise, including:

(1) Whether the business is lawfully entitled to share the information with advertising service suppliers or other entities for the purposes of data matching;

(2) The lawfulness of data matching itself; and

(3) Maintaining control of that information.

While the Privacy Act legitimises data matching between specified public sector agencies (provided a number of rules are adhered to) the Act is silent in relation to data matching in the private sector. As a result, data matching in the private sector is, for the most part, regulated by the privacy principles relating to the collection, use and disclosure of personal information, and the use of unique identifiers.

When information is shared between parties, care needs to be taken to ensure the security of the information, and to manage the permitted uses of that information by each party involved. Where a receiving business has not directly obtained consent to collect, hold or use that information, it will be heavily reliant on the terms on which the supplying business obtained the information from its customers.

For example, where information is shared with online advertising suppliers, the business sharing the information needs to make sure that the information:

(a) Is separately identifiable to avoid comingling with other information held by the provider; and

(b) Will not subsequently become available to competitors, or other clients of the advertising provider.

These risks can be managed by ensuring that all steps in the online advertising process, starting with the collection of customer data and culminating in the targeting of advertising to current and prospective customers, take place under appropriate terms and conditions.

The privacy act section of this guide has been extracted in full from an article written by James Carnie and Jasmine Smart who are registered Privacy Professionals with the Office of the Privacy Commissioner.

PHASE 2
DEVELOP

In this phase, you'll share what you've learned with your team, make sense of a vast amount of data, and identify opportunities for Database design. You'll generate lots of ideas, some of which you'll keep, and others which you'll discard.

You'll get tangible by building prototypes of your ideas, then you'll share them with the people from whom you've learned and get their feedback.

THIS PHASE WILL HELP YOU ANSWER

How do I make sense of what I've learned?
How do I turn my learnings into an opportunity for design?
How do I make a prototype?

IN **THIS SECTION**

Phase 2 - Develop

CO-DESIGN **SESSION**

The people you're designing for can tell you plenty, and they can show you more. Here's how to further incorporate them into your design process.

You'll be talking with scores of people throughout your project, and a Co- Design Session or sessions is a great way to get feedback on your ideas and bring people deeper into the process. The purpose of a Co- Design Session is to convene a group of people from the community you're serving and then get them to design alongside you. You're not just hearing their voices, you're empowering them to join the team. You can co-design the database with them, and create champions for the system.

STEPS

01 The first step is to identify who you want in your Co-design Session.

02 Once you know who you want, arrange a space, get the necessary supplies (often pens, Post-its, paper), and invite them to join.

03 Maximise a Co- Design Session with Conversation Starters a Brainstorm, or other activities to get your group engaged.

04 Capture the feedback your group gives you. The goal isn't just to hear from people, it's to get them on your team. Make sure that you're treating your co-creators as designers, not as Interview subjects..

TIME
1 - 8 hours
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, paper, a place to meet
PARTICIPANTS
Design team, community members, partners

RAPID **PROTOTYPING**

Rapid Prototyping is an incredibly effective way to make ideas tangible, to learn through making, and to quickly get key feedback from the people you're designing for. Because prototypes are meant only to convey an idea not to be perfect you can quickly move through a variety of iterations, building on what you've learned from the people you're designing for. Rapid Prototyping means that you're building only enough to test your planning and ideas and that you're right back in there making it better once you've gotten feedback.

STEPS

01 Once you've determined What to Prototype, it's time to build it.

02 The goal here it to make something tangible that conveys the idea you want to test. No need to make it perfect, just make it good enough to get the idea across. It could be mock-up of the report dashboards you want. Or a mock-up of the registration process screens.

03 Now take your prototype out and test it with people you're designing for. Put it in their hands and ask them what they make of it. Make sure to Get Feedback.

04 Here is where you can Integrate Feedback and Iterate. Once you've quickly built another prototype you'll do it all over again until it's just right.

TIME
Ask the digital taniwha (IT Geeks)
DIFFICULTY
Hard
WHAT YOU'LL NEED
Pen, paper, supplies
PARTICIPANTS
Design team, Digital Taniwha

NOTES

THINGS TO THINK ABOUT DURING THE BUILD

THE DATABASE **PLAN**

A database plan is the starting point and will be used as the brief when approaching a database developer or supplier. Its main purpose is to summarise what you require, and it should be written in plain language with any technical jargon either avoided or explained.

