

Design for decision making: the design of information for later life housing options

Submitted for the degree of Doctor of Philosophy
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November 2020

Declaration

I confirm that this is my own work and the use of all material from other sources has been properly and fully acknowledged.

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Abstract

This research explores the visual presentation of information for UK later life housing options provided by third sector organisations. The aim is to understand how design and design practice contribute to the effective provision of information that supports decision-making activities. Discussed below are the research approach and techniques used, recommendations for design practice, and avenues for further enquiry.

A layered and pragmatic research approach is used, including analysis of the visual organisation of housing options documents and discussions with users about perceptions of existing documents. Design practice, in relation to such documents, is considered through interviews with trained designers and document producers working in the third sector. The techniques used to describe document design and elucidate design practice include: tree diagrams, tables, document thumbnails, and colour coding to unpack graphic features; visual prompts to encourage discussion of design practice; paper and digital techniques to organise interview data; and spatial arrangements and colour coding in charts to communicate collated findings. The development of a framework to direct thinking towards document design also aided familiarisation with the multi-disciplinary domain of later life housing.

The research approach taken confirms the value of synthesising multiple perspectives so that the following recommendations can be better implemented within real-world design practice: using visual rhetoric appropriate for impartial content, to facilitate document use and perceived value; developing design resources to visually differentiate documents and a library of graphic features that facilitate decision-making activities; evaluating the comparative affordances of print and digital documents for decision making; and recognising the importance of image choice. The techniques used also have implications for design practitioners and researchers aiming to elucidate design practices within multi-disciplinary domains, and have pedagogical value for conducting visual analyses of documents. The findings also have implications for the management of design projects in the domain of later life housing, including financial considerations impacting third sector design practice, the integral role of design briefs in collaborative projects, and the involvement of users.

Areas for further research identified include the development of ‘conversation starter’ documents for later life housing, participant studies exploring how visually differentiating documents can alleviate perceptions of information overload, and the application of findings to other real-world domains, such as Power of Attorney, that deal with later life and decision making.

Acknowledgments

This dissertation would not exist without the support of many people without whom this research project and dissertation would not have been possible and to whom I will be forever grateful.

I wish to thank Sue Walker who encouraged me to pursue the possibilities of design research and her support as my supervisor alongside Alison Black and Jeanne-Louise Moys. Thank you all for providing knowledgeable advice and pastoral support at key moments throughout my studies. Thank you to the Design Star Centre for Doctoral Training for the financial support and opportunities to meet and make friends with fellow design students working across the spectrum of the design discipline. I am grateful for those who participated in the studies for this project, without which the research would not have been possible. In particular, Adam Hillier, Deputy Chief Executive at the EAC, and Sue Adams, CEO of Care & Repair England. Both provided invaluable information and contacts towards the beginning of this project. The efforts that those working in the third sector carry out should be applauded and I am grateful for their insights into the sector. Thank you also to my friends who have been a source of well-timed distraction when needed.

Most of all, thank you to my patient husband Rob for your belief in me, and to my parents Ken and Anne Becker for always supporting me, your continued encouragement, the numerous invaluable discussions, and the time and care taken to read drafts of this dissertation. Thank you.

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1 Introduction

1.1 Research topic, focus, aims, and objectives

This research explores the domain of later life housing options from the perspective of graphic communication design.¹ The focus is on functional documents² provided by third sector organisations (TSOs)³ in the UK that provide older people and their families with information about housing options for later life. With this focus two strands are explored:

- 1 how the design of information contributes to informed decision making;
- 2 how designers work, and the considerations made during design practice⁴ that influence effective document design.⁵

In essence this research project explores “what” graphic designers design [the documents], and “how” they do it [design practice]’ (van der Waarde 2018, 356).

The two research strands contribute a design perspective to the ongoing conversation about generating ‘improved information and advice for older people about housing choices’ (Department for Communities and Local Government (DCLG) 2017, 64) and, in turn, the importance of effective information provision within the wider discussion about the future of an ageing population (Government Office for Science

1 See Glossary for a definition of ‘graphic communication design’.

2 See Glossary for a definition of ‘document’ and ‘functional document’.

3 See Glossary for a definition of ‘third sector organisation’.

4 See Glossary for a definition of ‘design practice’.

5 See Glossary for a definition of ‘effective design’.

2016).⁶ It also fits alongside other projects that investigate ways to support people during transitions in life that show a ‘need to shift from fire-fighting to prevention, with a holistic, person-centred approach to [chronic health and social issues in later life]’ (Calouste Gulbenkian Foundation 2020). In so doing, this research aims to highlight the ‘public value’ of graphic communication (Ross 2018), where public value is broader than the popular narrower economic definition of value (Benneworth et al. 2016). Research into graphic communication is understood to add to this wider understanding of value by contributing:

... new knowledge and understanding about materiality, making, and the relationship to broader social, political, cultural, and economic contexts, whether the work of particular designers or groups of designers, or sets of object types, or of schematic presentations of data and information and beyond (Walker 2017, 557).

In this dissertation later life housing options⁷ is considered a ‘domain’⁸ that spans several disciplines, including: architecture (relating to the provision of later life housing), sociology (relating to needs of an ageing society); psychology (relating to decision-making activities); and the third sector (relating to advancing social causes). Importantly, this research is from the discipline of graphic communication design, which does not seem to have been used previously to research information about housing options.

The term ‘communication design’ is used throughout this dissertation as a shortened version of ‘graphic communication design’. This dissertation acknowledges that the term ‘communication design’ is synonymous with the term ‘graphic design’ (Walker 2017, 550),⁹ especially as graphic

6 See the Government Office for Science policy map (Government Office for Science 2016, 102–3) that illustrates the interconnected topics involved with policies to improve well-being throughout a life course. These include provision of information for people to lead active lives and to plan for housing in later life.

7 Throughout this dissertation the terms ‘later life housing options’ and ‘housing options’ are used interchangeably.

8 See Glossary for a definition of ‘domain’.

9 Frascara has highlighted that ‘visual communication design’ might be more appropriate than ‘graphic design’ (which places emphasis on the ‘graphic’), as the definition includes ‘a method (design); an objective (communication); and a medium (visual)’ (Frascara 2004, 4). With this in mind ‘communication design’ has been used as the main term throughout this dissertation.

design¹⁰ is now understood to be broader than the early twentieth-century association with ‘commercial art’ (Triggs et al. 2019), and is an:

... activity that organises visual communication in society ...
concerned with the efficiency of communication, the technology used for its implementation, and the social impact it effects,
in other words, with social responsibility (Frascara 2019, 306).

Although this definition of graphic design moves the discipline away from aesthetic associations, perceptions exist outside of the discipline that graphic design is an aesthetic pursuit (e.g., Kools 2012).¹¹ It is important to acknowledge that communication design (and by association graphic design) is more than aesthetic. For example, the terms share their definition with that of information design, whereby designers are ‘identifying the problem and analysing the context and audience before shaping the message’ (Spiekermann 2017, x).

It is clear from the discussion above that there are no clear boundaries between the different terms. Consequently, this dissertation acknowledges that it is important to have nuances within the discipline when discussing specific outputs of design practice. For example, when discussing diagrams ‘information design’¹² is a useful term as designers are visualising data (or information) (e.g., Pontis 2014). Equally, it can be used to describe wayfinding, map design, and instruction design (Black et al. 2017). ‘Graphic design’ can be used to describe branding projects and logo design, as well as encompassing advertising and wayfinding, demonstrated by the examples included in the exhibition ‘Can graphic design save your life?’ (Schrauwen et al. 2017).

10 See Glossary for definition of ‘graphic design’.

11 Advice aimed at health professionals writing materials for the public include statements such as: ‘In a brochure: [do not] make each new page a piece of art. This may be a graphical designer’s dream, but in general, artistic novelties need second and third glances for readers and annoy those who are distracted by content-free graphics’ (Kools 2012, 50). This dissertation agrees with Kools (2012) that artistic novelties are counter-productive to effective reading, but demonstrates that not all graphic designers aim at artistic results when designing, especially for functional communications.

12 ‘Information design’ is used in this capacity in this dissertation for discussing the use of ‘information design aids’ (Pontis 2019, 50) throughout the project (see Section 1.3). Additionally, see Glossary for a definition of ‘information design’.

All of the outputs of these design ‘sub-disciplines’ are ‘communicating’, consequently, in this dissertation, ‘communication design’ is considered appropriate. The dissertation argues that the design of information for later life housing options requires designers to consider the communicative aspects of the document. For example, how a document engages and attracts people to read it (aspects often associated with graphic design) as well as to organise information so that people can understand and interact with it (as per definitions of information design).

At the core of communication design are theories and principles that contribute towards effective presentation of information that supports readers.¹³ Using these underpinnings, the broad aim of this dissertation is to offer insights grounded on a practical footing in the ‘real-world’¹⁴ context of housing options that relate to:

- how design (of information) and design practice (of practitioners) contribute to the effective provision of information that supports decision-making activities for people making considering later life housing options.¹⁵

The three main objectives to achieve this aim are to:

- 1 identify ways of describing design and design practice graphically to direct thinking towards significant activities and considerations in the domain of later life housing options;
- 2 elucidate processes within communication design practice that are integral to the success of providing effective information for later life housing options;¹⁶
- 3 identify principles from good document design relevant for, and

13 For example, the use of visual organisation to support reading strategies (Waller, 2011d).

14 Gray (2018) offers these examples of what the real world means in a research context: ‘... businesses, hospitals, schools, colleges or other organisations ... sponsors of research ... communities where people live ...’ (4). Third sector organisations fit within this context.

15 Consequently, through this broad aim, the public value of design is highlighted.

16 Walker (2017) suggests that a challenge for graphic design research (where ‘graphic design’ is synonymous with ‘communication design’) is to raise its profile in projects where the role of graphic design is often considered ‘additional to, rather than an integral constituent of’ (550) a project.

applicable within, document producers'¹⁷ existing practices in the domain of later life housing options.

The following section outlines the research approach used to address these objectives.

1.2 Research approach

Researching design practice in the real world presents complexities such as: entering the field to gather data with only a general idea of what to look for; and the need to revisit previous stages of research (Gray 2018). Real-world situations are also subject to change throughout the course of a research project. Consequently, the research approach for this project is necessarily iterative and flexible, using multiple qualitative methods.¹⁸ This allows for an 'emergent and flexible' response to the 'changing conditions of the study' (Merriam 2016, 16). The methods used in this research are discussed below (see Section 1.2.2), following a brief outline about the theoretical stance.

1.2.1 Theoretical stance

Johnson et al. (2004) argue that pragmatism offers 'an attractive philosophical partner for mixed methods research' (14), setting out general characteristics of pragmatism that are suitable for education research (Johnson et al. 2004, 18).¹⁹ This dissertation maintains that a pragmatic stance is useful for research into design, particularly design practice, as it advocates:

- endorsing a practical empiricism, preferring action to philosophising, and using practical theories to find workable solutions;
- viewing current truth, meaning, and knowledge as changing over

17 Anyone involved with producing documents (see Glossary for further definition).

18 I use 'multiple methods' rather than the term 'mixed-methods' as the latter often refers to use of both quantitative and qualitative methods (Johnson et al. 2004). Although I maintain that mixed methods projects can be a combination of qualitative methods (Yin 2006, 42), and acknowledge that the term within-method triangulation is often used when referring to use of several qualitative methods (Gray 2018, 197), for the sake of plain language I use 'multiple qualitative methods'.

19 See Johnson et al. (2004, 18–19) for a complete list of their 'General characteristics of pragmatism'.

time and developing conclusions that are not absolute;

- endorsing eclecticism whereby different perspectives, observations, and experience are useful to gain an understanding of a topic;
- constantly trying to improve upon previous understandings in a way that fits and is effective in the world in which people work.

These aspects of pragmatism suit the changing real-world context of design practice, whereby contexts demand that a designer address different considerations, such as different user needs. A pragmatic approach allows for the focus of studies to flex as the research project progresses, and aims toward a practical application of research insights.

The exploration into the research topic is consequently pragmatic and practical, not relying on one methodological approach, allowing for the research direction to change as new data and findings are obtained (Saunders et al. 2016, 162–218). Aspects of the approach can be aligned to characteristics of established methodologies such as Naturalistic Inquiry, Qualitative Descriptive, and Grounded Theory, but no one methodology is used in its entirety.²⁰ The aspects of these methodologies adopted are:

- taking iterative steps;²¹
- comparing data during data collection to inform next steps;²²
- making emic and etic enquiry.²³

The first two aspects support the flexible research approach, enabling studies to inform each other. The third aspect enables my own knowledge as a design practitioner (etic enquiry) to contribute to conversations with document producers (emic enquiry) to explore design practice.

20 Naturalistic Inquiry is suited to a pragmatic stance subscribing ‘to social pragmatism: the idea that social research should be evaluated by how effectively it explains social phenomena’ (Beuving et al. 2014b, 34). Qualitative Descriptive studies take a philosophically pragmatic approach to research design (Neergaard et al. 2009).

21 Taking iterative steps is commonly used in Naturalistic Inquiry (Beuving et al. 2014).

22 Comparing data during data collection to inform next steps is an approach often taken in Constructivist Grounded theory studies (Charmaz 2014); see Bryant (2017) for discussion about Grounded Theories more widely.

23 Etic (referring to an ‘outsider’s’ account) and emic (referring to an ‘insider’s’ account) are included in Naturalistic Inquiry (Beuving et al. 2014).

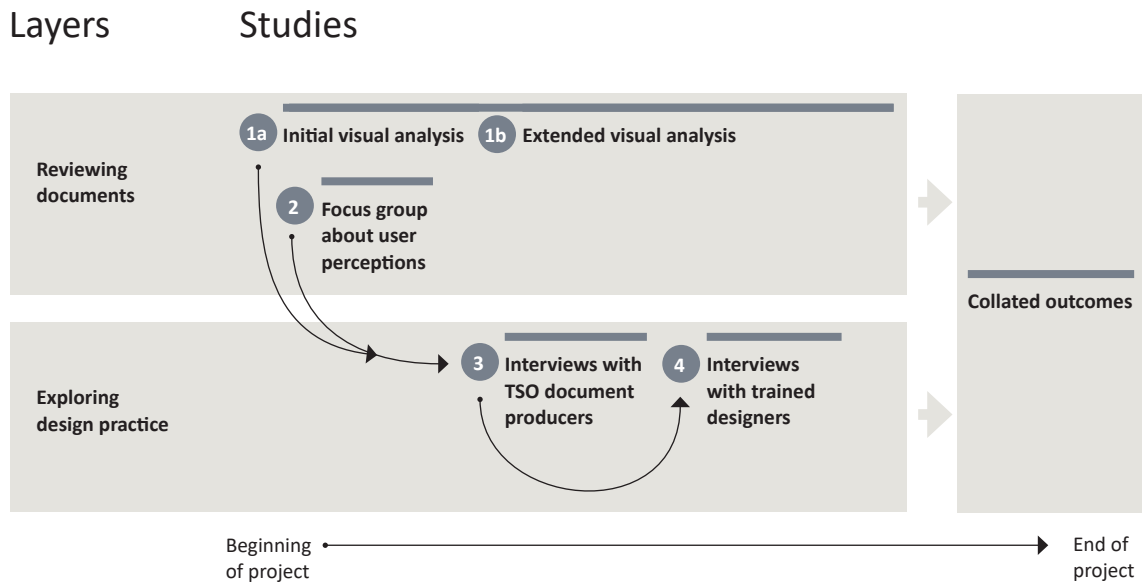


Figure 1.1 The project structure, showing the two layers, the studies carried out within each layer, and the collated outcomes 'phase'.

1.2.2 The layered and multiple study approach

To address the aim stated in Section 1.1, this research project is formed of two main layers (see Figure 1.1):

- 1 **reviewing documents** aids identification of how words and images are formatted in documents for housing options (see Chapter 3) and to understand users' perceptions (see Chapter 4);
- 2 **exploring design practice** captures insights into how documents are designed and considerations designers are working within (see Chapter 5).

Within these two layers are four studies:

- 1 **visual analyses** (an initial analysis and an extended analysis) of existing housing options documents;
- 2 **a focus group with users** about their perceptions of housing options documents;
- 3 **interviews with TSO document producers** about producing documents for housing options;
- 4 **interviews with trained designers** about how they would approach the design of documents for housing options.

Figure 1.1 illustrates the chronological order and position of the studies

during the course of the research project. However, an iterative approach is taken whereby studies are carried out in parallel (for example, the extended visual analysis and the interview studies), inform subsequent studies (see the arrows in Figure 1.1), and the findings from each study integrate to form a picture of the current domain in relation to the design of housing options documents (collated outcomes).

Ideally the focus group would have followed the visual analyses and interview studies, enabling insights to inform the aims of a focus group. However, an opportunity to conduct a focus group with third sector organisations and users of information occurred towards the beginning of this research project. This indicates the nature of doing research in the real world where opportunities arise that do not necessarily fit into an 'ideal' research timeline, meaning project plans may need to flex.

To aid the direction of each study and the synthesis of study data, my skills and experience as a design practitioner are embedded into the research approach, discussed further in the following section.

1.3 Embedding 'graphic means' as a research tool

Methods used by information designers to visually organise information, such as diagrams,²⁴ can help the process of thinking about and the communication of the 'complexity of connections' (Frascara 2001, 166). The non-linear form of diagramming can demonstrate the structure of what is being signified. In this research the things being signified are the graphic features in documents and the design practice of document

24 The terms 'diagram' (e.g., van der Waarde 2018), 'chart' (e.g., Kawakita 1986; Scupin 1997), and 'model' (e.g., Dubberly 2005) can be used to describe a way of visually representing practices such as human activity (e.g., design practice). 'Diagram' is used in this dissertation to refer to existing visual representations of design practice such as tree diagrams and webs. 'Chart' is used in the discussion about the adapted KJ method used to analyse interview data in Study 4, as this is the term used by Kawakita (1986) in the original KJ method (Scupin 1997). Consequently, this dissertation uses the term 'chart' to refer to the visual representations of design practice made during this research project (see Sections 5.5.9, 5.6.7, 5.6.8, 5.8.9, and 5.9). The term 'model' (e.g., Dubberly 2005) is not used in this dissertation as it suggests a process to follow, rather than a visual representation to direct thinking.

producers. The use of graphic means is useful for identifying significant graphic features, and for exploring and visualising the multiple activities and considerations that interact during design practice.

Pontis (2019) advocates the use of information design to support the research process.²⁵ This is also the approach of this project, by creating and using ‘information design aids’ (Pontis 2019, 50) to:

- organise, combine, and analyse findings;
- discuss findings with others;
- communicate the findings of this research project.

During the visual analyses the information design aids of **tree diagrams**, **tables**, and use of **thumbnails of documents** help to visualise and identify relevant design features of documents that focus the review findings (see Section 3.4.2 and 3.7.2). To understand information gathered during interviews, an **adapted KJ method**²⁶ that involved **creating and organising labels**, is used to visualise and organise interview data (see Section 5.6.6). Developing **charts** helps to draw study findings together that represent domain-relevant considerations for design practice (see Sections 5.5.9, 5.6.7–8, 5.8.9, and 5.9). All of these techniques give raw data structure, which helps to ‘make comparisons, notice differences, identify themes, count categories, see trends, and communicate findings with more clarity’ (Pontis 2019, 50).

My experience as a design practitioner is also embedded as a tool to direct the nature of the studies. As mentioned above the approach to enquiry is both etic (external to the domain) and emic (from within the domain). My etic perspective informs the exploration into design practices bringing an awareness of the importance of understanding

25 Pontis (2019) builds on the ‘visual displays’ concept (Miles et al. 2020) (Pontis cites the previous 2013 edition of Miles et al.) and the ‘Contextual Design’ process (Holtzblatt 2012) that outlines ways of ‘helping a team collect field data and use it for the purpose of defining and designing products, systems, websites, mobile devices, consumer electronics’ (984).

26 The KJ method, originally developed by Jiro Kawakita, comes from ethnographic research (see Section 5.6.6).

the context in which document producers are working.²⁷ In particular this recognises the importance of a design brief in the project development process (see Section 6.2.7). This is coupled with emic perspectives (practitioners within the domain) to understand domain-specific perspectives of design practice, in order to offer insights that may be effective in the world in which people work.

This dissertation does not include a conventional 'literature review' chapter. Due to the multi-disciplinary nature of design research this dissertation introduces relevant literature in context and throughout the dissertation. The chapters are arranged as follows: the context of later life housing options (Chapter 2), reviewing the documents through visual analyses (Chapter 3), reviewing the documents through user perceptions (Chapter 4), and exploring design practice with practitioners (Chapter 5). Chapter 6 is a discussion of the collated study findings and outlines implications for the research approach and findings. Chapter 7 summarises the dissertation with concluding remarks about the contribution of this research.

27 The perspectives of trained designers interviewed in Study 4, who do not work in the domain of later life housing, could also be considered 'etic' enquiry.

2 The context of later life housing options

This chapter introduces the domain of later life housing: the options available in the UK (Section 2.1); organisations that provide information about options (Section 2.2); kinds of documents (Section 2.3); and users who might read them (Section 2.4). An overview of existing studies into information provision frames the domain within a research context (Section 2.5). Factors associated with how decisions are made about housing options are then discussed, alongside aspects from the discipline of communication design, to explore the role of documents within decision making for later life housing options (Section 2.6).

2.1 Current UK housing options for later life

Current housing options in the UK vary and access to them is dependent on multiple factors. Battersby (2014) outlines five housing models available to people as they get older (the fifth being a combination of two or more of the four models located in one residential development). Figure 2.1 broadly illustrates the five models (on the left of the diagram) and the existing typologies (on the right of the diagram). ‘Move motivators’, reasons for why people move, and ‘ages’ are presented above the options.

Battersby argues that the provision of housing must be flexible to offer a ‘home for life’ and delay the need to move into expensive and less desirable institutional care (Battersby 2014). Access to effective information about options, as well as proper provision of housing and adaptation of homes, can contribute towards successful decisions (DCLG 2017, 64).

	Age					Housing Typologies
	50's	60's	70's	80's	90's	
	Move motivators					
		Lifestyle choice Security Location Convenience Downsizing Equity release Inheritance	Lifestyle choice Security Bereavement Social isolation Health Support/Care		Security Bereavement Social isolation Health Accident Dementia Care needs	
Housing and care models						
Staying in current home/ move in with relative						Mainstream Housing + Adaptations/Home care
Independent Living with Home Care						Sheltered Housing/ Retirement Villages etc.
Supported Housing with flexible care on site						Assisted Living/ Extra Care
Care/Nursing 24 Hour Care						Care Home/ Nursing Home/ Dementia Care Home
Continuing Care Community						Continuing Care Community

'Staying in current home (or move in with relatives) with Home Care' replaces 'Staying put with Home Care', to acknowledge the option of moving into a mainstream home of relatives, as well as staying in a current home. Similarly 'Mainstream housing + Adaptations/Home care' acknowledges the option to adapt mainstream housing or have home care. Grey text indicates options that are not in the scope of this research.

Figure 2.1 The housing and care spectrum, adapted from Battersby (2014, 11).

This research is principally concerned with information that aims to help people think ahead about housing options. This kind of information tends to focus on the housing options within the first two models and typologies, and move motivators, such as downsizing¹ or for non-acute health needs (highlighted in bold text in Figure 2.1).

The domain of housing options is connected to other considerations about later life that have a bearing on choices made throughout this research:

- 1 Topics of housing in later life and later life care² might be included

1 Also known as 'right-sizing' (Manchester School of Architecture 2018).
 2 'Later life' is used instead of 'elderly' throughout this dissertation. This is in keeping with recent terminology changes within the domain. For example, the change from 'elderly care options' to 'later life options' made by Which? due to awareness from user involvement during development of their website 'that the term "elderly" was becoming a label that many older people disliked' (Which? Elderly Care 2017).

within a single document.³ This research does not focus on documents primarily about Care Homes or moves motivated by the onset of the need for care. However, consideration must be taken when reviewing and discussing document design about how these two topics are presented (see Section 3.8.1).

- 2 The availability of housing options varies across localities. This research focuses on documents provided at national level rather than local level. Discussions must consider how such documents provided at national level communicate potential local differences (see Section 5.5.3).
- 3 An individual's access to options is dependent on their financial wealth. The documents reviewed in this research are functional communications (see Section 2.3.1) provided by third sector organisations, rather than 'promotional materials' produced to sell private retirement homes (see Figures 2.2–3). Consideration is needed of how functional communications may be visually different from promotional materials (See Section 6.2.3).

2.2 Third sector information and advice organisations

The importance of the provision of information and advice for housing options has been recognised in the past by the UK government. In 2011, £1.5million was invested into the information and advice service First-Stop (DCLG, 2011, 48). More recently, a white paper in February 2017 called for a 'conversation' to focus on ideas such as 'improved information and advice for older people about housing choices' (DCLG, 2017, 64), highlighting that policy makers acknowledge the support that effective information could provide.

Although discussion exists in political spheres about the importance of information and advice, information is (in the main) provided by third

3 An example of housing options and care being discussed together is on the HousingCare.org website that offers one search facility for finding both retirement housing and care homes (Elderly Accommodation Counsel 2017b).

sector organisations (TSOs), not governmental bodies.⁴ Organisations considered to be in the ‘third sector’ include:

... organisations that are neither public sector nor private sector [including] voluntary and community organisations (both registered charities and other organisations such as associations, self-help groups and community groups), social enterprises, mutuals and co-operatives (National Audit Office 2019).

The organisations that this research focuses on fit this description – organisations also known as ‘not-for-profits’.⁵

A list of organisations that provide national UK information for housing options was compiled from April 2017 to January 2018 by collating organisations from the following sources:

- the Housing Care website (Elderly Accommodation Counsel 2017b);⁶
- the Information Standards list of accredited organisations (NHS England 2017);⁷
- a Google search with the strings: ‘housing for later life’ and ‘housing for older age’.⁸

These sources provided a list of 424 organisations (see Appendix A) that was filtered for organisations that:

- provide documents that aim to facilitate decision-making activities about all housing options (i.e., not only one option);
- provide documents not directed at specific health conditions;

4 Local authorities do produce information related to social care and welfare, and there have been calls for availability of this information to be improved in order to improve quality of life for older adults (van Leeuwen et al. 2014).

5 The term ‘not-for-profit’ has no legal definition, but is used to encompass organisations whose main purpose is something other than making profit for directors, shareholders, or members (Resource Centre 2019).

6 At the time of collating the list the Housing Care website listed information providers. The updated website lists them by localities (e.g., Elderly Accommodation Counsel 2020b).

7 Certified organisations as of September 2017 were included in the list.

8 Organisations not included in the Housing Care website or on the Information Standards list were added to the main list of organisations.

- provide information at national level (i.e., not a local council);
- are independent third sector organisations (not associated with private retirement home providers or local councils).

Five organisations meet these criteria:

- 1 Age UK (Age UK 2017a) *super-major-sized TSO*;
- 2 Which? Elderly Care (Which? Elderly Care 2017)⁹ *super-major-sized consumer organisation (part of the Which? Group, a not-for-profit charitable organisation)*;
- 3 Independent Age (Independent Age 2019) *large-sized TSO*;
- 4 Elderly Accommodation Counsel (EAC) (Elderly Accommodation Counsel 2017) *medium-sized TSO*;
- 5 Care & Repair England (Care & Repair England 2019a) *registered society (small-sized TSO hereafter)*.

These five TSOs range from super-major- to small-sized. The size and labels used to describe the size of organisations is defined by income (UK Civil Society 2017)¹⁰ and calculated by the information about the organisations provided by the Charity Commission (Charity Commission 2019).

These organisations impart general information and specialist knowledge about available housing options; their stated intentions include:

- **helping people** to make the best choices for later life (Age UK 2019);
- offering **independent and impartial** information to older people (FirstStop 2019);
- **supporting older people facing decisions** about housing (Care & Repair England 2019b).

The intentions of these TSOs are relevant for reviewing documents for housing options. Waller (2011c) argues that a helpful way to review

9 At the time of collating and listing relevant organisations, Which? named their website 'Elderly Care' and has since changed the website name to 'Later life care' (Which? Later Life Care 2019).

10 See also The UK Civil Society (2020, 12).

documents that aim to ‘support, directly or indirectly, choices that people are being asked to make’ (29) is to make observations about the ‘alignment between the likely effects of the documents and the values and objectives which the originating organisation declares them to perform’ (29). This is in lieu of having an objective measure about users’ decision outcomes and whether a document is beneficial to the decision-making process that is interwoven with other contributory factors (see Section 2.6). The intentions of the organisations and documents (see Section 2.3) were incorporated into a framework that was used to provide a consistent way of reviewing housing options documents (see Section 3.4.1).

2.2.1 Design practice in the third sector

Arguably, the most visible kind of documents that third sector organisations produce are campaigns for fundraising or publicity.¹¹ Such work is honoured by awards (e.g., Third Sector Awards 2019) and when examples of charity design work are praised in design literature, it is often publicity work (e.g., Shaughnessy et al. 2009, 60–61).

Rather than eye-catching campaign work, this research focuses on documents that this dissertation defines as ‘functional communications’ (see Section 2.3.1). These kinds of documents, and information and advice for potentially life-altering decision making, are akin to the kind of ‘worthy’ design work brought to public attention in the form of the manifesto *First Things First* (Garland 1964) and echoed again in its updated version *First Things First 2000* (Garland 1999). In the 2000 version the signatories include the following pursuits, among others, worthy of designers’ skills:

... cultural interventions, social marketing campaigns, ...
charitable causes and other information design projects [that]
urgently require our expertise and help (Garland 1999).

11 The kind of work TSOs carry out ranges from advice services to communication campaigns (National Audit Office 2019), all of which entail some form of design practice.

Additionally, although aimed at the public sector rather than the third sector, the considerations outlined in the Design Council's 'Design for Good' report (Design Council 2013) echo the themes in the First Things First manifestos. That is that design skills more commonly used in the private sector (e.g., for corporate design work) can and should be utilised for 'public good' (Design Council 2013, 17). Although many examples of 'design for good' exist, such as 'hard-hitting posters, illuminated pharmacy signs and digital teaching aids' featured in the 2017–18 Wellcome Collection's exhibition '*Can Graphic design save your life?*' (Schrauwen et al. 2017; Wellcome Collection 2018), the potential for design skills to effect positive change still needs to be advocated from the design community, building on Garland et al.'s 1964 and 2000 calls.

Financial constraints are a consideration affecting design's ability to make such positive inroads. In its 2017 report 'Designing a future economy' the Design Council:

... provide a stark warning about the potential impact of under investing in [design] skills, and the need to better prepare for the economic, technological and political changes ahead (Design Council 2017a, 5).

Third sector organisations that provide information about housing options are subject to financial pressures including both restricted budgets and short-term funding. An evaluation of the FirstStop service, for example, notes that although the service offers clear benefits to the public:

It is not clear ... how sustainable the funding will be in the near future, despite concerns over how to resolve rising institutional care bills in the UK (Burgess et al. 2016, 210).

The Design Council (2013) calls for proper investment in design skills. However, as Burgess et al. (2016) suggest, TSOs often aim at 'doing good' for the public with restricted budgets. The insights of this research, therefore, aim at helping organisations to 'do more for citizens with less, or do less with greater effect' (Design Council 2013, 4). This dissertation contributes to these ongoing discussions of the value of design skills. By exploring functional communications and document producers' practices, the dissertation aims at offering

recommendations about effective design practice for the domain of UK housing options in the third sector.

2.3 Housing options documents

The third sector organisations discussed in Section 2.2 provide information about housing options in two ways:

- direct and personal approaches – such as advisors talking to beneficiaries;
- less personalised approaches – such as providing leaflets and web pages (functional communications) for people to use themselves.

This research focusses on the less personalised functional communications.

TSOs provide information through both print and digital channels and in different formats (e.g., printed leaflets and digital questionnaires).

Categories exist for several kinds of documents. Each kind has different intentions:

- **guides** are short and easy to digest documents that give an overview of a topic (Age UK 2020; FirstStop 2020a), introduce options and explain where to find out more (Age UK 2017b; Elderly Accommodation Counsel 2017a);
- **factsheets** are for people who want more information about topics, and are often longer than guides (Age UK 2020; FirstStop 2020a);
- **self-training documents** support people with the activities of thinking ahead (Care & Repair England 2015) and matters related to housing, care, and finance (FirstStop 2020b);¹²
- **self-help documents**¹³ help people identify potential difficulties and provide information and advice that might be available for these specific topics (FirstStop 2020c).

12 Also termed as ‘teach yourself’ documents (Care & Repair England 2020). The term ‘self training document’ will be used throughout this dissertation for consistency with the term ‘self-help tool’.

13 FirstStop uses the term ‘tool’ instead of ‘document’. For consistency, ‘document’ is used in this dissertation.

The named categories are not adopted by all organisations, and alternative names are used. For example, self-training documents (FirstStop 2020b) are also called ‘teach yourself documents’ (Care & Repair England 2020). Additionally, the term ‘Information resources’ is used that covers the kinds of documents listed above, but also includes reports, consultation documents, and web pages (FirstStop 2020b). Guides, factsheets, self-training, and self-help documents are the focus for this research project, to define the scope of the analyses. The document intentions of these kinds of documents and the intentions of organisations (see Section 2.3), had implications for the document review (see Section 3.4.1).

2.3.1 Establishing the documents as functional communications

All documents have functions. Documents can be designed to persuade a person to buy a product (e.g., advertisements), others are designed for reading at leisure (e.g., fiction books). This dissertation argues that documents for housing options are ‘functional communications’ (Waller 2011a).¹⁴ This term distinguishes them from the promotional ‘persuasive communications’ from providers of retirement homes (see Figures 2.2–3). Unlike documents produced for persuasion, the ‘communication effectiveness and usability’ (Waller 1979, 44) of documents for housing options takes precedence over their aesthetic qualities:¹⁵

[A functional document] should be designed around both the readers’ goals and the reading strategies people bring to functional documents, which they read only in order to act (Flower et al. 1983, 41).

14 See also functional documents (Flower et al. 1983), informative documents, functional text, public documents (Felker et al. 1985), and functional documents used in educational contexts (Redish 1989). These are documents that support ‘reading to do’ rather than ‘reading to entertain’, for example. Documents for housing options could also be considered ‘non-commercial advertising’ as ‘the promotion of socially oriented ... services, or facilities’ financed by non-profit organisations (Frascara 2004, 144). However, the word ‘advertising’ is problematic for this domain and would not distinguish the documents from those of private retirement homes.

15 Although aesthetic qualities are not the primary concern, visual rhetoric is still as important, discussed further in Section 6.2.2.

Figure 2.2 Example of a functional document for housing options: Housing Options for Older People, website home page, EAC, 2017 (Elderly Accommodation Counsel 2017b).



Figure 2.3 Example of a promotional document for retirement housing: Welcome to Retirement Villages, website home page, Retirement Villages, 2020 (Retirement Villages, 2020).



Documents for housing options are an exchange between a person and a third sector organisation that provides information and advice so that people:

... know how to make the right choice [of housing] for them, and are not forced to leave their homes before they are ready, or need to ... [and help people to] find out about their range of housing options (DCLG 2008, 13).

However, the organisations do not simply impart information. The ‘functional’ aspect of the term for the documents can refer more explicitly to how effective design can encourage ‘communicative action’¹⁶ whereby information is not simply imparted. Instead, meaning is conveyed and deliberation, discussion, exchange of views are enabled (Heath 2001). This is considered a more ‘citizen-led’ approach and is in contrast to a ‘consumer-led information service that Harding (2017) posits dominates UK information provision services:

Whereas citizen based ideas place a primacy on and provide discussion, deliberation and exchanging views as key mechanisms toward instilling active agency, consumerist ideas do not acknowledge the importance of these deliberative mechanisms as underpinning empowerment and active agency. Instead, consumerist theories and approaches to active agency place a primacy on the provision of information and stop short of providing substantive discussion, deliberation and exchanging views (29).

Labelling housing options documents as functional communications emphasises the practical contribution that design research in this domain can offer towards providing information that ‘instil[s] active agency’ (Harding 2017, 29). Additionally, ways of looking at functional communications can be used to review the documents (see Section 3.3).

This dissertation also acknowledges that the domain of later life housing is associated with the concept of ageing well (Care & Repair 2016):

16 For Habermas’ original work on ‘Communicative Action’, see Habermas (1992b) and Habermas (1992a).

The Care Act 2014 highlighted the importance of suitability of accommodation in determining well-being and also cited provision of information and advice as a key component in a system that shifted away from crisis intervention to prevention (Care & Repair 2016, 8).

Where we live impacts our health, especially as we age. Effective information that can assist people to understand and make decisions about housing before health crises occur links housing options with health matters and consequently health communication materials.

Patient Decision Aids (PDAs) are examples of health communications relevant to this research. PDAs are:

... tools designed to help people participate in decision making about health care options. They provide information on the options and help patients clarify and communicate the personal value they associate with different features of the options. Patient decision aids do not advise people to choose one option over another, nor are they meant to replace practitioner consultation. Instead, they prepare patients to make informed, values-based decisions with their practitioner (International Patient Decision Aid Standards Collaboration (IPDAS) 2017).

An example of a PDA is for girls making decisions about the Human Papillomavirus (HPV) vaccine (Leyva et al. 2013) (see Figure 2.4). The version of this PDA that is used in clinic settings was in the form of a laminated deck of cards that included colour-coding for information access and an exercise for the patient to think about values. The PDA was also provided in an alternative format for patients to take home and use with parents, recreating the conversation they had with their doctor. Design features that encourage discussion and task-based activities, such as those used in PDAs, are relevant to this research (see Section 2.6.2 and 2.6.3). However, as PDAs are designed to be used in a clinical setting with practitioners, their use differs from the housing options documents that are primarily used outside of an advice setting (the focus of this research).

Another aspect of health communication is behaviour change. Abraham (2012a, 2012b) offers advice for producers of health promotion



Figure 2.4 Example of a PDA (Leyva et al. 2013, 10).

materials¹⁷ that focuses on creating text that prompts ‘changes in beliefs, attitudes and behaviour’ (Abraham 2012a, 83).¹⁸ This chimes with recent projects about ageing, in particular the ‘Transform Ageing’ challenge (Design Council 2017b) created in response to the challenge of our ageing society. The Design Council launched six innovation briefs; brief 5 was *Right information, right time: How might we make information, accessible, relevant and meaningful?* (Design Council 2019). The projects that seemed to align with this call were ‘social prescribing’ focussed whereby information could be accessed through non-clinical groups (e.g., Made Open 2018; One Stop Advocacy 2020).

The project Made Open (Made Open 2018) recognised that:

... the problem we are trying to solve isn’t so much around helping GP’s to access information, although our platform significantly improves how that is done, it’s about changing everyone’s behaviour (Made Open 2018).

Although this dissertation acknowledges that the documents are provided to assist people with their decision-making activities and, by association, can affect behaviour, this research supports the view that:

... it is easier to produce well-performing information design when one tries to support cognitive functions than when one tries to promote attitude or behavioural changes (Frascara 2015, 46).

Hence, the principles of good document design associated with the development of functional communications (see Section 3.4.1) have been used to focus this research, rather than behaviour-change mechanisms.¹⁹

17 Health communications include Patient Information Leaflets (PILs) e.g., leaflets for medicines (e.g., van der Waarde 2017); Patient Decision Aids (PDAs) such as for the Human Papillomavirus (Leyva et al. 2013); Health Education Materials HEMs such as those for weight loss (e.g., Bull et al. 2001); health promotion and health campaigns (e.g., Dutta-Bergman 2005); and health promotion with the wider public (e.g., Berry 2007). Most akin to housing options information would be PDAs that support decision-making activities.

18 Kools (2012) and Hartley (2012) offer advice for making written materials easier to read and use. Much of this advice is akin to good document design principles used in benchmarking criteria for functional communications.

19 It is acknowledged that the benchmarking criteria used in the review of documents incorporates concepts from behavioural economics (Waller 2011b). However, the focus of the visual analysis remains on how the visual organisation of information supports document use, rather than the eliciting behaviour change.

