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21 – 24 Nov 2016

Cumulus Hong Kong 2016: Open Design for E-very-thing

WHAT IS OPEN DESIGN FOR ETHNOGRAPHY? AN OPEN DISCUSSION

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Abstract

Ethnography has been adopted in other fields for years, but the integration process has been a significant learning curve for both the ethnographers and practitioners from other fields. This wide adoption has created various subfields such as Design Ethnography, Urban Ethnography, and Anticipatory Ethnography etc. These ethno-fusions represent different interpretations of ethnography under the influence of other disciplinary nuances. Ethnography has shown us its potential flexibility and fluidity and the discussion continues: how and where will ethnography make its next big leap? In this research paper, we open a discussion with the Cumulus community by exploring the following three questions: 1. What could open design mean to Ethnography? 2. What are some challenges when applying ethnography in multi-/inter- disciplinary context? 3. What is the future of the openly designed ethnography?

Keywords

Open design, ethnography, interdisciplinarity

Setting the scene

In the past two decades, ethnography has been widely adopted, used, celebrated and criticised by some disciplines and fields (Grudin and Grinter 1994; Hammersley 1992). This widespread adoption has created various subfields such as Design Ethnography (Salvador et al. 1999; Crabtree et al. 2012), Urban Ethnography (Houston 2011; Yi 'en & Yi'En 2014; Thomas et al. 2016), and Anticipatory Ethnography (Lindley et al. 2014). In this regard, ethnography has been made 'open'. These ethno-fusions represent different interpretations of ethnography under the influence of other disciplinary nuances. Ethnography has shown us its potential flexibility and fluidity and the discussion continues: how and where will ethnography make its next big leap? In this research paper, or open discussion as we call it, we explore the following three questions: 1. What could open design mean to Ethnography? 2. What are some challenges when applying ethnography in multi-/inter- disciplinary context? 3. What is the future of openly designed ethnography?

Ethnography has been adopted in other fields for years, but the integration process has been a significant learning curve for both the ethnographers and practitioners from other fields. Ethnographers hold tight to the purity of ethno-methodology. Record and report, ethnography ends there. While in other fields, there has always been the push of 'design implications'. Ethnographic methodology also changed from merely informing design to providing critical elements to the practices, especially the process. This encounter is also mutual, because ethnography gains new forms and possibilities as it is employed designerly. The freedom and experimental propensity in design research reciprocate to the methodology itself, yet this freedom and experimentation has brought reputational risks to 'authority' and 'integrity' of ethnography. We seek to explore these tensions in our paper.

Considering the format of this paper (i.e. an open discussion), we base our paper on our experiences with ethnography (auto-ethnography), our on-going conversations with the ethnography community, existing credited sources (research papers, articles and blog posts), as well as primary interviews that we have recently conducted with ethnographers who have been the champions for applying ethnography in other fields and ethnography adopters who come from other backgrounds. Finally, with this paper we intend to open a discussion with the Cumulus community: where lies the future of ethnography?

The main characters

This paper has been written by two doctoral students who are in the final year of their studies, and have spent much of the past three years exploring and applying ethnographic methods. The primary author, an ethnographer by practice and training, conducted all the interviews, transcribed two of the interviews, and also led the analysis. The secondary author, a computer scientist by practice and training, transcribed three of the interviews, participated in the analysis, and helped to write this paper.

In the spirit of openness, we consider our interviewees main characters in this discussion; our narrative would have been incredibly weak without their thoughtful and thought-provoking participation. Our interviewees included a senior academic ethnomethodologist, an industry-based senior ethnographer, a design anthropologist, an ethnography-adopting film maker, and a philosopher using ethnographic methods in his research on primary school education.

Beyond our conversations with our fellow main characters, we have had countless conversations at formal workshops, conferences, and colloquiums with other academics. We

have also had many informal, offline discussions with friends and colleagues (at pubs, in library, between meetings, etc.) that have influenced what we present below. The Cumulus community, the EPIC community, and the wider ethnographic community (Ethnography Matters) have also influenced our work directly and indirectly through their blogs, papers, conference calls, and social media posts. We thank them all and hope they will embrace and participate in the open discussion below.

The open discussion

Our open discussion is structured around three main questions we would like to discuss: 1. What could open design mean to Ethnography? 2. What are some challenges when applying ethnography in multi-/inter- disciplinary context? 3. What is the future of openly designed ethnography? We address each question by first outlining our interpretations of and responses to the questions before presenting our interviewees' interpretations of and responses to the questions.