Spending time on the planning process ensures that you have a clear idea of the type of database your organisation needs, can afford and is able to support. A simple plan should consider the following points and questions:

Current position
Your organisation's overall objectives, a review of what you already have, how you currently collect information, reports you produce and the benefits a new database will offer.

Information flow
Determine what data you need to collect and who collects it – including partners. Ask who requires reports and what reports do they need. What are the on-line queries you expect to make of the data and information held on the database?

Timescale/budget
Your initial estimate of timescale and budget will become more and more accurate as the planning process continues.

Who is involved?
Who is leading the project? Who will use the database? Who will maintain it? What skills do they have? Include staff, volunteers, partners, other suppliers, etc.

Hardware and software requirements
Any limits created by your current set-up, such as the age of the computers, or whether they are PCs or Macs, and whether they have Windows or Linux installed? Do you have a network, or any remote workers? Is there a budget for upgrades? Should you adopt a on premise database on your own server or use a cloud-based database provider?

Data Cleansing and Migration
Is all the data you need in a machine-readable form? Is it accurate and up to date? Will a data cleaning task be needed? Agree a comprehensive procedure for transferring data into the new database.

Training
Which staff will need training in the use of the system? How will training be delivered?

Support
May include installing upgrades, adding new features or troubleshooting. Suppliers or developers may offer telephone support, but charge extra for on-site help. If you are building your own system, who will be available for ongoing support? Do you have a warranty period to resolve any minor glitches you encounter?

CHOOSING THE RIGHT **DIGITAL TANIWHA** TO BUILD YOUR SOLUTION

When choosing a database supplier it is of the utmost importance that they are the correct fit for your Rōpu Tīkanga Māori. In order to find this, you must, first of all, work out what you are looking for, and then create a plan. Once you do this it will make the process far more manageable and clear, so you get exactly what you need.

Planning

See whether someone from outside your organisation can help you run the process, such as a project manager who has delivered database-related projects.

Start by writing the clearest database plan you can – a bit like a job description. Keep it simple but focused on what you require.

Use feedback from contacts to draw up a list of possible suppliers. Advertise the main details through email lists and on your website and invite people to email you if they are interested.

Send your current database plan to potential developers and suppliers and ask for a written response to how they will meet your needs. Set a deadline and indicate interview dates. Invite informal contact beforehand, if you think you will have time to deal with it.

Review

It is important that you review the work of anyone who is selling you a database, whether they are building something from scratch or adapting an off-the-shelf solution. Ask potential suppliers for details of reference customers similar to your organisation and contact them for an honest appraisal of the supplier and their products.

Although some of your requirements may be technical, such as whether it requires a server, or whether your existing computers will support it, the review is an opportunity to look at other issues.

- Can you see work they have done for other similar charities or voluntary sector organisations?
- Do the screens seem easy to navigate?
- Are reports easy to set up and then print or export? Can they be adapted by the user? Ask to see how easy it is to change the reports, or have a go yourself if you can.
- Who picks up the bill if deadlines are missed?
- Do they use a language you understand, or overwhelm you with technical jargon?
- How will they manage the project? How will progress be monitored?
- Do they have time to fit in your work? If they're offering a discount, will you be a lower priority?
- What user manuals or training will you get for your money?
- What is their hourly rate for any work outside the scope of this project?

Selection

- Compile a shortlist in the same way that you would to fill a staff post. Identify the ones you think fit the budget and your needs, and then interview them. Two or three should be enough, although seeing more may help clarify your requirements.
- Involve a small but diverse group in the interview process, including someone who will be putting data into the system as well as someone who will be using the reports.
- Use the interview to decide whether they understand your needs and have the project management skills, technical solutions and experience to meet them.
- Remember that you don't have to make a final decision at the interview. You can follow up specific questions with each supplier, or ask them to re-submit their bid to reflect any changes you now realise that you need to make. You may ask for a further presentation, or bring the panel together again informally to review any follow-up information submitted.
- Even if the interview goes well, always check with referees about how happy they are with what they got for their money.
- Once you've selected someone, draw up an agreement about how the project will proceed, in the form of a letter of agreement or written contract. Make sure this includes a detailed payment schedule showing what is (and isn't) included in both the initial price and any ongoing subscription fee. Ensure questions about legal ownership of data, file structures and reports are covered at this point.
- An initial project plan will show key phases and milestones for completion and may be included in the submission for the tender. This may be used to reach final agreement, but never start work until it has been fully updated and agreed by both parties.

