



60°

Concept and Design Magazine  
观念与设计

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1:  
Reception desk  
in Sydney at the  
Participatory  
Design Conference  
2010.  
2010年悉尼“参与设计大  
会”接待现场

Photography:  
摄影:  
Toni Robertson

2:  
Large screens  
providing an  
overview of the  
patients at  
an Emergency  
Department,  
designed by  
Jesper Simonsen  
and clinicians  
from Emergency  
Departments.  
Jesper Simonsen与急  
诊室医师合作设计的屏  
幕系统,显示急诊室病人  
的情况。

# PARTICIPATORY DESIGN<sup>o</sup>

## 参与设计<sup>o</sup>

# PARTICIPATORY DESIGN CONFERENCE

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- Participatory design presents a design approach distinct from conventional approaches, which actively involves all stakeholders (e.g. designers, developers, end users), with a mission to ensure that the products or systems genuinely realize the effects that users require. Participatory Design is applied in various design fields, especially in information technology system development and design. It is centered on the true participation of all stakeholders in the design process, enabling users to articulate their needs and influence the outcome of design.

- Participatory Design Conference is a bi-annual event dedicating to explore the researches in this discipline since 1990. PDC brings together a multidisciplinary and international group of software developers, researchers, social scientists, managers, designers, practitioners, users, cultural workers, activists and citizens who both advocate and adopt participatory approaches to exchange their ideas in this discipline. The central concern is to understand how collaborative design processes can be driven by the participation of the people affected by the technology designed. This year's PDC will be held in Denmark on August 12—16<sup>th</sup>, with the theme of Embracing New Territories of Participation.

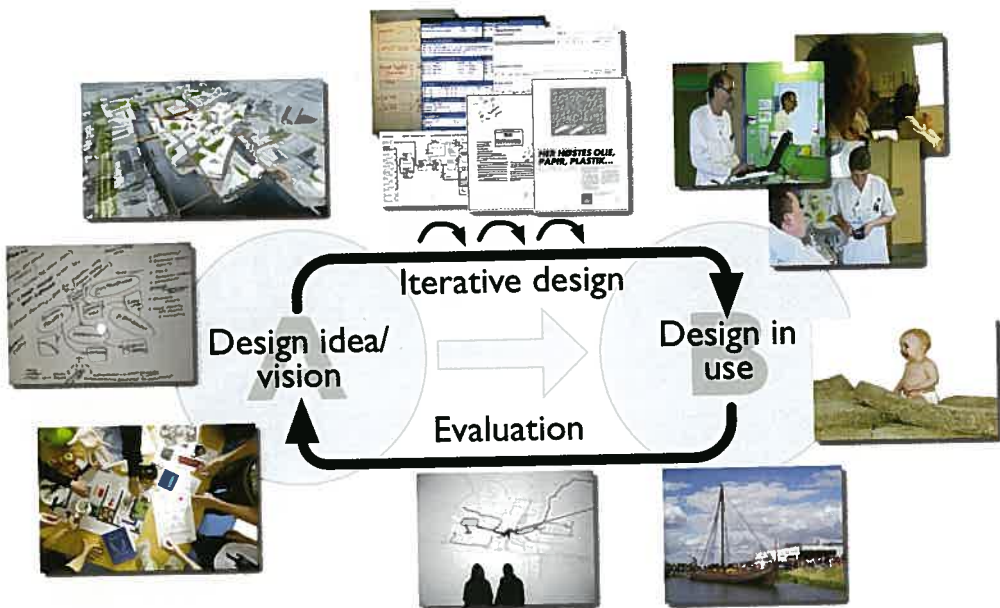
- We invite Professor Jesper Simonsen, the General Chair of this year's PDC, also a long-time researcher in related field to talk about Participatory Design. Professor Jesper Simonsen's researches are practice-oriented, rooted in Participatory

Design, and has the perspective of the IT designer in charge of designing and implementing IT based solutions in organizations. Jesper Simonsen will introduce this discipline to us from its approaches, principles, development, etc. in a practical and easy-understanding way.