We close our open discussion by addressing some of the tensions that arose in our work. Specifically, we address our struggle with articulating if we have discussed open design *for* ethnography, or open design *of* ethnography; both *for* and *of* carry different connotations, which the Cumulus community, ethnographers and designers should likely discuss. We also discuss some of the tensions that might arise around academic rigour, validity, and authority, a set of issues that our interviewees each struggled with in different ways, and that has persisted in ethnographic academic publications for decades. In keeping with our open discussion format, we offer few clear answers to these issues. Instead of presenting the findings and moving on to the discussion, we have fused the discussion with the findings.

What could open design mean to Ethnography?

Before discussing what open design could mean to ethnography, we first need to explore the concept of "open design" itself. No definition appears to exist, so we have crafted our own. In our minds, open design is a concept with origins in the "open source" computing community. "Open source" traditionally means using publicly shared design information while developing physical products, machines and systems. It includes both free and open-source software (FOSS) as well as open-source hardware. Meyer (2003) has identified several cases of 'collective inventions' that might represent what are now calling 'open design'. These inventions, and perhaps open design itself, involved a form of co-creation where users participated in or even controlled the design of the final product, tool or concept. If we fuse "open source" with Meyer's (2003) concept of "collective inventions", we can speculate on the ethos behind "open design" and say that: open design represents a design that everyone can contribute to, and that the process(es) for making contributions to that design should be accessible to and by everyone.

Of course, our definition of "open design" should not receive any preferential treatment. Every single one of our interviewees stated that they had no idea what 'open design' means, and therefore were unsure of what it *could* mean to ethnography. One interviewee stated, "it could mean anything. It is so open that I have no idea what it could mean honestly. It could apply to so many things." This sentiment was echoed by another interviewee, who said "I really don't know what open design might mean. All sorts of phrases become popular in our sorts of work, and lots of them don't mean very much." Similarly, a third interviewee vented their frustrations about the use of the term 'open', and emphasized that whatever it 'open design' is. "it should not just mean open to other specialists, but should be open to the people who will be affected by the service and will use it."

These responses highlight a fundamental issue with the phrase ‘open design’, at least for us and our interviewees: people do not have a clear understanding of what the phrase ‘open design’ means. As a result, they are quick to dismiss the phrase ‘open design’, project their own assumptions onto it, or feel like it is just another academic fad. Ultimately, ‘what is open design?’ is not a question we can fully address in this paper¹; we reduced our interviewees’ confusion and stress about defining the phrase by explaining our interpretation that the phrase ‘open source technology’ had inspired our understanding of what ‘open design’ meant. We also mentioned that we drew on references from computing, and the ethos of open source software, out of necessity because no other definition appeared to exist. With that, nearly all of our interviewees became comfortable offering their own ideas about what ‘open design’ could mean to ethnography.

One interviewee who has spent years doing ethnography in corporate settings said:

“If I think about the criteria that I would kind of set out: I would pick that openness of transparency. Because part of open source is both about it being free, but also about that contribution back, and building through community, where everyone is invested in it.”

During a presentation at a conference earlier this year, this interviewee also described an interesting example of how openly designed ethnography might be achieved. In one of the previous companies where the interviewee worked as a senior User Experience Researcher, our interviewee and her team came up with this idea of a process and a toolkit to train employees to collect, record and report their experience in the organisation. Through the use of this process and toolkit, the employees became transformed into ethnographic fieldworkers, with the toolkit offering guidance through the process and providing them with the rigour to ensure that they gathered quality ethnographic data. This example also mirrored how one of our academic interviewees envisioned open design for ethnography:

“If you do an ethnography on something, and somebody else works in that area, and they could read it, and then provide their own data, I think that would be interesting.”

This academic ethnographer was familiar with “open source” as a concept through the research experience he gained while working as an ethnographer in a computing department. He noted the advantage and benefit of open source design comes from the process of peer review and collective intelligence. In his own words:

“designing things using open source would be better than the traditional methods because in traditional methods, mistakes aren’t easily picked up by single design teams, whereas open source development has many eyes looking at the code and checking it for issues.”

While we struggle to pin down what open design could mean to ethnography, the ‘impact’ of this concept is an aspect that should not be overlooked. We envision that by opening ethnography up, it means embracing different viewpoints rather than privileging one over the other. As one interviewee put it:

“I have a horrible feeling that what would happen with open design is that you’d have the analyst’s view, the academic’s view, and they would merely cherry pick amongst the other academics who contribute to open design to support the view that they have. I mean, it’d be nice to point to things that support them, but also nice to point to

¹ we hope that the concept can be clarified at the Cumulus conference by the community.

contributions that contradict what they say. But that's not the nature of academic life, really. Nor does it lead to any better design recommendations.”