THE **SOLUTION PLAN**

Once a supplier is chosen a requirement gathering exercise for its proposed system needs to be undertaken. During the course of the initial meeting with management, broad requirements are outlined and discussions take place around the potential configuration and functionality possibilities of the system. A solution plan will then need to be developed that concentrates on outlining the potential new or redeveloped system, the options available, and the process the supplier may follow to implement it within the business structure and environment of the entity.

While the proposed solution that a supplier recommends may meet the general requirements of the entity, further analysis of each team and their current processes will still be required to ensure that functionality and components are tailored to meet the specific requirements or the organisation. Requirements only further analysis will uncover. Most Rōpu Tīkanga Māori face similar issues and have similar business needs. Ensure the supplier use their knowledge and experience to tailor a solution for you. Suppliers need to build on a base set of features and functionality available within their base system models, customising them to fit within your organisation and meet your unique needs.

A basic agile process to prototyping or full builds normally follows these steps.

Build and configuration of a base system
Further analysis and dynamic scoping using the fully functional base system
Customisation and configuration of the system to the entity needs
Testing and user training

A solution plan will outline the process and is a working technical document. It aims to provide as much detail as possible while not getting weighed down with explaining every fine grained technical aspect. Its aims are to; Outline the scope and process a supplier will use to build the solution, ensuring that due diligence and proper planning has been followed. Disclose all aspects of the project to the the entity in a jargon free environment. Clearly define the work and steps involved in the project so that the IT supplier and the entity are in agreement and 'on the same page' going forward. A solution plan serves as a vital tool and resource to start open communication lines between the supplier and the entity ensuring the success and quality of result for the entity.

SECURITY **PROTOCOLS**

Implementing security protocols and user access rights for internal and external users.

Examine the internal and external aspects of security and privacy. Recommendations and policies will be developed that the organisation can use to ensure privacy and security of information is kept. From these, technical restrictions/functionality should be built into the current registry to ensure these policies are maintained.

These measures and functionalities will include both internal and external access.

- Outline security level permissions
- Determine the different user types within the system, internal and external
- Outline the permissions for each user type
- Create a security policy for the organisation
- Implement the new security levels

Security Policy Document

The main internal privacy issue usually revolves around questions as to who can access the personal contact details of members and their whakapapa information. This is an internal issue that can be resolved with a clear security and policy direction advertised to all staff members.

Your Rōpu Tīkanga Māori will need to develop a draft privacy policy as to who can access data, and what they can access. This policy will be given for feedback and adjusted until the organisation is satisfied and can get sign off on it. The policy should then be published to all staff.

The policy document should include the following aspects.

- Who has access to system and information
- What these users have access to (internal and external users)
- How users can get access
- Who approves access
- Who can request data from the database
- What data they can request and can be given
- In what form this data can be given
- What the Privacy Act obligations are

The document will be in plain language and easy to understand while being brief and to the point. It will be written with the organisations needs and the Privacy Act 1993 in mind.

CREATING ACCESS LEVELS IN THE **DATABASE**

Security Levels

Name	Description
View Only	Can view member records on pages but not open them
Member	Can update only their own membership information. Updates must be approved and validated by the registry team.
Marae	Can view only Marae member and demographic reports.
Management	Read only, no access to full reports but can request them from the registry team. Have access to demographic reports.
Grants	1. Can input NEW tribal membership records excluding whakapapa information. Records must be approved and validated by registry team before they are committed fully into system. 2. Can update membership details but only the following fields • Name • Address • Telephone numbers • Email address • Demographic information 3. Can add/change/update all grant and scholarship applications 4. Can generate grants and scholarship reports only
Database Manager	Full access to RMS data with ability to: 1. Generate all reports 2. Full audit functionality 3. Full user control Only restriction is being unable to validate and approve new and updated members
Demographic information only	Can view all demographic information but not personal details or whakapapa details of members
The following default permission levels will be kept for future flexibility and compatibility	
Read Only	Can open and read items all membership information, including all reporting facilities
Contribute	Can open and change all membership information. Changes must be approved before the database information is actually updated
Approval	Can open, change and approve all changes made by other users
Full Control	Can do anything within database including changing field names, bulk deletion, change site settings, full auditing rights, user and permission changes etc