- “参与设计”是一种新型的设计方法,所有的项目相关人都参与设计过程中,以保证设计出来的产品和系统真正满足用户的需求。“参与设计”广泛运用于多个设计领域中,尤其是信息技术系统的设计和开发。其核心是各项目相关者的共同参与,使用户可以清楚表达他们的需求,影响设计成果。

- 参与设计大会(PDC)是一个旨在探讨“参与设计”研究双年会,于1990年创办。PDC为倡导这一学科的各国不同领域的人士,包括软件开发商、研究员、社会科学家、管理人、设计师、从业者、用户、文化工作者、活动家和市民提供了一个交流思想的平台,探讨如何利用相关人员的参与推动这一合作型设计实践。本届参与设计大会将于8月12至16日在丹麦举行,主题是拥抱参与设计的新发现。

- 我们邀请了本届PDC的主席,也是长期从事相关领域研究的Jesper Simonsen教授为我们介绍“参与设计”。Jesper Simonsen教授通常以实践为引导开展“参与设计”的研究,同时为不同的机构设计信息技术系统。Jesper Simonsen教授以实用简单的方法从设计方法、原则、发展等角度介绍这一学科。



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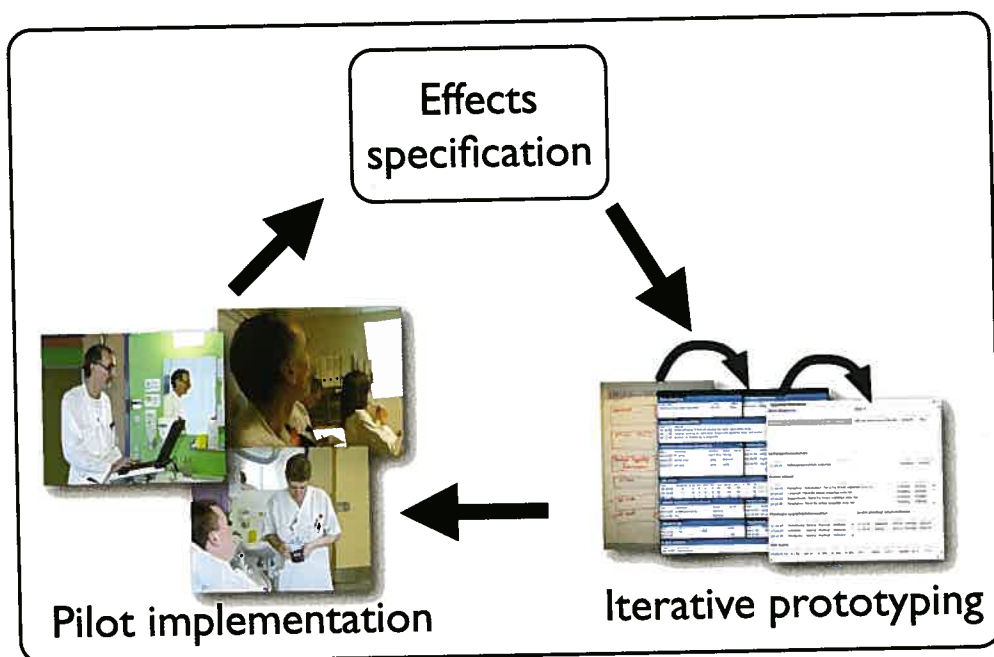
1: Jesper Simonsen outlined a general design process as a series of iterations. This general design process covers various design areas such as information technology, health, organizational studies, performance design, experiences, planning, urban studies and more. Jesper Simonsen在他的研究中列出了包括一系列循环的设计过程。这一设计过程涵盖各领域的的设计,如信息技术、健康、组织研究、性能设计、体验、规划、城市研究等。

2: How Effects-driven IT development support Participatory Design in commercial large-scale projects. Pilot implementation constitutes a formative evaluation of planned, emergent, opportunity-based, or curtailed technology-driven organizational change. - Hertzum & Simonsen

效果驱动的信息技术如何支持大型商业项目的参与设计。在试行操作中,按计划出现、临时出现或随机出现的技术结构变化或技术结构增减进行评估。——Hertzum & Simonsen

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## Interview with Jesper Simonsen

360: Is there a widely-recognized definition of Participatory Design? Could you please give us a practical snapshot of what it is about?

JS: I have just finished editing a new International Handbook on Participatory Design that will be published in August 2012 (Simonsen and Robertson, 2012). In this book, we introduce Participatory Design with the following definition (Robertson and Simonsen, 2012): In essence, Participatory Design can be defined as a process of investigating, understanding, reflecting upon, establishing, developing, and supporting mutual learning between multiple participants in collective 'reflection-in-action' (Schön 1983). The participants typically undertake the two principal roles of users and designers where the designers strive to learn the realities of the users' situation while the users strive to articulate their desired aims and learn appropriate technological means to obtain them.