2.4 Users of housing options information

Housing options documents are mainly written for an older person. For the purposes of this research, the term ‘older person’ refers to:

... a person ‘over or approaching retirement age, including the active [and] newly-retired ... whose housing needs can encompass accessible, adaptable general needs housing through to the full range of retirement and specialised housing (Ministry of Housing 2012).²⁰

Those who use TSOs for information are either referred from a health professional or self-referrals (Duffield 2016, 4), or find the information independently. For this research it was important to consider how documents might engage those who TSOs would consider as ‘self-referrers’. For example, someone who is searching for information about housing options without having spoken to a health professional about particular difficulties that they might be facing.

Additionally, TSOs model their information provision based on user needs. At level one, general information and awareness about TSO services are provided on the basis of one to many, e.g., information is provided at a local group event through talks and supporting documents, and sometimes one to one via email, letter or phone call (Duffield 2016, 4). At level two, tailored advice is given on a one to one basis and often follows discussion of a personal situation, e.g., people are provided with information via phone

20 This dissertation uses ‘older’ to mean 50 years of age and over (Manchester School of Architecture 2018, 2). The dissertation makes this distinction as it focuses on information for older people who may be thinking ahead about housing options rather than using information during a health crisis, or when requiring assistance to use the information from relatives, health professionals, or advisors (although the information might be used in a shared decision-making situation). Although the words ‘older’ and ‘old’ carry complexities and connotations, ‘older’ will be used throughout this dissertation as it has currency in design research (Sless 2004, 31; Waller 2011c, 10) (Walker et al. 2013; Black et al. 2014; Wright 2017).

The terms ‘older’ and ‘old age’ are not well defined. Although age is not considered the only indicator of old age, the age-range of 50–65 is commonly cited as the age when councils consider a person ‘older’ and from the age of 65 might require social care services (Think local act personal 2019). Conversely, the guidance to councils who provide housing for older people (Ministry of Housing 2019) uses the term ‘old age’ to include a wider bracket, those approaching retirement age through to the very frail and those requiring care needs (Ministry of Housing 2012). An additional complexity is that the term ‘older person’ might carry an assumption that the person is responsible and in control of their lives, or conversely no longer able to manage independently (Clough 2016, 135).

call, email, or letter (Duffield 2016, 5). At level three, individually tailored advocacy and practical assistance are provided to help the person achieve a solution (Duffield 2016, 5). The documents that this research focusses on are likely to be developed for levels one and two, rather than those who require advocacy and practical assistance and who might already be facing critical circumstances to adapt or move home.

2.4.1 The term ‘user’

This dissertation uses the term ‘user’ to refer to people who use documents.²¹ The term ‘user’, although not widely adopted in the domain of housing options, is in keeping with the design disciplinary focus of this dissertation.²² However, this dissertation recognises that terms for a person using a document are not used consistently in the multi-disciplines that the domain resides, or in communication design. Terms are often created from the perspective of an organisation rather than from the individuals served (Clough 2016), carry connotations, or are used to mean different things in different disciplines. Terms include: customer, audience, consumer, client, citizen, and beneficiary.

‘Customer’, and ‘audience’ are not appropriate for discussions about housing in later life. The terms suggest a transaction (customer) or passivity (audience) on the part of the person interacting with the document. ‘Consumer’ carries with it the connotations mentioned above whereby:

... consumerist theories and approaches to active agency place a primacy on the provision of information and stop short of providing substantive discussion, deliberation and exchanging views (Harding 2017, 29).

Conversely, the term ‘citizen’ is associated with a citizen-centred service, as opposed to consumerist service. Harding (2017) posits that

21 This research focuses on a topic that spans several disciplines and domains, including: sociology and gerontology (relating to needs of an aging society); psychology (relating to decision-making activities); and the third sector (relating to advancing social causes). However, it is written from the discipline and perspective of communication design. Terms for ‘user’ are used across these disciplines in different ways.

22 ‘User’ has been used in research on information and communication technology for housing choices for older people with functional limitations (e.g., Haak et al. 2015).

a citizen-centred service is essential for the effective supply of housing options as well as services that support information seekers. However, the term ‘citizen’ can emphasise a person’s connection to the State or community (Clough 2016, 134). Although this dissertation recognises the importance of a citizen-centred approach, due to the association with the State, ‘citizen’ is not used in this dissertation to refer to people who use information for housing options.

‘Client’ is a commonly used term in the third sector for those who use information about housing options. In design practice, ‘client’ is more widely understood to be someone who briefs a designer on a project and is a stakeholder within the design process. The term client is, therefore, not used in this dissertation to refer to the people who use documents.

‘Beneficiary’ is commonly used to refer to those in receipt of guidance or assistance to find a suitable home, and is often used in reports by TSOs about their services when referring to recipients of advice (e.g., Care & Repair 2016). It is also used within documents when referring to a person who is living in housing provided by charities, such as an alms house (e.g., Age UK 2017b). The term beneficiary is used in this dissertation when referring to a person directly receiving information from advisors, rather than people ‘simply’ using the functional communications by themselves.

2.4.2 Multiple users

Although documents are predominantly written for an older person, there are additional kinds of user. For example, FirstStop state that they aim to offer ‘advice and information to **older people**, [and] their **families and carers**’ (FirstStop 2019). TSO document producers interviewed in Study 3 for this research (see Section 5.3) indicated that **advisors** also use the documents when advising older people and their families. This suggests that users of documents for housing options include:

- older people;

- family members (or significant others);²³
- carers (or health professionals);
- advisors.

Different kinds of user will approach documents with differing knowledge and objectives. An older person may be approaching a document with pre-existing knowledge about later life housing that may colour how they perceive a document. An advisor may need to quickly find a specific section when signposting a beneficiary to information appropriate for them. Additionally, documents might be used in different contexts. For example, the context of shared decision-making may demand that documents facilitate conversations among family members.

If multiple kinds of user make use of the documents, and the documents are used in different contexts, the designer will need to consider these when organising and designing the content. For example, this can include layering the information so that different user needs are met (Waller 2011c, 22). An implication for the document review was to review how users and multiple kinds of user are identified in the documents (see Section 3.5.1). Additionally, for the conversations with document producers, it was important to explore how and when users participate in and inform the development of documents (see Section 5.4.4).

An additional consideration when thinking about the users of the documents is the level of capability to use digital technologies:

As the current cohort of individuals age they become less likely to embrace and use new technologies. In 2014, of the 6.4 million people in the UK (13% of the population) who had not used the internet, 5.6 million were aged 55 and over. While ‘catch up’ does occur as cohorts who have experience of using particular technologies, such as the internet, enter older age groups, this is balanced by the increasingly rapid pace of technological change ... (Government Office for Science 2016, 94).

23 Haak et al. (2015) use ‘significant others’, which opens this category to non-family members who might be supporting an older person with their housing options.

The quotation above highlights a potential difficulty of examining documents that aim at assisting an older person with housing decisions. As each generation ‘enters’ later life their online capabilities may differ from those older and those younger than themselves. This suggests that information for housing options needs to be supplied in multiple channels (print and digital) to ensure that a range of online capabilities is accommodated. In the document review both print and digital channels are considered, and are discussed further in relation to affordances (see Section 6.2.5).

To summarise, this dissertation has found it useful to use the following terms to refer to people who might use documents and distinguish between kinds of users:

- users – a broad term to address those who might use information, including:
 - an older person,
 - an adult child,
 - a carer,
 - an advisor;
- beneficiary – a person in receipt of direct support from TSOs that includes more than simply receiving a document.

In addition, the following terms are useful throughout this document:

- recipient – a person in receipt of a document;
- reader – a person who reads and engages with a document (to distinguish from those who are in receipt of a document but not yet engaged with it).

2.5 Existing research into information provision

Existing studies have looked at services that aim to provide effective advice and computer-based systems that assist decision-making activities for housing choice. These are discussed below with reference to implications for how design research can contribute to these discussions.

2.5.1 Evaluation of information and advice services

In the UK, attention has been given towards evaluating and reporting initiatives that provide information to the public (e.g., Burgess 2014; Duffield 2016), focus on the face-to-face advice that initiatives provide (e.g., Burgess et al. 2016), and telephone services (e.g., Harding 2017). Harding (2017) argues that appeals for better information and advice from the third sector and academic authors are deficient in ‘critical thinking around what better should constitute’ (303) and that:

... there is a lack of adequate contextual focus, understanding agency, and how I&A [information and advice] is used in different contexts to influence causal processes ... (Harding et al. 2016, 1).

Harding (2017) proposes that improvement of information and advice includes development of citizen-centred communicative based programmes that support discussion and a consideration of a full range of options (305). A citizen-based programme means that ‘where capabilities to act are framed as an individual concern, the citizen draws on the relational elements of discussion, deliberation and exchanging of views’ (Harding 2017, 26). The insights from this dissertation intend to make a specific contribution to what ‘better’ constitutes from a document design point of view, and how documents can empower a user to use information for ‘discussion, deliberation, and exchange of views’ (26) to assist their decision-making activities (see Section 6.2).

2.5.2 Evaluation of existing questionnaire-based documents

The self-help document called HOOP (Housing Options for Older People), illustrated in Figure 2.2, is an online version of an originally paper-based form that was developed to help older people make complex housing decisions and clarify the information they need (Heywood et al. 1999). Clough et al. (2004, 185) highlighted that HOOP should be considered a resource that can take people from thinking about housing to deciding about options. Their discussion (Clough et al. 2004, 76)

regarding the development of HOOP from a printed self-completion questionnaire into a digital version, and a mini version in the form of a scratch card, highlights that media and formats are being considered by document producers providing information about housing options. However, such discussions about HOOP do not address the way words and images can be presented effectively, or the implications of the choice of channels and formats used.²⁴

Although not design-led, design issues are mentioned in a usability study testing a digitised Housing Enabler tool (Jonsson et al. 2016).²⁵ In the study, participants highlighted issues with the graphic language, including: low contrast; small type sizes; difficulties in understanding the functionality and content; and a wish that the experience be more pleasurable and helpful through use of graphs, photos, and colours (Jonsson et al. 2016, 39). This has implications for the review of documents for housing options, highlighting the need to take account of the implications of:

- use of type size (legibility);
- explicit indication of how to use the document (functionality);
- user experience (engagement).

The first issue raised by the participants in Jonsson et al.'s (2016) study about low contrast and small type sizes relates to design decisions about effective screen design. These kinds of legibility issues are not the focus of this research.²⁶ However, although these points refer to the Housing Enabler tool rather than documents generally, these kinds of issues raise other implications for this research. For example, the exploration of whether guidelines are in place that assist document producers when producing documents for housing options (see Section 5.5.8) and

24 During this research project the EAC have worked on developing HOOP further, connecting to local provision of housing options (Elderly Accommodation Counsel 2020a).

25 The Housing Enabler is a method used by practitioners to assess accessibility problems in housing (Haak et al. 2015). The Housing Enabler method was translated into a digital tool by Haak et al. (2015) to help 'end users' in assessing their housing needs in Sweden and Latvia.

26 These kinds of issues are addressed in legibility research that provides guidance on how to avoid similar design problems (Dyson 2019).

whether guidelines such as type size are pertinent to document design (see Section 6.2.2).²⁷

The second issue in Johnston et al.'s study, i.e., the difficulties understanding the functionality and content, could be connected to the skill of the document producers as well as the technology used to design the tool. Advice for designing effective navigation of content on screen is provided by legibility research (Dyson 2019, 112–14), suggesting that although recommendations exist for effective screen design, they are not yet being utilised in full by research studies investigating tools for housing options. For documents already in the public domain, the issues raised about functionality have implications for the document review. For example, exploring how words and pictures are formatted to support navigation (see Section 3.8.2).

The third issue, the wish for a more pleasurable experience, raises a broader discussion about impartiality and rhetoric in design. TSOs who provide information about housing options aim at impartiality (e.g., FirstStop 2019). This suggests that information rather than persuasion is priority. However, as Kinross suggests in *The Rhetoric of Neutrality*, a seemingly information-only piece of communication (Kinross uses the example of a railway timetable) can operate rhetorically through typeface choice and typographic details (Kinross 1986). As McCoy (2000) proposes:

Perhaps information/persuasion is not an “either/or” choice, but rather an “and/also” interaction between communication modes. There could be a complex interaction between the sender’s intentions, message content, the audience/user’s motivations, the communications context, and the designer’s strategies (82).

If the information and advice aims at enabling people to make the right choice of housing for them (DCLG 2008, 13), users first need to be convinced that it is worth their time reading documents. The

27 With this focus, this dissertation aims to contribute towards discussions about flexible approaches to using guidelines that specify minimum type sizes (Waller 2011b).

concept of information versus persuasion suggests that consideration is needed, during the document review in this research project, of how visual rhetoric is used in the documents to create interest, convey tone, and establish credibility – some of the stylistic functions outlined by Kostelnick (1996) (see Section 6.2.2).²⁸

Additionally, Frascara (Frascara 2015, 46) discusses how to transform data into persuasive information, by producing information that aims to support cognitive functions moving beyond the visual solutions given by Jonsson et al. (2016) from the disciplines of health and computer science, towards a focus on the documents in relation to the cognitive functions of the user. This is relevant to this research as regards looking at how words and images are organised to assist reading strategies and decision-making activities (see Sections 6.2.3–4).

The following section continues to add a communication design perspective to the discussion about housing options. Factors related to decision making for housing options that arise from existing research are discussed. This highlights the complex context within which decisions about housing options are often made, whereby access to, and use of, information is ‘simply’ a part.

2.6 Factors impacting decision making for housing options

Although older people report that they believe in planning, few do plan ahead for future living arrangements (AARP 2003). This is despite those who have made decisions to change housing offering advice such as:

Don’t leave it too late to decide ... Do it while you are able ...
Be proactive and make plans and decisions before the ability to act is lost (Clough et al. 2004, 188).

When decision-making activities are undertaken they can be complex:

... people may not be able to explain ... exactly why they

28 The phrasing used to describe the stylistic functions is taken from Moys (2017), who also provides discussion about visual rhetoric and current research into the topic.

make the decisions they do, or whether their decisions are the right ones for them. They might be able to articulate some influences but not all, decisions are not necessarily the result of conscious deliberation or rational, analytical and objective thinking (Clough et al. 2004, 70).

This dissertation recognises that documents are part of this complex ‘conversation’ (Sless 1996), where documents are:

... typically experienced as part of a complex information journey, and their design may be intended to support numerous potential consumption patterns over time (Waller 2017, 2).

The ‘numerous potential consumption patterns’ that a later life housing document might perform include:

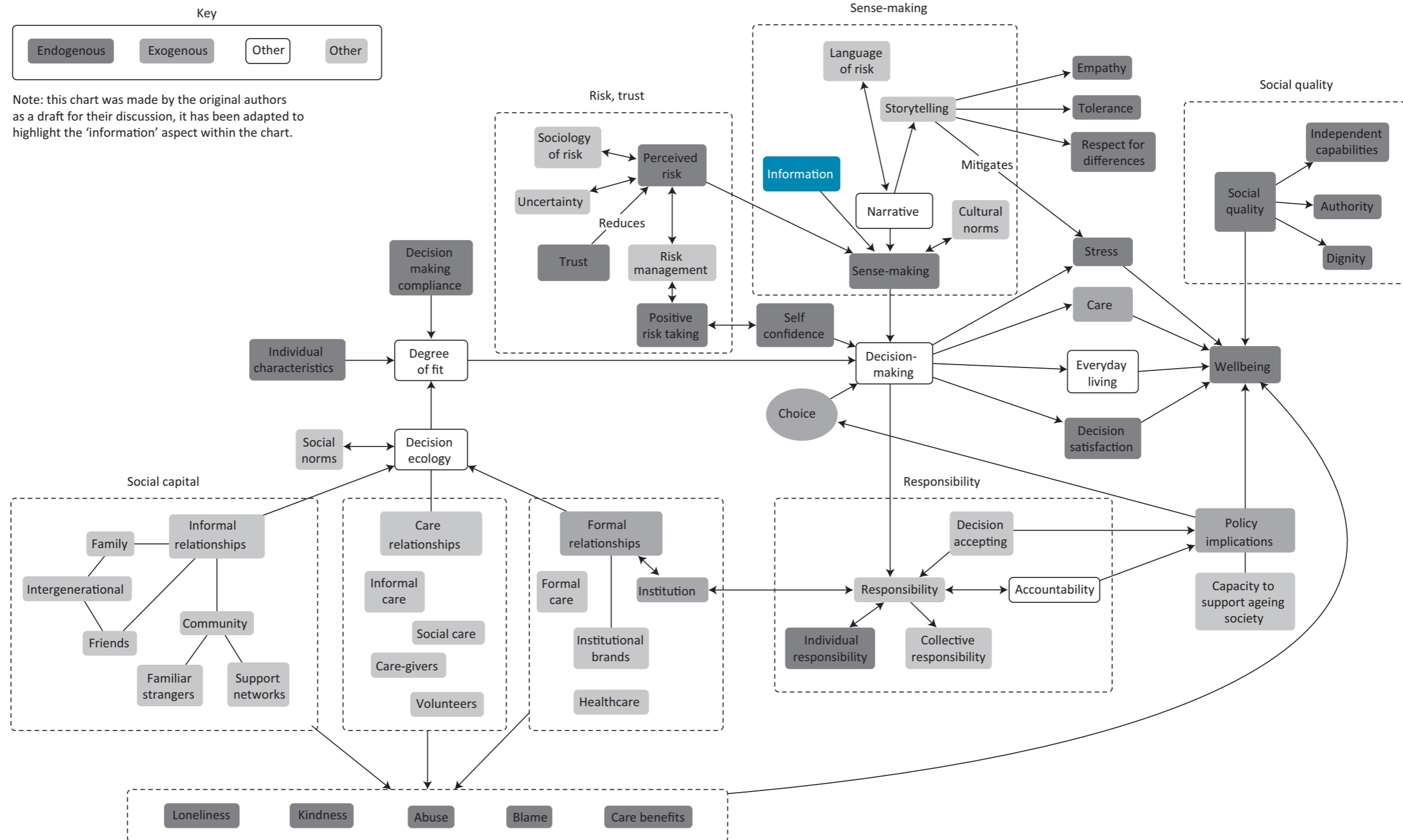
- used by an older person deciding for themselves;
- used in a shared-decision-making scenario with family members;
- used by advisors referencing a document on behalf of a beneficiary.

This ‘complex information journey’ is also alluded to by the Joseph Rowntree Foundation, suggesting that ‘information’ fits within a ‘decision ecology’ that includes multiple factors associated with sense making (Lindley et al. 2012, 13) (see Figure 2.5). Their proposition (Lindley et al. 2012) relates to later life care, but also resonates with complexities associated with housing options. A complex ‘decision ecology’ of housing options includes the following factors:

- the topic – sensitivity, prior knowledge, motivation, and engagement;
- involving others – discussing housing options;
- personal circumstances – self-awareness, push-pull factors, and financial wealth;
- using documents – information overload.

To explore a document’s role within such a complex ‘decision ecology’, these aspects of decision making for housing in later life are discussed in the following sections, alongside aspects from the discipline of communication design.

Figure 2.5 Diagram showing themes associated with a decision ecology for later life care, indicating that 'information' is placed within 'Sense-making', redrawn from Lindley et al. (2012, 13).



2.6.1 The topic: sensitivity, prior knowledge, motivation, and engagement

Lee et al. (1993) offer the definition of a sensitive topic as one that is ‘intimate, discreditable or incriminating’ (ix). A sensitive topic could also be seen as a taboo topic (Farberow (1963), cited in Lee 1993, 3), and for some, issues such as ageism and old age are a taboo topic (Gotay 2018).

Using these definitions, this dissertation considers housing options a sensitive topic²⁹ because it covers personal and emotional considerations that could be classed as intimate. For example, a person’s attachment to home may mean that their decisions about later life housing options are motivated by emotion (Clough et al. 2004, 86). Considering the topic as ‘sensitive’ acknowledges the complex nature of sensitivity surrounding housing decisions in later life, as suggested by Clough et al. (2004):

... the emotional context of people’s housing decisions includes fears, feelings of safety and insecurity, beliefs, aspirations and interpretations of the past, present and future. Many people have deep attachments to their homes and neighbourhoods. Their sense of identity is bound up with the feelings they have for places and people (86).

Documents have a role in how the topic of housing in later life is presented to the public. For example, the use of images can be influential. Studies examining stock images that depict ageing, in particular dementia, suggest that images such as a close-up of wrinkled hands can emphasise disease over person-hood (e.g., Harvey et al. 2019; Brookes et al. 2018). These kinds of images perpetuate the idea of the ‘loss of self’ often associated with age-related diseases such as dementia (Cohen et al. 2001). For some, home and a sense of ‘self’ are related (Clough et al. 2004, 181), consequently, the prospect of changing a

29 The topic of housing options in later life relates to getting older and, by association, death and grief – topics that Dickinson-Swift et al. (2008, 2) include within the list of sensitive topics health and social science researchers might be involved in. See Dickinson-Swift et al. (2008) for an overview of defining sensitive research.

home in later life could signify a change of self, loss of status, and a loss of familiarity with home.

Additionally, there is caution about misrepresenting the topic of later life (in functional communications) through the use of images that misrepresent later life housing options, making decisions seem a lifestyle choice akin to choosing a private retirement home. This kind of cautionary advice about perpetuating a biased agenda is evident in communication design. For example, advice for practitioners of ‘warning design’ indicate that:

... incorrect beliefs about safety can also come from advertising campaigns that convey a product’s positive benefits without giving any negatives (Wogalter et al. 2017, 341).

The sensitivity of the topic is also connected to people’s prior knowledge of later life housing. As discussed above, the topic of housing in later life is often associated with later life care, which is impacted by:

... many factors [that] may influence players involved in caring decisions, including negative stereotypes and visual images of older people, cultural perceptions of those in need ... (Lindley et al. 2012, 3)

Lindley et al. (2012, 29) highlight issues of negative stereotyping and cultural perceptions about later life care, issues also associated with housing options for later life. Clough et al. (2004, 59) suggest that there may be deeply held negative views about residential and specialist housing for older people, such as loss of independence. However, Clough et al.’s research suggests that people’s experience of specialist housing was often positive even though their prior knowledge was negative, as illustrated below:

[Sheltered housing] is wonderful, really wonderful. I think a lot of the other people downstairs would tell you the same thing....When the Doctor said to me, “We think we’d like you to go to sheltered accommodation”, I was horrified, I really was, you know. I said “Oh, I’m not ready for that yet”. I don’t know what my version of “that” really was, I’d never sort of talked about going into sheltered accommodation, never wanted to. I

was happy where I was.’ (Mrs Denson, 81 years, widow, sheltered housing, Lancashire) (Clough et al. 2004, 60).³⁰

A person’s understanding of information draws on prior knowledge about a topic,³¹ through which meaning is partly constructed and used to make inferences on the information being read. This may affect the use of a document, including how information is read that builds on existing knowledge. Chambliss et al. (1996) found that when reading printed materials, adults select the content that supports existing beliefs instead of weighing all the content provided. Additionally, if a document is about an unfamiliar topic a person’s pre-existing knowledge about the topic might influence their engagement with the document, for example, when choosing a pension (Waller 2011c). If a person’s pre-existing knowledge about housing in later life is associated with negative ideas about later life care, this might dissuade a person from engaging with information. This is considered a ‘top down’ process generated by the reader (Kools 2012, 44), an aspect relevant to the analysis of housing options documents to understand how prior knowledge is addressed (see Section 6.2.4).

Factors related to sensitivity and prior knowledge are motivation and engagement with the topic. Making decisions about where to live when we are older could be viewed as being the same as deciding about housing at any age: comparing options; compromising; and trading-off features between current and new homes. However, deciding about housing later in life:

... is a time of changing physical capabilities. Planning and thinking ahead is difficult because it is not possible to predict one’s own, or one’s partner’s, health and future physical limitations (Clough et al. 2004, 70).

30 The debate about the quality of housing options for later life is not the subject of this research. However, it is important to acknowledge that the quality of offerings may not be adequate and is compromised by reduced funding (Battersby 2014). These real issues of the quality of offering contribute towards negative perceptions.

31 Terms used to describe pre-existing knowledge include mental models, scripts and schemata (Waller 2011c). This dissertation uses ‘prior knowledge’.

This is related to the effect of normal ageing on decision making.

Depping et al. (2012) posit that decision making may change as we age towards:

... more vigilant and conservative decision-making strategies aimed at preventing losses...[and that] this might have important applied implications for the presentation of information in complex decision contexts for older adults such as health care or financial planning (Depping et al. 2012, 364).

This propensity towards loss aversion may manifest in a lack of motivation to engage with the topic of later life housing. For a document to be useful, it needs to attain initial up-take (engagement) and encourage longer-term use (Sless 2004). Documents for housing options could be described as ‘indiscriminate standard communication materials’ (Waller 2011c, 25), as they are not personalised and contain general information and might be used by different kinds of user. As with health communications they are ‘intended for those who do not know or do not care about the topic’ (Wright 2012, 66).

When faced with a non-personalised piece of communication, a person may be confused or demotivated if they do not consider the content relevant to their situation. In communication design studies, the use of pictures has been shown to be a factor in changing people’s reluctance to engage in a topic. For example, additional pictures on a tax form can make a form seem more attractive, less discouraging, and make form-fillers feel more positive towards a tax department (van Wijk et al. 2008). Of relevance to the document review of housing options documents is how the design addresses the challenge of engaging people in information about a topic that they may have little motivation to engage with (see Sections 3.5.1–3).

2.6.2 Involving others: discussing later life housing options

Research into people’s motivation to discuss housing options provides mixed insights, highlighting the difficulties related to accessing reliable information about people’s activities and decisions surrounding

housing options. In a 2017 survey,³² ‘housing’ was the highest cited topic (80%) within family conversations about planning ahead with relatives aged over 60 (Legal & General 2017). However, an Independent Age report identified that there is a reluctance among families to talk about emotional topics that can be vital to retaining independence and health in old age (Independent Age 2016). Legal & General’s ‘The family’s big conversation’ survey indicates that information about ‘specific guidance on housing options’ is needed (Legal & General 2017),³³ suggesting the need for effectively designed documents that facilitate family conversations.³⁴ This also resonates with the idea that information by itself is not enough, and often needs to be amplified through discussion with other people (Clough et al. 2004, 187).

As discussed above, providing documents that not only impart information but also support deliberation, discussion, and sharing feelings is an important aspect of facilitating a person’s agency to make decisions. In a study about advance care planning directives, van Scoy et al. (2017) found that:

... participants who played an end-of-life conversation game had a high frequency of performing subsequent advance care planning (ACP) behaviors and/or advanced in their readiness to do so. We found that within 3 months of playing the game, 78% of participants engaged in at least one ACP behavior, the most common of which involved starting further ACP discussions with a family member or friend about end-of-life issues (van Scoy et al. 2017).

32 Those surveyed were adults with parents aged 60 or over.

33 The survey options were (in order of most useful after specific guidance on housing options): A website mapping the main later life options; Information and advice on health and care; Updates on welfare rights; Leaflets and other publications; Guidance on Power of Attorney; Advice and signposting on finances; Information on assistive technology at home; and Other.

34 The idea of helping discussion among family members connects to the idea of shared decision-making activities. Within research into medical decisions there are examples of documents developed to aid shared decision-making activities such as Human Papillomavirus (HPV) vaccine decision aids for girls (Leyva et al. 2013). See also Sections 6.2.4.

The study by van Scoy et al. (2017) used materials that were a precursor of the ‘Hello Game’³⁵ (Common practice 2020a) that includes question booklets that help people ‘to start a conversation with ... family and friends about what matters most’ in the context of ACP (Common practice 2020a). This use of questioning, and graphic features that support discussion (such as the use of speech bubbles and quotation marks), was examined in the document review for housing options documents to ascertain how questions were used in existing documents, and how these might contribute to encouraging discussion about later life housing options (see Sections 3.5.2 and 3.8.1–2).

2.6.3 Personal circumstances: self-awareness, push-pull factors, and financial wealth

The importance of self-awareness in making decisions for later life housing has been recognised by Clough et al. (2004):

... it is that reflective and reflexive quality which seems to be central to making decisions that people are happy with: to have a sense of self-understanding and awareness of needs and goals in life generally, and the way housing and location fit into those aspirations (154).

To develop self-awareness, the ‘looking glass’ style of reflection (Clough et al. 2004) suggests that the following approaches for providing information are useful to people who are making decisions about housing in later life:

- using a shared approach – learning from others’ experiences prompts thinking about an individual’s situation;
- access to informed unbiased people – enabling unbiased discussion to reflect on choices;
- rehearsal time – imagining the future and planning options;
- reflection – self-understanding and knowing what is important to

35 The materials used in the research of van Scoy et al. (2017) were from the game originally called ‘My gift of grace’. The name ‘Hello game’ is now used after recognising the religious overtones that the original name conveyed (Common Practice 2020b).

the individual, and therefore what factors might be prioritised when facing decisions.

These suggestions echo discussions about health communications, including behaviour change techniques³⁶ that can ‘boost motivation’ Abraham (2012b, 104–109) and encourage self awareness. The points below are from Abraham’s list of techniques that map onto Clough et al.’s ‘looking glass’ approaches above:

- prompt recipients to assess their own risk;
- prompt self assessment of affective consequences;
- provide information about others’ behaviour;
- prompt mental rehearsal of successful performance;
- prompt barrier identification and planning in relation to anticipated barriers.

As discussed in Section 2.3.1, this dissertation does not focus on behavioural change techniques, such as those outlined above. However, how documents support sharing, access to information, rehearsal and reflection about options, are important aspects to consider in the document review (see Sections 3.5.2, 3.5.7, 3.8.2).

‘Push-pull factors’ are also a key component of housing decision-making, for general housing decisions, but especially in later life (Bäumker et al. 2012). For example, a person may have emotional attachments to an existing home which might ‘pull’ them towards continuing to live there (Clough et al. 2004, Chapter 5). A ‘pull’ factor to move to a new home might be the lack of amenities, meaning a move to a home closer to shops, for example, ‘pulls’ a person towards moving. How these push-pull factors are presented in documents might impact how a user is able to reflect on their own circumstances. The opportunity to reflect on circumstances and implications of different choices is considered an important aspect of effective information about housing options (Clough et al. 2004, 189). The ways

36 Behavioural economics considers self-awareness an aspect relevant to how we deal with decisions for the future (Baddeley 2017, 73).

that documents can support this comparative decision-making activity are important to the document review (see Sections 3.5.10 and 6.2.4).

Decisions will also be affected by the social and financial constraints that impact a person's access to housing options (Erickson et al. 2006; Matthews et al. 2017, 355). This connects to understanding how functional communications for housing option decisions differ from publicity materials that promote a retirement lifestyle only accessible to those with sufficient wealth (see Section 6.2.3).

2.6.4 Using documents: information overload

A key component of successful decisions is the ability to access factual information about available options (Clough et al. 2004). However, Western society is an information-dense society whereby people are often 'scanners' of information (Kools 2012) and are often 'reluctant readers'³⁷ (Wright 2012, 66). Of relevance to this research is exploring how document design overcomes 'information overload' (Gross 1964; Toffler 1970) and addresses the associated concept of information anxiety, defined by Wurman (2001) as 'the black hole between data and knowledge, and what happens when information doesn't tell us what we want or need to know' (Wurman 2001) (see Section 6.2.2).

The use and organisation of images and words can help alleviate information overload. Graphics help engagement and dispel the appearance of a leaflet being 'heavy' reading (Wright 2012). Wright (2012) offers a three-stage process for designing graphics for health communications: decide on the purpose of the graphic; select a graphic style; and locate the graphics appropriately within the leaflet. Understanding how images are used in housing options documents is relevant to identifying how they can address information overload (see discussion about positioning graphic features within a document, Section 3.5.11)

37 People are often reluctant readers due to multiple factors including poor literacy and numeracy skills, emotional stress, pre-existing knowledge, and mental pictures that are formed of the authors of texts (Wright 2012, 66), as well as information overload.

The layout of text in a document can also influence a reader and alleviate information overload.³⁸ Typographic and graphic features can ‘map out the structure of a text in a visual, accessible way, [whereby] readers are to some extent freed from the narrative and able to move around the text as they please’ (Waller 1987, 95). A document’s structure can help ‘active reading strategies’, which are:³⁹

... deliberate (although not necessarily articulated) choices that readers must make to read a text in a particular order or at a particular page, to start reading and to stop, to skip or to skim (Waller 1987, 82).

Thomas (1976) and Pugh (1979) found that readers are more likely to achieve goals if they employ active reading strategies than if they read text once at an even pace. Waller (1988) explains that:

... [a] purposeful style of reading is termed self-organized by Thomas & Harri-Augstein, and self-paced reading by Pugh. Its opposite – reading which follows the author’s sentences and paragraphs in a linear and even manner – is generally described as receptive reading (Waller 1988, 109).

Typography can assist active reading strategies by signalling ‘access structure’: ‘features that serve to make the document usable by readers and the status of its components clear’ (Waller 1988, 141). Considering the design of housing options documents in regard to reading strategy is an aspect of this research. For example, headings phrased as questions increase recall (Hartley et al 1980). Headings phrased in this way could support a ‘structured approach’ to providing information (Clough et al. 2004) and encourage greater self-awareness through questioning. (See Sections 6.2.2–4).

Another aspect relevant to information overload and engagement is the use of design features to assist information access versus rigidly following guidelines for clear print guidelines for public documents (Sensory Trust

38 Also known as ‘bottom-up’ processes, i.e., the influence a design has on a reader (Kools 2012, 45). See also discussion on typographic differentiation discussed in Section 6.2.2.

39 Active reading strategies include initial skimming, look-backs, rereading, changes of pace, and pauses for thought (Waller 1987, 82).

2016; Gov.uk 2018).⁴⁰ Guidelines such as the ‘Clear Print Standard’, that aim at producing legible documents, have influenced how public documents are formatted. Commentary on these guidelines posits that such guidelines should be more flexible as they exclude ‘common techniques which help designers use layout and typographic signalling to show the structure of documents’ (Waller 2011b, 4). This indicates that a review of housing options documents needs to consider legibility, but also aspects of graphic communication that go beyond guidelines and thus how layout and typographic signalling are used (See Sections 6.2.2–4).

In summary, this chapter has considered the current domain of later life housing options in the UK, focussing the scope of this research towards a collection of third sector organisations and the documents they currently offer to facilitate peoples’ decision-making activities. Significant aspects of communication design were identified that are relevant to exploring the factors impacting decision making for housing options. To explore these aspects, Chapter 3 focuses on the visual analyses of existing housing options documents, Chapter 4 on how users perceive these existing documents, and Chapter 5 on how housing options documents are designed and the considerations document producers make during design practice.

40 Clear and large print guidelines were originally published by the Royal National Institute for the Blind (RNIB 2006).

3 Reviewing documents: visual analyses

A review of housing options documents was carried out to explore the use of graphic language to communicate information for housing options in later life. The review consisted of visual analyses and a focus group with users. This chapter explains the initial and extended visual analyses (see Figure 3.1), Chapter 4 explains the focus group. The objective of the initial visual analysis was to establish how housing options information is presented in order to inform subsequent discussions with document producers. The objective of the extended visual analysis was to identify typical and significant features of graphic language used in the domain. Throughout each visual analysis, a framework provided a consistent way of looking at the documents (Walker 2012, 181) and ways were explored of visually recording observations.

This chapter introduces the collection of documents and sample documents chosen to be reviewed in the analyses (Section 3.1). A discussion about how to describe the documents introduces concepts from communication design (Section 3.2) before establishing how functional communications can be reviewed (Section 3.3). The initial visual analysis approach, framework used, visual approaches to graphically recording observations, and the observations about graphic features are discussed (Sections 3.4 and 3.5). The extended analysis is then discussed in terms of the adaptations made to the framework, recording of observations, and the observations made about housing options document design (Sections 3.6 and 3.7). The chapter concludes with a summary of the implications for the document review approach (Section 3.8.)

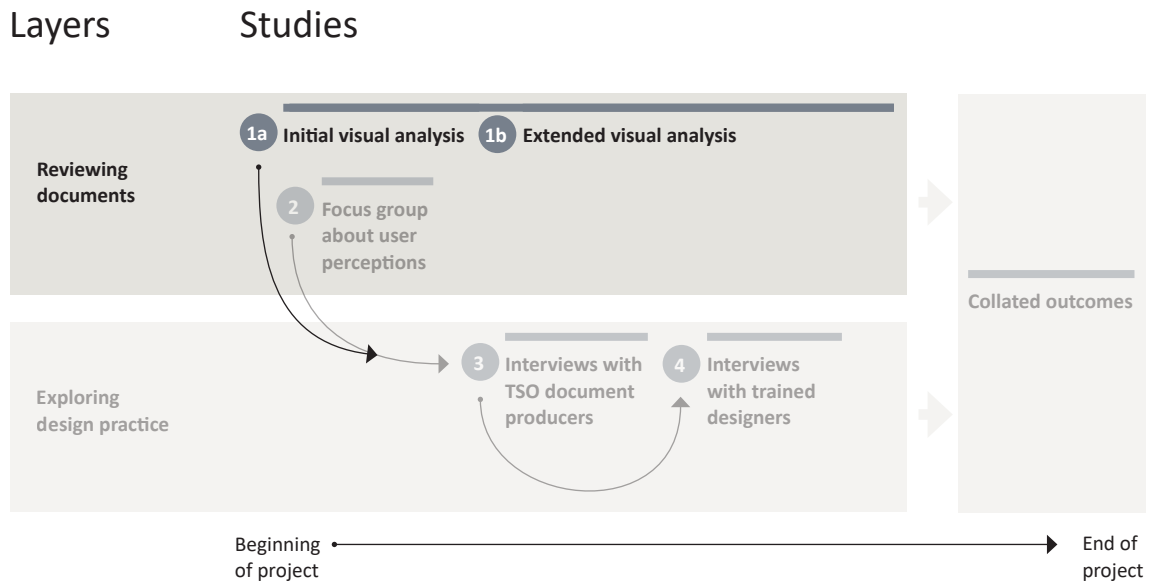


Figure 3.1 The visual analyses studies within the project layers.