NOTES

DATA **CLEANSING**

A lack of validation processes of data entry fields and lack of data entry auditing in a database will mean some data a database will become inconsistent and/or incorrect.

These inconsistencies can be corrected when it is migrated across to a new system but because of the size and amount of data, some less obvious errors will still remain. These errors require manual processing to ensure they are indeed errors and then correct them when necessary. Further procedures and validation need to be designed to be put in place to minimise any future data entry errors.

Build in to your database data cleansing reports that can be made available to database staff and also provide the human resources to help go through these reports and correct the data. Design in validations and error checking at data entry time as well. We suggest other processes such as auditing and quality control procedures that be put in place to ensure data entry matches the form it is taken off.

Data Quality reports (examples)

Description
Invalid postal addresses (Where address doesn't match a PAF record or are empty)
Incorrect postal address for members (mail has been returned)
Possible duplicate records
Beneficiary missing Hapū values
Beneficiary missing Marae values
Beneficiary missing date of birth values
Beneficiary missing first name values
Beneficiary missing gender values
Beneficiary missing area values
Beneficiary area values incorrect (doesn't match with current address)
Beneficiaries still active but possible deceased
Beneficiaries aged 13 or less but listed as having an occupation
Possible incorrect phone number (doesn't match with location of current address) or phone fields used incorrectly
Possible incorrect email address

Create rules for Automated processes to fix data

Automation of data fixing will occur if you provide rules to implement. An example of a rule would be, move all numbers that start with 021, 025, 027 to the mobile number field if that field is empty.

Ensuring accuracy of on-going data entry

When building a membership database ensure data entry is validated and fully audited so that these types of errors do not occur.

We recommend the following steps to ensuring on-going accuracy of data for your database

- *Further validations are introduced*
- *Further functionality and automation introduced*
- *More in depth documentation on custom reports*
- *technical training for the registry team*
- *Data entry auditing and review processes are put in place*
- *Data error reports are created and advertised to relevant management staff*

Example validations rules

The following validations are examples that can ensure accuracy of data entry.

- *If a person with the same surname, first name and date of birth is entered, database will make the registry team confirm that this member isn't a duplicate before adding them to the system.*
- *If the age of a member is less than 14, various demographic validations such as;*
- *No qualification should be entered*
- *No occupation should be entered*
- *Restrictions on what demographic information can be selected for all the new fields*
- *Phone number must be in the correct format*
- *Phone number area code must match the postal code of the address*
- *Email address must be in the correct format*

AUTOMATION

Further functionality and automated processes can be introduced to reduce reliance on data entry staff to follow correct processes.

These could include;

- *Automating the area field entry based on the postal address postcode and country (PAF- NZ Post Postal address formatting system)*
- *Create an automated process to merge and delete duplicate members*
- *Ability to link child members to one parent member so that the child's address and phone number will change when the parent's changes. This could be aged based so once the child is over 18 the automated updating will stop. The linking will still remain for reporting and whakapapa purposes.*
- *Alter the Tuhono process to suggest further changes based on the address of the linked Tuhono member. (i.e. if someone exists at the same address as the person being changed, database can flag that as a possible change for the registry team to check)*
- *print optimised version of the member search page*
- *Introduce new address finding methods within RMS, directly linked to the NZ Post address finder and Google Maps.*
- *Change the PAF lookup search to suggest addresses when an exact match cannot be found.*

DATA ENTRY **REVIEWING & AUDITTING**

We recommend during the build process that internal processes be put in place where data entry is reviewed and audited for quality control purposes. Put simply, if a data entry person knows their work may be checked for accuracy, they will be more inclined to ensure it is.

