Template

Frames of reference

Consumer Financial Protection Bureau
equity-centered design guidelines

As a team, use this activity to identify the frames of reference your team brings to a project, how those frames of reference could lead to biases that may skew research and design activities, and how you can mitigate those biases. Generally teams use this activity at the beginning of a project or when working on a specific product.

Everyone should choose how they want to participate, but ideally this can be a group activity.

0–30 minutes to prepare
1 hour to collaborate

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Learn about frames of reference and bias

Since this activity is about identifying biases, it's important your team understands how bias can affect research and design. If you're unfamiliar with biases in research and design, take time before the activity to learn more with some of the suggested resources.

0–30 minutes

1. **Equity-centered design guidelines**
   This guide contains initial steps for designers, researchers, and developers at the CFPB to help give the communities we design for greater power and authority in the design and research process.
   Open guidelines (https://cfpb.github.io/design-system/guidelines/overview)
2. **Equity-centered design and research**
   This presentation from 18F talks about what equity-centered design means and how it relates to public service work. It includes background on frames of reference and how they can impact a project.
   Watch presentation (https://www.youtube.com/watch?v=jTZUB8maX7k)
3. **Common biases in research and design**
   18F has also created a guide to common biases that can affect the research and design process. The guide includes descriptions of common biases as well as ways to avoid them.
   Open guide (https://ux-guide.18f.gov/research/bias)

1 Define context and audiences

Briefly describe your project so that everyone is on the same page. Then spend some time listing characteristics of the audiences your project is meant to serve.

PROCESS

1. As a team, write up a brief description of your project or product
2. Set a timer for 5–8 minutes and brainstorm who your audiences are and what characteristics they have; be careful not to exclude any audiences here
3. If needed, decide which audiences or characteristics to focus on for the rest of the activity

10 minutes

Project/product description

Audiences and audience characteristics

2 Brainstorm frames of reference

Brainstorm some frames of reference that might be relevant to your audiences. Think especially about what frames of reference could lead to bias in your project.

PROCESS

1. Set a timer for 5–8 minutes; brainstorm frames of reference important to your audience (here are examples below to get you started)
2. Give everyone 5–8 votes to choose frames they think are important
3. Use the 6–9 frames that get the most votes for the rest of the activity

10 minutes

Frames of reference

Common frames of reference

- Types of locations where you've lived (e.g. urban, rural)
- Typical internet speed (high speed, cellular data, etc.)
- Typical equipment used to access the internet (desktop or laptop computer, or mobile device only)
- Race & ethnicity
- Gender & sexual identity
- Age
- Food insecurity
- Housing insecurity
- Immigration status, or whether you've ever lived with an immigrant
- Disability status
- Familiarity with physical & mental disabilities
- Use of assistive technologies
- Marital and parental status
- Where you grew up
- Your values
- Your organization's values

Project-specific example

Imagine, you're building a tool to help renters who are struggling to pay their rent find assistance. Many of the above frames of reference might be relevant for your project. For example, if you've rented in a big city, you might be lacking the same frame of reference a rural renter would have. There might also be other relevant frames of reference, like experience applying for social services.

3 Vote on how to reflect on experiences

In the next step you'll be asked to reflect on what lived experiences you have with each frame of reference. Vote on how to reflect to make sure that everyone can participate in a safe and comfortable way.

PROCESS

1. Have everyone vote anonymously for one of the two options
2. Based on the vote, choose how you'll share individual lived experiences in the next step

2 minutes

Vote

I'm comfortable sharing lived experiences in this template	I'm not comfortable sharing lived experiences in this template

Choose

Based on the outcome of the vote, choose a way to identify individual experiences with the frames of reference you chose in the previous step.

If everyone is comfortable sharing in the template, use the activity in the next step.

If even one person votes that they are uncomfortable sharing, plan to:

- Have everyone privately write down their lived experiences, or
- Brainstorm the range of lived experiences you think your audience might have with each frame of reference

4 Identify individual lived experiences

Based on the result of the vote in the previous step, either reflect on lived experiences individually or share as a team.

PROCESS

1. Add the name of each frame of reference your team chose to focus on
2. If your team has chosen to share in the template, set a timer for 5–8 minutes; have everyone anonymously add their individual experiences however they're comfortable, and remind everyone they're not obligated to share anything they're not comfortable with

8 minutes

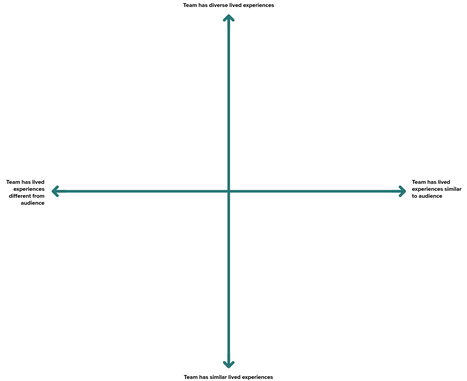
5 Identify frames of reference that could lead to bias

Based on your team's lived experiences, place each frame of reference on the grid to understand how your team is similar to or different from each other and your audience.

PROCESS

1. Put each frame of reference from the previous step into a sticky note to the right
2. As a team, put each sticky where you think it belongs on the grid (if you don't know your audience well or if they have diverse experiences, feel free to work along just the y-axis)

5 minutes



6 Identify biases

Informed by the grid, brainstorm biases that might arise. Who might be excluded by or from your decisions? What could be misinterpreted? What assumptions might you be making?

PROCESS

1. Set a timer for 5–8 minutes and brainstorm; one way to generate ideas is to think of how someone with different lived experiences might be affected
2. Work as a team to organize your ideas into groups; give each group a name or description

10 minutes

Potential biases, exclusions, misinterpretations, assumptions, etc.

7 Make a plan to mitigate biases

Brainstorm ways to mitigate potential biases. Check back throughout the project to make sure you're putting mitigations into action and brainstorm new ones.

PROCESS

1. Copy the sticky notes or groups from the previous step
2. Set a timer for 5–8 minutes and brainstorm mitigations for each note or group
3. Discuss as a group how you'll put those mitigations into action

10 minutes

Possible mitigations