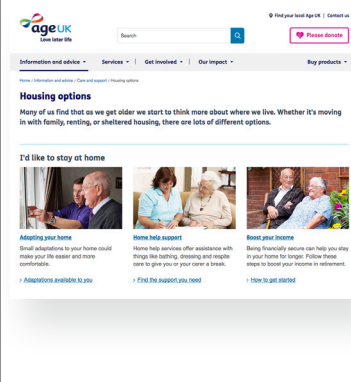
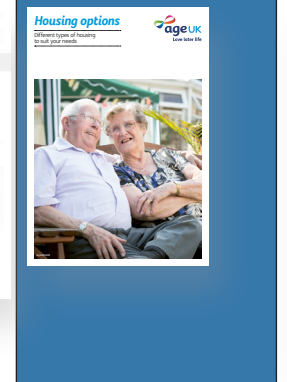
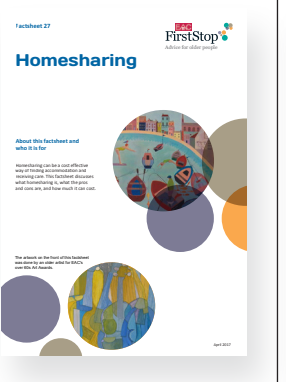
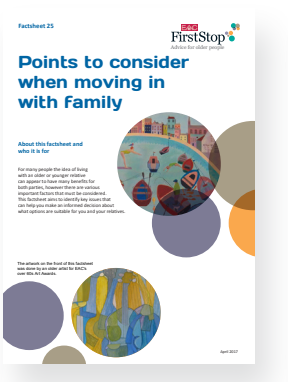



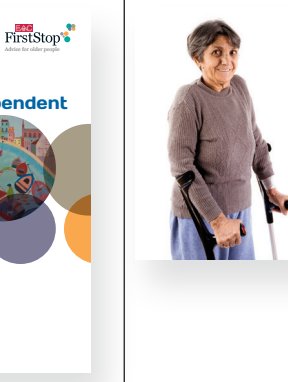

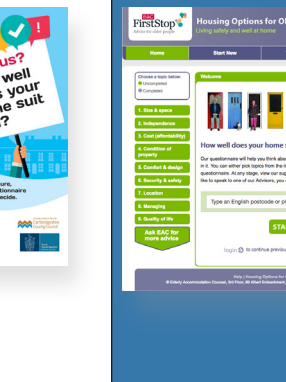
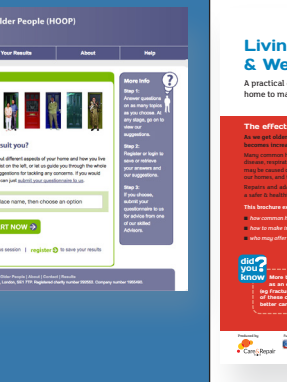
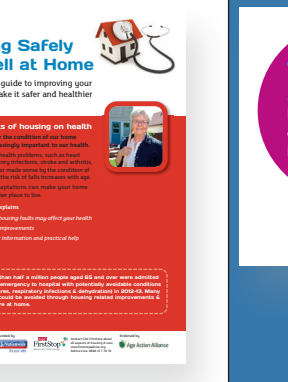

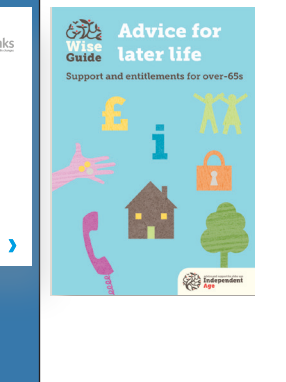
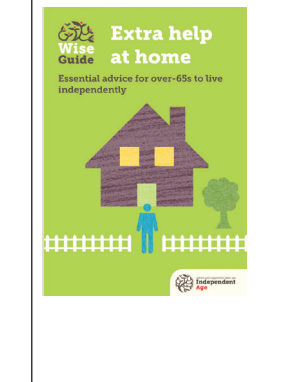
3.1 The collection and sample of housing options documents

A collection of documents was gathered from April 2017 to January 2018 from the organisations listed in Chapter 2 (see Figure 3.2). The documents in the collection:

- originate from differently-sized TSOs;
- aim at communicating with older people, carers, and relatives;
- contain a range of topics (e.g., care and specific housing options);
- use different channels (print and digital);
- present as different formats (e.g., PDFs, web pages, booklets, leaflets);
- combine words and images in a range of configurations.

A sample consisting of four documents (see Figure 3.3–6) was chosen

Figure 3.2 The collection of housing options documents (collected in 2017).

Organisation	Age UK (2017a)	Age UK (2017b)	Elderly Accommodation Council (2017d)	Elderly Accommodation Council (2017j)	Elderly Accommodation Council (2017b)	Elderly Accommodation Council (2017e)	Elderly Accommodation Council (2017i)	Elderly Accommodation Council (2017f)	Elderly Accommodation Council (2017g)	Care & Repair England (2014)	Care & Repair England (2015)	Independent Age (2015a)	Independent Age (2015b)	Which? Elderly Care (Which? 2017)	
Super-major sized	<input type="radio"/>	<input checked="" type="radio"/>												<input type="radio"/>	
Large-sized												<input type="radio"/>	<input type="radio"/>		
Medium-sized			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					
Small-sized										<input type="radio"/>	<input checked="" type="radio"/>				
Document (front covers)															
User	Written for an older person	11	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Written for family							<input checked="" type="radio"/>	<input type="radio"/>						<input type="radio"/>
	Written for advisors/professionals							<input type="radio"/>	<input type="radio"/>						<input type="radio"/>
Topic	Housing options	7	<input type="radio"/>	<input checked="" type="radio"/>				<input checked="" type="radio"/>	<input type="radio"/>						<input type="radio"/>
	Care	3		<input checked="" type="radio"/>											<input type="radio"/>
	Decision-making	5		<input checked="" type="radio"/>				<input checked="" type="radio"/>	<input type="radio"/>						<input type="radio"/>
	Financial	1													<input type="radio"/>
	Current home	3							<input type="radio"/>						<input type="radio"/>
	Specific option	3			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>								<input type="radio"/>
	Independence	1						<input type="radio"/>							<input type="radio"/>
Category	Guide			<input checked="" type="radio"/>											<input type="radio"/>
	Factsheet				<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>						<input type="radio"/>
	Self-training document								<input type="radio"/>	<input type="radio"/>					<input type="radio"/>
	Self-help document								<input type="radio"/>	<input type="radio"/>					<input type="radio"/>
	Unspecified web pages		<input type="radio"/>												<input type="radio"/>
Channel/Format	Print														
	Leaflet	1		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>						<input type="radio"/>
	PDF	10		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>					<input type="radio"/>
	Digital														
	Web page/s	3	<input type="radio"/>						<input checked="" type="radio"/>						<input type="radio"/>

↓
Guide

↓
Factsheet

↓
Self-help

↓
Self-training

for close analysis. The sample documents were chosen as they:¹

- represent three differently-sized TSOs;
- represent the four categories of document (guide, factsheet, self-training, and self-help documents);
- are written for an older person;²
- cover information about a variety of housing options (not a specific option);
- support decision-making activities;
- display a variety of graphic language and configurations.

The sample documents are:

- **guide** – *Housing options: Different types of housing to suit your needs* (Age UK 2017) (Figure 3.3) from a **large-sized TSO**;³
- **factsheet** – *Housing and care options for older people* (Elderly Accommodation Counsel 2017e) (Figure 3.4) from a **medium-sized TSO**;
- **self-training document** – *Thinking ahead: Housing, care & related finance in later life* (Care & Repair England 2015), (Figure 3.5) from a **small-sized TSO**;⁴
- **self-help document** – *Housing Options for Older People (HOOP)* (Elderly Accommodation Counsel 2017g) (Figure 3.6), from a **medium-sized TSO**.

1 After interviews with TSO document producers it was understood that the documents were produced under different circumstances: the guide was designed by an external trained designer using a template provided by the organisation; the factsheet by a non-trained designer working as an advice and information development officer; the self-training document by an external freelance trained-designer; and the self-help document by a non-trained designer in collaboration with a web developer. Additionally, over time these documents have been updated. The review concentrated on documents that were available at the time of collection. Further review would benefit from a new audit of documents.

2 Since the document collection, organisations have released new documents that better meet this criterion. However, the choice of documents was made from the documents available at the time of collecting documents for review.

3 This dissertation uses the term 'large-sized' organisation to refer to TSOs that are super-major-sized. This is to aim at plainer language throughout. See Section 2.2 for a discussion about sizes of TSOs.

4 The documents were labelled in this order to reflect the size of the TSOs, ranging from large- (super-major) to small-sized.

Figure 3.3 Guide document, Age UK, 2017. 148x210mm, shown at 25% (Age UK 2017a).

This figure shows a grid of 12 pages from a guide document titled 'Housing options' by Age UK. The pages are arranged in three columns and four rows. The first page is the cover, featuring the title and a photograph of an elderly couple. The second page is titled 'Information and advice you need to help you love later life' and includes a sub-heading 'We are passionate about offering that your later years can be filling years, whether you're enjoying your later life or going through tough times, we're here to help you make the best of your life.' The third page is the 'Contents' page, listing various sections and their corresponding page numbers. The fourth page is titled 'What this guide is about' and explains the purpose of the guide. The fifth page is titled 'Thinking about your options' and discusses the importance of thinking ahead. The sixth page is titled 'I want to stay at home but need to make some changes' and provides advice on how to make a home more accessible. The seventh page is titled 'New housing' and discusses different types of housing options. The eighth page is titled 'Helping you to think about your options' and provides a checklist of questions to consider. The ninth page is titled 'Remember that housing is about how you live' and emphasizes the importance of considering lifestyle needs. The tenth page is titled 'I want to stay at home but need to make some changes' and provides advice on how to make a home more accessible. The eleventh page is titled 'New housing' and discusses different types of housing options. The twelfth page is titled 'Helping you to think about your options' and provides a checklist of questions to consider.

Figure 3.4 Factsheet document, EAC, 2017. 210x297mm, shown at 25% (Elderly Accommodation Counsel 2017a).

This figure shows a grid of 12 pages from a factsheet document titled 'Housing and care options for older people' by FirstStep. The pages are arranged in three columns and four rows. The first page is the cover, featuring the title and a photograph of an elderly couple. The second page is the 'Contents' page, listing various sections and their corresponding page numbers. The third page is titled '1. Introduction' and provides an overview of the document. The fourth page is titled '2. Help to stay put' and discusses options for staying in your current home. The fifth page is titled '3. Moving on' and discusses options for moving to a new home. The sixth page is titled '4. Sheltered and retirement housing' and discusses different types of sheltered and retirement housing. The seventh page is titled '5. Shared living' and discusses shared living options. The eighth page is titled '6. Care homes' and discusses care home options. The ninth page is titled '7. Residential care' and discusses residential care options. The tenth page is titled '8. Support services' and discusses support services. The eleventh page is titled '9. Further information' and provides contact details for FirstStep. The twelfth page is titled '10. Glossary' and provides definitions for key terms.

Figure 3.5 Self-training document, Care & Repair England, 2015. 297x210mm, shown at 25% (Care & Repair England 2015).

This figure shows a grid of 12 pages from a self-training document titled 'Thinking Ahead: Housing, Care & Related Finance in Later Life' by Silverlinks. The pages are arranged in three columns and four rows. The first page is the cover, featuring the title and a photograph of an elderly woman. The second page is the 'Contents' page, listing various sections and their corresponding page numbers. The third page is titled 'About this teach-yourself workbook' and explains the purpose of the workbook. The fourth page is titled '1. What does "home" mean to you?' and discusses the importance of home. The fifth page is titled '2. What are your options?' and discusses different housing options. The sixth page is titled '3. What are the things that might become a problem?' and discusses potential issues. The seventh page is titled '4. What are the things that might become a problem?' and discusses potential issues. The eighth page is titled '5. What are the things that might become a problem?' and discusses potential issues. The ninth page is titled '6. What are the things that might become a problem?' and discusses potential issues. The tenth page is titled '7. What are the things that might become a problem?' and discusses potential issues. The eleventh page is titled '8. What are the things that might become a problem?' and discusses potential issues. The twelfth page is titled '9. What are the things that might become a problem?' and discusses potential issues.

Figure 3.6 Self-help document (website), EAC, 2017 (Elderly Accommodation Counsel 2017b).

This figure shows a grid of 12 screenshots from a website titled 'Housing Options for Older People (HOOP)'. The screenshots are arranged in three columns and four rows. The first screenshot is the homepage, featuring the title and a navigation menu. The second screenshot is the 'Home' page, showing a welcome message and a 'START NOW' button. The third screenshot is the '1. Size & Space' page, showing a checklist of questions to consider. The fourth screenshot is the '2. Location' page, showing a checklist of questions to consider. The fifth screenshot is the '3. Cost' page, showing a checklist of questions to consider. The sixth screenshot is the '4. Comfort & Design' page, showing a checklist of questions to consider. The seventh screenshot is the '5. Security & Safety' page, showing a checklist of questions to consider. The eighth screenshot is the '6. Location' page, showing a checklist of questions to consider. The ninth screenshot is the '7. Location' page, showing a checklist of questions to consider. The tenth screenshot is the '8. Location' page, showing a checklist of questions to consider. The eleventh screenshot is the '9. Location' page, showing a checklist of questions to consider. The twelfth screenshot is the '10. Location' page, showing a checklist of questions to consider.

The following section expands the discussion about housing options documents to explain ways of describing them, grounding the discussion within established concepts and terminology used in the discipline of communication design.

3.2 Describing the documents

This section directs thinking towards housing options documents by discussing print and digital channels, formats, genres, design patterns, and a schema for describing graphic language. These terms, concepts, and model form a foundation from which the visual analyses explored significant and typical design features used in the domain of housing options.



Figure 3.7 Extract from the front cover of a self-training document, Care & Repair England, 2015. Shown at 50% (Care & Repair England, 2015).

As the collection of documents demonstrates, information is provided in both print and digital channels⁵ and in different formats such as leaflets (print), web pages (digital) and PDFs (print and digital). The kind of channel and format that a document is presented in will affect the kinds of graphic language used. Documents for housing options are frequently presented as PDFs hosted and viewed online, and printed out to be read on paper. In these kinds of documents, the graphic language used needs to work across print and digital channels. For example, the symbols of a house and arrows used in the self-training document (see Figure 3.7) borrow from web design. When used online these features might be used to navigate the document; however, such online navigational aids become redundant when printed. Although channels and formats of documents are not the main focus of this research, it was relevant to include consideration of these in the research project as regards how they may influence the way information is presented (see Sections 5.4.5, 5.5.4, and 6.2.5).

⁵ For this dissertation the term ‘channel’ is used to describe the result of a document’s production, i.e., a document may be produced to be printed, or produced to be digital. In the case of PDFs they are produced to be hosted and consumed digitally, but are often printed, therefore span print and digital channels. Other terms used to describe this phenomenon are ‘medium’ (see Lickiss (2020, 37–39) for a critique of the different uses of the term ‘medium’) and platform.

Another aspect relevant to the description of documents is ‘genre’. In the discipline of communication design, genres are names for artefacts that have ‘already been given a name by its community of users’ (Waller et al. 2010, 8). They carry ‘conventions, rules, authority, and audience expectations’ (Waller 2012, 236), meaning users will have particular expectations when engaging with a genre.⁶ The term can be used to distinguish:

- kinds of documents, for example, a book and a magazine;
- topics, for example, a music magazine or health magazine;
- channels, for example, a digital women’s health magazine and a printed women’s health magazine.

As discussed in Section 2.3, categories exist for certain kinds of housing options documents (although naming conventions are not used consistently in the domain):

- guides;
- factsheets;
- self-training documents;
- self-help documents.

The terms ‘guide’ and ‘factsheet’ borrow from established genre names. The term ‘guide’ is a broad term associated with specific kinds of documents, for example, user guides (e.g., Waller et al. 2016). The term ‘factsheet’ is also understood as a kind of document that includes key facts and is often a summary of a longer document; for example, the World Health Organisation provides factsheets on health issues (e.g., ‘Adolescent mental health’, World Health Organisation 2019). Factsheets in the domain of housing options tend to be longer documents that provide details on a specific topic (e.g., ‘Buying a retirement home’, Age UK 2019a). This highlights that the concept of genre is context dependent. ‘Factsheet’ is formatted in one way by WHO, and another in the domain of housing options, for example. Additionally,

6 Documents have been reviewed from a genre perspective (e.g., tourist brochures, Hiippala 2012).

the categories ‘self-training’ and ‘self-help’ are less well-defined,⁷ but have associations with the ‘self-help book’ or ‘self-improvement book’⁸ genre of which Koay (2015) proposes ‘the social purpose of self-improvement books is to help potential readers improve their lives, and the approach of improving one’s life has an individualistic orientation’. Although Ellis (1993) states that there is evidence that self-help books can be helpful to people under certain circumstances, the ‘self-help’ genre name is a category that Hamlin (2018) proposes can put people off engaging with them.

Waller (1988) offers a genre model that takes account of three underlying structures that interact with each other to form a genre:

- **topic structure** – ‘typographic effects whose purpose is to display information about the author’s argument’ (Waller 1988, 140), for example, spacing of topics into sections on a magazine page;
- **artefact structure** – ‘features ... that result from the physical nature of the document or display and its production technology’ (141), for example, an opening page of a magazine article;
- **access structure** – ‘features that serve to make the document usable by readers and the status of its components clear’ (141), for example, a contents page.

Using Waller’s model, we can explore whether the categories are distinguishable visually, and therefore constitute genres within the context of housing options. The examples illustrated in Figures 3.3–6 suggest that there are similarities and differences across the categories. For example, the guide (Figure 3.3) and factsheet (Figure 3.4) have the most similar topic structure (use of headings), artefact structure (pages determine the positioning of content), and access structure (contents pages). From this perspective the documents are not visually distinguishable in

7 In other areas of health communication the terms ‘self-help’ and ‘guide’ are used together (e.g., Lawson 2003; NHSinform 2020).

8 Smiles’ (1859) ‘Self Help; with Illustrations of Conduct and Perseverance’ is considered the first publication of a book with ‘self-help’ as the title. In the twenty-first century, a search on Amazon.co.uk for ‘self help books’ can result in over 10,000 hits with a variety of titles and topics.

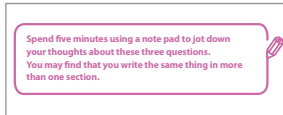


Figure 3.8 Tasks articulated with typographic differentiation. Extract from a self-training document, Care & Repair England, 2015. Shown at 50% (Care & Repair England, 2015).

terms of their categories, additionally indicated by the term ‘factsheet’ and ‘guide’ both being used on the cover of the sample factsheet (Figure 3.4). The self-training document (Figure 3.5) has a similar artefact and access structure to those of the guide and factsheet, but the topic structure is different. Topics are structured with greater distinction, such as the tasks that are highlighted by the use of rules and an illustration of a pencil (see Figure 3.8).

Considering the documents in terms of the genre model is relevant to this research in identifying whether the categories of guide, factsheet, self-training, and self-help document use typical graphic features that, if used consistently, could contribute towards establishing stronger visual distinction and, therefore, ‘strong expectations about how [the document] will be organised, and how to read it’ (Waller 2011b, 18)⁹ (see Sections 3.8.2 and 3.8.5).

A more visually distinctive category of the set is the self-help document (Figure 3.6). In this example, conventions, or ‘design patterns’,¹⁰ from the established genre of ‘questionnaire’ are observable. Design patterns are ways of organising words and images that designers use for common problems (Waller et al. 2010) and ‘are based on the tasks – big and small – that people want to do’ (Tidwell et al. 2005, xii).¹¹ Design patterns are common in interface design and are used as building blocks to create user interfaces (xii). These building blocks contribute towards a common language of graphic features that ‘support the

9 The concept of genre can also be useful to document producers who do not have design training, and has been used to guide development of documents (e.g., contracts as user guides Waller et al. 2016). Waller et al. (2016) argue that: ‘In the absence of training, or theoretical knowledge about document design, the genre perspective enables document producers to make use of their personal experience and cultural awareness. They can identify common document types which most closely match the needs of their own users, and use them as a starting point for their document transformation’ (14).

10 Pattern languages is a design method created by Christopher Alexander (Alexander et al. 1977) and has subsequently been used in software and interaction design (Tidwell 2005 – see Waller 2010), and typeface design (McKaughan 2016).

11 Design patterns may arise from particular use in a genre and settle ‘into a culturally situated norm shared by creators and consumers ... a design pattern or feature might have started with a consciously functional motivation ... but has since become enshrined in a genre convention’ (Waller 2017a, 7).

planning of communications’ (Waller 2017a, 7). Identifying design patterns is relevant to this research: by exploring whether there are significant features in the documents whereby a common language of design patterns for the domain of housing could be developed. These might constitute patterns developed by document producers in the domain or might borrow from established genres. Additionally, they could contribute to establishing visual characteristics that differentiate document categories within the domain (see Section 3.8.2 and 3.8.5).

In order to discuss the documents in terms of genres and design patterns, a way of describing words and images is needed. The concepts of genres and design patterns (as used in communication design) evolved from Twyman’s schema of graphic language (Twyman 1979) (see). This offers a matrix of approaches for organising words and images, and is a device for directing thinking rather than prescribing definitions (Twyman 1979, 117) (see Figure 3.9).¹² The rows of the schema describe kinds of graphic language (modes)¹³ and the columns define methods for organising graphic language (configurations). The schema provides a base from which to establish terminology. The terminology used in this research is adapted from the terminology used in the schema. Figure 3.10 is an adapted matrix used in this research that also includes category, channel, format, and document structure.

Most documents for housing options combine various kinds of graphic language and display different configurations. This combination of graphic language is termed ‘multimodal’ – using several modes in the same document. A cover and inside page of a factsheet and a self-training document are illustrated in Figure 3.11. The matrix can help to strategically direct thinking towards the aspects of the documents that are relevant for further discussion with document producers, and how document categories can be visually differentiated.

12 As such, sections of the matrix that are less easily distinguishable are separated by a dashed (rather than solid) line.

13 The term ‘mode’ is used in this dissertation to refer to images, words and schematics (e.g. diagrams). Mode has been used with more granularity. Van Leeuwen (2004) considers colour to be a mode, and that the level of modality is associated with realism, e.g., a full-colour photograph has a high-level of realism and, therefore, ‘high modality’. For extensive discussion about different uses of ‘mode’, see Lickiss (2020, 18–31).

Mode of symbolisation	Method of configuration						
	Pure linear	Linear interrupted	List	Linear branching	Matrix	Non-linear directed viewing	Non-linear most options open
Verbal/numerical	lettering around the frieze of a building	conventional typeset prose	ordered or unordered list; poetry	family tree; decision algorithm	table	advert scattered with salient words	print-making with type; Dada typography
Pictorial and verbal/numerical	Bayeux tapestry	page from a graphic novel in comic strip form	list of symbols with verbal explanations	family tree with portraits	table to identify e.g., birds' eggs by size or colour	exhibition catalogue; tabloid newspaper	pictorial map; Google Earth with labels
Pictorial	relief sculpture on Trajan's Column, Rome	sequence of wall paintings e.g., fresco cycle around a chapel	list of symbols on motorway service station sign	pictorial explanations of processes and organisation structures	pictorial sequences presented in parallel	naturalistic illustrations, especially those using perspective	aerial photograph; satellite map
Schematic	diagram of a single railway line; graph plot	musical score	[rarely if ever used]	schematic tree diagrams	bar charts	network diagrams, e.g., London Underground	cartographic map

Figure 3.9 Schema of typographic configurations and modes of graphic language (after Twyman 1979 and Luna 2018).

		Category				Channel/Format		
		Guide	Factsheet	Self-training	Self-help	Print	Print/Digital	Digital
						<i>e.g., leaflet</i>	<i>e.g., PDF</i>	<i>e.g., web page</i>

		Document structure		Configurations of graphic language				
		Mainly linear	Less linear	Continuous paragraphs	Ordered list	Unordered list	Tabular	Non-linear directed view
Kinds of graphic language	Words/Numbers							
	Words/Numbers + Images/Schematic							
	Image: Photograph							
	Image: Illustration							
	Schematic							

Figure 3.10 A schema for describing words and images, adapted from Twyman (1979).

The figure above displays the terminology used in this dissertation to describe housing options documents using: graphic language; configurations; layout; category; channel; and format.

Directing thinking towards the kinds of graphic language also highlights differences in the use of graphic language. For example, both documents include images, one uses illustrations (the factsheet) and the others photographs. This is relevant for informing the conversations with document producers to explore reasons why particular images were chosen (see Sections 5.4.2 and 5.5.1).

Directing attention towards the topic structure and configurations can highlight significant aspects of page layout. Layout is important to the focus of this research as it can enhance readers' ease of understanding (Wright 2012) and support active reading strategies (see Section 3.8.5).

To summarise, documents for housing options are:

- presented across print and digital channels;
- presented as different formats;
- often assigned a category that may be visually similar to other categories of documents;
- often formatted using design patterns from existing genres;
- multimodal, configuring words and images in various ways.

Acknowledging channel, format, genres, design patterns, and terminology for graphic language establishes the communication design perspective for this research. In Section 2.3.1 this dissertation established that housing options documents are functional communications, the following section expands on ways of reviewing functional communications that were important foundations for the visual analyses studies.

3.3 Ways of reviewing functional communications

Following the reasoning that housing options documents are functional communications, ways of looking at functional communications can be used to review the documents. Approaches to reviewing functional communications include:

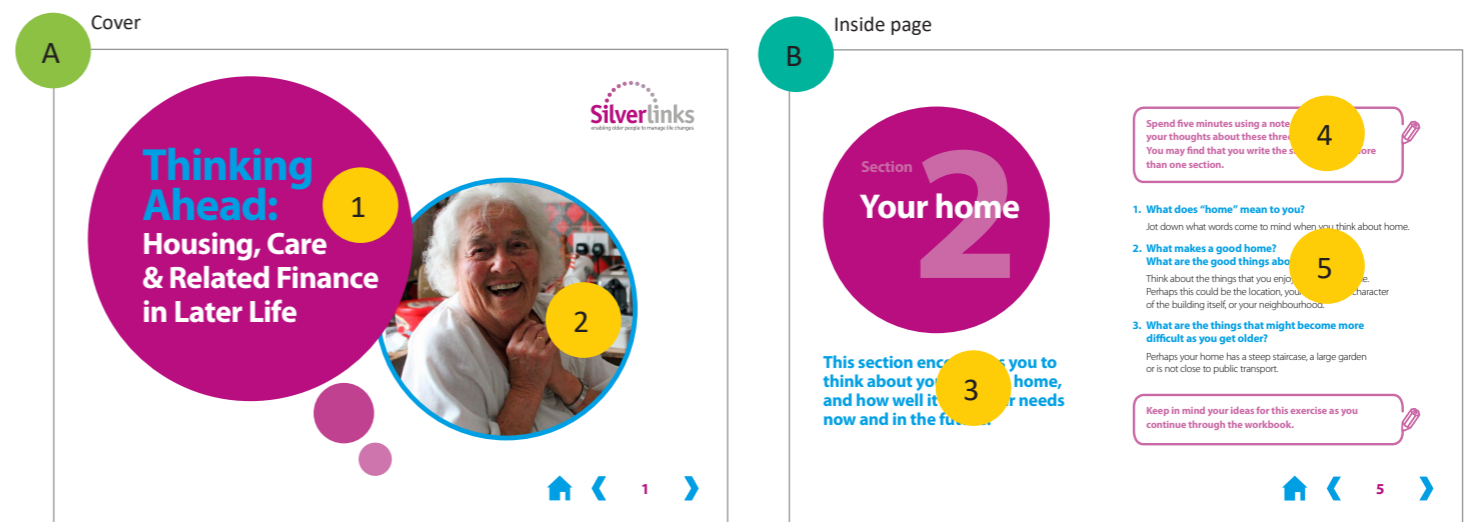
- testing documents with people using performance criteria (e.g., Sless 2008);

Figure 3.11 Examples of documents and use of the adapted schema for description.

Housing and care options for older people. 210X297mm, shown at 30% (Elderly Accommodation Counsel, 2017e).



Thinking Ahead: Housing, care and related finance in later life. 297x210mm, shown at 30% (Care & Repair England, 2015).



Category				Channel/Format		
Guide	Factsheet	Self-training	Self-help	Print	Print/Digital	Digital
	●				PDF	

Category				Channel/Format		
Guide	Factsheet	Self-training	Self-help	Print	Print/Digital	Digital
		●			PDF	

	Topic structure	Configurations of graphic language					
		Mainly linear	Less linear	Continuous paragraphs	Ordered list	Unordered list	Tabular
Words/Numbers	B		1 3		4		
Words/ Numbers + Images/Schematic		A					
Image: Photograph							
Image: Illustration							2
Schematic							

	Topic structure	Configurations of graphic language					
		Mainly linear	Less linear	Continuous paragraphs	Ordered list	Unordered list	Tabular
Words/Numbers				3	5		
Words/ Numbers + Images/Schematic		A B		4			1
Image: Photograph							2
Image: Illustration							
Schematic							

- benchmarking documents using a set of questions and criteria based on good document design principles (e.g., Redish et al. 1981; Lentz et al. 2004; Evans 2011; Waller 2011b).¹⁴

Testing documents with people and measuring against performance criteria is advocated as crucially integral to a design process (Sless 2008, 252). In terms of this research it is important to establish how TSOs incorporate testing and user participation into their design processes (see Section 5.4.4). However, a limitation for this research was the appropriateness of evaluating document effectiveness when the documents are part of a sensitive decision-making process. As explained in Section 2.6, documents are part of a complex decision ecology whereby multiple factors affect decision-making activities.

Instead of testing document effectiveness with users, this research:

- used a focus group to understand users' perceptions (see Chapter 4);
- collated appropriate questions to ask of the documents formed from:
 - organisation and document intentions (see Section 2.2–3),
 - factors associated with later life housing options (see Section 2.6);
- adapted existing benchmarking criteria for functional communications (Waller 2011b) (see Table 3.1).

This approach was deemed an approach more suited to the purview of this study (scoping later life housing documents using a communication design perspective) and the complexities of establishing document effectiveness within a person's complex decision-making journey. It also offered the opportunity to identify where existing knowledge about design principles can be applied to raise the standard of document design (Evans 2011). The following section explains the development of a framework that incorporated these three aspects.

14 Existing studies not within the discipline of communication design use criteria such as the Baker Able Leaflet Design (BALD) (Baker 1997) used, for example, in pharmaceutical studies evaluating Patient Information Leaflets (Mathew et al. 2013; Ladegaard Grønkjær et al. 2019). Also, techniques such as the GeM framework used, for example, in multimodal linguistic studies to evaluate tourist brochures (Hiippala 2012).

3.4 Initial visual analysis approach

The objective of the initial visual analysis was to establish how housing options information is presented in order to inform subsequent discussions with document producers. The initial analysis consisted of a pilot analysis (one document was reviewed with evaluators) and a full analysis (which incorporated evaluators' suggested adaptations to the framework and the visual approach to recording observations made). The following sections outline the development of the framework created to direct observation of the documents and the initial visual approach to recording observations. Initial observations are discussed, summarising with the pros and cons of the initial visual analysis approach.

3.4.1 Developing a framework to review the documents

Table 3.2 is a collation of the organisation and document intentions and factors relevant for housing options (column 1), associated questions formed to ask of the documents based on these factors (column 2), and

Table 3.1 Benchmarking criteria for functional communications, redrawn from Waller (2011).

Language criteria	How easy it is for people to understand the words
Directness	Using direct language to make clear who's doing what
Plain words	Extent to which the vocabulary is easily understood
Grammar and punctuation	Conformity with the practice of good standard English
Readability	Ease with which the reader can follow the argument of the text
Design criteria	The visual impact of the document and the way its design influences usability
Legibility	Use of legible fonts and text layout
Graphic elements	Use of tables, bullet lists, graphs, charts, diagrams, etc.
Structure	Quality of the document's organisation in relation to its function
Impression	Attractiveness and approachability of the document's overall appearance
Relationship criteria	How far the document establishes a relationship with its users
Who from	Is it clear who is communicating?
Contact	Whether there are clear contact points and means of contact
Audience fit	Appropriateness to the knowledge and skills of the users
Tone	Matching the style and language to the context
Content criteria	How the content and the way it is organised deliver the document's purpose
Relevance	How relevant the content is to the recipient
Subject	Whether it is clear what the communication is about
Action	Clarity about what action is required of the user
Alignment	Compliance with the organisation's intended aims and values

existing benchmarking criteria (column 4). Column 3 lists the document functions ‘inform’, ‘engage’, and ‘support’ that were developed to group together questions based on document functionality.

The benchmarking criteria are borrowed from Waller (2011b). Waller’s benchmarking criteria are underpinned by concepts from behavioural economics, linguistics, and educational theory, those that are relevant to housing options in later life are:

- schemata (‘prior knowledge’ hereafter);¹⁵
- cognitive capacity;
- strategic reading.

These three underpinnings are appropriate for a review of housing options documents as they map onto factors related to decision making for later life housing: knowledge of later life housing and care (see Section 2.6.1); task-based decision-making activities (see Sections 2.6.2 and 2.6.3); and information overload (see Section 2.6.4).

The benchmarking criteria used by Waller (2011b) (see Table 3.1) were originally developed to review transactional documents. These kinds of documents are ‘sent to people as part of a process they have already engaged in as customers or enquirers’ (21). However, housing options documents are often used by people who have not been in previous contact with the TSOs. Consequently, it was important to establish which of the benchmarking criteria were most relevant for a review of housing options documents, and whether additional aspects needed to be considered. The intentions of organisations and documents, and factors associated with housing options, were used to help develop an appropriate list of questions to ask of the documents during visual analyses.

A simplified framework was developed for the pilot analysis (see Figure 3.12). This framework consisted of ten questions that were

15 In communication design, ‘schemata’ can be used to describe graphic language (e.g., a diagram) or to refer to ‘prior knowledge’. Prior knowledge is used throughout this dissertation to reduce ambiguity.

Factors related to housing options decision making	Questions about the design of documents			Potential document functions	Benchmarking criteria for functional communications (Waller, 2011b)		
	Included in the Pilot (P) Full initial (FI) Extended (E) analyses:	P	FI		E		
Housing options in later life are: <ul style="list-style-type: none"> varied; localised; often associated with elderly care. 	Is it clear who is communicating?		*	*	Inform users	Who from	Is it clear who is communicating?
	How does the document explain/educate about the topic/options?	*	*	*		Subject	Whether it is clear what the communication is about
Third sector organisations aim at: <ul style="list-style-type: none"> introducing and explaining options; supporting decision-making activities [see below]; providing impartial information. 					Engage users	Alignment	Compliance with the organisation's intended aims and values
	How is impartiality considered?		*	*			
Users include: <ul style="list-style-type: none"> older people (primary user); family members/supporters; advisors. 	How are the intended users indicated?	*	*	*	Support users	Action	Clarity about what action is required of the user
	How are multiple users accommodated in the document?		*	*			
	How is information made relevant to the user?	*	*	*			
	How is engagement maintained?		*	*			
Factors impacting decision-making activities include: <ul style="list-style-type: none"> self-awareness; perceptions of later life; sensitivity of the topic; 'move motivators' and motivation to talk and plan ahead; push-pull factors. TSOs aim at supporting decision-making activities. 	How are creative approaches used to support the identification of emotion, meaning, and aspiration?	*	*	*	Support users	Action	Clarity about what action is required of the user
	How is pre-existing knowledge of housing in later life considered?	*	*	*			
	How does the document support discussion?			*			
	How are push-pull factors presented?	*	*	*			
Useful approaches to providing information: <ul style="list-style-type: none"> using a shared approach – learning from others' experiences prompts thinking about an individual's situation; access to informed unbiased people – enabling unbiased discussion to reflect on choices; rehearsal time – imagining the future and planning options; reflection – self-understanding and knowing what is important to the individual, and therefore what factors might be prioritised when facing decisions. 	How does the document support the sharing of experiences?	*	*	*	Support users	Action	Clarity about what action is required of the user
	How is the user supported to access informed unbiased information services?	*	*	*			
	How do documents support rehearsal time and reflection?	*	*	*			
	How is the document structured to help prompt thinking?	*	*	*			
	How does the document support a user to effectively use the information provided?	*	*	*			
					Legibility	Use of legible fonts and text layout	
					Graphic elements	Use of tables, bullet lists, graphs, charts, diagrams, etc.	
					Structure	Quality of the organisation of the document in relation to its function	
					Directness	Using direct language to make clear who's doing what	Transactional documents must make clear where action is needed by the user, or by the organisation. This is not deemed relevant for non-transactional documents for housing options.
					Plain words	Extent to which the vocabulary is easily understood	This is relevant to the domain as there are terms for options that are used differently across localities. However, the use of language is out of the scope of this document review.
					Grammar and punctuation	Conformity with the practice of good standard English	Although relevant, this is out of the scope of this review.
					Readability	Ease with which the reader can follow the argument of the text	Although relevant, this is out of the scope of this review.
					Contact	Whether there are clear contact points and means of contact	For functional communications that are transactional in nature, a point of contact for the organisation is important. Signposting to information provided by other organisations is considered important in housing options documents, and is addressed in the criterion 'How is the user supported to access informed unbiased information services?'
					Tone	Matching the style and language to the context	Waller (2011b) and Evans (2011) look for 'an appropriate tone of voice for the topic, the audience and the organisation's brand'. These aspects of the documents were noted regarding the visual identity (rather than language) in 'Who is communicating?'

Table 3.2 Initial mapping of factors related to housing options, questions to ask of the documents, potential document functions, and benchmarking criteria.

deemed appropriate from the collation of aspects discussed above. The self-training document (from the sample) was chosen for use in the pilot analysis as it was considered to have the most typographic differentiation than the other documents. Consequently, this document would test the robustness of the framework. The pilot analysis was an informal process to test the usability and appropriateness of the framework, suitability of recording observations, and to review decisions about the functions of design features.

Four evaluators evaluated the draft framework and ways of recording observations as tree diagrams (see Section 3.4.2). The evaluators in the pilot study were chosen from those known to me. Two evaluated the process together, two evaluated it on their own. Each evaluator was given the following (see Appendix B3):

- an explanation sheet;
- a printed sheet of the draft framework;
- a printed tree diagram sheet (a record of the visual analysis of the self-training document);
- a printed copy of the self-training document.

The evaluators' suggestions were either written onto the printed tree diagrams or collated into an Excel document (see Appendix B4). I met with each evaluator to discuss their suggestions. Table 3.3 summarises the suggestions used to amend the framework. The suggestions encompass the need to address how engagement is maintained throughout documents, how multiple users are addressed, to record design features that address impartiality, and to observe how the document originators are recorded. A final point was made that the colour coded tree diagram approach highlighted how design features were spread across documents. This suggested the need to be more explicit in the framework about how documents were structured. Figure 3.13 illustrates the framework used in the full study initial analysis that accommodates these suggestions.

1	Engage	<p>How is relevance addressed? – how are intended audience/s indicated?</p> <p>How are schemata of 'housing in later life' addressed?</p>
2	Inform	<p>How are the materials educating the audience about the topic? – How the is topic explained?</p> <p>How is/are the topic/s structured to help prompt thinking, or focus on particular needs?</p> <p><i>How are push-pull factors presented?</i></p>
3	Support	<p>How are creative approaches used to enable identification of emotion, meaning, and aspiration?</p> <p>How do the materials support the sharing of experiences?</p> <p>How are the materials supporting access to informed unbiased people?</p> <p>How are the materials supporting 'rehearsal time', 'reflection'?</p> <p><i>How do the materials support effective use of the information material?</i></p>

Figure 3.12 Draft framework used in the pilot initial review.

Evaluator suggestions from the pilot analysis	Revisions made to the framework
	Full initial analysis
Some 'units' are maintaining engagement throughout the document	Add: how do documents maintain engagement?
Acknowledgement of multiple users is missing	Add: how are multiple users addressed?
Identifying impartiality is missing	Add: how is impartiality considered? [extended]
How should logos be recorded?	Add: 'who from' from benchmarking criteria, to acknowledge and record observations about organisation logos
The visual approach to recording observations using tree diagrams highlights the spread of potential functions across documents	Separate this from the functions

Table 3.3 Suggestions made by the evaluators in the pilot initial analysis that related to the use of the framework.

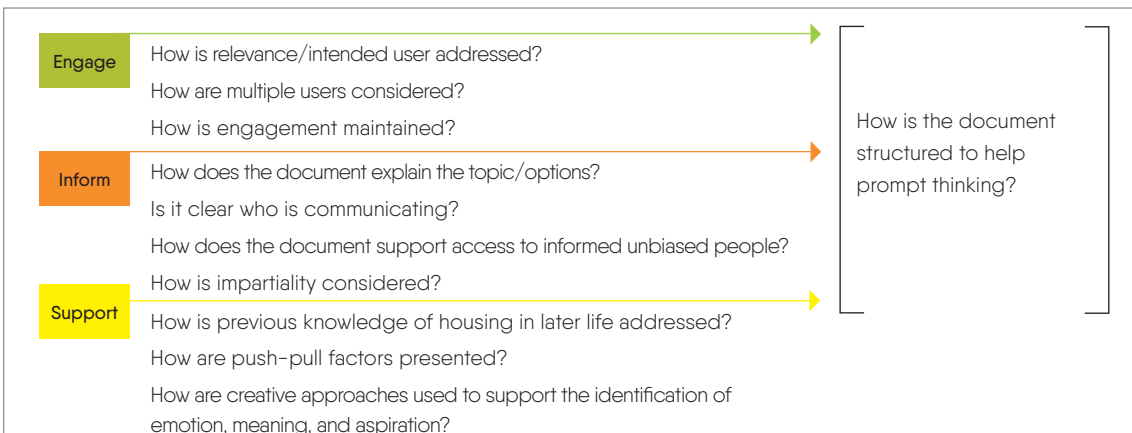


Figure 3.13 Framework used in the initial analysis.