It also means that the organisation can be aware of any data entry issues before they are left too long and corrupt the database. Where issues are found, a plan can be put in place (either through further automation or training and resources) to resolve them.

We recommend the follow manual checks be put in place.

- *Spelling of first and last names*
- *Date of birth entry is correct*
- *Address is correct and matched to a PAF postal address*
- *Correct Hapū and Marae are selected*
- *Correct gender is selected*
- *Correct Kaumaatua and signature date is selected*
- *Demographic information has been entered*
- *Whakapapa information has been entered and is correct*

Data error and entry reports

To support this auditing and reviewing of data entry you should design a report dashboard that will outline high level data entry statistics.

These may include; (each statistic will be based on the last 7 days unless otherwise specified)

- *Number of new manual members and who entered them in.*
- *Number of manual member information changes and who modified them.*
- *Number of automatic member additions from the website.*
- *Number of member information changes from the website.*
- *Number of validations waiting registry team approval.*
- *Number of possible duplicates in the system.*
- *Number of invalid postal addresses.*
- *Number of grant applications loaded in past month.*
- *Number of whakapapa forms entered.*

WHAKAPAPA **MAPPING**

Whakapapa information could be a powerful informational tool if it were available, the end result being a digital genealogy of the rōpu tīkanga māori. A variety of reports could be built to show the data in ways that are relevant to whānau hapū and iwi in general.

Benefits of capturing the data

- *Allow a mapping of the genealogy at a Hapū level.*
- *Allow a mapping of the genealogy at a Marae level.*
- *Allow members to see who they are related too and how they are related to them, outside of their own specific whakapapa. For instance, they could drill down and see the whakapapa of someone in their own family, and drill down further to see the whakapapa of that lineage. It will allow them another avenue to research their own lineage helping them to identify with their whānau, hapū and iwi and providing all a frame of reference.*
- *Allow mapping of the genealogy at a tribal level, providing another avenue of historical records and telling the story of the organisation in recent history.*
- *Overall better preserving the past records for future generations.*
- *Will provide a wealth of information to researchers and historians especially as Māori whakapapa have traditionally been orally based so there is a lack of available computerised records.*
- *Will help with validation of members*
- *Allow many report types at various levels including;*
    - *Whānau record sheets*
    - *Ancestor charts and fan charts*
    - *General whānau relationship charts*
    - *Timeline based whakapapa reports*
    - *General descendant based reports including descendant trees*
    - *Validation based reports*

Due to privacy considerations and the Privacy Act 1993, It is recommended that you speak to the people as well as obtaining legal advice around any potential whakapapa reporting facilities to ensure the feasibility or any possible restrictions of entering in and reporting on such data.

DATA **ACCURACY**

Analysis of registration data and strategies to ensure data is kept accurate, update to date and usable.

Much of the work in the other phases of this project will help to correct current outdated and inaccurate data and ensure that new data going into the database is accurate. With a large membership database, to make the data meaningful and useful in an on-going basis to the rōpu tīkanga māori further steps need to be taken to keep it up to date.

The fundamental problem is, why don't members want to keep their information up to date or join at all? Strategies for keeping the database up to date could include

Marketing

- *Advertising*
- *Incentive based approaches*
- *Age group based approaches to advertising and marketing*
- *Third party and governmental integration options similar to Tuhono**
- *Regular census type approaches*
- *Investigate how other iwi and organisations approach this issue, both nationally and internationally.*
- *Discuss the issue with Marae and see the problems and issues from their level*
- *Interview whānau and discuss/see the issue from their perspective.*

END USER **TRAINING & DOCUMENTATION**

End user training of the system should be provided onsite, preferably to focused small user groups. Follow up sessions should be used to reinforce this training and provide a deeper level of training into the functions and capabilities of the new solution.

As support for this onsite training, a user handbook should be produced that is easy to read, use and understand. It should be concise, clean and feature step by step instructions with a heavy use of screen shots.

if you have a cloud based solution that allows members to register and update online, ensure good step by step insturctions are avaialble on the website.

If you have the resources used video based instructions with heavy use of screen shots to assist with registering or updating processes.