Put it simple, Participatory Design embraces a diverse collection of principles, and practices aimed at making technologies, tools, environments, businesses, and social institutions more responsive to human needs. It brings together a multidisciplinary and international group of software developers, researchers, social scientists, managers, designers, practitioners, users, cultural workers, activists, and citizens who both advocate and adopt distinctively participatory approaches in the development of information and communication artefacts, systems, services, and technology.

Participatory Design has so much to offer to those living and working in environments where technologies are designed and used. Some of the most obvious examples include: clarifying design goals, formulating needs, designing coherent visions

for change, combining business-oriented and socially sensitive approaches, initiating participation and partnerships with different stakeholders, using ethnographic analysis as part of the design process, establishing mutual learning processes among heterogeneous participants, conducting iterative experiments aiming at organizational change, managing stepwise implementation based on comprehensive evaluations, and providing a large toolbox of different practical techniques to encourage and enable participation. Most importantly, its defining commitment to ensuring active and genuine participation offers a principled design approach and practice to those seeking to harness the benefits of new technology for greater human good.

360: Is the word "participatory" the same as "cooperative"?

JS: No! And "participatory" is also more than just "involvement". We stress a special human essence which we sometimes also underscore as "genuine participation" (Robertson and Simonsen, 2012):

By 'genuine' participation, we refer to the fundamental transcendence of the users' role from being merely informants to being legitimate and acknowledged participants in the design process. This role is established – for example – when users are not just answering questions in an interview about their point of view or knowledge of a particular issue, but are asked to step up, take the pen in hand, stand in front of the large whiteboard together with fellow colleagues and designers, and participate in drawing and sketching how the work process unfolds as seen from their perspectives. Inviting users to such collective discussions and reflections requires a trustful and confiding relationship between all participants. Any user needs to participate willingly as a way of working both as themselves (respecting their individual and group's/community's genuine interests) and with themselves (being

concentrated present in order to sense how they feel about an issue, being open towards reflections on their own opinions) as well as for the task and the project (contributing to the achievement of the shared and agreed upon goals of the design task and design project at hand) (Storm Jensen 2002). Such participation demands acknowledgment of the users' interests as fully legitimate elements of the design process. It includes addressing questions such as: what participation means in terms of actual power to make decisions; who needs to participate and how this can be managed and supported; how can the design process be itself designed so people can participate in it; and what kinds of design tools and methods do we need?

360: You are doing a research called EDIT Program, could you please share your opinions on how to enable the users to influence or decide the effect of the system?

JS: EDIT is a Participatory Design research program on Effects-driven IT development (Hertzum and Simonsen, 2010).

Effects-driven IT development entails a sustained focus on the effects to be achieved by users through their adoption and use of a system. The overall idea is that specification and formative evaluation of the effects desired from a system will provide users and developers – customer and vendor – with a means for working systematically with the design and organizational implementation of the system.

Effects-driven IT development supports the management of a sustained Participatory Design process throughout design and organizational implementation. The focus is on the effects to be achieved by users through their adoption and use of a system, where we: (a) specify the purpose of a system as effects that are both measurable and meaningful to the users, and (b) evaluate the absence or presence of these effects during real use of the system. Effects are formulated in a user-oriented

terminology, and they can be evaluated and revised with users in an iterative and incremental systems-development process that involves pilot implementations.

◦ **360°: You are the general chair of this year's Participatory Design Conference, the theme this year is Embracing the New Territories in Participation. What are the new territories?**

◦ **JS:** Participatory Design was rooted in a focus on involving people in the introduction of technology into their work. Today new territories embrace designing for everyday life and innovation in everyday practices including e.g. social networking services, various technologies for mobility and Community-based Participatory Design (DiSalvo et al., 2012).

◦ New territories for Participatory Design finally include how new 'Do-It-Yourself' technologies change the way we perceive the end-user in the design process and the availability of open source software and hardware tools kits such as electronics prototyping

platform enable people to produce their own applications, and thereby extend the design process into use. That end-users become designers hereby dissolves the boundaries between use and designing, and challenges our general understanding of users as participants in the design process.