3.4.2 Visually recording analysis observations using tree diagrams and tables

A visual approach was taken to documenting the review observations. It was necessary to create a visual record that aided synthesis of observations and comparison of graphic language use across the four sample documents.¹⁶

The approach used in the initial analysis was to review distorted versions of document pages, akin to the ‘layout layer’ step in used in the Genre and Multimodality (GeM) approach.¹⁷ Observations were then recorded as tree diagrams, similar to Norrish (1987).¹⁸ The process used in the pilot initial analysis is illustrated in Figure 3.14. The approaches taken by the GeM model and Norrish afford analysis across a spectrum of design features in documents. Since this research does not focus on one design feature, such as typeface or image choice, using techniques that envelop a variety of features was useful.

The following pages of each document were examined in the initial analysis:

- cover;
- preliminary pages (e.g., contents page);
- six subsequent pages of body matter (pages containing main information content (Norrish 1987, 10)).¹⁹

These pages captured examples of how words and images were being used and organised for each of the three functions listed in the framework.

16 This differs from creating a text-based record such as tree diagrams using words (e.g., Norrish 1987) or a database that can be used to label documents in a large collection such as in the full GeM model (Bateman 2008).

17 For a full description of the GeM approach, see Bateman (2008). The full model can be used to identify ‘consistencies in visual style’ across a corpus (Bateman 2014) and has been useful for reviewing genre-based documents, for example: age-related stock images (Harvey et al. 2019); tourist brochures (e.g., Hiippala 2012, 2016); newspapers (e.g., Bateman et al. 2007); and financial services documents (e.g., Thomas et al. 2010).

18 To understand more about the organisation and presentation of texts, Norrish used lists of questions such as ‘questions to ask about a paragraph’ (Norrish 1987, 12). As these questions were asked, Norrish (1987) created tree diagrams to record the document structures of the artefacts being reviewed.

19 In the full review the same number of pages were reviewed for the guide, factsheet, and self-training document. The self-help document is an online questionnaire and key web pages were captured. The decision was taken to review the main sections, which are the home page, a question page, and a results page.

Figure 3.14 Pilot-study visual analysis approach using a self-training document (Care & Repair England, 2015) as an example.

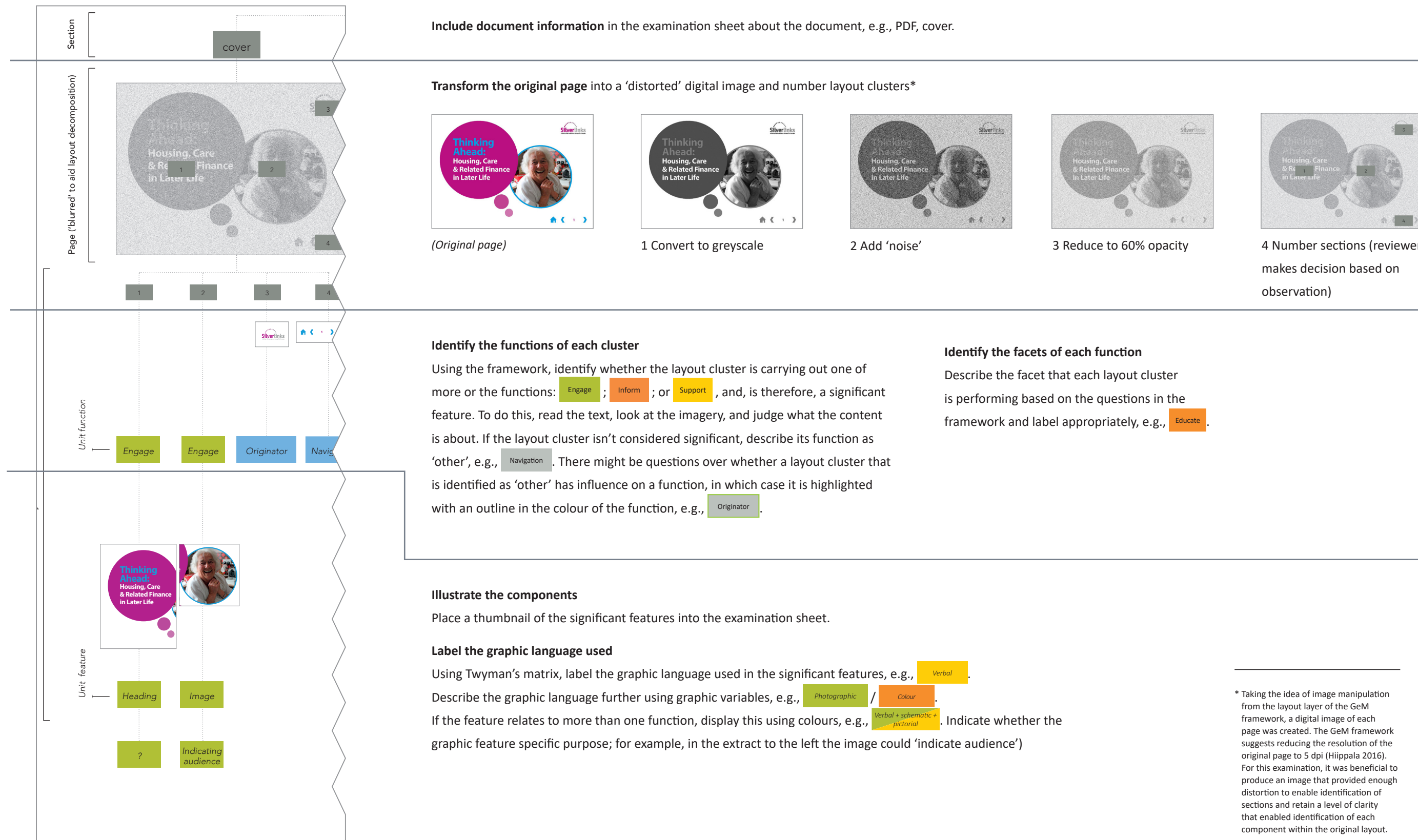


Table 3.4 The suggestions made by the evaluators about the process of recording observations.

Evaluator suggestions from the pilot analysis	Revisions made to the recording of observations	
	Full initial analysis	Extended analysis
It was important to have the PDF printed out to refer to during the review, as the small images were too small to see the words or pictures. The process of distorting images is useful for the segmenting of a page into units, but unhelpful to the identification of significant features.	Change: Look at the documents after separating out units.	
On the cover, the eye might be drawn to title (inform) or photo (engage).		
Distinguish between kinds of imagery.	Specify the kind of image used, such as photographic or illustration.	
Distinguish between kinds of quotes (single quote/conversational).	Identify different kinds of quotes.	
Distinguish between push and pull factors.	The push and pull factors might be different for each user, therefore these should not be recorded as separate features.	
Prose/continuous text/discursive text is used for the same kind of text.	Use the term 'continuous paragraphs'.	
Use a different term than 'unit' (e.g., 'hygiene units').	Use the term 'feature'.	
Some 'units' have multiple functions	Record these multiple functions of features.	
Capture 'graphic flourishes'/'designerly' things.	Include these kinds of observations as graphic variables such as colour and font variants, or pictures, e.g., where shapes are used such as speech bubbles.	
Include the page numbers on the examination sheet.	Page numbers can be added above the distorted images.	
Make the sections more prominent.	Format text for sections horizontally.	
Make 'significant features' more prominent visually.	'Other' sections could be grey, and include a horizontal bar across the examination sheet to highlight the significant sections.	
Some 'units' need to be presented more clearly to show connections between 'unit' and function/s.	Separate out components and functions where this is an issue during the recording of observations.	
The colour coding of elements shows visually how inform/support are located throughout a document.	This is a strength of the tree diagram approach, but this approach also detracts from the document structure. This was addressed in the extended analysis (see right).	Record observations in context so that the importance of the page and document structure are not lost during the recording of observations. Features that anchor each other can also be recorded.
Importance of proximity of 'units' on the page is lost in use of tree diagrams during the review process.		
Collectively 'units' reinforce a message.		

The evaluators in the pilot analysis made suggestions about the method of recording observations (see Table 3.4). The approach used in the full initial analysis was revised based on these suggestions and additionally recorded observations in tables (see Figure 3.15). Recording in tables enabled a clearer record of the design features, so that aspects of the graphic language could be better analysed and better familiarity with the documents was established for the interviews with document producers.

The visual approach to recording review observations in the initial visual analysis are:

- tree diagrams that show the flow of functions across the documents (see sections of Figures 3.14 and 3.15 and Appendices B5–8);
- tables according to the functions engage, inform, and support that show the different design patterns used for each function (see Figures 3.16–3.29).

The observations about the design features of the sample documents are discussed in the following sections, using the tabulation of design features and tree diagrams to illustrate observations made.

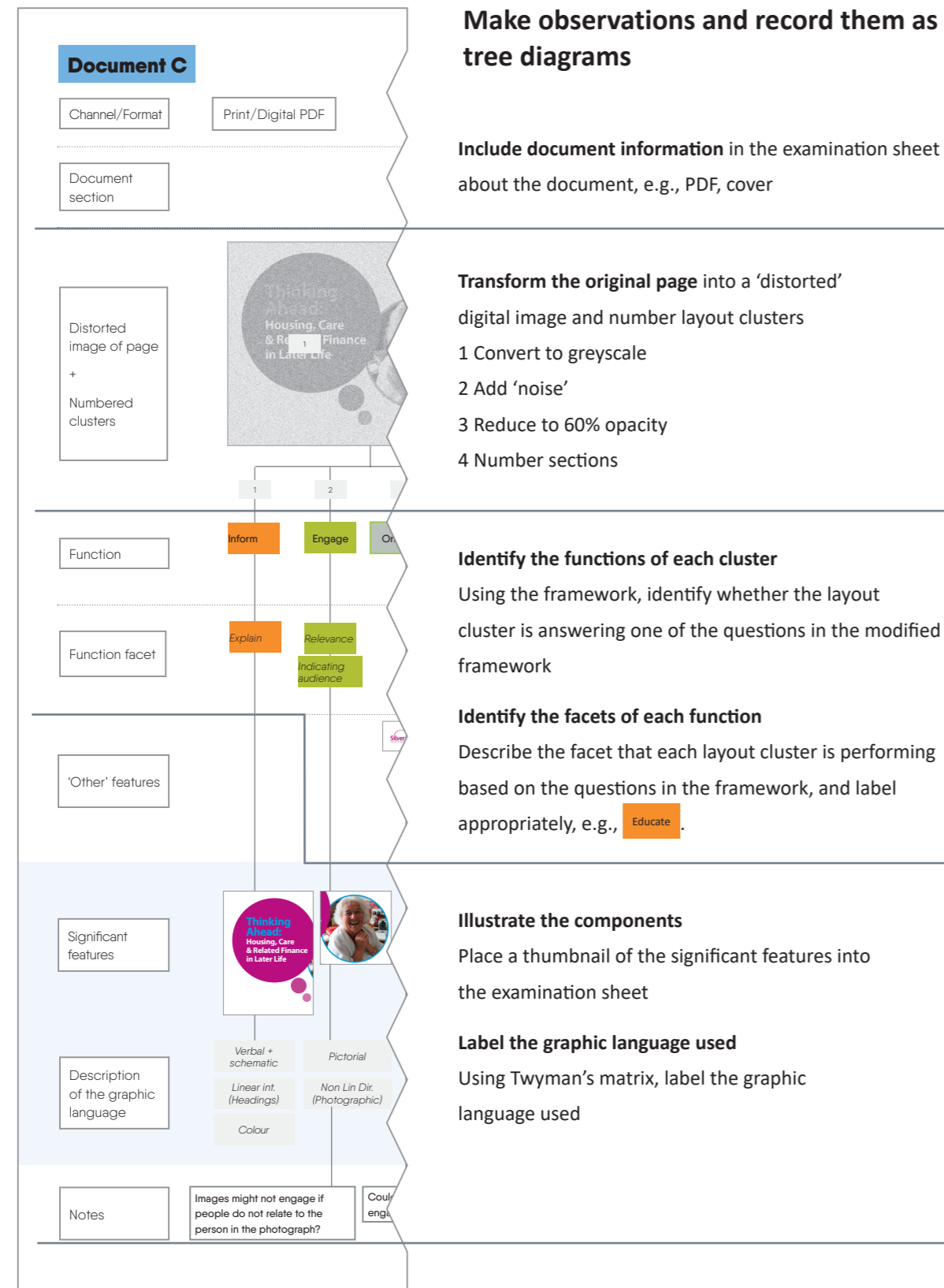
3.5 Design features identified in the initial visual analysis that support document functions

The observations documented in the initial visual analysis informed the conversations with TSO document producers about housing options documents (see Section 5.3). Consequently, the outcomes are not a comprehensive analysis of the graphic features of documents, instead they identify aspects of the documents that required further inquiry during the interviews, and whether graphic features support intended document functions. The following sections outline key observations made in the initial analysis.

3.5.1 Indicating users, addressing multiple users, and indicating relevance



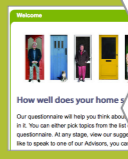
Images are used to indicate users, address multiple users, and indicate relevance to users. Photographs were used predominantly on the guide,

Figure 3.15 Full-study initial analysis approach using a self-training document (Care & Repair England, 2015) as an example.



Review document for other design features



Engage	Indicating relevance/u	
Words/Numbers	Headings	
Words/Numbers + Images/Schematic		
Image: Photograph		Full colour photo - stand alone - within an illustration
Image: Illustration		
Schematic		
Cover		
Guide	Information and advice you need to help you live later life	
Factsheet	Housing and care options for older people	
Self-training	Thinking Ahead: Housing, Care & Related Finance in Later Life	
Self-help	Housing Options for Older People (HOOP)	

Organise observations into tables

self-training and self-help documents (see Figure 3.16). The self-training document contained the largest quantity of photographs of people. White older people are on the cover of the guide and the self-training document, whereas on the self-help document six people of different ethnicities are displayed on the home page (see Figure 3.17). Conversely, the factsheet displays artwork by older people instead of photographs (see Figure 3.18). These observations indicate that photographs are predominantly used in the sample, in the self-help document they are being used to signify multiple kinds of user; however, the document producer of the factsheet had opted not to use photographs. This led to exploring the use of images further with document producers (see Section 5.4.2).

Additionally, it was noted that headings, summaries, and learning helps are used in the guide, factsheet, and self-training documents (see Figure 3.16). These help to indicate relevance to users. Conversely, an observation about the written content was the contents list of the factsheet and self-training documents indicated that document producers might be influenced by the report genre. The factsheet and self-training documents include 'section' and 'part' respectively (see Figure 3.18). These contents list are less clear than the one used in the guide, whereby headings clearly indicate relevance to user. For example, 'I want to stay in my current home'. This led to questions about how document content is structured and formatted by producers of housing options documents (see Section 5.4.2) and further exploration of the written content (see Section 3.8.1).

3.5.2 Identifying meaning, supporting reflection, sharing, and discussion

Design features in the self-training document were identified as supporting the user in identifying meaning, supporting reflection, and encouraging sharing and discussion.

The design features identified to support identification of meaning, emotion, and aspiration were headings with content such as 'love

Figure 3.16 Graphic features identified that could indicate users/relevance in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Engage	Indicating relevance/user			
Words/Numbers	Headings		Continuous paragraphs	Unordered list
Words/Numbers + Images/Schematic				
Image: Photograph		Full colour photographs: - stand alone - within an illustration		
Image: Illustration				
Schematic				
	Cover		Body matter	
Guide				
Factsheet	Housing and care options for older people			
Self-training	Thinking Ahead: Housing, Care & Related Finance in Later Life		This workbook is intended as a "quick guide" resource for older people, their families, carers and professionals who would like to know more about housing options in later life.	How well does your home suit you? Our customers will help you think about different aspects of your home and how you use it. You can either print this guide to use at home or take it with you when you visit a home. It will help you decide if a home is right for you. It will also help you decide if a home is right for you. It will also help you decide if a home is right for you.
Self-help	Housing Options for Older People (HOOP)			

Figure 3.17 Graphic features identified that could indicate multiple users in: a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Engage	Multiple users	
Words/Numbers	Heading Continuous paragraphs	Introductory paragraphs
Words/Numbers + Images/Schematic		
Image: Photograph		
Image: Illustration		
Schematic		
	Cover	Body matter
Guide		
Factsheet		
Self-training		This workbook is intended as a "quick guide" resource for older people, their families, carers and professionals who would like to know more about housing options in later life.
Self-help		

Figure 3.18 Graphic features identified that could indicate relevance in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Engage	Relevance						
Words/Numbers	Ordered list	Unordered list	Continuous paragraphs	Headings Continuous paragraphs			Unordered list Ordered list
Words/Numbers + Images/Schematic					Continuous paragraph within an illustration	Unordered list Photograph Within illustrations	
Image: Photograph							
Image: Illustration	Full colour photographs: - stand alone - within an illustration						
Schematic							
	Cover	Prelims	Body matter				
Guide							
Factsheet							
Self-training							
Self-help							

Figure 3.19 Graphic features identified that could support users in identifying meaning, emotion, and aspiration in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); and a self-training document, 297x210mm (Care & Repair England, 2015). All shown at 13%.

Support	Identify meaning, emotion, aspiration			
Words/Numbers		Heading		Headings Continuous paragraphs
Words/Numbers + Images/Schematic	Quotations Illustration		Heading Photograph	
Image: Photograph				
Image: Illustration				
Schematic				
			Body matter	
Guide				
Factsheet				
Self-training				
Self-help				

later life' (see Figure 3.19) in the guide document. Additionally, in the self-training document speech bubbles contained quotes from people who had moved home or quotes about what home means to them (see Figure 3.19).

The graphic features that supported reflection were found in the self-training document as pull-out boxes that encouraged users to think about their ideas whilst reading the document, and to write them down (see Figure 3.20). These kinds of prompts were formatted in paragraphs and lists in the guide and factsheet (see Figure 3.20). In the self-help document the questionnaire format encourages reflection through the answering of questions (see Figure 3.20).

Sharing and discussion were less represented in the documents (see Figure 3.21). However, in the self-training document there is use of graphic features such as speech bubbles draw attention to quotes by people who have made decisions about later life housing. Whereas in the guide content that encourages discussion is within paragraphs of text.

It was clear from these observations that graphic features were being used differently across the kinds of documents to support the identification of meaning, support reflection, share, and engage in discussion. These features were explored further in the extended visual analysis (see Section 3.8.2).

3.5.3 Maintaining engagement

Several of the graphic features that were identified as supporting reflection were identified as potentially maintaining engagement (see Figure 3.22). These were few, but aligned to the prompting of answers to questions about ideas as the reader uses the document and to reflect on existing circumstances. This use of questioning was explored further in the extended visual analysis (see Section 3.8.1).

Figure 3.20 Graphic features identified that could support a user to reflect or rehearse in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Support	Reflection/Rehearsal					
Words/Numbers	Continuous paragraphs			Ordered list	Ordered list Continuous paragraphs	Unordered list
Words/Numbers + Images/ Schematic		Continuous paragraphs Illustrations	Headings Unordered lists Likert scale Illustrations			
Image: Photograph						
Image: Illustration						
Schematic						
	Body matter					
Guide						
Factsheet						
Self-training						
Self-help						

Figure 3.21 Graphic features identified that could support a user to share or discuss in: a guide, 148x210mm (Age UK, 2017b); and a self-training document, 297x210mm (Care & Repair England, 2015). All shown at 13%.

Support	Sharing/discussion		
Words/Numbers		Continuous paragraphs	Heading Ordered list
Words/Numbers + Images/ Schematic	Quotations Illustrations		
Image: Photograph			
Image: Illustration			
Schematic			
	Body matter		
Guide			
Factsheet			
Self-training			
Self-help			

Figure 3.22 Graphic features identified that could maintain users' engagement in: a guide, 148x210mm (Age UK, 2017b); and a self-training document, 297x210mm (Care & Repair England, 2015). All shown at 13%.

Engage	Maintaining engagement	
Words/Numbers	Continuous paragraphs	
Words/Numbers + Images/ Schematic		Continuous paragraph within an illustration
Image: Photograph		
Image: Illustration		
Schematic		
	Body matter	
Guide		
Factsheet		
Self-training		
Self-help		

Figure 3.23 Graphic features identified that could support use of information in documents in a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Support	Supporting use of information			
Words/Numbers	Introductory paragraphs Continuous paragraphs	Headings Continuous paragraphs	Headings Unordered list	
Words/Numbers + Images/ Schematic				Continuous paragraphs Numbers Illustrations
Image: Photograph				
Image: Illustration				
Schematic				
	Body matter			
Guide				
Factsheet				
Self-training				
Self-help				

3.5.4 Supporting the use of information

Graphic features that support users to effectively use the documents were noted (see Figure 3.23). Introductory paragraphs in the self-training document introduce the document purpose and indicates what each section addresses. Additionally, in the self-training document an unordered list explicitly states what users will have achieved by working through the document. In the self-help document pull-out boxes indicate how to work through the questionnaire. These features are akin to 'learning helps' (Waller 2011, 4) and demonstrates that document producers are considering use of such features to support document use.

3.5.5 Explaining options

The topic and housing options are explained through headings, paragraphs, and unordered lists throughout each of the documents (see Figure 3.24). In the factsheet housing and care are considered together (in unordered bullet lists, for example). This is discussed further in Section 6.2.4 regarding avenues for further research.

3.5.6 Indicating originator

Each document carries the logo of the originating organisation indicating who the information is from (see Figure 2.25). Additionally, the factsheet includes a paragraph explaining what kind of advice the organisation offers. The guide includes introductory paragraphs that indicate the goals and intentions of the organisation. The visual identity of TSOs was discussed further in the interviews with TSO document producers (see Section 5.5.8). Additionally, user perceptions of the originator indicated that this was an important aspect for conveying the trustworthiness of information (see Section 4.3.3). The visual identity was explored further in the extended visual analysis (see Section 3.8.4).

Figure 3.24 Graphic features identified that could explain options in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Inform	Explain					
	Words/Numbers	Headings	Ordered list	Unordered list	Headings Continuous paragraphs Unordered list	Headings Continuous paragraphs
Words/Numbers						
Words/Numbers + Images/Schematic	Headings Illustration					
Image: Photograph						
Image: Illustration						
Schematic						
	Cover		Prelims		Body matter	
Guide						
Factsheet						
Self-training						
Self-help						

Figure 3.25 Graphic features identified that could indicate who is communicating in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Inform	Who is communicating	
	Words/Numbers	Headings Continuous paragraphs
Words/Numbers		
Words/Numbers + Images/Schematic	Words Illustrations	
Image: Photograph		
Image: Illustration		
Schematic		
	Cover	
Guide		
Factsheet		
Self-training		
Self-help		

Figure 3.26 Graphic features identified that could inform a user of further information in: a guide, 148x210mm (Age UK, 2017b); a factsheet, 210x297mm (Elderly Accommodation Counsel, 2017e); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Inform	Information access	
	Words/Numbers	Continuous paragraphs
Words/Numbers		
Words/Numbers + Images/Schematic	Headings Continuous paragraphs Illustrations	
Image: Photograph		
Image: Illustration		
Schematic		
		Body matter
Guide		
Factsheet		
Self-training		
Self-help		

Figure 3.27 Graphic features identified that could address impartiality in: a guide, 148x210mm (Age UK, 2017b); a self-training document, 297x210mm (Care & Repair England, 2015); and a self-help document, web page (Elderly Accommodation Counsel, 2017g). Printed documents shown at 13%.

Inform	Impartiality	
	Words/Numbers	Questions
Words/Numbers	Headings phrased as statements	
Words/Numbers + Images/Schematic		
Image: Photograph		
Image: Illustration		
Schematic		
	Prelims	Body matter
Guide		
Factsheet		
Self-training		
Self-help		

Figure 3.28 Graphic features identified that could support a user to address previous knowledge in a self-training document, 297x210mm, shown at 13% (Care & Repair England, 2015).

Support	Previous knowledge
Words/Numbers	Introductory paragraphs Continuous paragraphs
Words/Numbers + Images/Schematic	
Image: Photograph	
Image: Illustration	
Schematic	
	Body matter
Guide	
Factsheet	
Self-training	
Self-help	

Figure 3.29 Graphic features identified that could address push-pull factors in: a guide, 148x210mm (Age UK, 2017b); and a self-training document, 297x210mm (Care & Repair England, 2015). All shown at 13%.

Support	Push-pull factors	
Words/Numbers	Introductory paragraphs Continuous paragraphs	Headings Continuous paragraphs
Words/Numbers + Images/Schematic		Unordered list Illustrations
Image: Photograph		
Image: Illustration		
Schematic		
	Body matter	
Guide		
Factsheet		
Self-training		
Self-help		

3.5.7 Information access

Graphic features that direct users to further information were observed (see Figure 3.26). In the self-training and self-help documents, access to further information is formatted in pull-out boxes as well as paragraphs. The guide and factsheet embed the information about further information sources into paragraphs. Icons are used in the guide to indicate where information might be different across the UK, or where to go next to find further information. Signposting to further information was explored further in the extended visual analysis (see Section 3.8.2).

3.5.8 Addressing impartiality

Observations about impartiality were recorded regarding the written content, rather than graphic features (see Figure 3.27) (this warranted further consideration about the role of visual organisation for impartial content, see Section 6.2.2). In the guide, statements written in the first person and questions directed at readers were included, encouraging readers to consider their own circumstances. This kind of content was included in the contents list and in ordered lists. The style of written content, in relation to explanatory and description, were explored further in the extended analysis (see Section 3.8.1).

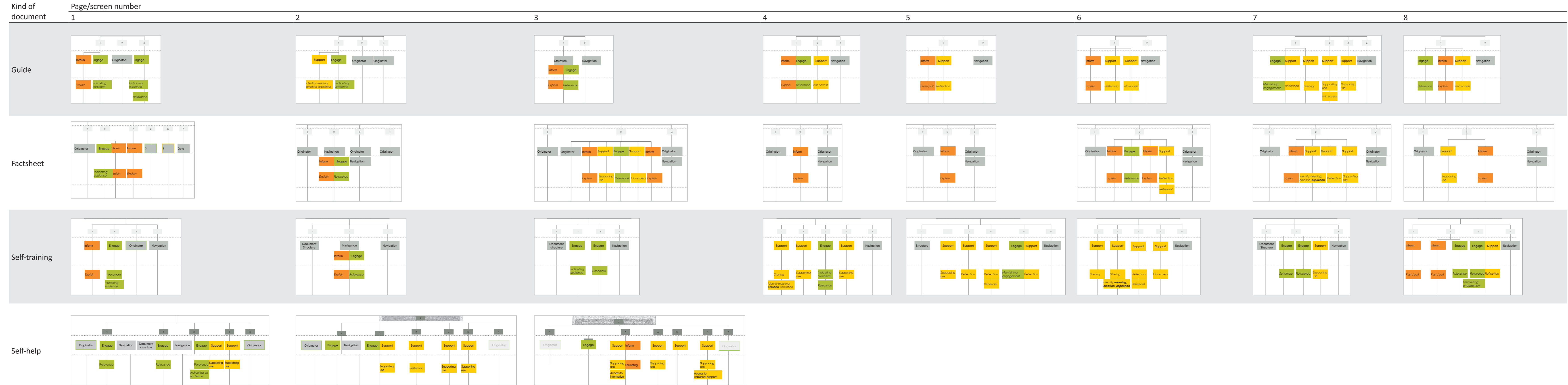
3.5.9 Addressing previous knowledge of later life housing

Previous knowledge of housing in later life did not appear to be addressed greatly in the documents, apart from one feature in the self-training document: an introductory paragraph hints at considering how housing needs may be different at different ages (see Figure 3.28). This warrants further research (see Section 6.2.4).

3.5.10 Addressing push-pull factors

The self-training document addressed push-pull factors through what could be considered a creative approach, combining words and images to suggest 'thinking' bubbles (see Figure 3.29). However, the guide and

Figure 3.30 Graphic features identified across the document early pages.



factsheet did not directly address push-pull factors, potentially due to the purpose of these documents, giving an overview or specific facts about options. This could be due to the difference between the categories of documents, and could be factored into visually differentiating the documents further to support particular reading strategies (see Section 6.2.3).

3.5.11 The position of design features across documents

One of the advantages to recording analysis observations as colour coded tree diagrams was the visual display of how design features might be spread across the early pages of documents (see Figure 3.30). What is evident from these tree diagrams is that the guide, factsheet, and self-training documents each have elements of ‘inform’ and ‘engage’ on the covers. The self-help document, being a questionnaire, as might be expected includes design features appearing later in the document that inform about options. Instead, the self-training document contains a greater quantity of graphic features that support a user, rather than the graphic features in the guide and factsheet that were more heavily associated with ‘inform’. This has implications for the visual differentiation of document categories, discussed further in Sections 3.8.5 and 6.2.3.

3.6 Outcomes of the initial visual analysis

It is acknowledged that the above observations are not a reflection of document producer intentions. Observations about design features are assumptions that the design features identified a) were intended to facilitate the functions of engage, inform, and support;²⁰ and b) that the design features are effective at facilitating these functions. To explore document producer intentions and document design practice, interviews with document producers were conducted (see Sections 5.3–5). This provided the opportunity

20 Since these functions were developed as ‘relevant’ functions for housing options documents to perform based on desk research into housing options and researching I&A organisation intentions, it was considered that these were appropriate kinds of functions to base the visual analysis upon.

to understand more about the design decisions that led to the documents analysed in the visual analyses. To address the potential effectiveness of document design features: firstly, a focus group with users explored user perceptions of the documents (see Chapter 4); and secondly, the design features were explored further in the extended visual analysis, with greater attention to the way words and images are organised as graphic features and within their page layouts (see Sections 3.7–8).

Additionally, although the visual method used to record observations using tree diagrams and adapted aspects of the GeM model provided an overview of graphic language use within and across the documents, a weakness of this approach was the omission of the importance of page layout and document structure. This weakness was addressed in the extended visual analysis by highlighting design features on thumbnails of document pages (see Section 3.7.2). The extended visual analysis approach and observations are discussed below.

3.7 Extended visual analysis approach

The extended visual analysis facilitated an understanding of ‘the purpose and worth of each part’ (Waller 2011a, 21)²¹ of the documents in order to explore the concepts posed in Section 3.2, i.e.:

- identifying significant design features that contribute towards developing a common vocabulary of design features (a library) for the domain of housing options;
- exploring further the visual differences between the categories of guide, factsheet, self-training, and self-help document.

The four documents reviewed in the initial analysis were retained as the sample, but the framework and visual approach of recording observations were developed to address weaknesses in the review approach identified in the initial analysis (see Section 3.6).

21 ‘You often need to pull a document apart, examine the pieces, and start again ... Deconstruction is not the same as destruction – it’s a positive step that helps you to understand the purpose and worth of each part’ (Waller 2011a, 21).

3.7.1 Adapting the framework

Table 3.5 lists the notes made during the initial analysis for adaptations to the framework. Figure 3.31 illustrates the framework used for the extended analysis which accommodates additional aspects of benchmarking criteria that facilitated consideration of the purpose of each design feature, the application of good design principles, and document structure. The functions were included in this framework, and recorded visually, but more focus was given to the aspects of the design features.

3.7.2 Visually recording analysis observations using page thumbnails

In the extended analysis, a method was needed to acknowledge the design features context. This recognises ‘the importance of considering interrelationships between clusters of typographic attributes rather than testing isolated variables’ (Moys 2014, 41).

An advantage to the tree diagram approach was the visualisation of how functions might be placed throughout a document. To retain this, yet gain a better understanding of the context, observations were recorded using thumbnails of pages organised in page sequence (see Figure 3.32; see Appendices B9–11 for all record sheets). The observations about the design features of the sample documents are discussed in the following sections, where images from the record sheets are used to illustrate the points made and demonstrate the design features in context.

3.8 Further observations about design features of housing options documents

The extended visual analysis gave greater attention to the purpose and worth of design features. Significant design features are discussed below with reference to aspects of the framework and the concepts of design patterns and document structure. Aspects discussed are separated for descriptive purposes; however, they are all related in contributing to the purpose of each document. The guide, factsheet, and self-training documents are

Table 3.5 Identified adaptations for extended review framework.

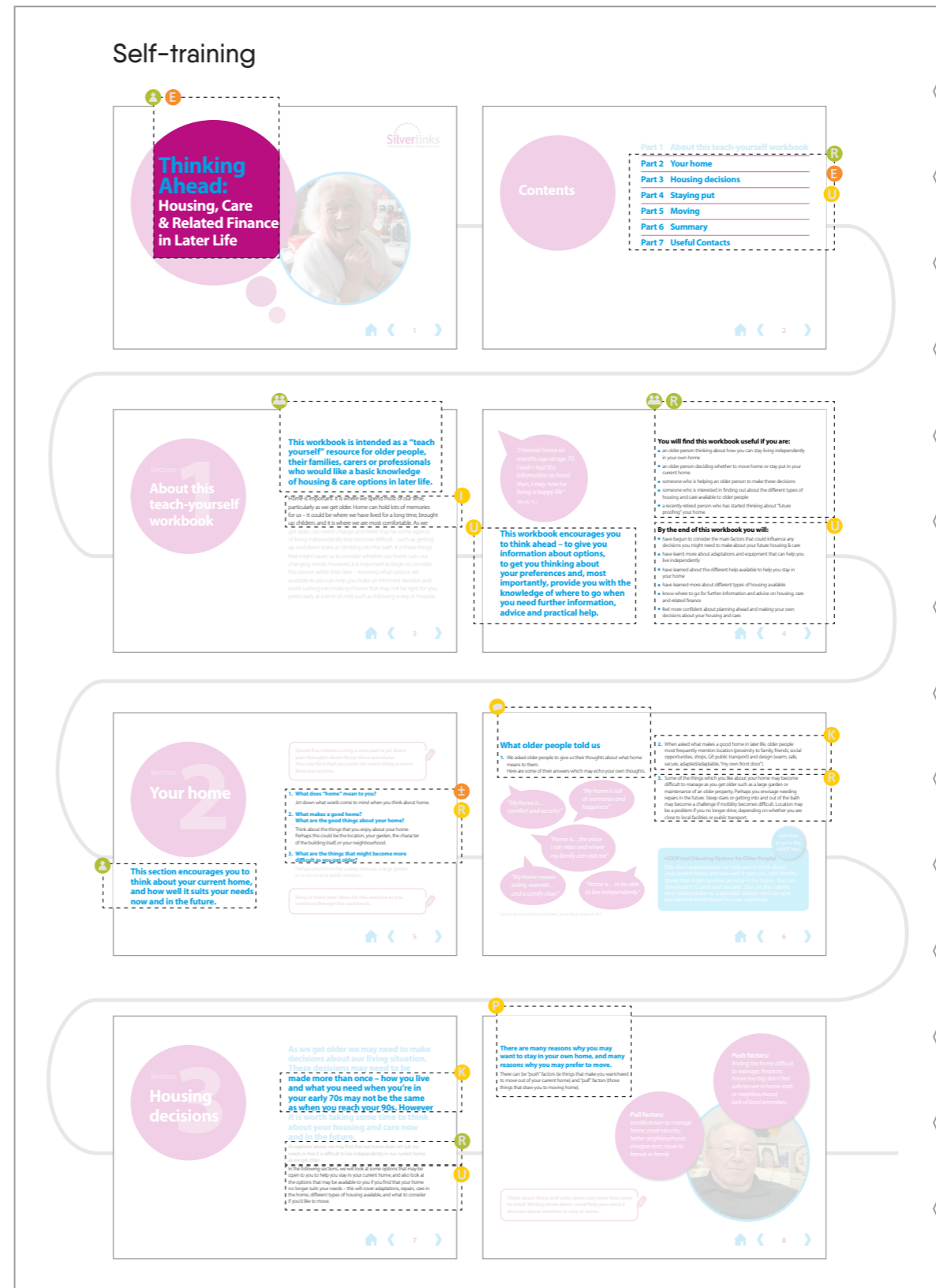
Identified improvements for the extended analysis framework	Revisions made to the framework
Revisited the discussions with evaluators who were not trained in design (3 of 4 evaluators) and identified that the inclusion of 'good design principles' as an aide-mémoire for future users (document producers of housing options documents) would be useful.	Revisited benchmarking criteria and added good document design features as an aide-mémoire.

Figure 3.31 Framework used in the extended analysis.

What to ask the documents		What to look for in the documents		
Function	Questions	Benchmarking	Visible criteria	Good design principles
Engage	How are the intended users indicated? How is information made relevant to the user? How are multiple users considered? How is engagement maintained?	Relevance and audience fit	Indications of expected audience Consider layered information that makes relevance clear for particular audiences and alternative reading paths	Indication of expected audience Layered information (if relevant to the context) Clear (relevant) headings
		Impression	Writing style Macro organisation (see also 'visual organisation')	Informative, clearly indicates subject (in headings) Orderly Open layout Navigational aids (e.g., contents page)
		Genre		Each genre should work according to its own convention <i>Make observations about genre and design patterns used in the documents</i>
Inform	How does the document explain about the topic/options? Is it clear who is communicating? How does the document support access to informed unbiased people? How is impartiality considered?	Subject	Titles, subtitles, and summaries	Clear, and relate to the world of the user
		Who from	Logo (identifier)	Clear identifier Signposts purpose Distinct
			Colour (visual identity)	Clear use of colour palette
			Fonts (visual identity)	Few fonts used Chosen with suitable weights
Alignment (to impartiality)	Tone of voice (visual identity)	Consistent tone of voice Uses conversational rather than bureaucratic tone		
Support	Reflection: How is prior knowledge of housing in later life addressed? How are push-pull factors presented? How are creative approaches used to support the identification of emotion, meaning, and aspiration? How does the document support rehearsal time and reflection? Discussion: How does the document support discussion? How does the document support the sharing of experiences? Use of information: How is the user supported to effectively use the information provided? How are documents structured to help prompt thinking? (e.g., how are the functions of engage, inform, and support structured in the document?)	Action	Signposting	Clear actions for user
		Legibility		Legibility is not a focus of this review, but pay attention to comfortable type size, line length and interlinear spacing; good background contrast
		Graphic elements	Typographic hierarchy	Hierarchies to make information clear Different kinds of information are distinguishable Consistent typographic formatting
			Tables	Easy to read Clear alignment Appropriate Helpful Not misleading Suitable placement Well designed
			Space	Good use of space
			Line/rules	Good use of lines
			Colour	Good use of colour Colour used to signpost
Photographs and illustrations	Appropriate Helpful Not misleading Suitable placement Well designed			
Structure [internal]	Visual organisation (see also 'macro organisation')	The overall purpose is clear Able to navigate within document Meaning and significance of content areas clear Clear how sections relate to each other		

Figure 3.32 Extended analysis approach using a self-training document (Care & Repair England, 2015) as an example.

Review document for other design features



Organise observations using thumbnails so that features are in context with page layout and document structure

referred to more prominently than the self-help tool. This is due to the fact that the first three documents are PDFs and comparisons across them could be made more readily than the self-help document that borrows heavily from the questionnaire genre. The discussion is organised into the written content, the way words are organised, the kinds of images used, how visual identities are presented, and page layout and document structure.

3.8.1 The written content

Although this research does not focus on linguistic attributes of the written content, during the analyses aspects of language use were noted relevant to:

- style of writing used to inform users;
- the use of first and second person to engage and address users;
- the use of questions to support the ways users might think ahead.

The expected style of writing for functional communications might be explanatory, rather than descriptive, narrative, or persuasive. Several styles were observed in the sample documents. Explanatory is used to explain and inform, for example in the factsheet: ‘The Care Act 2014 introduced a general duty on local authorities to promote an individual’s “wellbeing”’ (see Figure 3.33). Descriptive is used to activate reflection, for example in the self-training document: ‘Home is ... the place I can relax and where my family can visit me’ (see Figure 3.34). It could be argued that a persuasive style is used in the guide that supports existing opinions, for example the use of the first person: ‘I want to stay in my current home’ (see Figure 3.36).