GET **FEEDBACK**

You've learned and built. Now share what you've made with the people you're designing for and see what they think.

Soliciting feedback on your ideas and prototypes is a core element of the design phase, and it helps keep the people you're designing for at the centre of your project. It's also a direct path to designing something that those same people will adopt. If the point of a prototype is to test an idea, then collecting feedback from potential users is what pushes things forward.

STEPS

01 Now that you've got a prototype to share, get it in front of the people you're designing for. There are lots of ways to do it: Reconvene a Wānanga, intercept people for Interviews do another Expert Interview with your prototype, or perhaps run a co-design Session designed to elicit feedback.

02 Capturing honest feedback is crucial. People may praise your prototype to be nice, so assure them that this is only a tool by which to learn and that you welcome honest, even negative feedback.

03 Share with lots of people so that you get a variety of reactions. Refer back to Extremes and Mainstreams to make sure you're capturing a cross-section of potential users (old-young).

04 Write down the feedback you hear and use this opportunity with the people you're designing for to ask more questions and push your ideas further.

TIME
60 - 90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, paper, your prototype
PARTICIPANTS
Design team, people you're designing for

INTEGRATE **FEEDBACK & ITERATE**

Let the feedback of the people you're designing for guide the next iteration of your solution

Integrating the feedback, you hear from the people you're designing for is one of the essential elements. You learned from people in the Inspiration phase, and in the Ideation phase one of the best ways to keep learning from them is to show them what you've made and find out what they think. Integrating their feedback into your work and then coming up with another prototype is the best way to refine your idea until it's something that's bound to be adopted and embraced.

STEPS

01 Sit with your design team and share the feedback that you collected.

02 You'll now probably want to synthesise some of the feedback you got. You can Create Frameworks based on what you heard and how it applies to your idea. You might also try a Brainstorm around how your register could change based on feedback.

03 Get tangible and start building the next iteration of your prototype. Integrating Feedback and Iterating is closely tied to Rapid Prototyping. Check your costings then your prototype should change to reflect the feedback you got, build it.

04 Remember that this is a method for refining your idea, not for getting to the ultimate solution the first time. You'll probably do it a few times to work out the kinks and get to the right answer.

TIME
90 - 120 minutes
DIFFICULTY
Hard
WHAT YOU'LL NEED
Information from Get Feedback, Prototype
PARTICIPANTS
Design team & Digital Taniwha

NOTES

PHASE 3
IMPLEMENT

In the Implementation phase, you'll bring your solution to life, and to market. You'll build partnerships, refine your business case, develop your database, and eventually go live.

And you'll know that your solution will be a success because you've kept the very people you're looking to serve at the heart of the process.

THIS PHASE WILL HELP YOU ANSWER

How do I plan for what's next?
How do I make my concept real?
How do I assess if my solution is working?

IN THIS SECTION

Phase 3 - Implement

GO **LIVE**

A Live Prototype is a chance to run your solution for a couple of weeks out in the real world.

Though you've been getting feedback from the people you're designing for all along, a live prototype is one of the most powerful ways to test your solution. A Live Prototype gives you a chance to stress test your solution in real-world conditions. It can run from a few days to a few weeks, and is a chance to learn how your solution works in practice.
Live Prototypes are all about understanding if your database is working for you and your members

STEPS

01 The first thing to do is to determine what it is you want to test when you go live. It could be the way that people find out about registering or how your service will run or how your reportinh model works. For example, you could run an membership outreach at events to test a channel strategy.

02 Once you've decided on what you're testing, sort out the logistics of your Live Prototype. Do you need a physical space, additional staff, or anything else.

03 Never stop iterating. If something went wrong on Day 1, try a new approach on Day 2. Live Prototypes are all about learning quickly, iterating on the fly, and pushing your solution closer to going live.

04 As always, capture feedback from the people you're designing for.

TIME
A few days to multiple weeks
DIFFICULTY
Hard
WHAT YOU'LL NEED
Space, staff, , or whatever it takes to run your solution in real world conditions
PARTICIPANTS
Design team, key partners, additional staff

ROADMAP

You'll need a timeline and a plan of action to get your idea out to members and stakeholders. A Roadmap can help keep you on time and on target.

