Liberatory Design Thinking for Equity-Centered Instructional Design: A Systems Thinking Analysis

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DOI:10.59668/1269.15663



As per the National Equity Project, any system that produces inequities, injustices, and inequalities is often a product of design. Research has shown that systemic inequity often results from the design process and can rupture the power balance, producing inequitable relationships in the social justice arena (NEP, n.d.). Equity-centered systems design is pivotal in dismantling systems of oppression and empowering people of color, people with disabilities, the LGBTQ+ community, the indigenous, and other marginalized communities. An equity-centered liberatory design thinking approach can support instructional designers in identifying and addressing the problems of inequities in an existing system. By considering the ethos and strategies necessary to center equity by design, instructional designers can provide a platform and opportunity for all stakeholders to practice converging and divergent thinking.

Introduction

Liberatory design thinking is an equity-centered design framework that was co-created by Tania Anaissie, Victor Cary, David Clifford, Tom Malarkey, and Susie Wise during a collaboration in the year 2016 and 2017 with the National Equity Project and Stanford d.school's K12 Lab expanding the familial design thinking process (Anaissie et al., 2017). While design thinking has five phases —Empathize, Define, Ideate, Prototype, and Test (The Interaction Design Foundation, n.d), liberatory design thinking has two added phases: Notice and Reflect, as shown in Figure 1. These phases in the context of learning experience design focus on what instructional designers can do to add equity to designing and developing learning experiences. In the liberatory context, systems thinking can identify, analyze, and challenge the systems of power and design interventions and strategies for promoting social justice and liberation. It involves identifying the root causes of inequities and analyzing how different systems and structures contribute to or reinforce those inequities.

Figure 1

Liberatory Design Thinking Framework (Anaissie et al., 2017)



Design Challenge

The nonprofit in this design case experienced high turnover during COVID-19. The exit survey revealed that a lack of a sense of belonging, resource availability, and team member inclusion were major concerns leading to high exit rates. To improve team member experience, the organization prioritized hiring diverse employees along with DEI initiatives. And the L&D team was asked to redesign the onboarding learning experience. The author who was the sole instructional designer on this project, introduced the 'liberatory design thinking' framework for redesigning the onboarding learning program and inquired two significant questions:

- 1. How do instructional designers implement an equity-centered framework to design learning experiences that disassemble structural inequities?
- 2. Second, how might instructional designers promote effective instructions and learning strategies within the constraints and interdependencies in an existing system?

Design Decision and Outcome

The liberatory design thinking framework is non-linear and agile, allowing for simultaneous generation, presentation, and evaluation of design directions and alternatives. For this project, the tools were tailored and customized to fit the requirements and system constraints. The project started with creating a plan, keeping the liberatory design thinking framework as its core philosophy.

Figure 2

Project plan for liberatory designing thinking phases (Self-Design)

PROJECT	PLAN - MANAGER TOOLKIT]			
	PROJECT TITLE	1	PROJECT ROL	ES	
	Onboarding and Orientation	START DATE	Individual Names and their roles		
	PROJECT TEAM	02/01/23			
	Core and Reflection Design Team	END DATE	1		
		12/15/23			
*WBS NO.	TASK NAME	MILESTONE STATUS	Assigned To	DUE DAT E	COMMENTS
1	PHASE I - NOTICE AND EMPATHIZE				
1.1	- Project Conception, and Kickstart	Done			
1.2	- Notice Exercise	Done			
1.3	- Empathy based Research	Done			
2	PHASE II - DEFINE AND IDEATE				
2.1	– Create Personas	Done			
2.2	– Synthesize Data	Done			
2.3	- Learner Personas	Done			
2.4	- Ideate Solutions/Project Scope	Done			
3	PHASE III - PROTOTYPE				
3.1	- Program Goals and Learning Objectives	Done			
3.2	- Content Breakdown	Done			
3.3	- Task Analysis, High Level Course Design	Done			
3.4	- Opening Module (Pre-Arrival)	Done			
3.5	- Module 1 (First 2 Weeks)	Done			
3.6	- Module 2 (First 30 Days)	Done			
3.7	- Module 3 (First 60 Days)	Done			
3.8	- Module 4 (First 90 Days)	Done			
3.9	- Module 5 (First 90 - 180 Days & Closing)	Done			
4	PHASE IV - TEST AND REFLECT	Done			
4.1	 Pilot Release Focus Group Feedback - Opening (Pre-Arrival) and Module 1 (First-Two Weeks) 	Done			
4.2	 Pilot Release Focus Group Feedback - Module 2 (30 Days) and Module 3 (60 Days) 	Done			
4.3	 Pilot Release Focus Group Feedback - Module 4 (90 Days) and Module 5 (90-180 Days) 	Done			
4.4	- Communication Strategy & Email Templates	Done			
4.5	- Final Course Launch	Done			