Additionally, a persuasive style is observed in the use of the second person singular and plural through the way words and images anchor each other in the guide. For example, the words ‘help you to love later life’ and ‘to suit your needs’, are anchored by the photograph of a smiling couple (see Figure 3.35). This is substantiated by the use of the first person singular in the contents list (see Figure 3.36). Additionally, use of the first-person plural speaks to a collective experience. For example, ‘home is important it is where we spend most of our time

Figure 3.33 Example of explanatory written style from an inside page of a factsheet. 210x297mm, shown at 30% (Elderly Accommodation Counsel, 2017e).

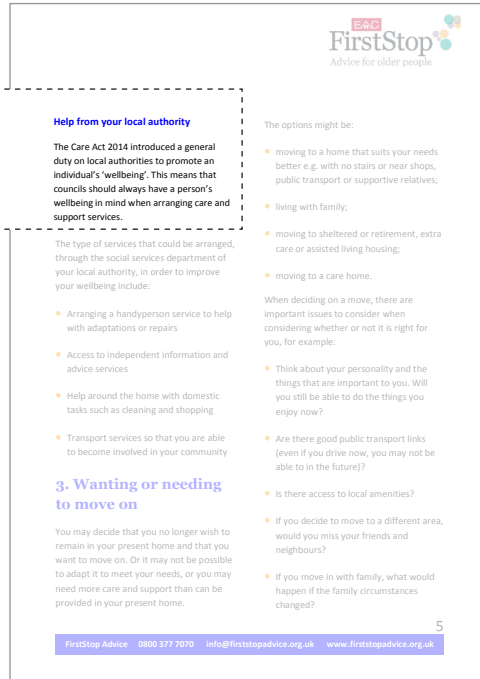


Figure 3.34 Example of descriptive style from an inside page of a self-training document. 297x210mm, shown at 30% (Care & Repair England, 2015).

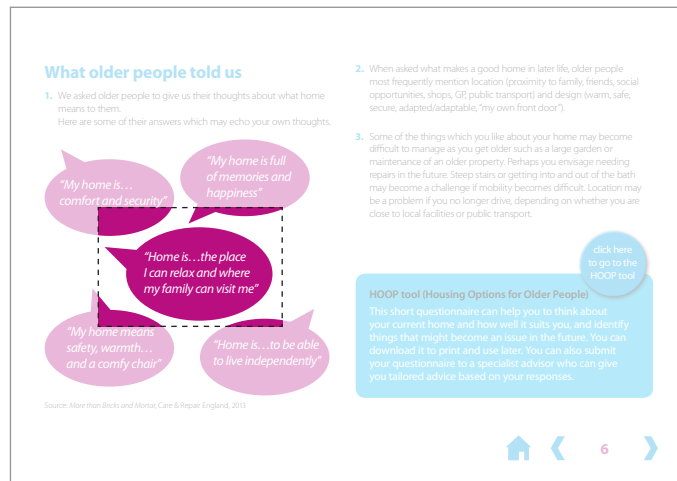


Figure 3.35 Example of persuasive written style and use of second person pronouns from the cover and inside page of a guide. 148x210mm, shown at 30% (Age UK, 2017b).



Figure 3.36 Use of first-person pronoun and questions in the contents list of a guide. 148x210mm, shown at 30% (Age UK, 2017b).

Contents	
What this guide is about	2
Thinking about your options	3
I want to stay in my current home	4
I want to stay at home but need to make some changes	6
I want to stay at home but need some support	10
I'd like to boost my income	12
I've decided to move	13
I want to move in with family	14
I want to move home: buying options	16
I want to move home: renting options	20
I'd like to move abroad	24
I want to move to where I can get more support	25
I'm interested in sheltered housing	25
I want to find out about other types of housing for older people	30
I'd like to know more about care homes	32
Useful organisations	33

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...' (self-training) and 'we often have a deep emotional attachment to the place we call "home" ...' (guide). Although the organisations aim at impartiality, this kind of language and use of images could be perceived to be persuasive.²² Especially compared to the use of the third person as used, for example, on the cover of the factsheet (see Figure 3.37). Additionally, we see in the example of both the factsheet and the self-training document that housing and Care are addressed in the documents (see Figure 3.37).

Although there is cross-over between the styles (for example, descriptive could be considered persuasive), this observation suggests that the writing style used could differ across the kinds of documents. For example: a document using more descriptive style could encourage thinking, reflection, sharing, and discussion; a document using more explanatory and persuasive styles could be used to help those who have made a decision and want to act on it.

All documents use the possessive pronoun 'your' and the possessive adjective 'you'. For example:

- 'different types of housing to suit your needs' (guide);

²² The guide cover has subsequently been updated by the organisation, replacing the photograph with an illustration.

- ‘help from your local authority’ (factsheet);
- ‘encourages you to think about your current home’ (self-training document);
- ‘how well does your home suit you?’ (self-help document).

The guide and the self-help documents use these forms in the headings on the cover and first page of the website, pages that users are most likely to see first (see Figure 3.38). On the covers of the factsheet and self-training document the headings are less direct, using the words ‘older’ or ‘later life’ (see Figure 3.37). Instead, the forms discussed are used on the inside pages of the factsheet and self-training document: ‘if you are a home owner or tenant ...’ (factsheet) and ‘This section encourages you to think about your current home ...’ (self-training) (see Figure 3.39).

A reason for this difference may lie with the size of organisation. The guide is produced by an organisation well-known for supporting older people, signified by the logo in the top right. Additionally, the use of imagery in the guide, a photograph of an older couple, anchors meaning into the words ‘housing options’.

On the factsheet and self-training document, where the headings do not include second-person pronouns, explanations about intended users are given in introductory paragraphs. These indicate that the documents are intended for multiple kinds of users. In the factsheet, this is indicated in a paragraph on the cover stating who the organisation provides information to: ‘older people, their families and carers’. On the self-training document, intended users are people ‘who would like a basic knowledge’ of options, including ‘older people, their families, carers or professionals’.

These multiple users are not addressed separately in the document. A way to consider multiple users, who have different levels of knowledge and needs, is to layer information. For example, in terms and conditions documents content can be layered to ‘offer a heading layer for skim-reading, an explanation layer, and a legal language layer. Layering can prioritise the consumer-friendly explanations, while still referring

Figure 3.37 Use of less direct language on the cover of a factsheet, 210x297mm, shown at 30% (Elderly Accommodation Counsel, 2017e), and a self-training document, 297x210mm, shown at 30% (Care & Repair England, 2015).



Figure 3.38 Use of 'your' and 'you' on the cover of a guide. 148x210mm, shown at 30% (Age UK, 2017b), and the first screen of a self-help document (Elderly Accommodation Counsel, 2017g).



Figure 3.39 Use of first-person pronoun in the inside pages of a factsheet, 210x297mm, shown at 30% (Elderly Accommodation Counsel, 2017e) and a self-training document, 297x210mm, shown at 30% (Care & Repair England, 2015).

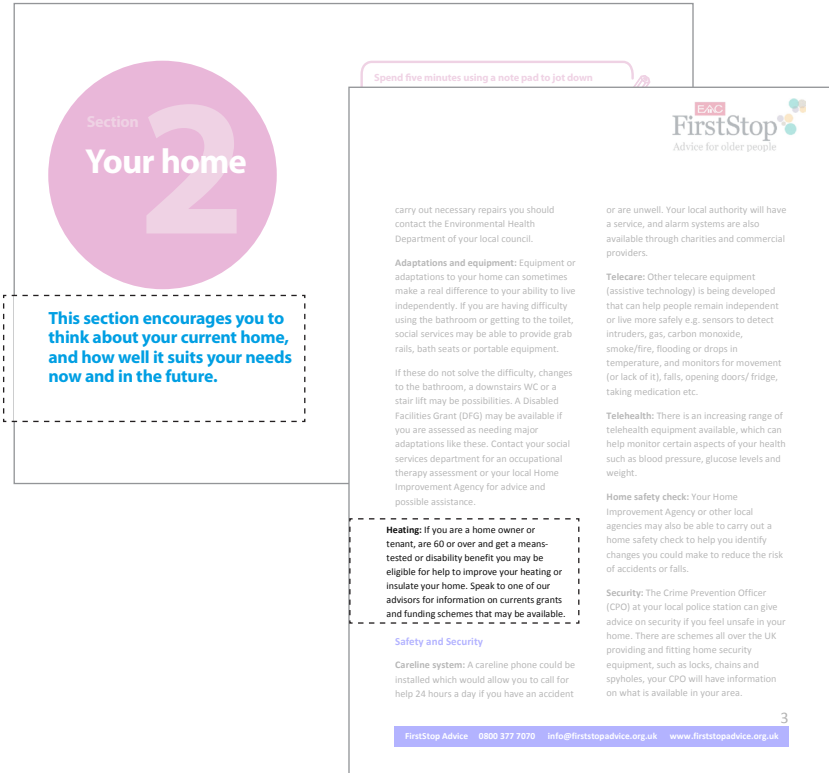
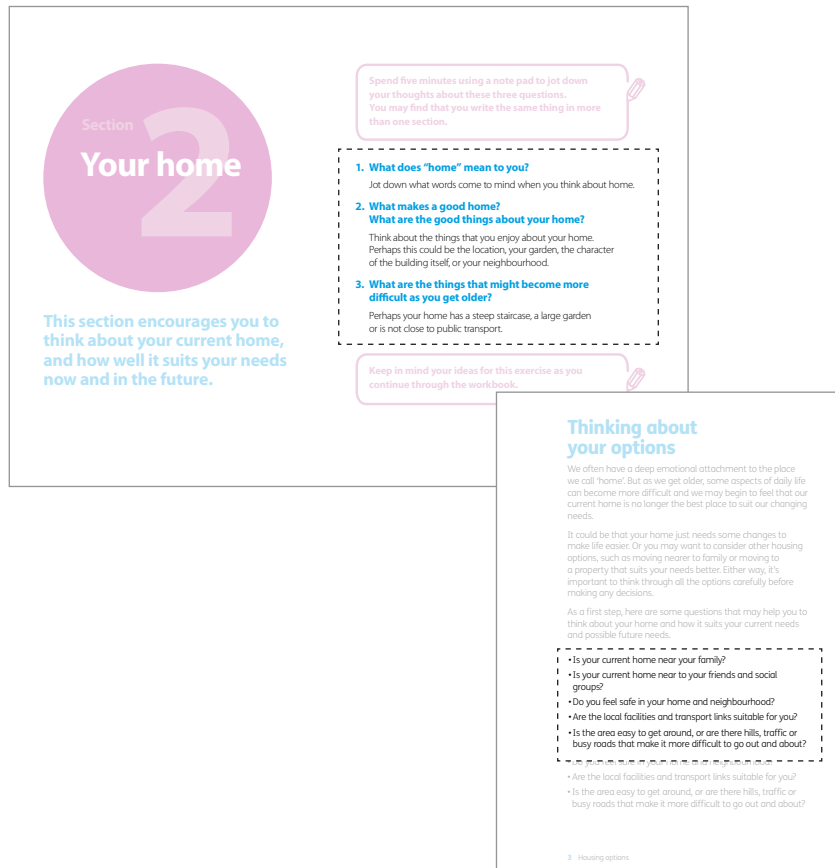


Figure 3.40 Use of questions on the inside page of a guide, 148x210mm, shown at 30% (Age UK, 2017b) and a self-training document, 297x210mm, shown at 30% (Care & Repair England, 2015).



to legal concepts when necessary' (Waller 2017b, 10). This observation suggests that aspects of documents that communicate complex information, such as documents for terms and conditions (Waller 2017b), may have relevance for the development of documents for housing options (see Section 6.2.3).

The use of questions is also appropriate for documents that are encouraging thinking and reflection (see Figure 3.40). In the self-training document, the questions encourage enquiry about emotion and aspiration, e.g., 'what does home mean to you?', as well as issues associated with health and later life: 'what are the things that might become more difficult as you get older?'. In the self-help document, the questions are framed more towards issues a person might have with their existing home. Similarly, the questions in the guide are less open than in the self-training document, e.g., 'Do you feel safe in your home and neighbourhood?'. Although this demonstrates that questions can be framed differently, topics phrased as questions align to organisational aims of providing impartial information, as they place the onus on the user to make meaning.

3.8.2 Organisation of words

In Section 2.6.4 reading strategies and navigational aids were discussed in relation to information overload and engagement. One of the main observations about the way words are organised in the sample documents concerns the differences among use of typographic hierarchy, differentiation, and space. This was observed in how users are:

- informed about housing options;
- signposted to access further information;
- supported to conduct decision-making activities.

3.8.2.1 *Graphic features that inform users of options*

Figure 3.41 demonstrates how the guide, factsheet, and self-training documents display options for adaptations, and how the self-help document displays information about a current home being too large. Each

document uses a typographic hierarchy of headings and subheadings, with typographic differentiation to signpost the options. However, what is most noticeable is that the content informing about options in each document is formatted as continuous paragraphs. Greater typographic differentiation can lessen information overload, and is used to present information that helps people to carry out task-based activities in the self-training document. Such observations lead to questions about how decisions are made concerning how to present information about options, as opposed to formatting the decision-making activities (see Sections 5.4.2 and 6.2.4)..

3.8.2.2 Graphic features that signpost users to further information

Typographic and spatial differentiation are used on a page to signpost access to further information. The three kinds of further information found within the documents concern:

- information within the document itself;
- information contained in another document (print and digital);
- contact details for organisations.

Figure 3.42 demonstrates how the documents signpost access to these kinds of further information.

Access to further information within a document is embedded within paragraphs, and in the guide additional illustrative objects in the margins signposting that further information is available. Signposting to other documents is in pull-out paragraphs, pull-out boxes, and clickable buttons in the self-training document. Signposting to contact details for organisations is embedded in paragraphs, as interactive buttons (not accessible when printed) or as pull-out boxes in the page footer. Each of the documents includes sections that list contact details for organisations.

3.8.2.3 Graphic features that support users to conduct decision-making activities

Observations about typographic differentiation extended to ways that the self-training document used greater differentiation to present

Figure 3.41 The ways information about options are presented in: (a) a guide, 148x210mm, shown at 30% (Age UK, 2017b); (b) a factsheet, 210x297mm, shown at 30% (Elderly Accommodation Counsel, 2017e); (c) a self-training document, 297x210mm, shown at 30% (Care & Repair England, 2015); and (d) a self-help document, web page (Elderly Accommodation Counsel, 2017g).

Help with adaptations and repairs

- If you have a Home Improvement Agency (HIA) in your area, you may be able to get help with making repairs or home improvements. HIAs are not-for-profit organisations that provide a variety of services for older people and disabled people, including advice, practical assistance with works and access to grants and loans. Some HIAs run handyperson schemes for help with small jobs. If you live in England, contact Foundations (see page 36) to see if there's an HIA near you. In Wales, contact Care and Repair Cymru, and in Scotland, contact Care and Repair Scotland (see page 36).

Over 70 local Age UKs operate handyperson services across much of the country. These services offer older people extra help with small practical jobs – from putting up curtain rails to installing energy efficient light bulbs or putting on a door chain. These are usually charged for services, and the cost will depend on the nature of the work required. See our free guide *Getting help at home* or contact your local Age UK for more information.

If you want to find a reliable tradesperson, see if your local Age UK runs a 'Trusted Trader' scheme or use the TrustMark directory at www.ageuk.org.uk/trustmark.

If you're a tenant you have certain rights to have repairs carried out. Let your landlord know as soon as possible what repairs need to be done. Find out more in our free factsheet *Tenancy rights – repairs*. In Scotland, contact Age Scotland for information.

what next?

- See our free guide *Adapting your home* and our factsheets *Disability equipment and home adaptations* and *Funding for home improvements* for more information. In Wales, contact Age Cymru (see page 33). In Scotland, see Age Scotland's factsheets *Elderly homeowners – financial help with repairs and adaptations* and *Equipment for daily living*.

■ Housing options

1. Introduction

FirstStop provides advice and information about housing and care options for older people, their families and carers.

This guide is an introduction to the different types of accommodation and support services available for older people in England.

There may be a range of options available to you depending on your circumstances and your current tenure. Each section in the guide suggests some points you may like to think about before deciding what is best for you, and provides information about what is available and from whom. After having read this booklet you can contact us directly to discuss your needs and we can offer you advice specific to your own situation.

At the end of the guide are contact details for all the organisations mentioned in the text, including details of FirstStop's Advice Line and website services.

For information on other parts of the UK contact us on 0800 377 7070 or visit our website.

2. Help to stay put

If you are finding it difficult to cope with daily tasks or think you need home care, special equipment or meals, contact your local authority's social services department, or the hospital social worker if you are in hospital, and ask for an assessment of need.

Condition or layout of your home

Home Improvement Agencies (HIAs): Also known as **Care & Repair** or **Staying Put** agencies, these are local not-for-profit organisations set up to help older or disabled home owners and private tenants arrange and pay for repairs, improvements and adaptations to their homes.

Many HIAs also offer additional services such as a handyperson, help with gardening, checking home security or preparing for coming home from hospital. Find your local HIA on the FirstStop website or call FirstStop Advice.

Repairs: If your property is in poor repair and you are a home owner, or a private tenant who is responsible for certain repairs you may be able to get help from your local HIA. If you are arranging repairs yourself, you may want to use TrustMark to find a reputable builder. TrustMark is a scheme supported by the government, the building industry and consumer groups to help you find reliable trustworthy tradesmen. If you are a tenant, you should report the repair to your landlord. If you have difficulty getting your landlord to

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FirstStop Advice 0800 377 7070 info@firststopadvice.org.uk www.firststopadvice.org.uk

Warmth:
Cold houses can lead to heart and respiratory problems.

Lighting:
Poor lighting can be a cause of trips and falls. Make sure you have high wattage lighting and get rid of any spotlights, which can cause dark areas and shadows.

Trip hazards:
Trips and falls are the leading cause of admissions to hospital for older people.

Reduce your risk of falling by making sure rugs are fixed down, there are no trailing electrical wires in your home and check that carpets are not worn (particularly on the stairs). Installing ramps in place of steps and grab rails at doors and in the bathroom can reduce your risk of falls.

Security:
Make sure you have adequate window and door locks, a spy-hole in your front door and a chain. Exterior lighting can also help you feel secure. You can also have a key-safe fitted which is accessed by a code so that someone you trust can gain access if needed.

click here for information on how to make your home more suitable for living with existing conditions

Maintenance and repairs:
If your home needs some maintenance or minor repairs, these can soon turn into larger jobs. If you're unable to do these yourself this can turn into a worry – make sure you have these jobs done so that it doesn't impact on your health and your ability to live in your home safely and independently.

Your local HIA or Age UK may run a handyperson service that can help with maintenance, smaller repairs, or jobs such as putting up curtain rails, mending fencing and glazing. As above, they may also have a trusted trader list. See useful contacts.

Larger repairs/renovations:
You may find that your home needs larger repairs – such as fixing slipped roof tiles. Again, the anxiety of having to have work done to your home could affect your physical and mental health. Some HIAs can manage the process of major repairs for you or carry them out themselves, making it a much easier process for you. Some grants or benefits may be available towards the cost – your HIA or Age UK can tell you about these. See useful contacts.

Living with long term conditions:
Detailed information is available about how to make your home a better place to live with long term conditions – heart disease, stroke, respiratory disease, macular disease, dementia and arthritis. Click the blue button for further information.

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Housing Options for Older People (HOOP)

Home Start Now Your Results About Help

Choose a topic below:
Uncompleted
Completed

1. Size & space
2. Independence
3. Cost (affordability)
4. Condition of property
5. Comfort & design
6. Security & safety
7. Location
8. Managing
9. Quality of life
Ask EAC for more advice

Back to your HOOP results Print this page Export to PDF

Your Results: Suggestions

1. Size & space

Concern 1: Property too large

- One option may be to take in a lodger, as well as offering company they can also provide a source of income which can help reduce the cost of running your home.
- An alternative route would be to consider 'homesharing', a scheme whereby older people with spare bedrooms have a specially younger person live with them in exchange for providing some help around the home, with domestic tasks for example. You can read more in our factsheet on homesharing.
- Although downsizing to a smaller property may feel daunting, a move to a more suitable property can help maintain your independence whilst reducing your expenditure and potentially releasing some capital. There are some organisations that specialise in helping older people with the moving process, you can search for their details in our [factsheet on downsizing](#).

Suggested resources

- Your nearest retirement housing

Figure 3.42 Typographic differentiation for signposting to information in: (a) a guide, 148x210mm, shown at 28% (Age UK, 2017b); (b) a factsheet, 210x297mm, shown at 28% (Elderly Accommodation Counsel, 2017e); (c) a self-training document, 297x210mm, shown at 28% (Care & Repair England, 2015); and (d) a self-help document, web page (Elderly Accommodation Counsel, 2017g).

level of typographic and spatial differentiation

use of words and images

Within document

To other documents

Contact details for organisations

a

Help with adaptations and repairs
If you have a Home Improvement Agency (HIA) in your area, you may be able to get help with making repairs or home improvements. HIAs are not-for-profit organisations that provide a variety of services for older people and disabled people, including advice, practical assistance with works and access to grants and loans. Some HIAs run handy-person schemes for help with small jobs. If you live in England, contact Foundations (see page 36) to see if there's an HIA near you. In Wales, contact Care and Repair Cymru, and in Scotland, contact Care and Repair Scotland (see page 36).

Over 70 local Age UKs operate handy-person services across much of the country. These services offer older people extra help with small practical jobs – from putting up curtain rails to installing energy efficient light bulbs or putting on a door chain. These are usually charged for services, and the cost will depend on the nature of the work required. See our free guide Getting help at home or contact your local Age UK for more information.

If you want to find a reliable tradesperson, see if your local Age UK runs a 'Trusted Trader' scheme or use the Tradeslink directory at www.ageuk.org.uk/trustedtrader.

If you're a tenant you have certain rights to have repairs carried out. Let your landlord know as soon as possible what repairs need to be done. Find out more in our free factsheet Tenancy rights – repairs. In Scotland, contact Age Scotland for information.

what next?
See our free guide **Adapting your home and our factsheet Disability equipment and home adaptations and funding for home improvements** for more information. In Wales, contact Age Cymru (see page 33). In Scotland, see Age Scotland's factsheet **Older homeowners – financial help with repairs and adaptations and Equipment for daily living**.

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b

What older people told us

- We asked older people to give us their thoughts about what home means to them. Here are some of their answers which may echo your own thoughts.
- When asked what makes a good home in later life, older people most frequently mention location (proximity to family, friends, social opportunities, shops, GP, public transport) and design beams, safe, secure, adapted/adaptable, 'my own front door'.
- Some of the things which you like about your home may become difficult to manage as you get older such as a large garden or maintenance of an older property. Perhaps you envisage needing repairs in the future. Sleep stairs or getting into and out of the bath may become a challenge if mobility becomes difficult. Location may be a problem if you no longer drive, depending on whether you are near to local facilities or public transport.

HOOP tool (Housing Options for Older People)
This short questionnaire can help you to think about your current home and how well it suits you, and identify things that might become an issue in the future. You can download it to print and use later. You can also submit your questionnaire to a specialist adviser who can give you tailored advice based on your responses.

1. Introduction
FirstStop provides advice and information about housing and care options for older people, their families and carers.

This guide is an introduction to the different types of accommodation and support services available for older people in England.

There may be a range of options available to you depending on your circumstances and your current tenure. Each section in the guide suggests some points you may like to think about before deciding what is best for you, and provides information about what is available and from whom. After having read this booklet you can contact us directly to discuss your needs and we can offer you advice specific to your own situation.

At the end of the guide are contact details for all the organisations mentioned in the text, including details of FirstStop's Advice Line and website services.

For information on other parts of the UK contact us on 0800 377 7070 or visit our website.

2. Help to stay put
If you are finding it difficult to cope with daily tasks or think you need home care, special equipment or meals, contact your local authority's social services department, or the hospital social worker if you are in hospital, and ask for an assessment of need.

Condition or layout of your home
Home Improvement Agencies (HIAs): Also known as Care & Repair or Staying Put agencies, these are local not-for-profit organisations set up to help older or disabled home owners and private tenants arrange and pay for repairs, improvements and adaptations to their homes.

Many HIAs also offer additional services such as a handy-person, help with gardening, checking home security or preparing for coming home from hospital. First your local HIA on the FirstStop website or call FirstStop Advice.

Repairs: If your property is in poor repair and you are a home owner, or a private tenant who is responsible for certain repairs you may be able to get help from your local HIA. If you are arranging repairs yourself, you may want to use TrustMark to find a reputable builder. TrustMark is a scheme supported by the government, the building industry and consumer groups to help you find reliable trustworthy tradesmen. If you are a tenant, you should report the repair to your landlord. If you have difficulty getting your landlord to

10. Further reading
The following FirstStop publications can help to provide you with further information on your housing and care options. All the documents can be ordered free of charge by contacting our advice line on 0800 377 7070 or you can view them at www.firststopadvice.org.uk

FirstStop factsheets
Care and support at home (Factsheet 6)
Equity release (Factsheet 25)
Extra Care Housing (Factsheet 10)
Funding care and support at home (Factsheet 7)
Help with the costs of moving (Factsheet 20)
Home-sharing (Factsheet 27)
Living longer – remaining independent (Factsheet 24)
Mutual exchange (Factsheet 31)
Points to consider when moving in with family (Factsheet 25)
Choosing and paying for a care home (Guide)

11. Useful contacts

- Accessible Property Register <http://www.accessible-property.org.uk>
- Age UK 0800 678 1174 www.ageuk.org.uk
- Association of Retirement Housing Managers (ARHM) 020 7463 0660 www.arhm.org
- Attendance Allowance Helpline 0345 605 6055
- Citizens' Advice Bureau (CAB) First details of your local CAB in your phone book or call: 0344 111 444 www.citizensadvice.org.uk
- Care Quality Commission (CQC) 0300 61 61 61 www.cqc.org.uk
- GOV.UK <http://www.gov.uk>
- Disabled Living Foundation 0300 999 0004 www.dlf.org.uk
- Foundations (find your local Home Improvement Agency) 0300 124 0315 www.foundations.org.uk/home

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Help with adaptations and repairs
If you have a Home Improvement Agency (HIA) in your area, you may be able to get help with making repairs or home improvements. HIAs are not-for-profit organisations that provide a variety of services for older people and disabled people, including advice, practical assistance with works and access to grants and loans. Some HIAs run handy-person schemes for help with small jobs. If you live in England, contact Foundations (see page 36) to see if there's an HIA near you. In Wales, contact Care and Repair Cymru, and in Scotland, contact Care and Repair Scotland (see page 36).

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If you want to find a reliable tradesperson, see if your local Age UK runs a 'Trusted Trader' scheme or use the Tradeslink directory at www.ageuk.org.uk/trustedtrader.

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33 Housing options

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Useful organisations

Age UK
We provide advice and information for people in later life through our Age UK Advice line, publications and online.
Age UK Advice: 0800 169 65 65
Lines are open seven days a week from 8am to 7pm.
www.ageuk.org.uk
Call Age UK Advice to find out whether there is a local Age UK near you, and to order free copies of our information guides and factsheets.
In Wales, contact Age Cymru: 0800 022 3444 www.agecymru.org.uk
In Northern Ireland, contact Age NI: 0800 808 7575 www.ageuk.org.uk
In Scotland, contact Age Scotland: 0800 124 4222 www.ageuk.org.uk

Suggested resources

Finding the right home for you (FS15)
This factsheet aims to provide you with general information about the various housing options that may be available to you. You will also find guidance and suggestions on how to identify a property that may be suitable for your future needs in later life.
Published by EAC FirstStop Advice
Download

Home-sharing (FS27)
Home-sharing can be a cost effective way of finding accommodation and receiving care. This factsheet discusses what home-sharing is, what the pros and cons are, and how much it can cost.
Published by EAC FirstStop Advice
Download

Energy Saving Advice Service
The Energy Saving Trust is organised as a social enterprise with charitable status. Its purpose is to give impartial, accurate and authoritative advice on how to reduce carbon emissions and use water more sustainably, as well as to help people to save money on energy bills. It provides a comprehensive advice service via its website and a free, independent telephone advice line.
Published by Energy Saving Trust
Download View their webpage

FirstStop Moving Home Service
Even relocation can be a cost effective way of finding accommodation and receiving care. This factsheet discusses what home-sharing is, what the pros and cons are, and how much it can cost.
Published by EAC FirstStop Advice
Download View their webpage

Your general retirement housing

content that supports decision-making activities. It was observed that words were organised that supported the following tasks:²³

- reflection on topics;
- comparison of information;
- discussion about topics.

During the analysis the documents were scanned for ways information is presented to support these kinds of tasks. Figure 3.43 is a chart that collates how these tasks are organised in the sample documents. The chart represents the way words and images are presented to encourage reflection, comparison, and discussion. They are arranged in order of how much typographic differentiation is displayed and the use of words and images on their own or together. This collection displays design patterns that are:

- used together, such as comparison of push-pull factors and a reflection task;
- useful for reflection and comparison, such as checklists;
- used to differentiate content, such as people's quotes or a link to a video of people talking about their stories.

From this collation it is argued that the development of a library of graphic features that support different decision-making activities could be beneficial for effective document design in the domain of housing options, using the observations in Figure 3.43 as a starting point (see Section 6.2.4).

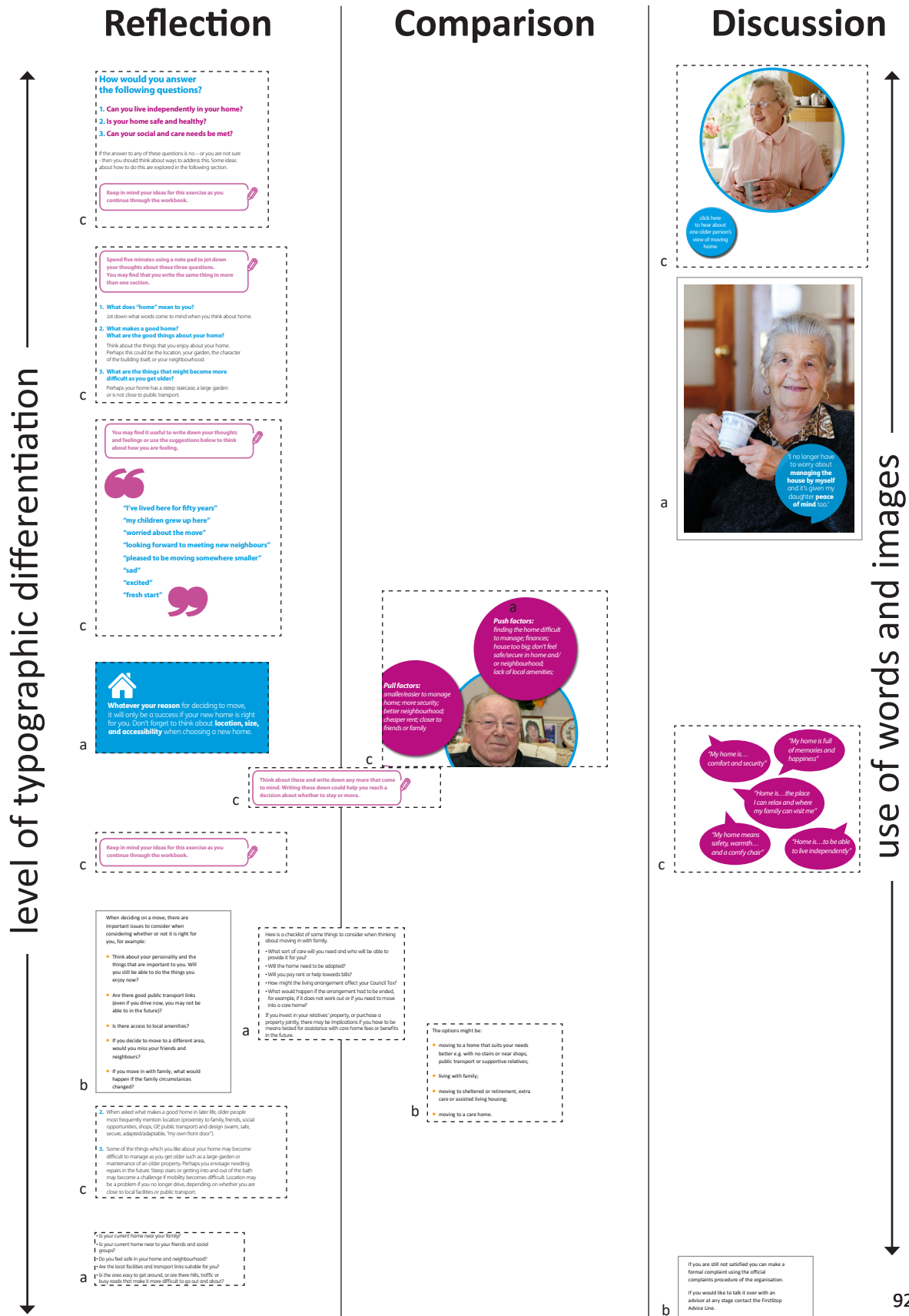
3.8.3 Kinds of images used

The following observations were made about the kinds of images used:

- the content of the images;
- use of professionally photographed images;
- varied ethnicity of people in the images;

23 The author created names of design patterns.

Figure 3.43 Typographic differentiation for task-based reading strategies in: (a) a guide, 148x210mm, shown at 21% (Age UK, 2017b); (b) a factsheet, 210x297mm, shown at 21% (Elderly Accommodation Counsel, 2017e); and (c) a self-training document, 297x210mm, shown at 21% (Care & Repair England, 2015).



- illustrations used to represent objects and concepts;
- the use of photographs versus illustrations on document covers.

Figure 3.44 displays the range of images used in the sample. The guide, self-training, and self-help documents all used photographs and mainly include people.

The photographs collated from the review do not depict the typical ‘wrinkled hands’ photograph that is often criticised (e.g., Harvey et al. 2019; Brookes et al. 2018). However, the use of photographs in the guide, self-training, and self-help documents highlighted the lack of photographs in the factsheet. On the cover of the factsheet, examples of art work by older people are used within the circles (using an aspect of the organisation’s visual identity). An aim of the conversations with document producers was to gain a better understanding of why this is, and how photographs are chosen for existing documents.²⁴

Another observation about the photographs was the aim of portraying diversity. The self-training and self-help documents use photographs of various ethnicities. The self-help document aims to represent diversity through the use of different doors and different kinds of people standing outside them. These observations indicate that in some cases document producers aim to represent diversity.

An observation about the illustrations that are used in the documents is that this medium is used to represent both objects, such as checklists, and concepts, such as thinking and discussion. Further exploration of image use was conducted in the interviews with document producers (see Section 5.4.2).

24 Since the completion of the extended review, several organisations have updated their documents. The guide is a particular example of this, whereby the photograph of an older couple has been replaced with an illustration of a house and keys (see Figure 3.45).

Figure 3.44 The use of photographs and illustrations in: (a) a guide, 148x210mm, shown at 28% (Age UK, 2017b); (b) a factsheet, 210x297mm, shown at 28% (Elderly Accommodation Counsel, 2017e); (c) a self-training document, 297x210mm, shown at 28% (Care & Repair England, 2015); and (d) a self-help document, web page (Elderly Accommodation Counsel, 2017g).

Illustrations

Illustrative objects/concepts

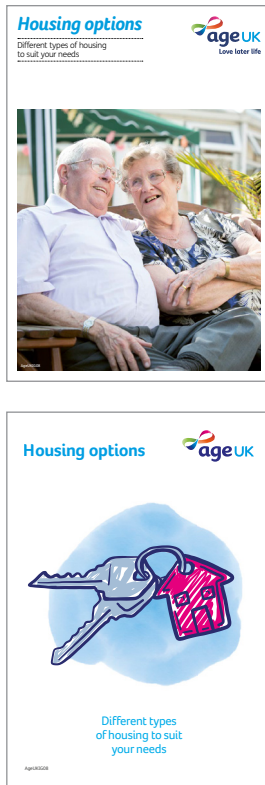


Figure 3.45 Photograph used on the cover of the 2017 version of a guide (Age UK, 2017b) replaced by an illustration on the updated 2019 version of the guide (Age UK, 2019). Both documents are 148x210mm, shown at 23%.

3.8.4 Application of visual identities

An organisation's visual identity not only distinguishes it from other organisations and indicates who a document is from (Waller 2011b), it can also convey authority and even persuade a person to read a document. The Elaboration Likelihood Model (ELM) proposed by Petty et al. (1986) suggests that periphery cues, such as who the document is from, are likely to be important aspects to persuade a person to read a document when people are unmotivated or lack skills to carefully consider the content. Consequently, visual identity is an important design feature to review for documents that facilitate decision-making activities for sensitive topics where motivation to engage with decisions may be low.

During the document review the following aspects were observed about the visual identities of the three organisations (see Figure 3.46):

- logos;
- use of colour;
- use of typefaces.

Sabin (2014) argues that logos for charity organisations (and other 'small' logos) need a different set of rules than those of major corporations (e.g., the application of 'minimalism', such as Apple). However, 'message, usage, and context are key factors' (256). Age UK is a super-major-sized organisation and arguably more well-known than the other two. This affords documents from this organisation more recognisability and less need to explain the purpose of the organisation and document. This allows for the strapline 'love later life' that evokes positive connotations and aspirations, rather than explanatory text as per the smaller organisations, i.e., 'Advice for older people' and 'Enabling older people to manage life changes'. Additionally, the logo for FirstStop includes 'EAC', the overarching organisation that runs the FirstStop initiative. This demonstrates the fact that smaller organisations can be different things meaning smaller organisations struggle with identity (see Section 5.5.8).

By organising the colour palettes of the logos and documents above and below each other (in Figure 3.46), observations were made regarding

how the logo colours (colours of the visual identity) are applied in the documents. We can see that for the super-major-sized organisation one colour from the palette has been chosen from the visual identity, paired with black (the colour of the body text) and white (colour of the page). For the medium-sized organisation, none of the colours from the colour palette are used in the factsheet, and one colour from the palette is used in the self-help document. For the small-sized organisation, two colours are used from the visual identity colour palette plus white and cyan. This suggests further work regarding the effective use of colour palettes would be of interest and beneficial to smaller TSOs in this domain (see Section 6.2.2).

As regards typeface, the super-major-sized organisation uses 'FSMe' and a typeface designed for the organisation, i.e., 'FocoAgeUK'. The medium- and small-sized organisations use system typefaces more commonly available to document producers. Although typeface choice has a role to play in the visual identity of an organisation, other aspects such as colour and image choice often have greater bearing on readers' reactions to documents. Moys' (2011) studies indicate that readers' responses to documents are impacted by a range of typographic variables (capitalisation; font, such as italic; and weight), rather than the kind of typeface. Additionally, in further studies it was deemed that text layout influences 'readers' rhetorical judgments' (Moys 2014, 41). Observations regarding the page layout of housing options documents are addressed in the following section.

3.8.5 Page layout and document structure

As well as the way words and images are organised throughout the documents, observations about the page and document structures were noted during the extended visual analysis. As discussed above, the typographic differentiation in the self-training document was greater than in the other kinds of documents. These design features tended to be part of the 'supporting' function of task-based reading strategies. The use of these design features to support a user was noted as being greater in the self-training document than in the guide and factsheet.

Figure 3.46 Visual identities/who the information is from in: (a) a guide, page is 148x210mm, shown at 28% (Age UK, 2017b); (b) a factsheet, page is 210x297mm, shown at 28% (Elderly Accommodation Counsel, 2017e); (c) a self-training document, page is 297x210mm, shown at 28% (Care & Repair England, 2015); and (d) a self-help document, web page (Elderly Accommodation Counsel, 2017g).