◦ **360°: What researches this year do you favor? Or what researches is this year's PDC exploring?**

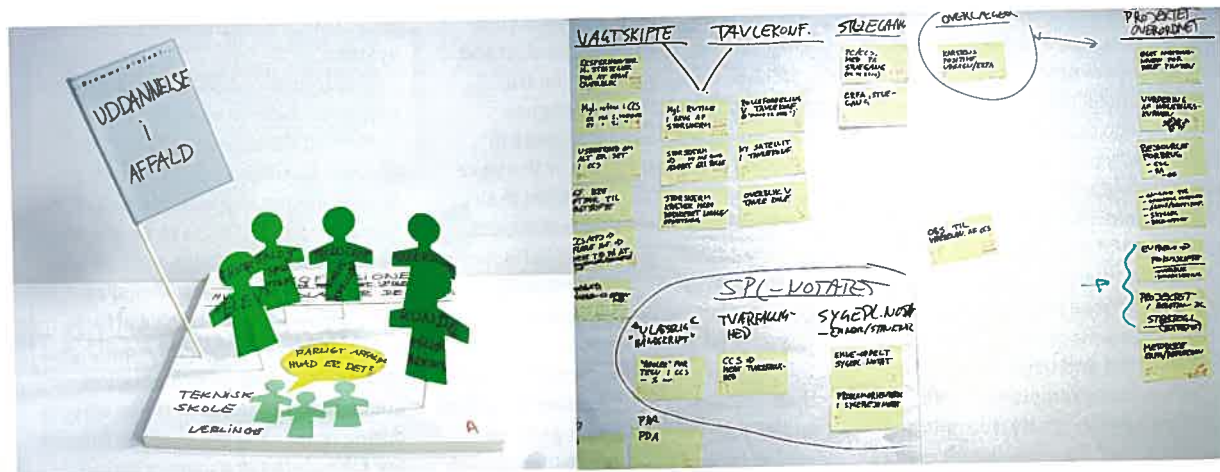
◦ **JS:** I favor researches that truly commit to the Participatory Design. The Participatory Design community constitutes a research community with a unique and special quality: It acknowledges that what you succeed in doing as a researcher has valuable meaning for yourself and for society as a whole, and further that you inevitably have to take responsibility for your professional work as a researcher and take a stand for your views within the community and society within which you work.

◦ Core areas of studies within Participatory Design include:  
◦ Methods, tools and techniques

for how to do Participatory Design.

◦ The commitments and guiding principles of ethnography and Participatory Design, including ethnographic methods and their relation to design.  
◦ The ethics of Participatory Design. Participatory Design is exceptional as an international community of researchers and practitioners who expect, and are expected to, engage in the ethics of their practice and who take that engagement very seriously.  
◦ Studies of how Participatory Design continually re-invents itself to face the changing political, economic, social, and technological environments.  
◦ **Jesper Simonsen: General Chair of The Participatory Design Conference**

“终端用户成为设计师，这就消除了使用和设计之间的界限，改变我们对于用户作为设计参与者的理解。”



1: Designers discussing with users on how to support training in waste handling. 医生正在查看新设计的电子屏幕，了解病人情况。

Design: The Royal Danish Academy of Fine Arts & Schools of Architecture, Design and Conservation, School of Design 丹麦皇家艺术学院 & 建筑学院 & 设计与环保协会 & 设计学院

2: Notes taken at a participatory design workshop of a clinical Electronic Health Record system. “电子医疗记录系统”参与设计过程中的笔记。

Design: Jesper Simonsen

3: Physician viewing the new electronic whiteboard for patients. 医生正在查看新设计的电子屏幕，了解病人情况。

Photography: Jesper Simonsen

4: Participatory Design researcher Joan Greenbaum introducing Participatory Design at the PDC'2010. “参与设计”研究员 Joan Greenbaum在2010PDC大会上介绍参与设计。

Photography: Toni Robertson

。采访 Jesper Simonsen

。360:对于“参与设计”，现在有一个广泛认可的定义了吗？能否简单给我们介绍一下“参与设计”？

。JS:我前不久编著了一本《国际参与设计手册》，将在今年8月出版（Simonsen&Robertson, 2012），在这本书里，我们是这样给“参与设计”定义的：就其本质而言，“参与设计”可以理解为企业“行动中反思”（Schön, 1983）的活动中，探索、理解、反思、建立、发展以及协助各方参与者之间相互学习的过程。参与者通常是用户和设计师这两个角色，设计师试图了解用户的实际情况，而用户试图表达自己想要的结果，并通过学习适当的技能来使用成品。

。通俗一点来说，“参与设计”是一个参照多个原则、集合多项实践的过程，旨在让技术、工具、环境、商业和社会机构更符合人类需求。在这一过程中，不同学科不同地区的软件开发、研究者、社会科学家、经营者、设计师、从业员、用户、文化工作者、活动家和市民一起合作，倡导并运用特殊的参与式方法来开发信息和通信产品、系统、服务和技术。