The Notice Phase

The first initiative taken before moving on with the project was to create a design team. Traditionally, people who participated in the design team were from the learning and development department consisting of instructional designers, training facilitators, learning administrators, content writers, project managers, leaders, and subject matter experts. In order to bring a liberatory mindset, multiple stakeholders were invited who were impacted by learning designs, i.e., the team member representatives. These representatives were from the 'team member resource groups' with shared characteristics or life experiences. The objective was to amplify the voices of traditionally under-represented people and marginalized communities by providing them a platform for the members of these communities and their allies to connect in the organization. When the author introduced the 'liberatory design thinking' framework, the senior leadership provided excellent support as it aligned with the organization's inclusion mandate. However, the thought of inviting external team members to the design team created tension in the existing team. The tensions were due to insecurities about giving up the power of design decisions and overlapping team member roles and responsibilities. In order to address these concerns, it was decided that the design team would be divided into two sub-teams: the 'core' team and the 'reflection' team. The 'core' team consisted of members from the learning and development department, with clearly defined roles for each member. The reflection team consisted of the TMRG representatives and subject matter experts to provide crucial feedback at each iteration and have a final voice for a more inclusive learning design.

Second, to notice with empathy, both the core team and the reflection team started a self-reflection exercise to notice shared values, identities, and biases. The reflection exercise helped to notice constraints and opportunities and negotiate with key stakeholders and people in power to influence the overall design. The self-reflection exercise consisted of questions, as shown in Table 1.

Table 1

Liberatory questions for the Notice Phase (Self-Design)

Liberatory Questions for the Notice Phase

- 1. Who am I/we? Who are our learners? What do I/we know about our learners?
- 2. How does my identity or job title position me in improving the learning experience?
- 3. Do I have privileges enjoyed by others? How does it impact the learning design to improve learning experiences?
- 4. Do I see patterns in the previous learning designs that might be biased and affect the learning experience?
- 5. Have I/we designed learning programs using inclusive language? Have I/we included examples and language that was culturally sensitive? Were the learning programs accessible to people with disabilities?

The Empathy Phase

The Empathy phase is core to understanding the people for whom the learning experience is designed. During this phase, the 'core' team collected data through ethnographic methods, including observations, interviews, and focus group discussions from both the 'reflection' team and with team members who joined the organization in the past 12 months and were impacted by the current onboarding and orientation learning program. The core team focused on liberatory questions that opened the door for more profound and meaningful data collection, as shown in Table 2.

Table 2

Liberatory questions for the Empathy phase (Self-Design)

Liberatory Questions for the Empathy Phase

- 1. How does my identity and role in this project affect how and what people share with me about their lived experiences? Do the learners feel safe to share their experiences?
- 2. What are the core needs of the learners? What are their struggles and aspirations regarding the onboarding and orientation program? When and where do their struggles occur? How often does this happen? Are there any additional data available?
- 3. Are the learners clear about their job expectations? Do they have any inequities in resource availability? Do the learners feel included? Do they feel their opinions and viewpoints are given a platform to be heard? What do my learners hear, think, and feel about the onboarding and orientation learning program? What do they see in their environment that affects their learning experiences?