	Guide	Factsheet	Self-training document	Self-help document
Logos				
Logo colour palettes*				
Document colour palettes*				
Page examples to show colour application				
Typefaces	FSMe FocoAgeUK (logo)	Calibri Georgia	Myriad Pro	Lato

*Colours are approximations to the actual colours of the visual identities

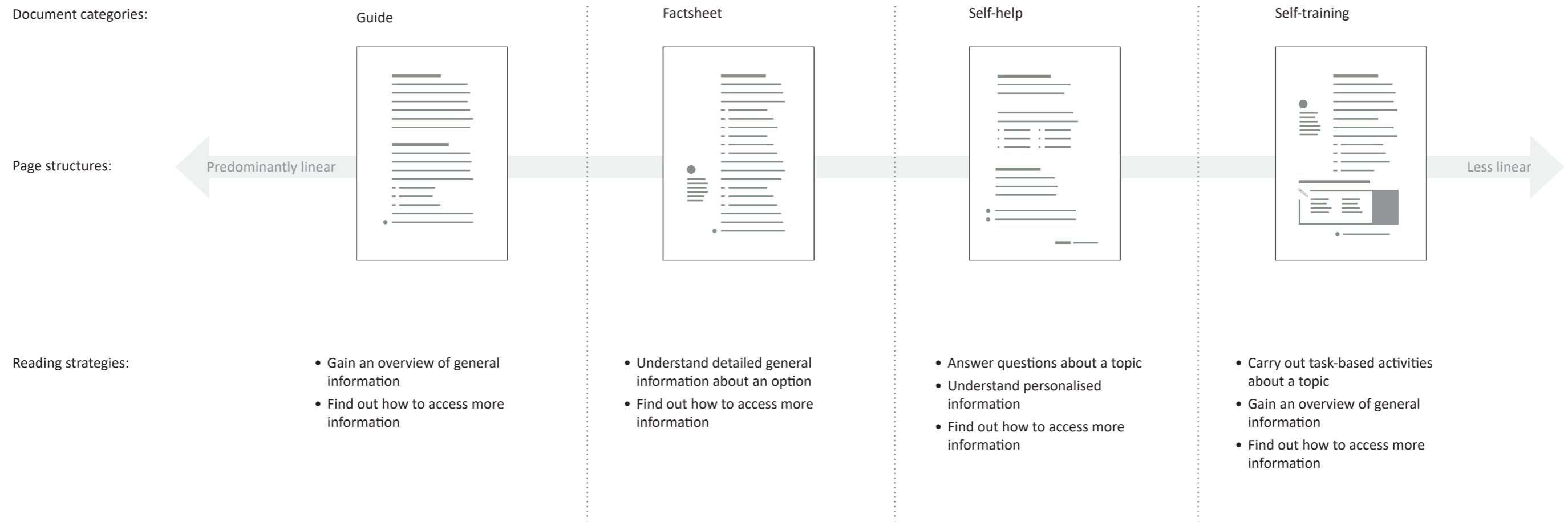
This meant that the page structure of the self-training document was less 'linear' than in the other kinds of document.

The document review was not an extensive analysis of the collection, so observations are preliminary.²⁵ However, initial findings of the analyses concern how topic structure (Waller 1988) could be better used to facilitate relevant reading strategies for each kind of document category. These differences could indicate to the user the kind of document (establishing genres for the domain) and its purpose (Figure 3.47). The implementation of this could be through greater or lesser use of different graphic features on pages and across documents. Additionally, the self-help document (acknowledged as borrowing graphic features from the established genre of the questionnaire) could also contribute to this use of graphic features.

A crucial factor in housing options documents is possible 'information overload' (see Section 2.6.4). The design of a document can contribute to easing this, as typographic and graphic features 'map out the structure of a text in a visual, accessible way, readers are to some extent freed from the narrative and able to move around the text as they please' (Waller 1987, 95). As well as structuring the text to support particular reading strategies, considering the function of design features and how they are spread across documents, could address the perceived information overload, further studies would be of interest into these observations. The initial visual analysis observations, regarding the spread of design features across documents that support different document functions (see Section 3.5.11), suggest that use of such design features could lessen information load by, for example, 'breaking-up' large amounts of content that 'informs', with graphic features that 'support' a user, such as maintaining engagement. Further participant studies using adapted materials based on the visual analyses insights discussed above would be of interest, to explore the potential for such design features alleviating information overload.

25 It is too early to establish design patterns, as this requires a focussed study outside the scope of this research.

Figure 3.47 The visual presentation of content according to document category and structure, reading strategies, and design patterns.



3.9 Implications for the visual analysis observations

The visual analyses discussed above include observations about document design regarding:

- indicating users, addressing multiple users, and indicating relevance;
- how documents address impartiality, previous knowledge, push-pull factors;
- graphic features that support users to conduct decision-making activities (e.g., identifying meaning, supporting reflection, sharing, and discussion) and maintain engagement;
- graphic features that inform users of options;
- graphic features that signpost users to further information and support the use of information;
- the position of such design features across documents;
- the different kinds of written content;
- the kinds of images used;
- the application of visual identities;
- document page layout and document structure.

The implications for these observations, for building a picture of the current document design in the domain of later life housing options, are discussed throughout Chapter 6 alongside findings from Study 3 and 4.

3.10 Implications for the document review process

The use of the framework and visual representation of visual analysis observations focussed on identifying the purpose of graphic features. In the initial analysis this highlighted differences between the kinds of documents regarding how content is organised across the early pages of documents. The observations suggest that the self-training and self-help documents more heavily ‘support’ a user, whereas the guide and factsheet more heavily inform. This suggests that the framework includes appropriate document functions. Consequently, there is potential to develop the framework for use in developing housing

options. However, the framework was developed separately from an understanding about how housing options documents are designed by document producers. Further work would be needed to develop the framework with document producers. Additionally, the use of a framework has value in facilitating an understanding of multi-disciplinary domains (see Section 6.1.2). Furthermore, the visual means of recording analysis observations showed that not separating graphic features from their context provides a better understanding of the purpose and worth of graphic features, and have application in design pedagogy (see Section 6.1.3).

In summary, this chapter has explained concepts and models used to describe documents. To review the documents, factors pertaining to the domain of housing options were used to direct thinking towards how words and images are organised in later life housing options documents. Using tree diagrams and tables as visual ways of explanation have helped to unpack design features of housing options documents, addressing one of the objectives of this research. The following chapter explores user perceptions of existing documents to add another layer to an understanding of later life housing options documents.

4 Reviewing documents: user perceptions

To contribute towards the review of documents, a focus group was organised to further understand users' perceptions about existing later life housing options documents. This study ran in parallel with the initial visual analysis (see Figure 4.1). This chapter begins with a discussion regarding ways of involving users in research (Section 4.1). The planning of the focus group is then explained (Section 4.2) and discussion of the findings (Section 4.3) concludes the chapter.

4.1 Ways of involving users

This dissertation acknowledges that ways of involving users in the evaluation of documents include:

- use of test materials designed to evaluate particular aspects of documents (e.g., Moys 2014a);
- evaluation of existing documents using methods such as diary studies (e.g., Black et al. 2012);
- use of cross-disciplinary collaborative methods among researchers, designers, and users (e.g., Zender et al. 2017)¹.

¹ Users are involved in design research and design practice in varying degrees. Participatory design (or co-design) is prevalent in the design discipline as an approach whereby users and designers work collaboratively to develop appropriate solutions for user needs. Such methods are relevant to the domain of this research; however, at the start of this research project the familiar method of a focus group was chosen to scope perceptions of existing documents.

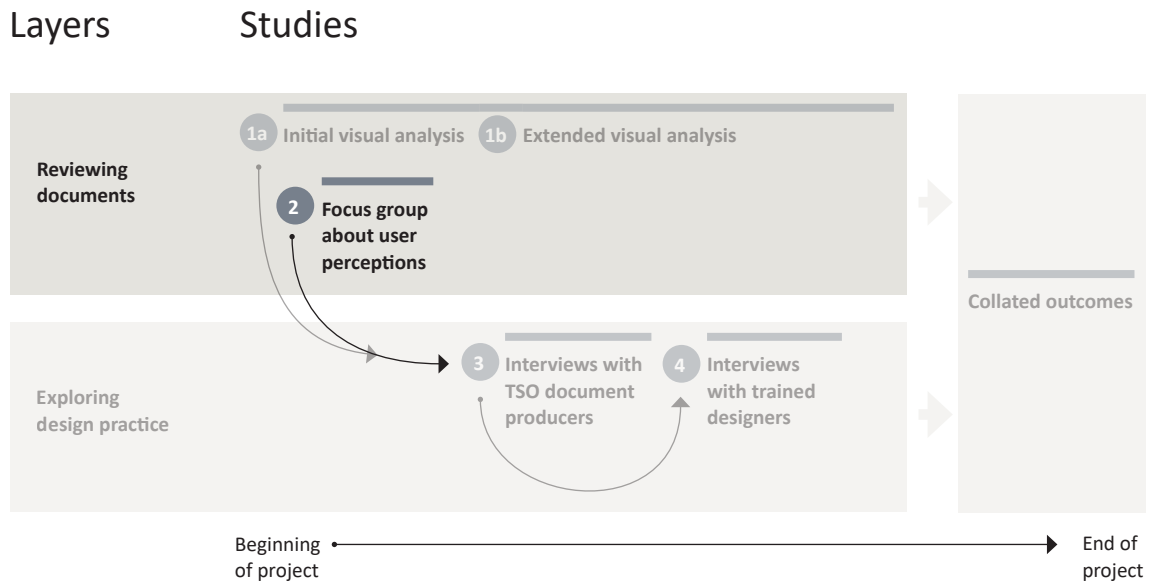


Figure 4.1 Focus group in project structure

Black et al. (2012) advise that:

... in order to gather a full understanding of document performance there is no substitute for detailed investigation of users' opinions of and interactions with documents over time, and in their context of use (Black et al. 2012, 8).

During the early stages of this research an opportunity to involve users developed through contact with the Health and Housing Programme Lead of a TSO that produces documents for housing in later life. A focus group was chosen as a method to explore users' perceptions about existing documents provided by the TSO Care & Repair England (CRE) through its Silverlinks scheme, and its subsidiary West of England Care & Repair.²

Although a focus group does not allow investigation of use over time (Black et al. 2012), and is not a collaborative method such as those used in the approaches listed above, and in co-design projects (e.g., Zender

² From 2013 to 2018, CRE ran a programme called Silverlinks that aimed 'to help older people make informed decisions about their housing and related care' (Care & Repair England 2019). CRE's subsidiary group West of England Care & Repair (WECR) was included in the collaboration. WECR provide services and products to improve homes for people to live independently for as long as possible (WE Care & Repair 2019). Both the Silverlinks programme and WECR provided documents that aimed to help people to make informed decisions about housing options.

et al. 2017), the focus group method was deemed appropriate for this early stage of the research as it allowed participants to share their perceptions, and was a familiar concept to staff of CRE, and suitable for my early design research skills.³ Additionally, during the early stages of the research, it was decided that a longitudinal study about the potential impacts of documents would be beyond the current remit of this PhD study. Instead, an exploratory study into the design of information for housing could provide a useful overview from which topics for further design studies might arise. The planning of the focus group is discussed in the following section.

4.2 Planning the focus group

The focus group was organised with the following aims:

- to elicit older people's experience with documents and events;
- to gather feedback on documents about:
 - 1) what the documents look like;
 - 2) the content;
 - 3) the ease of use;
 - 4) whether the documents are considered useful and appropriate for planning ahead and decision making.

The focus group method was deemed suitable for exploring these aims as it afforded an opportunity to identify:

- shared and unshared attitudes towards current documents about housing options;
- themes about perceptions of documents for housing options.⁴

Additionally, the focus group was a useful method for exploring the sensitive topic of later life housing options as it encouraged a 'cascade effect' where ideas were triggered by participants listening to others' experiences (Gray 2018, 462). People's experiences of housing in later life

3 The facilitators were myself (as an early career researcher) and two members of staff from the CRE Silverlinks initiative and WECR.

4 The two aspects are listed as uses and benefits of focus groups by Gray (2018, 461–462).

and, consequently, usefulness of documents, were discussed among the focus group participants. Conversely, the context of a focus group meant talking about a sensitive topic that might have been uncomfortable for participants and, therefore, the data is restricted to some extent.

A further limitation of using the focus group method is that participants are selected by convenience sample, meaning generalisations cannot be drawn from the results.⁵ Additionally, focus groups are time-bound, limiting the possibility of understanding how documents might affect knowledge, attitudes, and behaviours of people after a ‘communicational event’ (Frascara 2004, 13). As Frascara suggests:

... [an] important issue is not the [product or] communication act itself, but the impact that this has on the knowledge, the attitudes, and the behavior of people (Frascara 2004, 13).

Focus group participants were recruited from April to June 2017 via WE CR. Recruitment was targeted towards those who were existing contacts of WE CR via the Silverlinks programme, and were either volunteers for Silverlinks or had attended previous events as a member of the public. Participants responded to an emailed advert (see Appendix C1).⁶ Due to low participant response, no inclusion criteria other than those stated above were used to select participants. Participants were those who had embarked on a house move in later life, knew of those who had moved in later life, or were an adult child with parents who might be in a position to consider later life housing options (see Appendix C2).

5 Three participants took part in the focus group, along with two staff members of the organisation. Although this is a small number, the participants did vary in their experience with documents for housing in later life. One participant was a volunteer at Silverlinks, therefore familiar with the type of documents. Another participant, also a Silverlinks volunteer, had been through a move in later life. A third participant was not a Silverlinks volunteer and was unfamiliar with any of the documents. The participants’ experience with moving in later life also varied between having moved in later life, having not yet moved but aware of others who had, and not yet considering options but having parents who may be in a position to consider options.

6 Future studies for this research should widen the recruitment so that internet access is not required.

The focus group was carried out at the WECR premises in Bristol. Following consent, the participants took part in two sessions to give feedback on documents (see Appendices C5 for structure of each session). For session one, participants provided feedback on documents⁷ (see Section 4.2) using the feedback sheets and recorded verbatim in tables after the session (see Appendices C6–9) and interacted with the documents on their own. For session two, participants were invited to discuss the documents as a group and with the focus group facilitators. The sessions were held on the same day, with a lunch break in between. Therefore, the nature of the feedback from the second session benefited from the time to reflect on the documents seen in session one.

Transcriptions were made of the video recording and participants' feedback sheets from session one were collated into tables of perceptions (see Appendices C6–9). The transcript of session two was coded for themes present in the discussion) (see Appendices C10). The study was approved by an ethical approval process. The perceptions are discussed in relation to these themes in Section 4.3 following a brief explanation of the documents used in the focus group.

4.2.1 Documents used in the focus group

The documents used in the first session included:

- a self-training document (see Figure 4.2);
- factsheets (see Figure 4.3);
- labelled photographs (see Figure 4.4);

7 This focus group used documents as examples to elicit perceptions of the documents. However, use of such 'probes' have further potential. For example, 'cultural and domestic probes' were first applied in research context by Gaver et al. (1999); Gaver et al. (2004). In these studies probes (postcards) were used to 'provoke inspirational responses from elderly people in diverse communities' (Gaver et al. 1999, 22) in order to bridge 'generational gap implied by designing for another age group' (Gaver et al. 1999, 25). The development of probes was also a starting point for designers to explore the domain, and enabled discussion about design issues and scenarios (Hemmings et al. 2002). Probes have since been used to collect data (Boehner et al. 2007) and, for example, engage people in conversation to 'inform design in supporting independence and quality of life in later life' (Chamberlain et al. 2020). Mattelmäki (2008) proposes that probes can be used individually or collaboratively with participants, designers, and experts to support collaboration and empower participants.

Figure 4.2 Self-training document used in the Focus group, C&RE, 2015. 297x210mm, shown at 30% (Care & Repair England, 2015).



**Thinking Ahead:
Housing, Care & Related Finance
in Later Life**



1

"I moved house six months ago at age 70. I wish I had this information to hand then, I may now be living a happy life!"
(Mrs B, 71)

This workbook encourages you to think ahead – to give you information about options, to get you thinking about your preferences and, most importantly, provide you with the knowledge of where to go when you need further information, advice and practical help.

You will find this workbook useful if you are:

- an older person thinking about how you can stay living independently in your own home
- an older person deciding whether to move home or stay put in your current home
- someone who is helping an older person to make these decisions
- someone who is interested in finding out about the different types of housing and care available to older people
- a recently retired person who has started thinking about "future proofing" your home

By the end of this workbook you will:

- have begun to consider the main factors that could influence any decisions you might need to make about your future housing & care
- have learnt more about adaptations and equipment that can help you live independently
- have learned about the different help available to help you stay in your home
- have learned more about different types of housing available
- know where to go for further information and advice on housing, care and related finance
- feel more confident about planning ahead and making your own decisions about your housing and care.

4

Section **2**

Your home

This section encourages you to think about your current home, and how well it suits your needs now and in the future.

Spend five minutes using a note pad to jot down your thoughts about these three questions. You may find that you write the same thing in more than one section.

- 1. What does "home" mean to you?**
Jot down what words come to mind when you think about home.
- 2. What makes a good home?**
What are the good things about your home?
Think about the things that you enjoy about your home. Perhaps this could be the location, your garden, the character of the building itself, or your neighbourhood.
- 3. What are the things that might become more difficult as you get older?**
Perhaps your home has a steep staircase, a large garden or is not close to public transport.

Keep in mind your ideas for this exercise as you continue through the workbook.

5

Adaptations

Adaptations and equipment (sometimes called 'community equipment') are available that can help you to maintain your independence – they can help you with washing and bathing, cooking, using the toilet and getting around within the home. Simple adaptations can make life easier – such as a perching stool so you don't have to stand for long periods when you are cooking or washing up. Lever taps can make it easier to turn the taps on and off if you have arthritic hands. Grab rails in the bathroom can help you to keep steady when showering or getting in and out of the bath. Equipment is also available such as riser beds, and swivel chairs to help you get in and out of bed or your chair. Larger adaptations are also available such as stairlifts, through-floor lifts for wheelchairs, and level access showers.

[click here for more information about adaptations](#)



11

Figure 4.3 Factsheets used in the Focus group, C&RE, 2017. All 297x210mm, shown at 30% (Care & Repair England, 2019a; 2019c; 2019d; 2019e; 2019g).

Silverlinks
enabling older people to manage life change

What are Adaptations?

Adaptations are either physical changes to your home or specialist equipment that make it easier for people with health or mobility problems to carry out day-to-day activities such as bathing and cooking. They can help you to stay living independently in your home for longer.

Adaptations are sometimes called Community Equipment or Simple Aids to Daily Living (SADLs). You may be able to get some small adaptations or pieces of equipment free through your local council. This can include items such as grab rails, lever taps or external lighting. You will need to contact your local council to have an assessment and they will then recommend the correct equipment and arrange for it to be fitted.

If you need larger adaptations, you may qualify for a grant to have these installed. This is called the Disabled Facilities Grant (DFG) and can be used for a range of adaptations. It is a means-tested grant, so the amount of income and savings you have can affect how much you may be awarded. Home owners and tenants can both apply. You need to apply to your local council for a DFG, but in many areas your local Home Improvement Agency or Age UK can help you through the process.

This list is not exhaustive but gives you an idea of some of the equipment and adaptations available.

Examples of adaptations and equipment.

Accessing your home	Answering the door
Hand rails to the entrance	Intercom
Ramps (portable or fixed)	Wireless doorbell/entry phone
Wheelchair lift	Video entry phone
Motion sensor lights	Key safe
Moving around your home	Getting up and down stairs
Good lighting (remote control/touch lamp)	Second handrail
Pager alarm	Stairlift
Warning doorways	Through floor wheelchair lift
Getting up and dressed	Washing, bathing, using the toilet
Bed or chair raisers	Electric bath lifts
Powered riser/recliner chairs	Level access showers
Long handled grabbers	Wall mounted sinks
Hoists	Flood detectors
Gadgets to help do/don't buttons	Fold up showers
Long handled shoe horns	Raised toilet seats

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Housing for Older People

Sheltered Housing

- This is sometimes also called Retirement Housing and is usually groups of flats and bungalows built specifically for older people.
- It is usually for those people who are still able to look after themselves. Sheltered housing does not offer on-site care and support although you can arrange your own care and support if you need to (the same as in general housing).
- Many sheltered housing schemes will have a 24 hour alarm system installed for emergencies, linked to a call centre.
- Some sheltered housing schemes have some shared facilities which could be a lounge, garden, laundry room or guest room.
- There is a wide range of retirement and sheltered housing to rent or buy, offering a variety of facilities. They range from local authority sheltered bed-sits and flats to top-of-the-market retirement apartments.
- The majority of sheltered housing to rent is managed by local councils or housing associations. Local housing associations or council will have its own way of allocating properties, usually based on assessment of need.
- Sheltered or retirement housing for sale may be built by private or non-private developers (such as housing associations). These are usually leasehold schemes and there will be additional ongoing costs such as service charges and other running costs that can vary considerably. It is important to understand all of the financial obligations and rules of the scheme if you are buying a leasehold property. Some housing associations have built shared ownership retirement housing.

where the person buys a proportion of the property and pays rent for the remainder.

- Some developers are also developing 'Lifetime Lease' schemes where the older person pays a lump sum (significantly below market value) which buys them the right to live in the property for as long as they wish, but upon death or moving out the property reverts back to the company.

Extra Care Housing

- Extra Care Housing is also sometimes called Very Sheltered Housing, Assisted Living or Living with Care.
- This provides older people with independent accommodation combined with 24 hour on-site care. It is designed for people who have a higher level of care and support needs and aims to offer older people the privacy and security of tenure of their own housing unit combined with the level of personal care they need.
- Care is usually provided by on-site staff.
- The schemes often provide more communal facilities such as a restaurant or dining room.
- There are schemes covering the different tenure types (leasehold, purchase, rent, and shared ownership). Some specialist schemes are also being developed e.g. for older people with dementia or learning disabilities.
- Schemes vary significantly in size from a small number of units to hundreds of flats, and the facilities on offer will also vary.

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Moving Decision Checklist

If you are considering moving, use this checklist to help you make sure you have considered all the aspects about moving home and what type of housing might suit you. This will help you make an informed decision. There is also space for you to add any questions you might want to ask.

If you are deciding between more than one location or property, you can use this list for each property you are considering.

Notes

Location:

- Is it near where you are now, or in the area you'd like to move to?
- Is there good access to local transport and services like shops, post office, bank, GP etc.?
- Is it near to family and friends?

Social Opportunities:

- Are there social activities on site?
- If so, are they things you enjoy?
- Will you be able to keep existing friendships or social groups such as church groups and lunch clubs?
- Will there be opportunities to make new friends?

Size and Layout:

- Is it one or two bedrooms?
- Will your furniture fit?
- Can you easily access the bathroom and kitchen?
- Will you be able to have guests?

Design:

- Has it been designed with older people in mind, with grab rails, step-free access or the potential to make these changes if needed?
- Are there higher level plug sockets?
- Is there a walk in, level access shower?

Security and Safety:

- Is there an intercom?
- How easy is it for people to gain access to the complex/building?
- Do the doors have a slyhole and chain?
- Are there decent locks on the doors and windows?
- Is there an alarm system?
- Is it in an area you know?
- Is the area safe?

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Cost of Moving Home Checklist

Use the list below to work out how much it would cost you to move to another property. There is room for you to note down your current expenditure as well as what your new expenditure would be so you can compare them. It is also worth having a benefits check to make sure you are getting everything you are entitled to. Age UK (www.ageuk.org.uk) or your local Citizens Advice (www.citizensadvice.org.uk) will be able to help you with this.

If you are thinking of selling your current property and purchasing a new one:

Expenditure	Current Expenditure	Cost of Moving
Estate Agent Fees	£	£
Valuation Fee	£	£
Stamp Duty (on homes over £125,000)	£	£
Surveyors Fee	£	£
Legal Fees	£	£
Removal Costs	£	£
Total	£	£

Monthly Expenditure	Current Expenditure	New Expenditure
Mortgage (if applicable)	£	£
Council Tax	£	£
Buildings Insurance (if applicable)	£	£
Contents Insurance	£	£
Leasehold Costs (e.g. ground rent, if applicable)	£	£
Service Charges (if applicable)	£	£
Management Charges (if applicable)	£	£
Water	£	£
Gas	£	£
Electricity	£	£
Phone	£	£
Repairs/maintenance	£	£
TV Licence (for tv over 750)	£	£
Paid help (e.g. gardening, cleaning etc.)	£	£
Other support services	£	£
Total	£	£

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Useful contacts

Organisation	Contact details	Notes
FirstStep Advice Line	www.firststepcancareadvice.org.uk	An independent, free service for older people, their families and carers. It provides advice and information on housing issues to enable older people to live as independently and comfortably as possible.
AgeUK Advice Line	0800 149 4545 www.ageuk.org.uk	A free, national, confidential phone service for older people, their families, friends, carers and professionals. They have a team of expert advisors who can give up to date information and who can signpost to the appropriate service.
Independent Age Advice Line	0800 319 4799 www.independentage.org/advice	A free advice service for older people, their carers and families offering advice and information on benefits and entitlements, getting a care assessment, moving into a care home, paying for care, being discharged from hospital and much more.
Foundations	0845 864 5210 www.foundations.uk.com	The national body for Home Improvement Agencies and Handypersons Services, providing support to over 200 home improvement and handy person service providers in England, covering over 80% of local authorities.
Extra Care Housing and Assisted Living Homes Directory	www.housingcare.org/elderly-uk-assisted-living-extra-care-housing.aspx	Find extra care housing or an assisted living community in this directory of retirement properties specialising in housing with care in the UK.
Disabled Living Foundation	0300 999 0004 www.dlf.org.uk	Guide to equipment and adaptations.

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Figure 4.4 Labelled photographs used in the focus group. All A4, shown at c.25%. Provided for the focus group by West of England Care & Repair.



Figure 4.5 Leaflet pack used in the focus group including A5 leaflets and a sticker, shown at c.25%. Provided for the focus group by West of England Care & Repair.



- a leaflet pack (see Figure 4.5).

The documents added in session two included:

- a self-help document (see Figure 4.6);
- factsheets (see Figure 4.7);
- a guide (see Figure 4.8).

These documents were chosen as they were documents that Silverlinks and WCER provided to the public, and for which the two participating organisations aimed at understanding user perceptions about their documents. The additional documents used in session two introduced factsheets from a different organisation and two additional kinds of documents – a self-help document and a guide – that had not been used in session one. The documents used included the sample documents used in the visual analyses (see Section 3.1).

Figure 4.6 Self-help document (website) used in the focus group (Elderly Accommodation Counsel 2017b).

FirstStop
Advice for older people

Housing Options for Older People (HOOP)
Living safely and well at home

Home Start New Your Results About Help

Choose a topic below:
● Uncompleted
● Completed

1. Size & space
2. Independence
3. Cost (affordability)
4. Condition of property
5. Comfort & design
6. Security & safety
7. Location
8. Managing
9. Quality of life

Ask EAC for more advice

Welcome

How well does your home suit you?

Our questionnaire will help you think about different aspects of your home and how you live in it. You can either pick topics from the list on the left, or let us guide you through the whole questionnaire. At any stage, view our suggestions for tackling any concerns. If you would like to speak to one of our Advisors, you can just [submit your questionnaire to us](#).

Type an English postcode or place name, then choose an option

START NOW →

login → to continue previous session | register → to save your results

More Info

Step 1:
Answer questions on as many topics as you choose. At any stage, go on to view our suggestions.

Step 2:
Register or login to save or retrieve your answers and our suggestions.

Step 3:
If you choose, submit your questionnaire to us for advice from one of our skilled Advisors.

Help | Housing Options for Older People | About | Contact | Results
© Elderly Accommodation Counsel, 3rd Floor, 89 Albert Embankment, London, SE1 7TP. Registered charity number 292552. Company number 1955490.

Figure 4.7 Factsheets used in the focus group, EAC, 2017 and C&RE, 2014. All A4, shown at 25% (Elderly Accommodation Counsel 2017b; 2017c; 2017d; 2017e; 2017i; 2017j; Care & Repair England 2014)



Figure 4.8 Guide document used in the focus group, Age UK, 2017. 148x210mm, shown at 25% (Age UK 2017a).

Housing options
Different types of housing to suit your needs




Information and advice you need to help you love later life.

We're Age UK and our goal is to enable older people to love later life.

We are passionate about affirming that your later years can be fulfilling years. Whether you're enjoying your later life or going through tough times, we're here to help you make the best of your life.

Our network includes Age Cymru, Age NI, Age Scotland, Age International and more than 160 local partners.

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What this guide is about

Many of us find that as we get older we start to think more about where we live. Do you want to stay where you are, but could do with some support to make life easier? Would repairs or adaptations make your home more comfortable? Perhaps you're thinking about moving somewhere you'd like or nearer to family and friends? Or you may be considering housing specifically for older people, such as sheltered housing.

This guide gives you information about these different possibilities and explains how to find out more about your options.

As far as possible, the information given in this guide is applicable across England, Wales and Scotland. In Northern Ireland, contact Age NI.

In this guide, where we refer to a local council social services department in England and Wales, we intend this also to be a reference to a social work department in Scotland.

Key

i This symbol indicates where information differs for Scotland and Wales.

what's next? This symbol indicates who to contact for the next steps you need to take.

Thinking about your options

We often have a deep emotional attachment to the place we call 'home'. But as we get older, some aspects of daily life can become more difficult and we may begin to feel that our current home is no longer the best place to suit our changing needs.

It could be that your home just needs some changes to make life easier. Or you may want to consider other housing options, such as moving nearer to family or moving to a property that suits your needs better. Either way, it's important to think through all the options carefully before making any decisions.

As a first step, here are some questions that may help you to think about your home and how it suits your current needs and possible future needs.

Location

Where we live makes a big difference to how comfortable and safe we feel, and is especially important if we have friends, neighbours or social groups nearby. Some things to think about include:

- Is your current home near your family?
- Is your current home near to your friends and social group?
- Do you feel safe in your home and neighbourhood?
- Are the local facilities and transport links suitable for you?
- Is the area easy to get around, or are there hills, traffic or busy roads that make it more difficult to go out and about?

Size

A home that's too big for our needs can become harder to manage as we get older. However, a home that's too small could be more tricky to adapt. Some things to consider include:

- Do you currently have more rooms than you need?
- If you have a garden, is it a size you can manage?

Accessibility

As we get older our needs change and we may find it more difficult to get in and out of or move around our homes. You could think about the following:

- Can you move around your home comfortably and easily?
- If your home has more than one floor, is there a downstairs toilet? If not, could you get one installed?
- Do you have to walk up a long path or stairs to reach your front door?
- Will your home suit your needs in the future, for example if you become less mobile?

Finances

A home can be expensive to run, especially if you are paying rent or a mortgage on a fixed income such as a pension. Moving to a smaller home or to a cheaper area can have a big effect on our finances. You could consider:

- Do you pay rent or a mortgage and can you manage these costs comfortably?
- Are your energy bills affordable?
- Do you have sufficient income for all you need?

If you're struggling to make ends meet, see the section 'I'd like to boost my income' on pages 12-13.

You could use these questions as a starting point to think about your current situation and what you may want and need. Even if you're fairly sure what you want to do, it may be a good idea to read through all the options here. You may find you like the sound of something that you didn't know existed or assumed wasn't suitable for you.

Talking through the possibilities with family or friends and taking independent advice can also be very helpful. However, remember that choosing where and how you live should be your decision. No one should try to persuade you to do something you're not sure about.

what's next? This guide contains an overview of the options that you may wish to consider. If you want someone to talk to for further advice, contact the Eldery Accommodation Counsel (see page 36) or your local Age UK (see page 33).

Remember that choosing where and how you live should be your decision. No one should try to persuade you to do something you're not sure about.

I want to stay at home but need to make some changes

Staying in your own home doesn't necessarily mean that things have to stay the same. A few simple changes could make life a lot easier. Perhaps your home could do with some repairs, adaptations or equipment to help you live there safely and independently.

Useful equipment

There's a whole range of equipment and useful gadgets available to help people live at home independently. These include:

- kettle tippers
- one-handed chopping boards
- long-handled shoe horns
- telephones with large buttons.

The Disabled Living Foundation can offer advice on what products are available and how to get them. They also have a loan library where you can try out products for two weeks to see if they suit you. See page 35 for contact details.

There's also lots of useful technology to help with safety in the home. For example, if you're worried about having an accident or falling ill while you're alone at home, you could get a personal alarm. These allow you to contact a 24-hour response centre by pressing a button on a pendant or wristband that you wear all the time. Staff at the emergency response centre will then call either your chosen contact person – a neighbour, relative or friend – or, if the situation is more urgent, the emergency services.

Your local council may run a personal alarm scheme. In England and Wales, you can search for your local community alarm service based on your postcode by visiting www.gov.uk/guidance/for-community-alarm. You may get one free of charge following a care needs assessment from your local council but this will depend on the assessment and your circumstances. Contact your local council's social services department for more information.

Aid-Call Limited, a subsidiary of AXA PPP Healthcare Group Limited, also provides Age UK branded personal alarms including within Northern Ireland. For more information about the service and the likely costs, call 0800 011 3846.

Home adaptations

If you'd like to stay at home but are finding it more difficult, you could consider home adaptations. These don't always have to be big or expensive. Some examples are:

- grab rails
- a ramp to the front door
- a walk-in bath
- a stairlift.

Some people may be eligible for free home adaptations from their local council. See our guide 'Adapting your home' for more information. Equity release could also be an option for funding home adaptations (see page 13).

4.3 Users' perceptions about housing options documents

The insights collated from the feedback sheets of session one and the transcript of session two were grouped into the following themes (discussed below):

- triggers for accessing information;
- kinds of documents;
- written content;
- visual appearance of documents;
- navigation through documents;
- usefulness for planning ahead and decision making;
- talking versus reading.

4.3.1 Triggers for accessing information

Although the focus group aimed to elicit perceptions about documents, two triggers were discussed that may influence people to seek information about later life housing options, health and 'being realistic':

...your health ... that would be the main pivot really. How you felt you could cope, which is linked to your health.'

(U3)⁸

...what is important is to be realistic. (U1)

For the first trigger (health), comments about the overwhelming nature of too much information was identified as negative when an action to find information might be in reaction to a health crisis:

And that point you get so much information, it's not just about that one thing, but everything and it's totally overwhelming and of course you are going to prioritise your health rather than everything else. (U1)

Alternatively, people facing the second trigger of 'being realistic' would

8 Participant responses are labelled as U1, U2, and U3. See Appendix C2 for list of participants.

not be facing a health crisis. Comments were made about the volume of information:

... there's so much information isn't there ... where do you start ... which is the best one to start with. (U3)

Such comments indicate that it may be difficult for users to understand where to go first when you do not have a specific information need but would like to begin the process of planning ahead. This supports the advice by Black et al. (2012) for 'document originators to use design to help consumers decide what really requires their attention' and that by doing so reduce the length of documents (Black et al. 2012, 7). This is discussed further in Section 6.2.3, regarding visually differentiating documents.

4.3.2 The kinds of documents

The difference between the self-training document (Figure 4.2) and factsheets (Figure 4.3) were observed by the participants:

[The self-training document] is more about the planning, going through a process ... (U1)

... this one [factsheets] is just information. (U1)

Additionally, participants noticed overlap and repetition across the documents:

... so many different leaflets, there's ... overlapping, there's so much repetition. (U1)

Discussion highlighted that users would be employing strategic reading strategies for the self-help document, as per studies about direct mail (Black et al. 2012) and instructions (Wright 1981), and follow the principle of least reading (Frohlich, 1986):

... [the self-help document] booklet is quite lengthy ... you're probably not going to start at page 1 and go through to the end. (U3)

Additionally, adult children who are looking for factual information to help older parents might seek out factsheets:

... I have parents who are in mid-to-late-eighties, so I'm thinking that ... if I was looking for them, for me that's how I would use it ... that's why I find these [factsheets] quite useful ... so, that's what you were perhaps looking to see ... what are they entitled to, what could we do, you know, the facts. (U3)

Participants noted how the usability of the factsheets could be improved and how the two different kinds of documents (self-training and factsheets) could be linked:

... Yes [a table of contents] would definitely help with those [factsheets] ... (U1)

... [the factsheets] would be much more useful to me in a folder with an index ... it's just that physical thing of having something ... where you can get to the right place ... (U3)

... having links from [the self-help document] to these [factsheets] so that if you wanted to look at the official bit ... where you can click on it and get to [them]. (U3)

These kinds of comments suggest that there can be improvement to some of the existing later life housing documents by employing graphic features that support strategic reading (see Section 6.2.4).

4.3.3 The written content and identity of organisation

The written content was discussed by participants in relation to intended users. For example, for an adult child, factual authoritative content is important:

[As an adult child] I find these [factsheets] quite useful, really sort of factual, authoritative ... what they [parents] are entitled to, what could we [adult children] do ... (U3)

Content that portrays trustworthiness (identified as being provided by a not-for-profit organisation) or supported by an established authority (such as a Council) is important to a person who is providing the information to others:

[As a Volunteer] one of the things that I think is worth put-

ting over is the basis of the organisation that it's a charity and not-for-profit ... it's my personal view it's the confidence of the individual knowing that ... we're not for profit ...we're not like the tradesman down the road. (U1)

[It is] more authoritative if show working in partnership with local councils, supported by/funded by, charity/not for profit. (U1)

This connects to previous studies by Black et al. regarding direct mail, that recommending that documents should provide complete interaction free from extraneous messaging:

... when recipients choose or have to engage with documents, they expect their effort to be repaid by content that meets their needs concisely and without distraction, for example, from marketing messages (Black et al. 2012, 8).

However, the comments of the participants in the focus group additionally suggest that documents that are perceived to be 'selling' will also not be trusted, in the context of later life housing options. The relevance of these observations is discussed further in Section 6.2.2, and resonates with responses about the visual appearance of documents, as discussed in the following section.

4.3.4 The visual appearance of documents

The participant responses from the focus group for this research differentiated documents based on perceived 'professionalism', 'authoritativeness', and 'realness'. The responses were aimed at three kinds of documents: the factsheets, self-training document, and photographs of housing adaptations.

The factsheets are considered:

Very authoritative as they are professionally produced with clear, well written information. (U3)

The self-training document is authoritative as it is:

... full of lots of information and clearly presented. (U3)

The perceived professionalism, the clarity of presentation, and the quantity of information are identified as contributing towards a document being authoritative. Moys' (2014a; 2014b) studies evaluated documents based on low, moderate, and high levels of typographic differentiation, and demonstrated that documents that moderately exceed the difference threshold were perceived to be 'accessible, credible, objective, and informative' (Moys 2017, 214).⁹ Comparing the factsheet and self-training document with Moys (2014a) levels of typographic differentiation, they sit in the moderate area of the spectrum, displaying 'a high degree of orderliness' (Moys 2014a, 49). The relevance of these observations about documents is discussed further in Section 6.2.3.

Conversely, the perceived reality of the photographs is considered a positive aspect of the documents as they are 'accessible' and not 'professional':

... having those real photos with real houses, real people
just makes it that much more accessible. (U3)

... sometimes professional means ... puts people off ... this
[real photograph] is what it is and this is what it can do for
you. (U3)

In these responses 'professional' might connote 'marketing'. However, the responses demonstrate that there is a desire for information to be presented in a professional manner, but that images of the options (in the case of the focus group this was adaptations to a home) should depict reality. Discussion regarding the 'reality' of photographs was discussed with document producers (see Section 5.5.1).

Although previous studies suggest that those not trained in design lack an awareness of the impact of document design (Black 2010; Black et al. 2012) and that people vary in ability to articulate the 'visible evidence of design skills' (e.g., Sless 1996, 258), participants' responses, discussed above, suggest that the perceived production value, clarity of information presentation, and reality of photographs affect readers' assumptions about documents for housing options.

9 This perception differs from perceptions of high differentiation that would be 'patronising' 'in your face' 'shouting' to grab attention (Moys 2017, 214).