。“参与设计”对那些需要在生活和工作中心设计和应用技术的人提供诸多帮助。最明显的，它可以帮助我们阐明设计目标、准确表达用户需求、设计一致的改革愿景、将商业诉求与社会敏感问题相结合、推动不同利益相关者的参与和合作、在设计过程中使用人种志分析法、在不同参与者之间建立相互学习的过程、开展多项实验以改善组织、在全面评估的基础上管理各阶段执行情况、提供各种技术以鼓励并实现各方的参与。最重要的是，在保证活跃、真正的参与活动的同时，为那些希望利用新技术以更好地服务人类的从业者提供了有准则的设计方法及实践。

。360:“参与”是否等同于“合作”？

。JS:不，而且“参与”也不仅仅是“介入”。我们强调一种特殊的人的本质，有时我们也称之为“真正的参与”（Robertson&Simonsen, 2012）。

。“真正的”参与，是指用户的角色发生根本的变化，从单纯的信息提供者，到设计

过程中正当的、公认的参与者。举个例子，以往用户只是回答一些问题，将他们对某一问题的看法说出来，而现在，我们需要用户进一步的行动，拿起笔，与工作人员和设计师一起，在白板上画出他们心目中的工作流程。邀请用户参加这种集体的讨论和思考，各参与者之间需要建立一种信任的关系。任何用户都要自愿参与这一过程，他们既是代表自己（表达自己和群体或社区的利益），又是在与自己工作（集中精力感受自己对某一问题的看法，对自己的想法进行思考），也是在为任务和项目工作（为实现公认的设计任务和设计项目的目标而努力）（Storm Jensen 2002）。这种参与要求我们认可用户的利益是设计中一个正当的元素。其中需要解决一些问题，比如：从决策的角度看，参与意味着什么；谁来参与，如何管理和协助参与；如何设置设计过程本身，使人们可以参与进来；我们需要哪些设计工具和方法等。

。360:您正在做一个叫EDIT的项目，能不能跟我们谈谈您觉得如何能让用户影响或决定系统的效果？

。JS:EDIT是一个参与设计研究项目，指“效果驱动的信息技术研发”（Hertzum & Simonsen, 2010）。

。这个项目关注于用户在使用系统后要达到的效果。对系统需要达到的效果进行规范和结构分析，使用户和开发商——即客户和卖家——进行系统的合作，设计并执行系统。

。系统的设计和 execution 过程都运用了“参与设计”的方法，而EDIT项目则对这一方法进行管理。我们关注的是用户在使用系统后希望达到的效果。我们首先要明白哪些效果是用户要求的，并且是可以测量的，在使用系统的过程中，如果达到了这些效果，或没有达到这些效果会怎样，对此我们也需要进行测试。我们从用户的角度来制定这些效果，并在试点执行和系统升级中与用户一起评估并修改。

。360:今年的“参与设计大会”主题是“拥抱参与设计的新发现”，你是本届大会的主席，“参与设计”有什么新的动向？

。JS:“参与设计”的根本在于邀请人们参与技术开发。用于日常生活的设计和日常创

新，如社交网络服务、移动技术和社区参与设计等（DiSalvo et al., 2012）是我们关注的新动向。

。“参与设计”的新领域包括“自己动手”新技术如何改变我们对用户在设计过程中的角色的看法，以及开源软件和硬件工具包的使用，如电子原型制作平台可以让人们制作自己的应用程序，由此将设计过程延伸到使用过程。终端用户成为设计师，这就消除了使用和设计之间的界限，改变我们对于用户作为设计参与者的理解。

。360:今年的“参与设计大会”寻求哪些方面的研究，您个人倾向怎样的研究？

。JS:我倾向于那些真正探讨“参与设计”的研究。“参与设计”领域中的研究有其独特的质量标准：你的研究成果对自身和社会都有意义，你要为自己的专业研究工作负责，并在工作领域中维护自己的观点。