If these tensions and concerns exist even before “open design” has become a formalised concept, then the Cumulus Community, ethnographers, and designers will need to work together to address them. We need to clarify the ethos behind open design, and explore what it could mean for ethnography. Does it mean that we open up the process of conducting ethnographic research? Or does it mean the ethnographic data itself will be openly shared? Does it mean something else altogether? And how do we navigate the tensions that will arise during the process of ‘opening’ ethnography. Perhaps we can start to untangle these latter issues by exploring some of the challenges that exist when applying ethnography in multidisciplinary and interdisciplinary contexts.

What are some challenges when applying ethnography in multi-/inter- disciplinary contexts?

Applying ethnography in multi-/inter-disciplinary contexts brings some well documented challenges, in part due to its sociological roots. In the beginning, ethnography was a tool for undertaking social investigations and describing those investigations. Many early “ethnographic studies succeeded in revealing just how regulated, mundane and ordinary were the lives of people” (Button, 2000). Only more recently has ethnography gained “practical goals”, like making recommendations for social policy development or offering ‘implications for design’, a development that has made ethnography “theoretically, methodologically, and politically motivated” (Button, 2000). These motivations--whether they are made explicit or kept implicit--can create challenges for any researcher or research team who must turn their ethnographic insights into recommendations, especially when the work is commissioned by a client or must speak to a specific academic audience. “How do I make my findings relevant?” is a question that every ethnographer-for-hire or ethnographer in multi-/inter-disciplinary team must ask herself or himself; the challenge comes when answering the question, as it can involve selective reading of data and skewing of results. In many ways, this challenge links to another set of challenges that arise when applying ethnography in multi-/interdisciplinary contexts: those associated with establishing skill, value, and authority.

Some people believe that anyone can be an ethnographer (Sharma, 2016) because ethnography relies on a set of skills that most people can learn. However, not everyone possesses the patience, time, or attention to detail required for ethnographic studies. Ethnographic training and experience of conducting ethnographic studies are both important parts of becoming a skilled ethnographer. But colleagues from other disciplines might not recognise the skill of a trained ethnographer, and this can lead to a devaluing of the practice. Because the final output of spending one to two years (or, heck, three months) immersed in a context is often a series of journals about observations and fieldnotes, colleagues from other disciplines (or managers with cost-benefit analysis forms to complete) might not see a value in the expertise offered by ethnographers. There are no easy solutions to this challenge. We’ve seen ethnography battling for ‘value’ when being deployed alongside design methods and practices, and so, too, have our interviewees.

One of our ethnography-adopting interviewees suggested that the issue begins with the definition of ethnography itself. He explained, “I think there’s a barrier that is entailed in the word of ethnography. It’s a quite exclusive and quite an obscure term.” This feeling of exclusivity and obscurity might be echoed by anyone who adopts ethnography and integrates it into their own research practices. Of course, it might not be aided by the protective nature of some established ethnographers. One of interviewees, an established ethnographer, lamented the state of ethnography being applied in multi-/interdisciplinary teams, saying:

“If you’re an ethnographer, you need to take what you do seriously. You’re supposed to be revealing the social nature of work. Of how people go about doing their job. All these other fancy tools, like design fictions and cultural probes, and you know, the postmodern turn, all these, basically, they ignore the data in order to support already established academic positions. The data is a kind of bogus body of dumb data that supports already established theories. For me, that’s the opposite of an ethnography.”

By dismissing design fictions and cultural probes, this established ethnographer intentionally--or unintentionally--limits opportunities for ethnography to contribute to multidisciplinary or interdisciplinary projects and contexts. In some ways, he dismisses a shift that has already happened within the fields of design and ethnography. The role of ethnography in design has already shifted from ‘designers being informed by ethnographers about the “users” they studied in real-life settings’ to ‘designers being the ethnographers themselves’, mixing the real and now with future interventions. Dismissals of that shift might contribute to the exclusivity and obscurity identified by our first interviewee.