4.3.5 Navigation within a document

In terms of navigating information within a single document, participants considered that the volume of content in an A5 four-page leaflet was ‘not too much’, whereas the longer 25-page self-training document was ‘lengthy’. Navigation within the longer document was raised through comments about how a participant might access the content within a document that was perceived as lengthy:

If something’s quite lengthy like that one [self-training document] is, then you’re probably not going to start at page 1 and go through to the end. (U3)

To facilitate the use of large amounts of information in a document, there was consensus that a table of contents or an index is important to enable accessing information within the material, and that the physicality of a folder would facilitate navigation through a large volume of content:

It’s got an index, but in a folder where you can go to, you know that thing of having to find, I don’t know it’s just that physical thing of having something ...(U3)

These comments were directed towards a set of factsheets. These documents were developed as part of a package to support a ‘pass-it-on’ talk provided by Silverlinks, and were also intended to be passed on by event attendees to friends or family who had not necessarily attended the talk. Discussion about the need for a navigational device in relation to these loose A4 sheets highlights the importance of designers considering how a user might use a document other than in the intended context of an event. These observations resonate with the need to consider the visual differentiation of housing options documents (see Section 6.2.3) and the use of typographic differentiation to facilitate reading strategies (see Section 6.2.4).

4.3.6 Usefulness in planning ahead

An outcome of the findings was that current documents vary in terms of the appropriateness for planning ahead. The Silverlinks factsheets were highlighted as being useful during a move; however, their ease of use in

terms of finding information was questioned. The self-training document was singled out as a potential starting point, however this had failings in its perceived lengthy content. What did become clear therefore was that the documents examined by the focus group can:

- 1 easily be taken out of the original context of their intended use;
- 2 are multi-purpose.

These then impact the effectiveness of such documents for use in planning ahead.

4.3.7 Talking versus reading

The theme of the delivery format of information – whether people wanted printed items, or whether talking to people (via an event, or by word of mouth) was more beneficial – emerged throughout the discussion:

Do people want leaflets and paper, or do they actually want to talk? (U3)

It's useful talking to somebody, by talking to them that brings out the ideas to plan to start ... (U1)

Most of the elderly people I have met in the last 6 years, I would say most of them prefer talking to reading. (U3)

... for some there's always that fear of paper or anything that looks authoritative to be honest. (U3)

However, an observational note made by a facilitator was how a discussion developed (in the second session) about the current situation of one of the participants. This discussion was sparked after discussing the self-training document, and how this might be used to begin thinking ahead for housing in later life. Therefore, although talking is a useful vehicle for exploring the topic, a pertinent focus for this research is on the role of documents to facilitate a discussion, and then supporting continued planning-ahead activities post-discussion.

This relates to existing studies and projects that demonstrate the use of printed documents that facilitate conversation. For example, for families to facilitate preparatory conversations, parents using documents for didactic purposes (Harper et al. 2002, 316), and use in conversation

starters about end of life planning (Common practice 2020). Additionally, Tamayo-Velázquez et al. (2010) suggest that the combination of document use and discussion (in clinical settings) increases the completion rates of Advanced Directives.¹⁰ This suggests that information or conversation in isolation are not enough to facilitate decisions. However, these findings suggest that documents such as ‘conversation starters’ may be a valuable addition to a TSO’s range of documents that support decisions for later life housing options (see Section 6.2.4).

In summary, this chapter has explained the planning and findings of the focus group carried out to explore users’ perceptions of housing options documents. Observations were made regarding the reasons why people access information about housing options, the perceptions of the different kinds of documents, the written content and identity of organisation, the visual appearance of documents, the navigation within documents, the usefulness of documents in planning ahead, and the merits of talking versus reading. The following chapter explores the design practice of document producers, explaining the choices made about the way words and images are organised in housing options documents. This puts the user perceptions, highlighted in the focus group, and the observations made in the visual analyses, into context.

10 ‘Advance directives (ADs) or living wills are written documents used by patients to express their wishes or preferences in relation to medical treatment, and are to be applied in the event that the patient becomes incapable of making his or her own decisions’ (Tamayo-Velázquez et al. 2010, 10)

5 Exploring design practice: interviews with document producers

This chapter discusses design practice – designers’ activities and considerations – with a focus on the domain of later life housing options. An aim of this layer of the research project was to explore relevant activities and considerations associated with designing information for decision making in the domain (e.g., a sensitive topic) and those pertinent to the third sector (e.g., budget restrictions). Two interview studies were conducted to address this aim (see Figure 5.1).

The chapter begins with an overview of design practice from a broad perspective in terms of what communication designers do and what they consider during their design practice (Section 5.1). In this section, existing diagrams that help visually communicate design practice are introduced. These diagrams help toward the development of graphically representing design practice in the domain of housing options, an objective of this research. Methods for finding out about design practice are discussed (Section 5.2). Focus then turns towards current design practices in the domain through two interview studies interviews with third sector document producers (Sections 5.3–5), and interviews with trained designers (Sections 5.6–8). A chart of design practice for the domain of later life housing is then offered that draws together insights from the two interview studies, visual analyses, and focus group (Section 5.9).

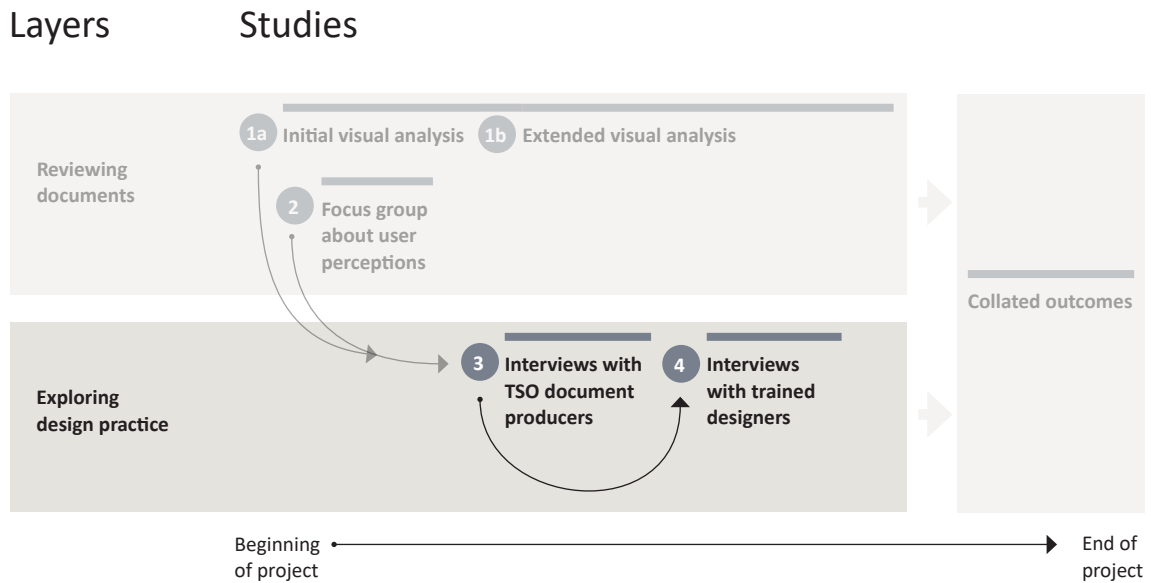


Figure 5.1 Interview studies in project structure.

5.1 Design practice

In the discipline of communication design a core part of a designer's role is to:

... try to illuminate or explain things using graphic language, which may be verbal, pictorial, or schematic, and presented on paper or screen (Walker 2017b, 549).

Designers enhance communication by organising content in such a way that the user can understand, make sense of, and organise information (Waller et al. 1987; Frascara 2001). Frascara (2015) posits that design processes involve two 'distinct moments', and include the use of knowledge, skills, and understanding:

The design process in the [information design] field involves two distinct moments: 1) the organization of the information (the content and its units of meanings, texts and illustrations), and 2) the planning and implementation of the visual presentation. These tasks require knowledge and skills to process, organize and present linguistic and non-linguistic information. They also require an understanding of cognitive and perceptual processes, as well as the legibility of symbols, letters, words, sentences, paragraphs and complex texts (6).

Ways of visually representing these aspects of what designers ‘do’ have been explored in several design disciplines, including information design and graphic design. These are discussed in the following section.

5.1.1 Visually representing design practice

Dubberly (2010) posits that there are ‘models’¹ that depict design processes² and diagrams that depict ‘the scope or nature of practice’ (Dubberly 2010, 1). Diagrams that depict design processes often highlight the iterative nature of project stages. Both Sless (2008, 252) and Pontis et al. (2016, 255) offer diagrams for information design that represent this iterative nature (see Figure 5.2 and Figure 5.3). These diagrams also represent phases associated with the moments, knowledge, and skills that Frascara (2015) outlines above. ‘Implementing’ in each diagram is where content is organised through words and images.

An earlier diagram from Pontis (2014) of a ‘two-stage information design model’ (18)³ (Figure 5.4) hints at aspects of the process that affect the outputs of design practice. For example, the brief will include intentions of an organisation or the author; information sources and user needs will identify certain aspects to focus a project; the way the problem is defined and the level of understanding that the designer has of these aspects will also affect the direction of a project. These are all considerations a designer will be making throughout a project.

The second kind of diagram that Dubberly (2010) refers to depicts ‘the scope or nature of practice’ (Dubberly 2010, 1): in this dissertation this

1 Dubberly (2005) uses the description ‘design process models’ to refer to the depictions of design practice in his compilation (Dubberly 2005, 9). ‘Model’ is not used in this dissertation to describe the visual representation of design practice, as it suggests a process to follow, rather than a visual representation to direct thinking.

2 A compilation of models of design process can be found in Dubberly (2005). These are mainly concerned with architecture, engineering, industrial design, and software development, although they include a model of the graphic design process from the American Institute of Graphic Arts (AIGA) (47). Other diagrams include the seven-phased information design process by Sless (2008) and the double diamond by the Design Council (2007).

3 This earlier model is based on models from the Information Design Exchange Group (idX (Information design exchange group) 2007) and Pontis (2012b).

Figure 5.2 Systematic and iterative design process redrawn from Sless (2008, 252).

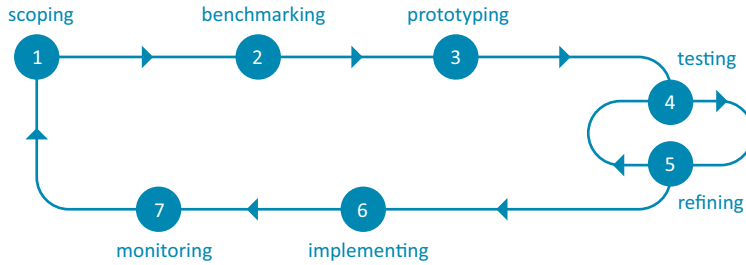


Figure 5.3 Diagram of design process redrawn from Pontis and Babwahsingh (2016, 255).

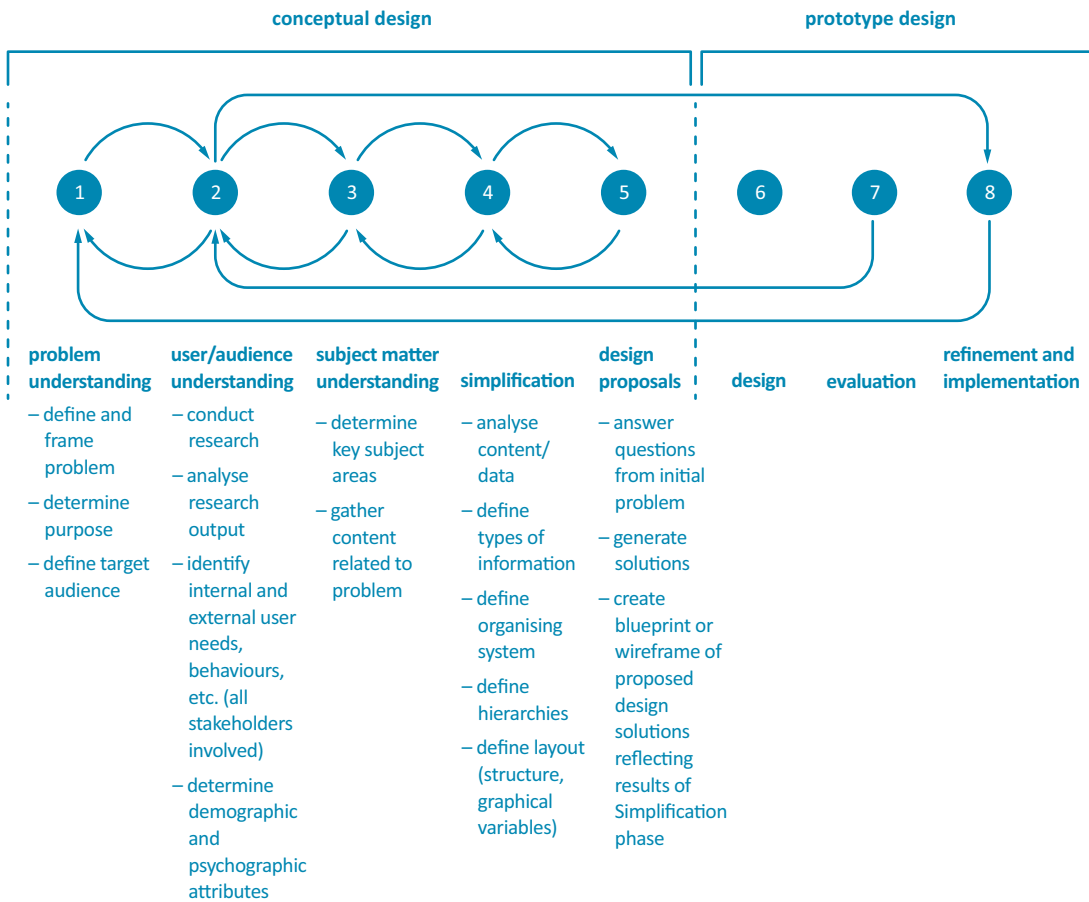
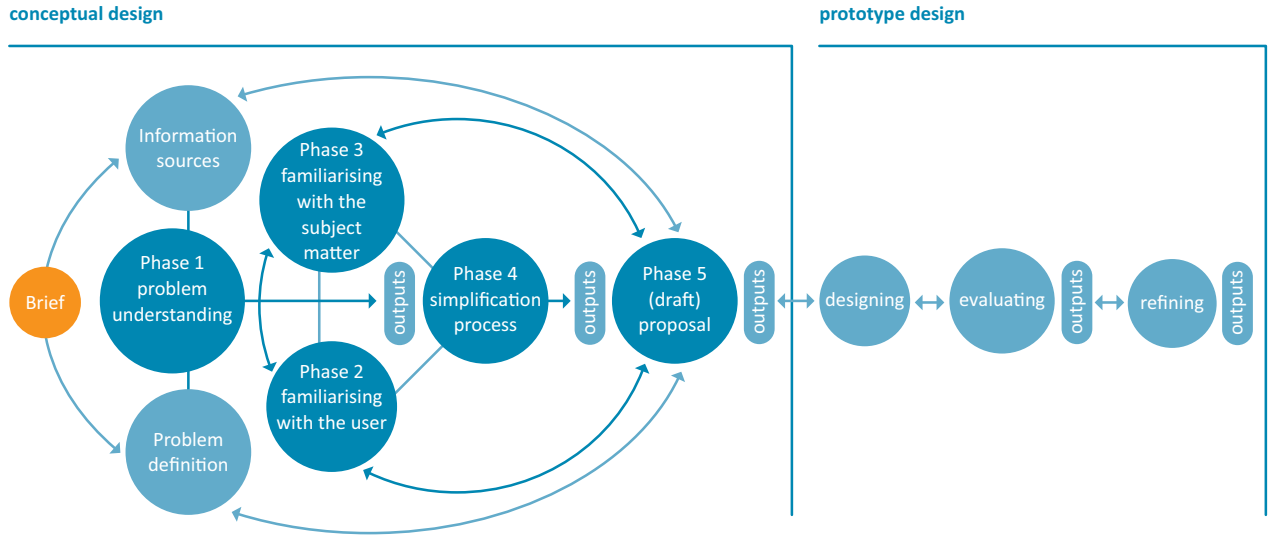


Figure 5.4 Two-stage information design process redrawn and adapted from Pontis (2014, 118).



is called ‘design practice’. Design practice refers to this holistic ‘nature’ of design, whereby designers are working on design processes and activities as well as considering factors relevant to the domain in which they are working. Factors include:

- agency and skill of document producers;⁴
- commissioners and collaborators;⁵
- users, context of use, and perceived user needs;
- technology;⁶
- available budget;⁷

4 The approach taken by designers, trained or non, have a bearing on the way words and images are organised. As non-trained designers we all learn principles of words and images at school and through documents we encounter day to day, such as newspapers (Walker 2001). If the document producer perceives the information to be formal, their decisions about the organisation of graphic language will be influenced by this. The more formal something is perceived to be by the author, the more likely it is that the solutions chosen will be formal and will carry some kind of authority (Walker 2001, 30). Trained designers are said to have ‘designerly ways of knowing’ (Cross 1982). This is often recognised as trained designers using ‘solution-focussed’ strategies where they ‘problem-solve by synthesis’ (223). This approach acknowledges that design problems are often ‘wicked problems’ where the necessary information is not always available and that designers are producing solutions that are ‘satisficing’ rather than ‘optimising’ (Cross 1982, 224). The concept of ‘wicked problems’ is, therefore, in itself a factor related to the effectiveness of a document design.

5 Archives of Marie Neurath’s work shed light on her process of designing children’s books whereby documents are often developed by teams rather than individuals (Waller 2017, 175), including key people such as editors, expert opinions, and designers (Walker 2017a, 120–1). Hiiippala (2017) suggests that the agency of collaborators affects the visual presentation. For example, the assumed attention span of readers means designers producing annual reports avoid pages solely displaying verbal language as these are assumed to inhibit the reader’s attention (45). Additionally, Schriver’s work (1997, 167) highlights that designers are often ‘stuck in the middle’ between taking into account the users needs versus furthering the goals of an organisation’.

6 The technology used to produce the document will be an influence on the decisions a designer will make. This is not a new concept, the printing press for example having played a part in influencing the dominance of linear organisation of verbal language (Twyman 1979). Walker (2012) discusses how typeface manufacturer and advances in printing technology affect the design of children’s books. The way a document is produced can impact the perceived authority of a document (Walker 2001, 38). For example, a professionally produced brochure might be perceived to have more authority than a document that is type set in a Word processing programme and printed on office paper.

7 Although discussing eras separated by thousands of years’ Wakelin and Twyman both allude to the influence of budget on the design of a page. For tenth-century document producers this might result in unfinished manuscripts (Wakelin 2018, 75). For twentieth-century typists this might be the avoidance of formatting text as tables due to the expense of type setting (Twyman 1979, 143). For third sector organisations working in the twenty-first century, budget is still a constraint on the possibilities of providing information (see Section 5.4.5 and 5.5.8).

- canvas constraints;⁸
- guidelines and visual identities;⁹
- intellectual rights and marketing considerations.¹⁰

These considerations are interwoven and interact with each other during the development of documents. Lentz et al. (2004) differentiate between ‘purpose constraints’ and ‘non-purpose constraints’, and offer a picture of how power is often a deciding factor that determines which constraint directs decisions:

An apparent disagreement between purpose and non-purpose constraints frequently arises when the design team proposes beautifully coloured visuals in the document to enhance attention and comprehension, while management refuses to invest in the technical resources needed to achieve this design...these kinds of disagreement can only be really solved by reader-testing the document and by consulting the literature in the field. But in practice the outcome of such conflicts are more likely to be determined by the balance of power between the legal, financial, and communication departments in the organisation (396–397).

These situations exist, in part, because design is often a service relationship between the client and end users, and the designer who is providing a service to them (Nelson et al. 2012, 43). Due to the nature of providing a service, a designer is working within a gamut of considerations when working on the design of a document, such as technical constraints that even the most highly trained designer, commissioned to improve documents in an organisation, must consider:

-
- 8 The canvas is the substrate (e.g., paper) or physical manifestation (e.g., screen) on which words and images are displayed, which have constraints that arise ‘out of the physical nature of the object being produced: paper or screen; fold geometry such as for a leaflet’ (Bateman 2008, 18).
- 9 Guidelines include those that guide accessibility, such as the Clear Print Guidelines, and visual identity guidelines that explain how an organisation’s brand is visually represented (e.g., colour palette and typefaces). Waller (2011) (discussing the Clear Print Guidelines) argues that although guidelines are useful, they can be inflexible and inhibit organisations from making information more effective.
- 10 Waller (2017, 175) cites intellectual property rights and marketing as being considerations of the design process.

The print technology available to use for the redesign was limited, with few fonts, little font control, and few graphic and layout options – a challenging design environment in which to work (Sless 2018, 131).

Although not with the aim of depicting these ‘swampy lowlands’ (Schön 1983, 42)¹¹ and challenges in which designers are often working, Dubberly posits that there are three kinds of diagrams¹² that represent the nature of design practice, research, or teaching (Dubberly 2010, 1):

- spaces;
- taxonomies;
- timelines.¹³

Figure 5.5 is an adaptation of Charles Eames’ Venn diagram (Eames 1969) demonstrating a ‘space of design’. This diagram shows an area in the middle of three overlapping ‘considerations’: the design office; the client; and society. The area where these considerations overlap is where a designer can ‘work with conviction and enthusiasm’ (Eames 1969) as they are working with aspects that have particular relevance to the project they are engaged in.

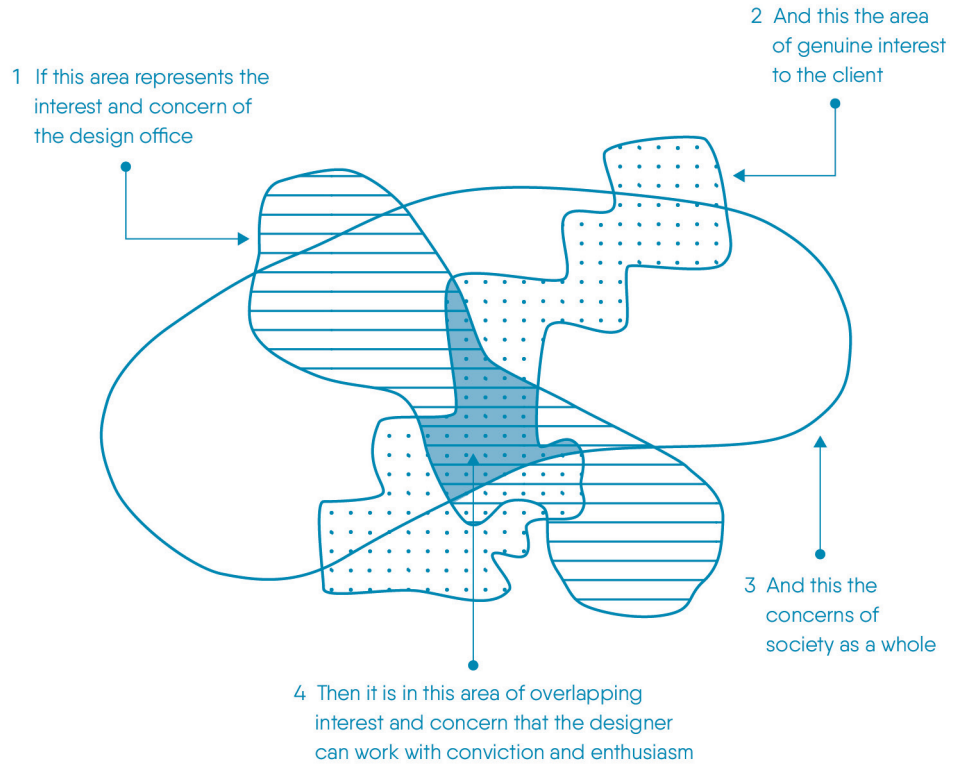
Eames’ Venn diagram simplifies the considerations designers are employing during their design practice. Lickiss (2020) offers an expanded version of a diagram by Norrish (1987) that represents the designing of text (see Figure 5.6). In this diagram the considerations are more specific than Eames’ diagram. For example, ‘human skills,

11 Schön contrasts the ‘swampy lowlands’ with ‘a high, hard ground where practitioners can make effective use of research based theory’ (Schön 1983, 42). This research suggests that ‘real-world’ factors contribute to situations that can be ‘confusing messes’ (42).

12 Diagram, model, and chart are all used by existing studies that discuss how to visually represent design practice. This dissertation uses ‘chart’ to refer to the visual representations created for this research as it is deemed a more suitable term than ‘diagram’ or ‘model’, which both suggest greater use of visual techniques (such as a tree diagram or a web) than is used in the charts for this research (see Figures 5.9, 5.15, and 5.16 for the three charts made to explore design practice in the domain of later life housing).

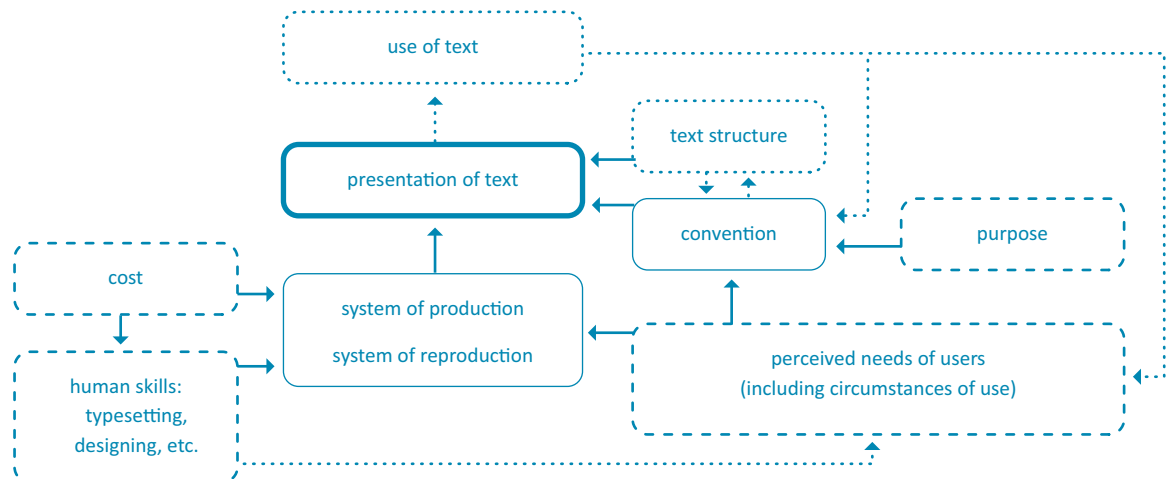
13 Dubberly does not offer an explicit example of a diagram that depicts design practice as a timeline. Instead Richard Buchanan’s ‘The Matrix of Inquiry’ is provided as an example that depicts the nature of design research (Dubberly 2010, 8).

Figure 5.5 Eames' design process diagram redrawn from Eames (1969).



Note: these areas are not static – they grow and develop as each one influences the others

Figure 5.6 Diagram of 'Factors that affect the presentation of text' redrawn from Lickiss (2020, 59), which adapted Norrish (1987, 3).



typesetting, designing etc.’ alludes to more specific aspects of the skills of the designer, not just the ‘interest and concern of the design office’. This kind of diagram loosely fits into Dubberly’s (2010) category of ‘taxonomy’ diagram whereby design practice is depicted as a flow chart.¹⁴ The diagram illustrates an iterative cycle, similar to Sless (2008) and Pontis (2014), but clearly indicates how factors not only overlap, but form feedback loops, informing each other as well as the presentation of text.

Lickiss’ and Norrish’s diagrams do not include all factors influencing design practice. A fourth category of diagram (adding to Dubberly’s three) that illustrates a greater number of considerations associated with design practice is ‘a web’ offered by van der Waarde (2018) (see also: van der Waarde 2009; van der Waarde et al. 2012). van der Waarde (2018) uses Schön’s concept of a ‘web of moves’ (Schön 1983) to explore graphic designers’ practices, suggesting that within a web of moves designers are considering the consequences of their activities and:

... when graphic designers talk about their activities, they clearly separate different domains. Examples of these domains are costs, type of client, collecting existing examples, implementation, and presentation (van der Waarde 2018, 354).¹⁵

Using insights from interviews with graphic designers, van der Waarde (2018) offers two diagrams: one that represents the ‘visual argumentations’ that designers consider (see Figure 5.7); and a second diagram incorporating these ‘argumentations’ as a ‘specialism’ of graphic design that sits within a set of ‘professional reflections’ (see Figure 5.8). Together these constitute considerations that a designer is working with.

Yet, a web-like diagram to represent design practice still has

14 Dubberly (2010) suggests that taxonomies are ‘lists of sub-domains; trees branching into categories and sub-categories and so on’ (1).

15 Van der Waarde (2018) uses ‘domains’ to refer to considerations a designer is working with. Domain is used in this dissertation to refer to the context that a design is working within, e.g., housing options for later life.

Figure 5.7 Aspects that graphic designs work within when considering visual configurations, redrawn from van der Waarde et al. (2012, 11; see also 2018, 353).

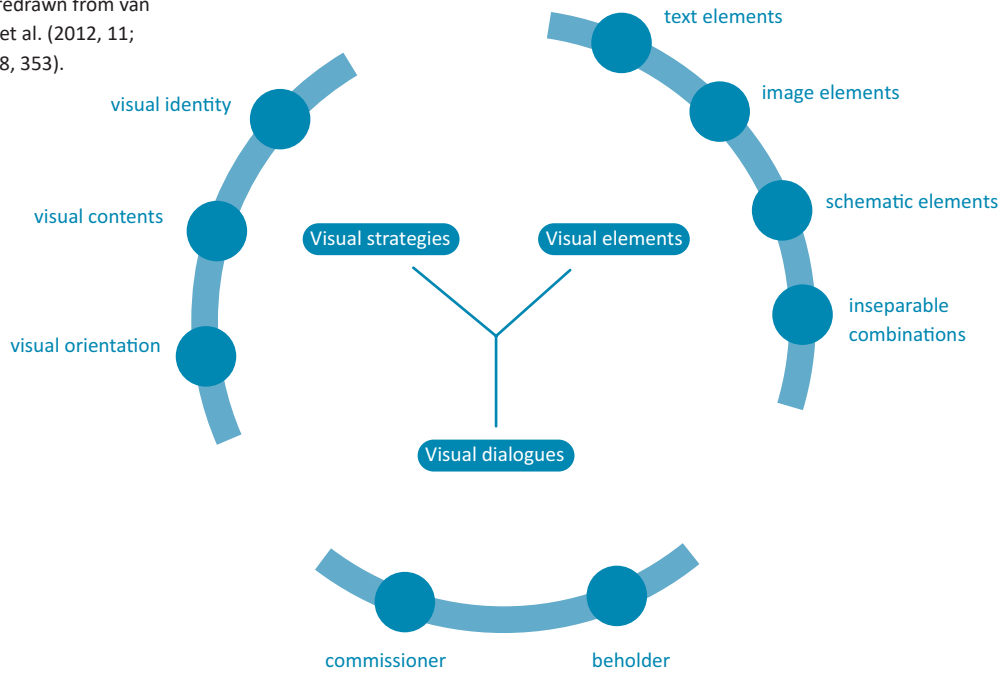
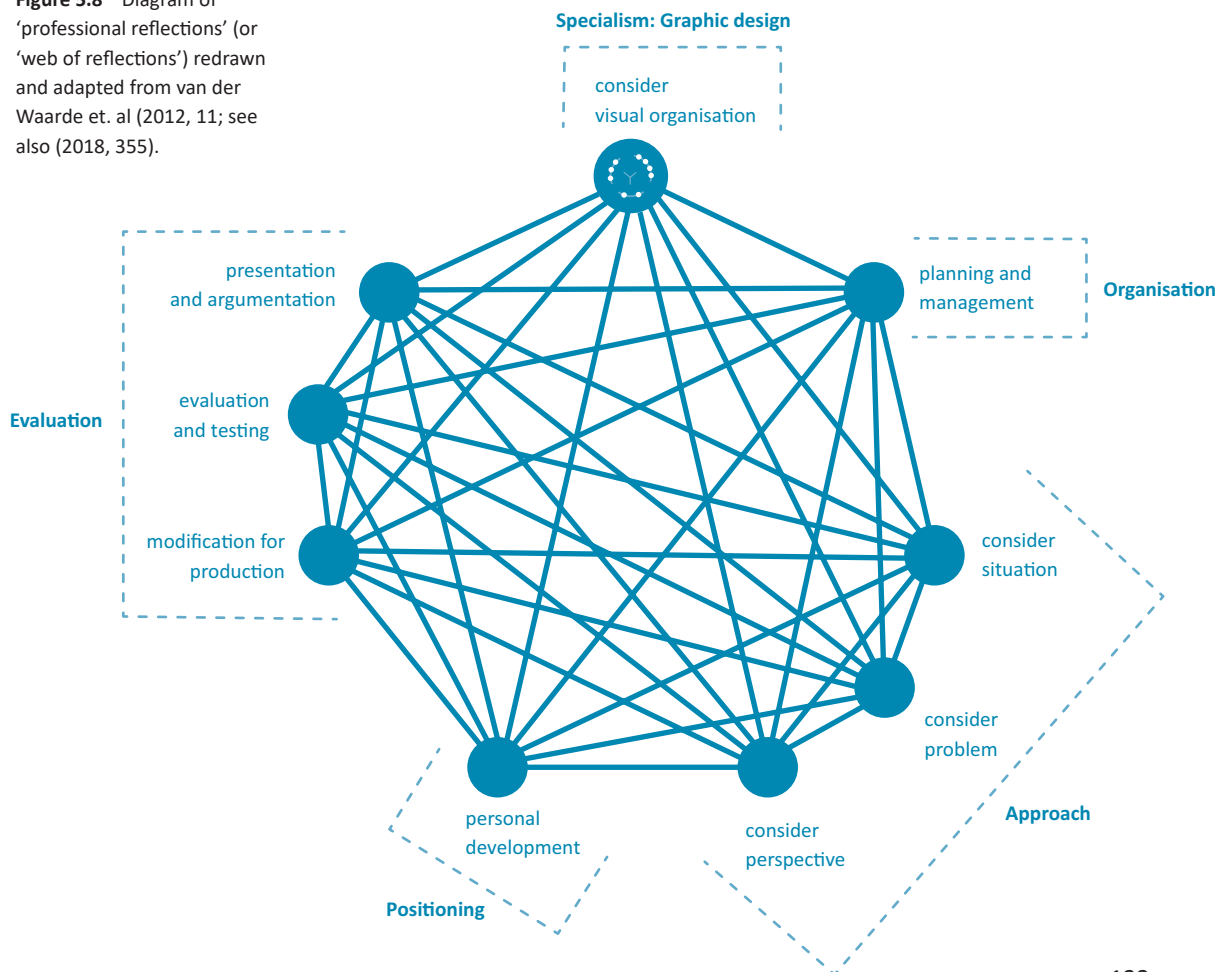


Figure 5.8 Diagram of 'professional reflections' (or 'web of reflections') redrawn and adapted from van der Waarde et. al (2012, 11; see also (2018, 355).



shortcomings:

... Both circles and lines could be varied (to more accurately represent a single project.) Both patterns might oversimplify professional practice, and they might not be applicable to all graphic designers ... (van der Waarde 2018, 356).

If we return to Eames' diagram, we see that this Venn diagram lends itself to the flexibility and context-orientation that van der Waarde alludes to. As Eames notes on his sketch:

These areas are not static – they grow and develop as each one influences the others (Eames 1969).

Additionally, the Venn diagram elucidates Lentz et al.'s (2004) reference to the context of the domain and sector affecting which consideration take priority over others.

This research combined the approach by van der Waarde (2018) of representing multiple considerations and processes within design practice, and the approach by Eames (1969) that represents the flexing nature of design practice in particular contexts. Acknowledging that graphically representing processes and factors has limitations, as indicated above, the chart created for this research (see Section 5.9) represents design practice to:

- direct thinking (Twyman 1979);
- discover 'patterns, hierarchies, and causalities' (Frascara 2001, 169);
- provide a starting point for discussing processes within design practice (van der Waarde 2018, 356).

This section has summarised how design practice is made up of processes and considerations and that these can be represented in diagrams and charts. The following section outlines ways of finding out about design practice and explains the methods used in this research.

5.2 Methods for finding out about design practice

Existing research has explored design practice within different disciplines and using different methods, including:

- self-documentation (e.g., with information designers developing diagrams: Pontis 2012a);
- creating diagrams (e.g., with experienced information designers and students: Pontis et al. 2016);
- analysing discussions (e.g., among architects and clients: Oak 2011);
- analysing meetings (e.g., between architects: McDonnell et al. 2009);
- interviews (e.g., with graphic designers: van der Waarde 2009; 2018; with lay designers: Owens 2012).

Pontis (2012a) uses a ‘self-documentation’ package (see also diary studies: Bolger et al. 2003) whereby diagram creators record daily aspects of diagram creation whilst using MapCI Cards: ‘a collection of guidelines that make use of prompts and questions, in order to assist the conceptual design stage of diagram creation’ (Pontis 2012a, ii). These kinds of studies focus on a specific snapshot of document producers’ experience, whereas an aim of this research is to achieve a ‘bigger picture’ of considerations designers work within in the context of housing options and the third sector.

In a study about design processes used by students and experienced information designers, Pontis et al. (2016) ask participants to draw diagrams that explain their design processes. This method of communicating visually through diagrams is understood to facilitate thinking (Frascara 2001). As Frascara (2001) posits, ‘picture making’ (as in making non-verbal marks) ‘has been relegated to self-expression and recreation, while verbal language has provided the paradigm for thinking ...’ (165–166). It was acknowledged that mark-making to aid participants’ thinking about a ‘nebulous’ concept of design practice may be unfamiliar to non-trained designers. Consequently, asking interviewees to draw their design practices was not used in the studies for this research.

Analyses of discussions between designers and clients can elicit ‘stories’

about design practice (Oak 2011).¹⁶ Oak analyses conversations between architects and clients to reflect on how designers ‘comprehend and negotiate their own, and others’, perceptions as they work to create objects’ (211). Oak claims that the approach of analysing practitioners’ conversations differs from those which impose generalisations and categories to explain design practice. Practitioners’ responses are used to present a narrative of design practice that practitioners might recognise themselves. This research does not create a written narrative, but uses an adapted KJ method (Scupin 1997, 234) (See section 5.6.6) that uses participants’ own words to help develop themes within the data. Consequently, the themes form a ‘picture’ that could be recognised within the domain.

Analysing meetings held among designers can elucidate how designers approach projects. In studies exploring design practice in architecture design meetings, two projects were used as subject matter for designers to discuss (e.g., McDonnell et al. 2009). In his review of McDonnell et al. (2009), Lawson (2010) suggests that ‘these data [about design team meetings] give little insight into how such formal meetings relate to the rest of the design process’ (92). However, the scenarios did give an opportunity to understand how designers might approach design projects. This research took the opportunity to get a wide range of designer viewpoints about how they might approach a design project for housing options documents. Instead of asking designers to meet and discuss amongst themselves, individual interviews were held whereby designers were presented with two ‘design scenarios’ to prompt discussion about their approaches (see Section 5.6).

16 Oak (2013) discusses a ‘big story’ approach, focussing on a designer’s reflections about work, with a ‘small story’ approach, focussing on conversations that occur in practice-based settings, such as meetings. The two approaches provide different kinds of information. In a ‘big story’ approach, interviewees are recounting their experiences at a distance from the events being described. This might highlight how ‘subjectivities and personal experiences’ (Oak 2013, 187) impact the design of an object. A ‘small story’ approach is capturing experience in the moment it occurs. This research project aligns more with ‘big stories’ – insights are formed from designers’ memories of experiences about design practice. This is driven by an aim of understanding the bigger picture within the domain. This broader perspective can then be used to guide more specific studies that focus on ‘small stories’ within the domain.

The approaches in this research project used a semi-structured interview approach¹⁷ using interview guides that acted as memory prompts (Bryman 2016). The use of semi-structured interviews is in keeping with similar research into graphic design (van der Waarde 2009, 2018) and document design by lay designers (Owens 2012). ‘Design scenarios’ were used as ‘visual prompts’,¹⁸ akin to design projects used by McDonnell et al. (2009). Graphic means of diagramming were then used to synthesise and communicate the data.