。“参与设计”研究的核心领域包括：

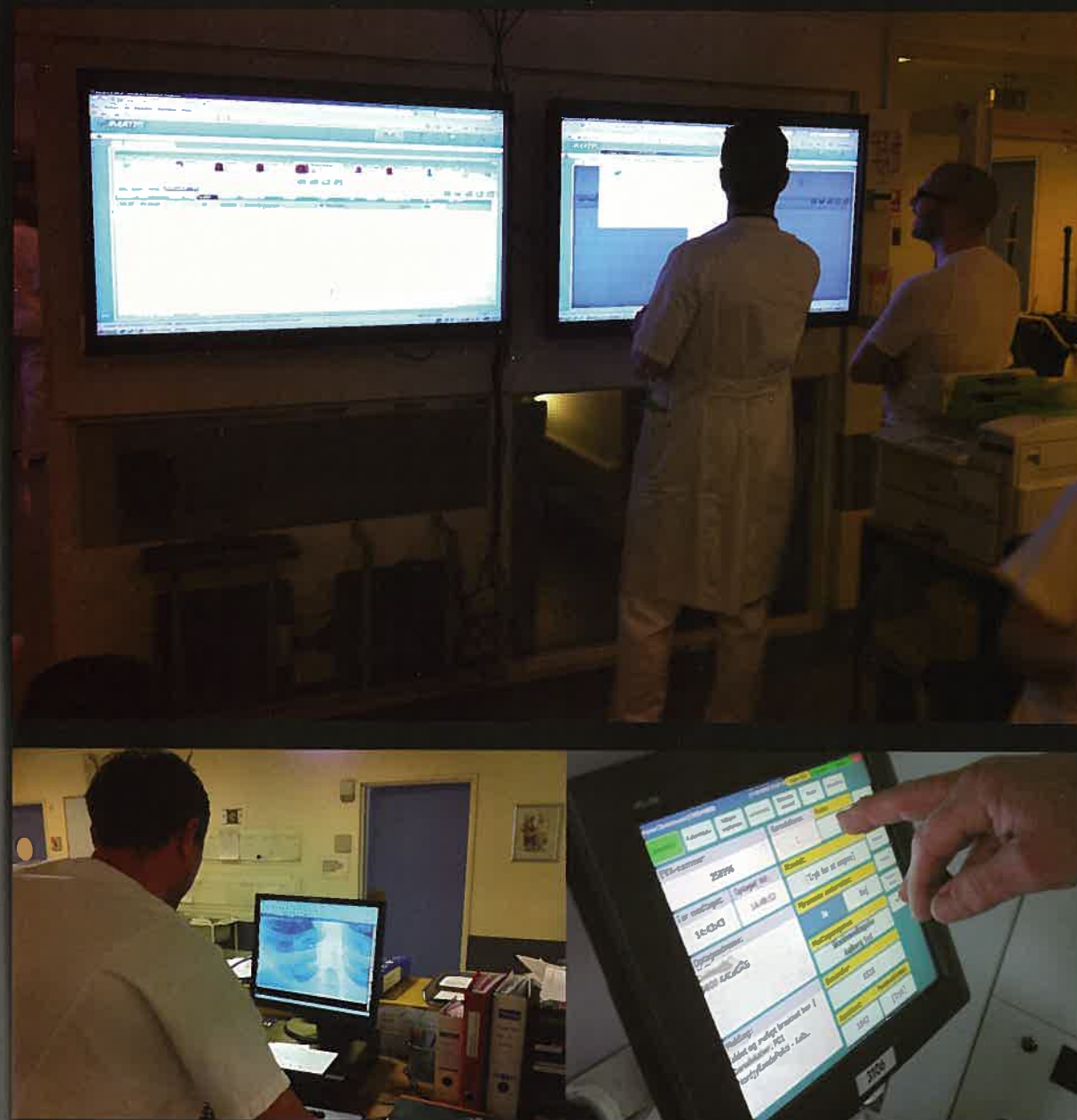
。开展“参与设计”所需的方法、工具和技能；

。人种志研究和“参与设计”的目的和指导准则，包括人种志方法和它们与“参与设计”的关系；

。“参与设计”的职业准则。“参与设计”由各国研究员和从业员参与，取得不错的成绩，这些人期望，同时被赋予期望，可以制定职业准则，并严格遵守这些准则。

。研究“参与设计”在政治、经济、社会和科技环境的变化过程中如何不断地进行创新。

。Jesper Simonsen: 2012年参与设计大会的主席



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1: Physician working with electronic whiteboards at an Emergency Department. 急诊室医生查看电子屏幕。

Photography: Jesper Simonsen

2: Physician examining an X-ray picture just taken. 医生查看刚拍到的X射线照片。

Photography: Jesper Simonsen

3: Electronic Ambulance Record (EAR) during the ambulance ride, connected wirelessly to the large screens in the Emergency Department.

救护车上的电子救护记录，与急诊室的大屏幕无线连接。

Photography: Jesper Simonsen