As one of our industry-based interviewees noted, “the power of ethnography is that the person who’s doing it should be neutral, and trained to observe, and people aren’t all that good at observing themselves in a way that’s neutral enough.” In this vein, another challenge that has been identified by ethnographers working in multidisciplinary and interdisciplinary contexts relates to the fieldwork and data. Fieldwork provides data about the topic at hand, the organisation or location where the fieldwork takes place, and the technology used in the that situated context. However, after that data is gathered, it needs to be analysed, and the process of that analysis matters (Button 2000). As one of our industry-based interviewees stated, “it’s one thing to gather ethnographic information, but it’s no good if you don’t do something with it.” This issue was raised during several of our interviews, we have experienced it in our own research, and it has been pointed out in ethnography literature. In *Doing Design Ethnography*, Caribee et al. (2012) argued that data is meaningless until it is looked through the analytical lens. This analytical requirement becomes particularly challenging in corporate settings, as our interviewees noted. She explained, “that translation into actionable insights from research like that I think takes a lot of skill.”

Inadequate analysis poses its challenge to ethnography in multidisciplinary and interdisciplinary settings. On the other hand, over-analysis could also jeopardise how ethnography is applied. As one of our interviewees explained,

“everyone says that ethnography is always a betrayal, you are always simplifying, you are always summarising you are always reducing people’s lives into these theories.”

Striking the perfect balance between over and under analysing is the trick here, and there are few clear explanations of how to achieve this perfect balance. One of the challenges of applying ethnography in multidisciplinary and interdisciplinary contexts is finding an ethnographer who can strike that balance, without jeopardising the integrity of their work.

Participation has also been seen as one of the challenges facing most of ethnographic practitioners. Getting people to participate in ethnographic studies is one challenge but making sure the study is also valuable and meaningful for the participants is another thing. As our academic ethnographer explained:

“It’s difficult to do that... to get that level of support. It’d be really nice. In the work we’ve done, we’ve seen how hard it is to get people to participate because there’s

nothing in it for people. Whereas I'm getting paid, there's lots in it for me, but there's nothing in it for them."

He is not the only one. An industry based ethnographer described ethnography as a "top-down approach", where ethnographers as people who "kind of come in, and study this community; you take from it and you never give it back." This is a challenge for ethnographic practitioners in multidisciplinary, interdisciplinary and traditional/sole-disciplinary projects. One of our interviewees thought that "open design for ethnography" might offer a solution to that problem. As she explained,

"we could justify the spend on the ethnography by bringing the group in working with them on these tools and they had from the very beginning a very strong opinion and ideas of which tools will be useful for them and their lives and how they want to evaluate that."

However, in practice, how much the participants could know about the project and especially the end product also needs to be delicately handled in protection of the "intellectual property".

In summary, our interviewees' perspectives suggest that there are many challenges when applying ethnography, and there might even be unique challenges in academic vs. industry settings. What these two settings share in common is the challenge of maintaining scientific rigour. But the specifics of that challenge vary between academia and industry. Ethnomethodologists (who use ethnography) may be more concerned about the quality of observations due to the fear that people try to 'hide' their data by imposing their own social theory. While in industry, the challenge relates more to job security, credibility, professional value. With all these challenges in mind, we discussed with our participants where lies the future of ethnography, particularly the openly designed ethnography.

What is the future of openly designed ethnography?

We envision the future of openly designed ethnography to be bright, after its initial murky phase of definitional debates. This initial murky phase will likely persist while we, as a community of academics and practitioners, try to establish what 'open design' means, and how it can be applied to ethnography. Whenever we try to introduce a concept (open design) that appears to have emerged and been developed in one discipline (i.e. computing) to another related field (ethnography), we know we cannot simply put them together and hope it works out. Even in the case of these two domains, which have long-term fusions and overlapping goals, they still have their own nuances. What's more, even within ethnography, how it is practiced within academia and industry are divergent. This divergence creates another layer of complexity for the future of openly designed ethnography, but one that we believe the Cumulus community, ethnographers, and designers will embrace wholeheartedly. Our interviewees largely agreed. One expressed her belief that opening up the practice of ethnography would only bring more positive opportunities, since "it has been an upward trajectory" in the past decade. Of course, it might not be an *entirely* positive journey.

We would be remiss not to return to an issue that caught our attention: the perceived 'risks' of opening up ethnographic data collection. One of those risks relates to the suspicion that ethnographic practitioners and researcher might have about "giving away" the skillset. We touched upon this 'risk' briefly in the previous section when discussing the challenges of adopting ethnography in multidisciplinary and interdisciplinary settings, and we believe it might resurface as open design for ethnography expands. In the case of our interviewee who created a toolkit and participatory data collecting process in her previous workplace,

she mitigated that risk by trusting in the toolkit and process that she developed. The initial fears and suspicions of her ethnographic colleagues ended up being misplaced, and what they found was that the process of opening up ethnographic practices had actually granted the professional ethnographers with increased freedom and capacity to take on the more challenging and demanding tasks that could not simply be done by novices. By acknowledging the skills and expertise needed to set up the open design structure and environment, our interviewee established a supportive and productive process. As 'open design for ethnography' expands, we may need to re-consider how to best recognise skillsets and knowledge of ethnographers.