Another critical aspect that followed throughout the empathy phase was creating an environment of psychological safety. In a systems approach, it is a shared expectation that leaders or people with power to influence will not embarrass, reject, or punish each other for sharing ideas, taking risks, or soliciting feedback (Staff, 2022). Hence, the 'core' team took the following steps to provide a platform that promotes safety:

- Anonymous feedback forum if team members are unwilling to disclose their identity.
- Multiple options to collect data using personal interviews, anonymous surveys, and focus group discussions. Hence, the team members can share their experiences in whichever format they prefer to feel safe.
- Encouraging open and non-judgemental communication and active listening with no interruptions when someone shares their opinions, ideas, frustrations, or pain points.
- No personal remarks and respect for diverse perspectives and lived experiences.
- Focus and prioritize the well-being and safety of all.

The Define Phase

In the Define phase, the design team, including the 'core' and the 'reflection' teams, collaborated to synthesize the findings and articulated the insights by creating learner personas and empathy maps, as shown in Figure 3. The learner personas helped to visualize the target learner or group of learners for whom the learning programs were designed. On the other hand, the empathy maps helped to understand what the end users, i.e., the learners, felt, thought, saw, and heard, what pains and gains they experienced, and what were their own biases. During this phase, the team used whiteboards and visualization tools like the Miro to brainstorm and narrow down the key learner personas, their characteristics, behaviors, likes, pain points, and needs, as shown in Figure 3.

Figure 3

An empathy map showing a learner's persona and needs (Self-Design).



The Ideate Phase

The 'reflection' team played a crucial role in offering insights into the solutions. The TMRGs were also involved in the co-design processes to co-create solutions that met their needs and aligned with their values. The Ideate phase also overlapped with other phases, especially the 'Reflect' phase. Taking feedback from multiple stakeholders, including the TMRG group members, helped to understand the impact of the learning solutions. Furthermore, to make adjustments as needed to ensure that it genuinely empowers marginalized individuals and communities, as shown in Figure 4.

Figure 4

A virtual whiteboard for a brainstorming session for the Ideate phase (Self-Design).



The Prototype Phase

During the Prototype phase, the 'core' team designed prototypes incorporating learning principles like the backward design model and adult learning principles and created storyboards and wireframes. The 'reflection' team, which included the TMRG representatives, played a crucial role in providing feedback to co-design the learning solution at each iteration.

The design team at the nonprofit organization followed a few criteria to prototype the learning solutions:

- The solution must address the problems within the larger systems in which it operates.
- The solution must address and ensure that it aligns with the needs and values of diverse learners, especially marginalized and underrepresented learners.
- Use systems mapping techniques to visually represent the current systems and identify key stakeholders, feedback loops, and leverage areas.
- Use co-design techniques to involve multiple stakeholders, including representatives from the TMRG groups, in the prototyping process.
- Use inclusive and accessible design principles when creating the prototype. For example, ensuring closed captioning, good color contrast, culturally relevant images and language, and other WCAG (Web Content Accessibility Guidelines) protocols.

The Test and Reflect Phase

The Test phase focuses on getting specific feedback about how ideas and solutions can improve. The Reflect phase is ongoing and transparent throughout the liberatory design thinking phases. The design team made a questionnaire, as shown in Table 3, to make testing and reflection a continuous process.

Table 3

Reflection questions in a 'liberatory design thinking' framework (Self-Design)

Liberatory Questions for the Reflection Phase

1. As a team, does the learning experience feel equitable and inclusive? If not, why? What

and how should we adjust?

2. How might cultural norms trigger unconscious biases that impede our relationships and

work? What are the suggestions to improve the learning program?

3. What emotional state affects representative groups after experiencing the learning

program?

4. How can we share or release distressful emotions to move through the Liberatory

Design process with care for each other?

Conclusion

To summarize, a few critical observations in the design case that were observed while implementing the 'liberatory design thinking' framework were:

- Create a diverse design team, including multiple team members from diverse backgrounds, especially underrepresented and marginalized members.
- · Promote psychological safety to get honest and diverse feedback (anonymous feedback/ no repercussions for providing feedback).
- The political will of senior leadership
- Appoint moderators who can serve as facilitators, mediators, and champions of inclusion.
- And design solutions with a systems thinking lens.

Finally, it is vital to remember that liberatory design thinking is an ongoing process that requires continuous reflection, adaptation, and monitoring to ensure that the solution effectively addresses the complex issues within the system.

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