You've got a concept you feel great about and you've tested it in the world. Now you'll need to create a plan for how you're going to implement it. A Roadmap helps you gather the key stakeholders in your project and collectively figure out a timeline, assign responsibility for each element of the project, and establish milestones. This is a great method to do alongside Resource Assessment to give you a full picture of how to build your Roadmap.

STEPS

01 Assemble your design team as well as all the critical stakeholders and partners responsible for implementing your idea.

02 Print out a big calendar for the next year or 18 months and use it to map out what needs to happen when. Start putting Post-its on the calendar with key dates like Go Live, etc.

03 It's easy to get lost in all that needs to happen, so think about your calendar in chunks. Figure out what needs to occur in the next month, in three months, in a year. Themes will emerge around the various tracks of work that will need to take place.

04 Think about the major milestones in your project timeline when you go to market, when you launch your register on your website and get them on the calendar. Use a different coloured Post-it for milestones perhaps even flip them so they look like diamonds instead of squares to stand out.

05 As you add Post-its to the calendar, assign a team member or partner to each track of work. Find someone to own or champion each element of your project and prepare to hold them accountable to the tasks.

TIME
90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, paper, calendar
PARTICIPANTS
Design team, key stakeholders, partners

PILOT

A Pilot is a longer-term test of your solution and a critical step before going to market.

If a Live Prototype is a quick look at how your solution behaves in the marketplace, a Pilot is a sustained engagement. Pilots can last months and will fully expose your solution to market forces. At this point you're not testing an idea. you're testing an entire system. Ideally, you'll have run a few Live Prototypes before going to Pilot so that some of the kinks are worked out. During a Pilot you'll fully execute on your idea finding out if it truly works the way you envisioned by running it with all the staff, space, and resources necessary.

STEPS

01 First you'll need to sort out all the logistics of your Pilot.

02 You'll be iterating less in Pilot because now is the time to truly test your system. You can of course make necessary improvements, but if you change too many variables it may become harder to know what's working and what isn't.

03 As you run your Pilot you'll want to collect information about how your solution is working. Feedback from the people you're designing for is always crucial, but you'll also want to have business metrics to assess your success.

TIME
Months
DIFFICULTY
Hard
WHAT YOU'LL NEED
Everything necessary to run your solution
PARTICIPANTS
Design team, key partners, staff

DEFINE **SUCCESS**

Sit down with your team and map out what success looks like. Setting key milestones will keep you on course and give you something to work toward.

Though you've always been driving toward impact with your project, this is a point in the Implementation phase for you to stop and determine how you'll know if you're getting there. You'll determine important milestones in the life of your solution and come to understand what succeeding looks like. Think about a variety of time horizons. What is success in the next two months, in the next year, in five years? Imagine success in terms of both your organisation and the people you're designing for. What does success look like in terms of how you've affected them?

STEPS

01 Start by returning to your original design challenge. Use that as a lens to think about what success looks like.

02 Look at your Roadmap and find key delivery dates and milestones. Hitting those dates might be a good indicator of early success. How can you plan to make sure you stay on target?

03 Imagine what success would look like from different angles. Maybe breaking even by a certain date makes sense from a business perspective. What about success in terms of your organisational operations? What about the perspective of the community you're looking to serve?

04 Are there any external measures of success that you need to consider? Is governance or partners going to hold you accountable to certain standards? Plan for those as you Define Success.

05 You can refine how you want to Define Success as you undertake the Monitor and Evaluate Method. They're related and the one will feed the other.

TIME
90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, paper
PARTICIPANTS
Design team

KEEP **ITERATING**

Testing, getting feedback, and iterating will help you get a great solution to market and let you know where to push it when you do.

Your solution is now nearly ready to get out into the world, you need to Keep Iterating. Can you tweak your communication strategy, maybe you'll need to evolve your
marketing strategy to get to all potential members, or perhaps your online verifications needs a rethink? As soon as you get your solution out into the world, start to notice what could be better and assess how you can make it so. By continuing to iterate, soliciting feedback, and building those learnings back into your solution, you'll get further toward having a huge impact.