Another risk for the future of openly designed ethnography relates to data collection. When people follow any data collection process "blindly", regardless of how many guardrails are in place to maintain the data quality, it is still easy for untrained eyes to miss something and not realise it. We believe this risk can be mitigated by establishing close collaboration between trained ethnographic practitioners, participants, and anyone else who may be involved in the openly design ethnographic research practice. If open design for ethnography is open to mass participation, then the observational expertise and analytical skills of ethnographers combined with the massive data input from participants could be where the merit of this participatory approach to ethnography lies.

Our interviewees had different ideas about where the merits of openly design ethnography might lay. The ethnography adopter we interviewed envisioned ethnography becoming an extended theory of sense-making that could be applied during times of change, or in complex circumstances. He suggested that ethnography is particularly useful for "feeding a coherent identity for how it is valuable to different groups of communities of practice. It's almost like, spreading it out but keeping it reasonably coherent." Another interviewee imagined that the future of open designed ethnography would actually prove to be very rich for many industry settings. In her mind,

"The future [of openly design ethnography], I think, seems to be more valuable to a lot of tech and other kind of companies that are looking for... they are not just looking to optimise the old work but to find new ideas for what to do. For that you need to learn whys and you need to learn details. You can't just learn what and optimise that. I think ethnography as a set of skills can be redeployed in different circumstances and for lots of reasons. "

All of these imagined futures carry value, and highlight some of the tensions facing the Cumulus community. How do we balance the tension between sharing the skills and maintaining the rigour of ethnography? Who gets to analyse the data we gather, and how will it be analysed? These fundamental questions about the direction and nature of ethnography in interdisciplinary questions might need to become the focus for the Cumulus community, even if that means they temporarily overshadow the main discussion at Cumulus: what is open design for ethnography.

Open design *for* ethnography, or open design *of* ethnography?

We set out to explore open design *for* ethnography, but quickly realised that we were also simultaneously exploring open design *of* ethnography. We see the two as complementary but separate topics. Open design *for* ethnography appears to be an open design tool or platform in support of ethnographic practices. Open design *of* ethnography is more concerned with how to open up ethnography as a research practice and method, making it more accessible and transparent to other disciplines. Throughout our open discussion, what has become clear to us is that these two topics do not necessarily overlap. There can be open design *for* ethnography, without any need for open design *of* ethnography. Indeed, it

appears as though there might already be “open design of ethnography” examples (see: our interviewee’s industry-based shared ethnography tool, or even the long-established Mass Observation Archive), but the list of “open design for ethnography” examples is sparse. We believe the Cumulus community, ethnographers, and designers should discuss if the two can co-exist, and if so, how.

The closing act

Our open discussion has highlighted existing tensions between who adopts ethnography, why and how they adopt ethnography, where they apply it (industry vs. academia) and how they analyse the data they collect through ethnography. These tensions surfaced in different ways and carry different implications for the future of openly designed ethnography. But, as our interviews and the academic literature indicates, these tensions are not new (Button, 2002; Caribee et al., 2012); they’ve been reflected in challenges for applying ethnography ‘elsewhere’, and they’ve also been expressed as concerns for a more openly designed ethnography. So where does this leave us? This paper and open discussion suggests that we need to have an open mind about people adopting ethnography, but we also need to be clear about what about ethnography is, what it is not, what it can do, and what it can not.

In the call for submissions, the track chairs posed a question: what will be the impact for this if design and production are further opened? We close our paper by unpacking this question into a few smaller questions: What impact? Impact for whom? Further opened how? Our experiences, and our conversations with our interviewees, suggested that these questions will carry unique tensions in every project. And that we might need to have patience and compassion with each other while we negotiate the answers to those question. So what if ethnography is more open? How would more openly designed ethnography impact design and production? Perhaps it’s best we leave those questions to the people they impact most, once we have a clearer idea of what openly designed ethnography is and the what sort of politics its carries with it.

Acknowledgements

We would like to thank the Digital Economy programme (RCUK Grant EP/G037582/1), which supports the HighWire Centre for Doctoral Training (highwire.lancs.ac.uk). All data created during this research are openly available from Lancaster University’s data archive (Wang & Thomas, 2017).

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