STEPS

01 Don't lose sight of the iterative approach that you've taken so far. As counterintuitive as it might seem, your solution is never truly finished. Even when you've gone Live you can always improve it.

02 Even if your product, service, or experience is in a good place, think about how you're marketing to potential or current members, if you have the right talent on staff, if you could deliver your solution more effectively. These are all opportunities to iterate.

03 Rapid Prototyping and Live Prototyping are great opportunities to iterate on the fly and quickly test your ideas.

TIME
Throughout the process
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Feedback from the people you're designing for, prototyping materials
PARTICIPANTS
Design team, key stakeholders, partners

MONITOR AND **EVALUATE**

Your goal has always been to have big impact. Design the ways that you'll measure and grow it into your solution.

Throughout the design process you've constantly been learning, evaluating, and improving your solution. And now that you're on the verge of getting it out into the world you'll need a plan to find out if you're having the impact that you want. There are lots of ways to run a Monitoring and Evaluation (M&E) assessment, the key is to understand what kind is right for you. If you're trying to change a community's behaviour or increase the adoption of online applciations, you may need a more nuanced approach.

STEPS

01 The first thing you'll want to determine is why you need to Monitor and Evaluate your work? Is it to demonstrate impact, to get more registrations, to get more data, to generate more benefits to members

02 Be sure to bring key partners and stakeholders into this conversation. They may have been Monitoring and Evaluating your topic area for a while and can provide key insight.

03 Assess whether your team is the best suited to Monitor and Evaluate your work. You may need to hire an outside team or consultants to help you.

04 Try to find a balance between quantitative and qualitative measurements. A mix of stories and data can be very powerful.

05 Take a prototyping attitude to your measurement. You can always tweak your model based on the information coming in to maximise your impact.

TIME
60 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, a wall or board
PARTICIPANTS
Design team

MONITOR AND **EVALUATE**

KEEP GETTING **FEEDBACK**

Even though your idea is Live, you still need the input of the people you have designed for

Gathering feedback from the people you have designed for is a never-ending process and is critical as you push your idea forward. As you Pilot your idea, or go Live, you'll want to have team members dedicated to getting feedback from key partners and the people you're looking to serve

STEPS

01 As you move into Pilot and Go Live, make sure that you're collecting feedback. Interviews and Wānanga are a great way to learn from the people you're designing for.

02 Reach out to key partners as well for their input. They'll often have expertise that the design team may not and can help point the way forward. Convening the right group of stakeholders all at once can bring up a lot of feedback in a single session.

03 Capture feedback and share back with the design team.

TIME
90 minutes
DIFFICULTY
Moderate
WHAT YOU'LL NEED
Pens, Post-its, paper
PARTICIPANTS
Design team

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RESOURCES

INTERVIEW GUIDE

Open General

What are some broad questions you can ask to open the conversation and warm people up?

Then Go Deep

What are some questions that can help you start to understand this person's hopes, fears, and ambitions?

FRAME YOUR **DESIGN CHALLENGE**

What is the problem you are trying to solve?

1) Take a stab at framing it as a design question.

2) Now state the ultimate impact you're trying to have.

3) What are some possible solutions to your problem?
Think broadly. It's fine to start a project with a hunch or two, but make sure you allow for surprising outcomes.

4) Finally, write down some of the context and constraints that you're facing.
They could be geographic, technological, time-based, or have to do with the population you're trying to reach.

5) Take a stab at framing it as a design question.

CREATE **INSIGHT STATEMENTS**

Write your design challenge

Theme:

insights:

1

2

3

Theme:

insights:

1

2

3

Theme:

insights:

1

2

3

CREATE **HOW MIGHT WE QUESTIONS**

Turn your insights into How Might We Questions

Insights:

How might we

Insights:

How might we

Insights:

How might we

BUSINESS **CASE**

Business Case

Registration database

Designed for:

Designed by:

Key Partners	Key resources	Key activities	Value Proposition	Suppliers

Costs	Channels	Stakeholders

NOTES

TE RERE KĀHUI

CONNECTING WHĀNU HAPŪ & IWI

Te Rere Kāhui means - to fly together as one - it's about **Rōpū Tīkanga Māori** coming together to plan and design smart tools to carry our people in to the future.

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