Figure 5.1 illustrates the interview studies that make up the ‘exploring design practice’ layer of the research project:

- Study 3 – interviews with TSO document producers using semi-structured interview guide whereby insights were made into processes that are used and factors that influence the design of documents;
- Study 4 – interviews with trained designers using visual prompts to discuss design practice whereby factors were explored further with these trained designers to explore how factors might be considered.

The planning for, and findings derived from, each of the studies are explained in the following sections.

5.3 Interviews with TSO document producers about design practice

Study 3 aimed at understanding the context in which documents for housing options are produced within the third sector organisations.

17 These semi-structured interviews are similar to conversations. The term ‘interview’ implies that answers were provided to specific questions, whereas ‘conversation’ indicates an exchange of views and ideas. As mentioned in the Introduction to this dissertation, I used my own ‘etic’ understanding about design practice to shape enquiry. However, to make a distinction from methods that analyse conversations (e.g., Oak 2011), the term interview is used throughout this dissertation.

18 Törrönen (2002) discusses the use of stimulus texts in interviews as ‘cultural products’ that might elicit people’s views about values such as gender identification. My research is less concerned with the cultural significance of the visual prompts, and instead uses them to elicit people’s tacit knowledge about their design practice.

Following the initial visual analysis questions were identified and grouped into five broad themes:

- existing documents for housing in later life;
- how TSO document producers use their knowledge and skills of design;
- when and how decisions are made about organising words and images;
- how users are involved in document development;
- challenges that organisations face that affect design practice.

The specific questions are documented in the interview guide (see Appendix D5). The planning of, and findings from, the conversations with TSO document producers are discussed in the following sections.

5.3.1 Planning the interviews with TSO document producers

Staff from the five organisations discussed in Chapter 2 were contacted by email from January to April 2018, with requests to take part in interviews about design practice (see Appendix D1). Staff from the following organisations agreed to interviews:

- EAC;
- Care & Repair England;
- Age UK;
- Which?.

The interviewees were staff working in roles such as advisors and trained designers working as freelancers (see Appendix D2). An interview guide was created (see Appendix D5). The questions in the interview guide were based on the insights made about the use of words and images in the initial visual analysis (see Section 3.6). The questions were phrased as open questions (Gray 2018), rather than about specific aspects of the documents observed in the sample. This was to enable a broader discussion about the domain of housing options and allow for insights to emerge that may not have been identified during the initial

document analysis. The participants were given an information sheet and completed consent forms (see Appendices D3–4). The interviews were recorded and transcribed (see Appendix D6). The study was approved by an ethical approval process.

5.3.2 Analysing transcripts using simultaneous coding

‘Simultaneous coding’ was chosen to analyse the interview data to find out how staff approach the design of information, and whether there are major considerations that affect these processes (see Appendix D7). Simultaneous coding uses two coding methods side-by-side and is used when data might carry both descriptive and inferential meaning (Saldaña 2016, 94). The study data held both the description of activities as well as latent meanings about the considerations on design practice. Simultaneous coding can also highlight where there is a link between meanings, and was therefore useful to identify whether considerations come into play during certain stages of a design project. Extensive use of Simultaneous coding can be considered indecisive by the analyst and suggests an un-focused research purpose. However, for analysis of Study 3 data, it was necessary to uncover both descriptive and latent meanings, which contributed towards design practice and focus for further exploration with trained designers.

The two methods of coding used were Process coding and Concept coding. Through Process coding the analyst uses gerunds (-ing words) to identify action in the data (Saldaña 2016, 111). For this research, actions related to design practice were identified. Concept coding is used to identify large segments of data that indicate macro levels of meaning that are broader than a single action (Saldaña 2016, 119). In this instance the considerations that affect the design process were identified. For example, ‘printing out documents ourselves’ and the consideration of ‘keeping the costs down’. After coding, the actions and considerations were collated into a list. Table 5.1 lists the categories of

activities and considerations¹⁹ compiled after all interviews had been transcribed, coded, and listed (See Appendices D8–9).

The insights from third sector staff were organised into the categories of ‘activities’ and ‘considerations’ listed in Table 5.1. These have been collated from views across different kinds of organisations both super-major-sized and small-sized. Consequently, the picture of design practice is an amalgam of these experiences, recognising that some considerations may be more relevant to certain kinds of organisations than others. However, this amalgam of experiences provides a broad narrative of design practice in the domain from which to explore certain aspects further.

Table 5.1 The activities and considerations that TSO staff discussed being part of the development of housing options documents.

Activities	Considerations
Managing and marketing	Time
Collaborating with colleagues	Funding and budgets
Developing content	The third sector
Organising words and images	Other organisations in the sector
Using software	The organisation
Working with designers	Visual identity and public awareness of organisation
Involving users	Staff in the organisations / internal and external designers
	Procedures
	The kind of document and the purpose
	The sensitive topic
	Use of documents and users

5.4 Activities TSO document producers undertake when producing housing options documents

Through the coding process the activities were grouped into the following themes:

- developing content;
- organising words and images;
- using both word processing and design software;
- involving users;

¹⁹ The list of considerations was used to develop two design scenarios used in Study 4: interviews with trained designers (see Section 1.2).

- managing projects, budgets, time and marketing;
- collaborating with colleagues and designers (internal/external).

5.4.1 Developing content

Content is being developed from existing information and advice, and by researching other organisations and complex legislation. It is then rewritten in plain language:

And that [document] needed quite a lot of research, but you know, and it's also about how to, how to state things clearly that people will understand, because this is, well it was quite a complex thing ... So, trying to then put that into plain English so that people, and also pick out the relevant bits as well. (P2)²⁰

Additionally, content is created through talking with colleagues such as advisors who speak directly with users. This contributes a 'real-world' perspective on the content being produced:

... the local project workers are more kind of on the ground, so they have more, so a lot of the things that are put together are from research, and from talking to people and kind of thing, rather than actual knowledge of what's ... So, I can put something together and then someone will go 'oh no, it's not actually like, or that's a ridiculous thing to put because that doesn't happen in real life'. You know that kind of thing. (P2)

The development of content includes considerations of readability and consistency:

I think quite carefully about how readable it is. Whether we are waffling, using jargon, where there's something superfluous, how to make it as accessible as possible, given that ... it's often quite a complex advice area. (P6)

Making sure that it reads the same, in theory, each factsheet follows a certain rhythm. (P5)

20 Participant responses are labelled as P1–8. See Appendix D2 for list of participants.

5.4.2 Organising words and images

When addressing the organisation of words and images, document producers are considering the quantity of information using techniques, such as sub-headings and different kinds of content, to break-up large quantities of text:

... we're using non-numbered sub-headings as a way to break-up text without it having to be reflected in the contents page. (P6)

... we're looking a lot more about bringing people's case studies and voices into the guides more, kind of, littered, peppered throughout, rather than just having one double page spread 'my story' which might get a bit lost, you know having more quotes and some more images throughout ... (P5)

Additionally, images are used to engage users:

... instead of a heading and some text on a page I thought, we need to do something with this to engage the end user ... I went through and thought we'll change this into more pages, we'll spread it out, we'll get some pictures in here and break it up. (P8)

These aspects of 'good' document design whereby the organisation of words and images were considered integral to the usability of the document, perceptions of design as aesthetic were still evident:

I kind of wrote them ... in partnership with colleagues ... and then had them kind of 'prettied-up' (P2)

5.4.3 Using software

Microsoft Word is used to develop the content that will be designed using design software:

So we work in Word document form when we're drafting the guides, but then we get to the stage where it's pretty much ready to go into design and we work with an agency who have the set templates. (P5)

... when we're working in Word document form, we're still

thinking about the layout, we're still working to quite a strict word limit, and we're still thinking about the length of the guides. (P6)

It is also being used to format and produce factsheets:

The factsheets we don't have agency involvement, we work entirely from a Word template. We probably had agency or in-house involvement in designing the template in the first place. But now that it's created we have very little if any contact with whoever originally designed this, and we just work entirely from it. (P6)

Use of Microsoft Word templates means that non-trained designers can update documents more easily:

... you know, we don't need to go to a designer every time we need to update a factsheet or anything, that's all done in-house. Now that we've got that front-page template that can all just be done by me or whoever else. (P1)

5.4.4 Involving users

Users participate in the process of designing documents through formal and informal means. Formally, focus groups and bespoke user research are organised.²¹

So we did some focus groups on bereavement in December, which was, we almost put the guide to one side, and just, we didn't really want to, we just wanted to know what things did you want to know when you went through a bereavement, and what were you feeling, where did you seek information, and who did you speak to. Whereas some guides, we're going to some Alzheimer's Society service user review panel, so it panels the people who have dementia and you can kind of submit your resource for their review, and that's going to be very much around design and very little on content. So just kind of, does it, is it accessible? Is it dementia friendly? Looking at the kind of different aspects of the guides ... (P5)

21 TSOs have readers panels to review documents (Age UK 2017, 36).

... we ran some focus groups with the advice line in Ashburton and some local Age UK advisors, and it was more around how they see people using their guides and who they see using them. (P6)

Informally, users are involved through the activities of the organisations. For example, users' queries via advice lines and the monitoring of users' access to print and online information are ways that user needs are identified:

... throughout the year, those same advisors can also contribute ad hoc comments to a query log spreadsheet we have. If they've had a call, where the caller has said 'I've read your factsheet and I think this is incorrect' or 'it hasn't been helpful' or 'can you clarify this further' or where they've tried to address a caller's concern and they've found the factsheet either silent on the issue, or difficult to use. So, we're getting that constant feedback from them. (P6)

... clients will regularly get in touch ... saying they found it difficult to use, or that we've missed a piece of information, or that they'd appreciate clarification on something, or the inclusion of something ... So it is kind of built-in to the update process as set out in this production manual. But there's also scope for it to come to us at any point during the year ... (P5)

Document producers are also 'putting themselves into the shoes' of users when developing documents:

Yeah ... putting yourself into those shoes ... to try and get it right, think right 'what would I want to know?'. (P2)

Document producers are then deciding which feedback to use to improve documents:

... [feedback] will get sent down to us, and we'll consider whether or not we should make that update immediately or we should save it for the next time. ... (P5)

5.4.5 Managing projects, budgets, time, and marketing

TSO document producers are overseeing programmes of information

provision, organising marketing and promotion of the documents, organising the printing, and distribution:

... managing the stock and also marketing them, so it's quite a broad role. And then as well as our information guides, there's web content and kind of videos and web pages, online tools, so it's also responsible for all of those as well. (P5)

Additionally, they are managing budgets for example, print costs:

... [factsheets] are printed out ourselves. Even when we've gone to an external organisation to have them all printed up they are still just simple stapled, just to kind of keep the costs down really, because those aren't ones that are sitting in, you know, brochure stands or anything like that, they're sent out to people that we have spoken to. (P1)

This indicates that financial considerations are a factor in the print quality and channel used for documents.

Another aspect that document producers are managing is disseminating information in a timely manner, meaning that user involvement (see Section 5.4.4) needs to be considered early in a project:

...the signing-off of a document is often time-bound as we need to publish the information to be available at the right time. Therefore, user feedback at final design stage would need to be factored in to the process to make sure there is enough time to include this step. (P4)

5.4.6 Collaborating with colleagues

Document producers are collaborating with colleagues within their organisations and across the sector. This includes training sessions and providing advice to colleagues. They are working with both external (freelance/agency) and internal (in-house) trained designers and often commission designers through design briefs. These design briefs often include how the document producers want the document to look, structure, format, layout, headings, and providing content:

[TSO document producers are] working on the content and then setting out the structure the flow and how we want it to, you know, look. And what format we want it in. Do we

want it A4 or leaflet, or whatever? And then going to the designer and saying 'what can you do with this'? (P1)

Designers are then offering advice about document development:

I'm not sure if [the client] was aware at the beginning, I don't know. [The client] just wanted this online version, but I kind of said 'what happens if they want to print it out?' or whatever, or want another version, similar, but it doesn't have the interactive ... (P8)

5.5 Considerations TSO document producers address when producing housing options documents

Within the activities mentioned above document producers are also working within considerations. By coding the interview data and identifying categories, the insights suggest that these considerations stemming from the domain consists of three parts:

- topic: later life housing options;
- kind of content: information and advice;
- kind of organisation: third sector.

Within these three aspects of the domain document producers are considering:

- older aged beneficiaries;
- nature of providing information and advice;
- the way housing options are provided across the UK;
- time;
- users;
- purpose of documents;
- funding and budgets;
- stakeholders (staff in the organisation and external designers);
- the organisation and other information and advice organisations.

5.5.1 A topic associated with older age

The topic of old age was discussed in terms of use of images and the provision of information and advice. Images are sought from image banks that the organisations own; however, one participant noted:

... there is a certain delicacy about having older people when that photo was taken ten years ago. (P1)

This means that photo shoots are commissioned for new photographs if budget allows, or stock images are used. It is also considered important that:

... budget does have to be spent on those because it has to be just right so that people can relate to that. Quite positive images as well, and people in the context of their own home, real homes, where these people really lived, some realism into it. (D7)

However, the choice of image content is important to avoid misrepresenting old age:

... [the wrinkly hands campaign is] a picture of two wrinkly hands sort of holding hands, or shaking hands. And a lot of people are kind of like ... that doesn't ... sum up older people ... (P1)

... every kind of big retirement housing developer in their leaflets they've got, you know, two smiling happy older people ... 'isn't life fantastic' ... they're selling a lifestyle, they're marketing, and so OK that's fine. But it is a struggle. (P1)

... and what we struggle with is finding those that are not glossy and not very americanised images. We have to spend quite a long time going through until we find something. You put in different searches as well trying to get that right image. (D7)

There is clearly a balance that document producers are considering when choosing images for housing options documents. To avoid misrepresentation, images may not be used, or artwork and illustrations are used instead of photographs of people (See Figure 3.45, page 95):

... what you find is that the big advice organisations we do

tend to, in our more focused factsheets, whether that's us, whether that's Age UK, whether that's Independent Age. It's a more plain front cover. And it's almost saying 'no this is serious, this is something that you need to, this is not just a flippant marketing thing'. (P1)

The complexity of decision making and how prior knowledge of the topic can influence document production was also discussed by document producers:

... in my mind [a document is] there to clarify a situation it's to help give a straight forward ... answer, to sometimes a more difficult question. ... you've got to bear in mind things around the process of buying a retirement property, these are people that have probably lived in their house for the past 30 to 40 years, they've not moved house in that time, they don't know what's involved. Partly because the world has changed from 40 years ago, and you hear things over the garden fence, about 'so-and-so moved and it was a nightmare', or 'so-and-so did this and it was great'. (P1)

5.5.2 The nature of providing information and advice

In terms of imparting information about people's rights to services, document producers discussed how impartiality is balanced with a sense of understanding about difficulties:

... it's a rights-based document, that to a certain extent, it's just setting-out someone's entitlements under the law, but we're aware that people are having difficulty enforcing those entitlements, because statutory services are becoming quite gatekeepy, or are routinely making negative decisions, you know whether that's correct or not. So we want to reflect the legal position, the kind of this is how it should be going on, but maybe also give a sense of the difficulty someone might come up against trying to enforce those rights and how to manage those difficulties, with an awareness that there might be a lack of services available to support them in doing that. (P6)

... we are I think increasingly feeling like we have to reflect that we have an awareness there may be difficulties in [accessing services]. (P5)

This indication of understanding is balanced with presenting the reality of how options are made available to the public:

... you don't want to give the impression that somebody can just get this help, it's difficult because I suppose the local authorities or governmental bodies don't want it to be perceived as you can't get this help, because they want it to be seen that they can, but you need to come from a real perspective and say these may be there, but if they're not, these are others, so there's more information you are having to give. (P6)

5.5.3 The way housing options are provided across the UK

The national diversity of options is also a consideration within the topic:

... housing is very, in some topics is quite localised, particularly around social housing, different local authorities can set different policies on who gets social housing, which can make it quite difficult to write a national, or I mean it's not just national, also most of my housing factsheets have Welsh input too, so, national and also Welsh position. And other things like specialist housing for older people varies a lot from area to area, so it can be quite difficult to reflect that in a national factsheet. (P6)

There is often media attention on the provision of later life housing. This has potential to provide change, yet can have negative consequences on how people understand the domain:

I think it's only in recent years that it's really gained the media traction it has today, and that's generated a lot of interest and hopefully will lead to progressive changes being made. But at the same time, people can have a quite muddled view of the technical landscape. Some people know things like the names of certain tenancies, and they have a vague sense of the rights you have under them, but it's not that refined. And that can have negative consequences. So I've found that a challenge in training advisors say. Someone can appear to have quite a high-level of technical knowledge, can reel-off tenancy names and other jargon, but actually there's a bit of a muddled picture behind that. (P6).

5.5.4 User attributes

Document producers recognise the value of formatting content according to certain kinds of user needs:

... and it might be that someone can't cope at home anymore, so it's really, it's quick and they have to sort something out quickly. And if that is the case, and they've picked-up this guide, then they probably don't want to read through everything, they just want to know 'tell me what to do'. So that's something we've been testing with the LGBT guide, so rather than these 'what next' [indicates to text at end of section within guide] we've moved to boxes at the end of sections that say 'for more information' 'who do I contact' 'what do I do next' kind of thing. (P5)

This demonstrates that document producers are considering the structure of content and the way it is formatted for particular reading strategies. Additionally, larger TSOs are exploring the advantages of the online channel in meeting such needs:

... we're definitely leading towards more action-led content on the website. Potentially on the website you're a click away from actually sorting out that action ... So that's been a bit of a test ... but if that works well and fits with our templates and the website, and with online tools, then it would be something we cover everywhere. (P5)

The use of language is considered regarding the kind of users for example, the use of 'later life' rather than 'elderly'. Also, printed documents are considered an important aspect of information provision for this user group. However, document producers are mindful of the number of pages users will need to print themselves at home, and therefore mindful of fitting content onto one page. The kind of user may affect print quality. For example, if a user is already in contact with an organisation, documents that are produced simply, such as printed on sheets and stapled, are considered suitable. Consideration of a beneficiaries' circumstances are important, not just providing specific advice about one need.

Weighing-up user needs and commercial implications were also discussed:

As a graphic designer you are in the business of communicating things out in the best way possible for the end user I suppose that is your training as a designer ... But when you're working in a commercial environment it has to do the job in the best way it can. So, I think that ... you have to have that understanding I think and be mindful of that, I think it's quite important. (P7)

5.5.5 The purpose of documents

The approaches to different kinds of documents were discussed. Guides provide overviews of the domain, and they are often the first port-of-call that then sign-post to factsheets. Factsheets specialise in a topic, and are therefore mainly text-based. Document producers are thinking about the organisation of content in factsheets differently than to guides:

... you will think about the length of the factsheet, but not in the same way, where it feels like you're working within a template and something must fit on a certain page, and text box must go there. We don't really have those same considerations. ... It's much less visual. We do have the odd text box, although we've tried to minimise those ... we want to make sure you can take in everything you need to take in as seamlessly as possible, and you don't miss anything. And text boxes can disrupt that sometimes. But they can also be useful, there are various ways in which they can be useful, but we don't have images. (P6)

The kind of document also influences the terminology used:

... the HOOP tool is an information and advice tool, it's a self-help tool, so you're ... already going through this information yourself, and we are posing it in such a way that we're saying, look we'll help you identify support that's available for you in the area. And that's partly because it's true, it's a very practical tool we're identifying local services ... So, saying support feels right, because we are identifying that extra, you know, that practical assistance. (P1)

5.5.6 Funding and budgets

Limited resources were discussed as being a challenge. These include a responsive rather than anticipatory approach to providing information:²²

It's partly resourcing again, you know challenges, we would love to anticipate people's needs and put out things that people might not need, but we think that a few people might. But as it stands, we have to be responsive, we just have to react to what people are doing and what they are needing. (P1)

Budget and quality of information are two considerations that are being balanced:

... whilst I'm updating the new Word document, and thinking how is this going to fit, where's it going to save space. So yeah, which then can sometimes lead to us cutting-down, especially in terms of saving money on print runs, so I think that ... it can just cause a bit more of a headache when we're thinking okay, we want to cut this down but we don't want it to affect the quality of the information, so how do we manage that, so it's finding a balance. (P6)

The way initiatives are funded is another consideration. This was noted by the requirement of the funding for an initiative for the use of a blog to record the initiative activities. The blog platform was then developed into a website to provide information to the public.

5.5.7 Stakeholders

Responses to how documents are designed included an unprompted reference to genre to explain decisions made about page layout. For example, one participant explained how:

... we stuck with columns because it's slightly different, because it's more of a newspaper style, because it seems to

22 This was mentioned by staff working in small-sized rather than super-major-sized TSOs.

break things down into bite-sized chunks a little bit easier. It's quicker to read through sometimes for people. And it's still a very familiar style to people, they know how to read in columns. (P1)

This association concurs with existing studies about how people use genre associations to explain their judgements about documents (Moys 2014) and that:

... in the absence of training, or theoretical knowledge about document design, the genre perspective enables document producers to make use of their personal experience and cultural awareness. They can identify common document types which most closely match the needs of their own users, and use them as a starting point for their document transformation (Waller et al. 2016, 14).

However, this response also demonstrates that non-trained designers use stylistic inferences about genre to make decisions about the organisation of text. This concurs with research that 'unwritten rules' are 'followed because they are identified as a part of a particular tradition' (Walker 2001, 84). For this participant, the conventions associated with the newspaper genre are used as a framework to make decisions about document design and how users are expected to use the document.

5.5.8 Third sector information and advice organisations

Partner organisations are also being considered according to how they will be included in the design of documents:

... it [section of document] can be changed up, it can, you know, the text on there can be set to anything that the local partner wants to push. (P1)

TSO document producers reported having procedures and shared resources across the organisation that enabled information transfer between departments, such as a log query that was used between the advice line and document producers. Procedures included using the NHS standards, a process manual adapted for use within the

organisation, and an annual production schedule that organised the development and production of documents.

Smaller organisations reported that the visual identity of the organisation was something that they struggled with:

... identity has always been something that we've struggled with. Partly because we've got EAC, we've got FirstStop, we've got HousingCare which is what most people, how most people come across us. And then we've got HOOP as well, as kind of almost a different thing. So we can be different things to different people. (P1)

Often organisations are different things to different people and they struggle with public awareness of their offering. However, the perception of 'branding' was putting a logo on a document, rather than a wider concept of visual identity and brand:

So, obviously we're producing these and our name and our logo is on it and through it. (P1)

... the only thing that we did when we kind of re-branded it was, I say re-branded, just put this logo on. (P2)

The organisation's approach to information provision impacts how documents are formatted. In larger organisations, it was noted that a 'mobile first' approach was adopted and drove how document producers approached information provision. Larger organisations reported the consideration of nudge at organisation-level. In smaller organisations, it was noted that it was easier to have clear goals about information provision, and thus the process of developing a document could be more straightforward than in larger organisations.

In terms of the third sector, participants noted that there is a lack of a joined-up approach for providing information and advice to the public.

... the lack of a joined-up approach can lead to a lot of information being provided to the public. This can lead to someone who requires information needing to look at all available information and weigh-up what is appropriate for them. (P4)

The third sector more broadly presents budget-related considerations for document producers. TSO document producers reported that as funding shrinks they are less able to help through advice services such as telephone advice lines. This means that greater importance is placed on documents to act as tools for people to think through options themselves. This involves not only shrinking funding within an organisation but across the sector. A lack of funding means that documents are often printed simply as stapled documents to keep costs down. Documents are often provided as PDFs as this is considered to be less resource-intensive. Limited resources also impact the kinds of images used, as often there are not large budgets for photo shoots for each document. Additionally, certain kinds of digital formats, such as apps, are considered to be more expensive than using existing websites. The use of trained designers is also a consideration as there are cost implications for using this resource.

The skills of document producers, although not related to document design, were discussed:

I find it very difficult to comment as a peer reviewer on PDFs versus Word documents. Sometimes we do need to make changes at the eleventh hour once it's gone to PDF. (P6)

From the analysis of TSO document producers' insights, this dissertation posits that a domain in which a document producer is working is made up of at least three connected aspects. For the domain of later life housing options the three aspects are: the topic (later life housing options); the kind of content (information and advice); and the kind of organisation (third sector). By visually representing the aspects of the domain, considerations can be mapped and demonstrate how considerations connect with each aspect of the domain. For document producers in the domain of later life housing options, the considerations being addressed during design of documents include: sensitivity of topic, the way options are provided in the UK, the kinds of users, time, purpose of documents, nature of providing information and advice, funding, stakeholders, and other information and advice organisations. These considerations were explored further in the interviews with trained designers, discussed in the following section.

Key to activities

- developing content
- organising words and images
- using word processing and design software
- organising the channel/format of document
- involving users
- managing projects and marketing
- collaborating with colleagues and designers (internal/external)

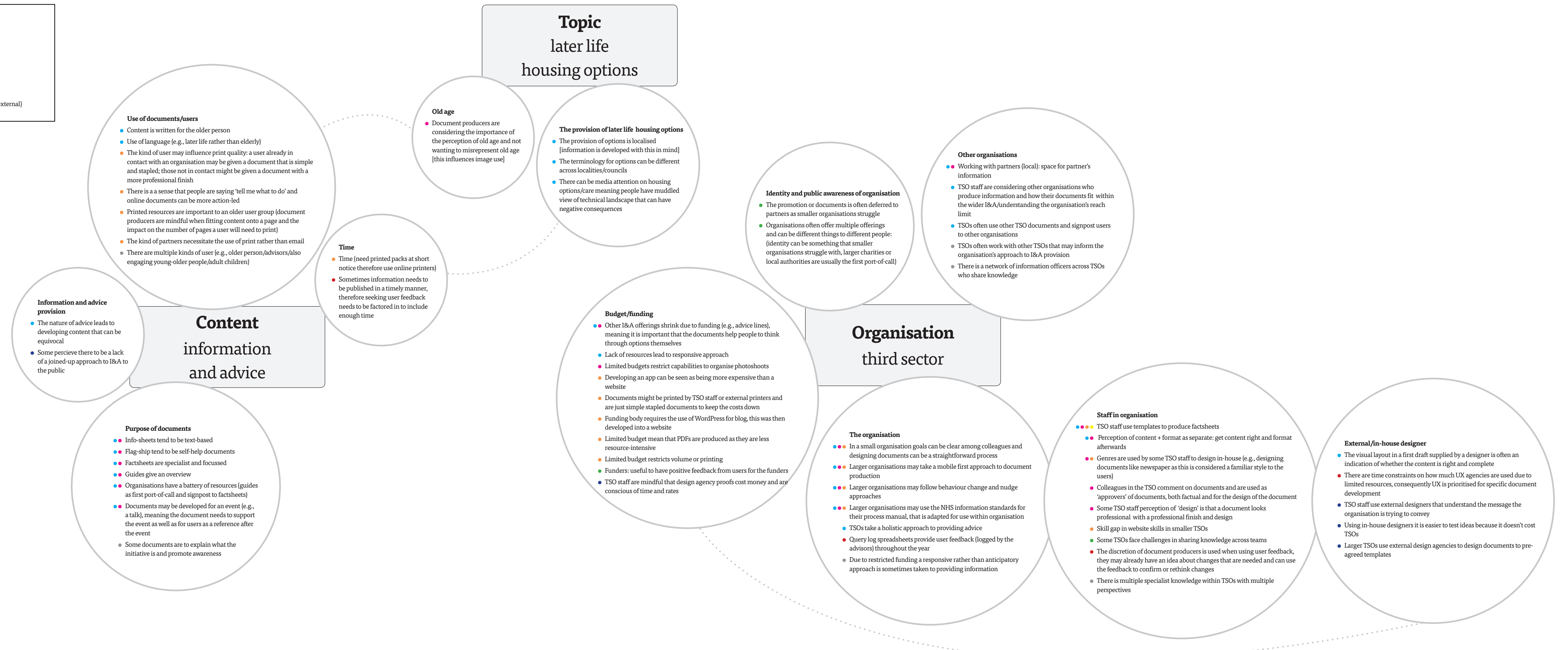
Figure 5.9 The visual representation of TSO staff activities and considerations made from insights during the study.

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To continue reading subsequent pages it is recommended that the zoom is set to 100% before continuing.



5.5.9 Study 3 chart: TSO document producers

To aid further understanding of TSO document producers activities and considerations when producing documents of later life housing (discussed above) a chart was developed (Figure 5.9). The techniques used were:

- use of circles to enclose considerations and activities;
- use of overlapping circles and connecting lines to indicate connections between categories of considerations;
- use of list format to display considerations and activities;
- use of colour coding to identify the kinds of activities.

An advantage to using these techniques was that during the process of grouping the considerations into circles, three groups formed that indicated there could be three aspects of the domain of later life housing options:

- content;
- topic;
- sector.

This supports van der Waarde's comments that development of diagrams can be used whereby:

Both circles and lines could be varied to more accurately represent a single project (van der Waarde 2018, 356).

In the case of the chart for TSO document producers, the circles and lines were used to map out the three broad aspects of the domain relevant for design practice.

A limitation to the techniques used for the Study 3 chart were that:

- the circles suggested neat compact areas that didn't demonstrate the overlapping of particular considerations;
- the connecting lines did not display the interconnectedness of considerations (e.g., where considerations might be associated with several categories).

An advantage to the techniques used for this chart were that:

- categories of considerations could be mapped onto the three identified aspects of the domain;
- colour coding facilitated the identification of particular activities that were impacted by the considerations.

These observations about the techniques used influenced the approach to developing the chart for trained designers (see Section 5.6.9). The chart helped towards discussing the activities and considerations TSO document producers are working with, as discussed in the following section.

5.6 Interviews with trained designers about design practice

The insights from third sector staff indicated considerations relevant to design practice within the domain of later life housing options and the third sector. To explore how trained designers might work with these considerations, semi-structured interviews were conducted with nine trained designers (see Appendix E2).²³ To encourage reflection about the considerations highlighted in Study 3 (interviews with TSO staff), ‘design scenarios’ were developed to use as visual prompts during the interviews with trained designers.²⁴ The study was approved by an ethical approval process. The planning of the interviews and development of visual prompts are discussed in the following sections.

5.6.1 Selecting participants

A pilot interview study and a subsequent full interview study were conducted. Interviewees for both were selected through purposive

²³ Four trained designers participated in a pilot study (see Appendix E1).

²⁴ Additionally, a table of design processes was used as a visual prompt in the pilot study (see Section 5.6.4).

sampling.²⁵ They were contacted through those known to me, those already interviewed in Study 3, and through contacts in the third sector.²⁶ The criteria for the participants were:

- formal training in a design discipline;
- at least 3 years professional design experience.

All but one participant had considerable experience in design (3–28 years),²⁷ meeting the criterion of at least three years trained design experience. Each participant was provided with an information document (see Appendix E3) and completed a consent form (see Appendix E4). To gather as diverse a set of views as possible, as I continued to contact designers I selected those who worked for a different design domain or design specialism than those already interviewed. For the full study I introduced insights from designers who had skills in user experience (UX) and digital design.

All interviewees were provided with an information sheet about the research and completed consent forms. Semi-structured interview guides and visual prompts were used in both the pilot and full study. The development of these are discussed below.

5.6.2 Developing an interview guide

The interview guide included the broad research questions, questions to ask interviewees about their own design practice, and then an invitation to respond to the design scenarios about designing in the domain of later life housing options.

25 Purposive sampling (Gray 2018, 215) involves a degree of researcher judgement about who will be interviewed, and may impose a degree of bias. I deemed it a suitable approach for the purposes of this exploratory research to gather insights into design practice and in determining the effectiveness of the method to elicit tacit knowledge. I acknowledge the need to be mindful about not claiming generalisations from the data.

26 This way of recruiting participants for further studies is known as ‘snowball sampling’ (Gray 2018, 220).

27 The designers D3, D4, and D5 work as a team within an open office and were interviewed as a group. Prior to the interview it was understood that D4 was an intern. During the interview it was clear that they did not fit the experience criterion of three years’ experience. Their data have not been included in the results.

The guide used in the full study (see Appendix E6) included three changes compared to the pilot study (see Appendix E5). Firstly, an additional question was included to find out the kind of work designers engaged in their professional practice, to give context to their responses. Secondly, the design briefs and list of considerations were presented together as scenarios to the designers, rather than as separate documents. Thirdly, designers were asked ‘what factors might affect your design processes in the scenarios’, to encourage more targeted responses about the domain.

5.6.3 Developing design scenarios as visual prompts

Within the field of communication design a project is often initiated by a design brief, where a client outlines to a designer the requirements for the work. These are often accompanied by example documents, especially when a project is to develop or review an existing document. When working on this design brief a designer will also consider the context in which they are working (e.g., budgets). To simulate the beginning of a design project the interviewees were given design briefs, existing documents, and an outline of the context. These are called ‘design scenarios’ in this dissertation.

Two design scenarios were created based on the insights from Study 3 and design briefs provided by third sector organisations. Scenario A was based on a design brief and insights about a super-major-sized organisation (labelled as ‘large’ to indicate this organisation was larger than the organisation in scenario B). Scenario B was based on a design brief and insights about a medium-sized organisation (labelled as ‘small’ to indicate it is smaller than in scenario A). The scenarios included a design brief, existing documents (where appropriate), and a context. The design briefs and existing documents were sourced from third sector organisations. The context included a set of considerations that were developed from Study 3 insights about design practice in the domain. These scenarios acted as prompts for designers to discuss how they might respond to design briefs for housing options documents and work within the set of considerations.

It was clear that responses to scenarios would be affected by viewing the previous scenario. To evaluate whether this had significant effects on the responses, during the pilot study the interviewees were given the design scenarios at different times (see Appendix E1). After analysing the transcripts from the pilot study, no major difference was identified. Therefore, the design scenarios were presented to interviewees in the full study in the same order (scenario A then scenario B) (see Appendix E2).

5.6.3.1 Design briefs

The design briefs were examples of real projects that third sector organisations had worked on previously. They were sourced from organisations that had taken part in Study 3. The briefs were anonymised and labelled ‘Design brief A’ and ‘Design brief B’. Design brief A was written at the start of a project to produce a new booklet about housing options (see Appendix E10). Design brief B was a request to update an existing leaflet about housing options (see Appendix E11.). Both design briefs were reformatted to standardise the document format and to remove references to the organisations.

Ideally, more than two design briefs would have been sourced so that I could critically choose one brief that represented a typical example. However, limited access to additional design briefs hindered gathering a larger collection. Nevertheless, the design briefs sourced provided two different perspectives from the third sector and were considered suitable to use as they:

- had enough detail to give the interviewees content to consider;
- were succinct enough to use in an interview situation with limited time;
- offered a chance to compare responses to two different kinds of brief (the brief itself being a potential influence on design practice).

The briefs used in the pilot review were heavily edited to reduce the amount of reading the interviewees were required to do (see Appendices E7–8). It was clear from the pilot study that the interviewees needed more information about the project that had been redacted for

the purposes of the study. In the full study information that had been redacted from the briefs was added (see Appendices E10–11).

5.6.3.2 Existing documents

When assessing a design brief, a designer is often using prior knowledge of the client's work or the sector in which they will be working. The design briefs were accompanied by existing documents. This evolved during the full study, where it became clear that having a previous document to refer to is important when designing a new document. Where possible, the organisation's name and logo were removed from the existing leaflet and booklet. Interviewees were informed of these changes.

5.6.3.3 Context

Each design brief was accompanied by a context that gave information about the client, the project title, and a list of considerations that the designer would need to take into account when approaching the design project. The list was compiled from key insights from Study 2 that applied to a super-major-sized TSO (for Design brief A) and medium-sized TSOs (for Design brief B). The considerations in the list represented those that were associated with the organisation and the third sector, and those relevant to the users. To make the scenario manageable to read within an interview situation, the intention was to represent considerations from Study 2 as bullet points.

5.6.4 Developing a table of design processes as a visual prompt

In the pilot study and first two interviews of the full study, a visual prompt – a table of design processes – was used to gain insights into how published processes compared with designers' practice. The design processes were compiled from a literature review of design processes related to information and graphic design. See Appendix E9.

The table was used in the pilot study and for the first two interviews of the full study. Insights during the two full study interviews were comparable to those made in the pilot study: no new insights were given. Additionally, insights that were more relevant to the research focus about housing options were provided by designers whilst using the design brief and scenario documents, rather than the table. Consequently, I decided not to continue using the table in further interviews, and instead concentrated on responses to the design scenarios.

5.6.5 Transcribing the interviews

The interviews were audio recorded and transcribed into Word documents. Each interview was transcribed verbatim; non-verbal cues were not included. The pilot study transcripts were formatted as per Study 2 transcripts (see Appendix E12). The full study transcripts were formatted to aid the extraction of labels during the adapted KJ method of analysing the interview data, see below (See Appendix E13).

5.6.6 Analysing transcripts using an adapted KJ method

Saldaña (2016) outlines several methods for coding qualitative data, and Process and Concept coding were used to analyse the interview data in the Study 3 with TSO document producers. Saldaña (2016) terms such methods ‘Elemental methods’ that provide focussed filters and produce a foundation for future coding (Saldaña 2016, 97). When approaching the data analysis for Study 4, a more inferential and visual analysis method was adopted, namely the KJ method.²⁸ Firstly, this allowed concepts to emerge and connections to be made between design activities and influencing factors that result from the considerations being made. Secondly, it led to a visualisation of ‘a design space’, assisting identification of connections between influencing factors and

28 The KJ Method was chosen for its greater inferential process compared with ‘traditional’ coding methods. However, some structure was added to the adapted KJ Method, as discussed in Section 5.6.6, page 168.

actions of designers in relation to these factors. This section describes an adapted KJ method used to analyse the data from Study 4 with trained designers.

Originally developed by the Japanese anthropologist Jiro Kawakita, the KJ method is a method for organising and analysing data (Scupin 1997, 234).²⁹ The term ‘KJ Method’ applies to a four-step research approach, as well as a method of data analysis. Holistically, the four parts of the KJ method offer a way of gathering and organising data that can reveal themes within a group of people’s ideas and experiences about a phenomenon. Throughout this dissertation the term ‘KJ method’ is used to refer to a method of data organisation and analysis, not the four-part methodology.

Since its development by Kawakita, the KJ method has been adapted and developed for use in other disciplines, including design research.³⁰ For Buur et al. (2000) the KJ Method inspired the development of the ‘Video Card Game’ technique, used with design teams when developing products. Pontis (2019) advocates the use of ‘affinity diagrams’ (151), an adapted form of the KJ Method, when analysing interview transcripts. The Method is also used by human-centered design teams to develop digital products (18F Methods n.d.). For my research, the KJ Method offered an additional benefit of providing a visual organisation of the data, contributing towards visualising a space of design.

The original KJ method for data organisation follows four main steps (Scupin 1997):

- 1 Making labels that each carry an idea about the phenomenon being researched;
- 2 Clustering the labels into meaningful groups and naming the themes that unify them;

29 The original KJ method is outlined in Kawakita’s 1986 paper, in Japanese (Kawakita 1986). To gain an understanding of the original method, I reference here the English paper of Scupin (1997).

30 Other disciplines using the KJ Method include business and innovation settings (Silverstein et al. 2012, 195–8), and gerontology (Fukui et al. 2010).

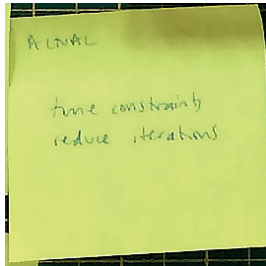
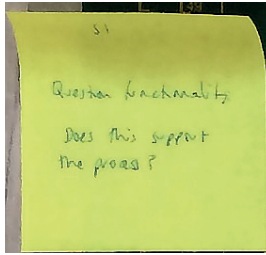


Figure 5.10 Hand written labels created in the pilot study.

- 3 Making a chart³¹ that represents the themes and the connections between them;
- 4 Writing (or verbalising) an explanation of the chart.

When organising the interview data for Study 4, I followed steps 1–3 and consider Chapter 6 of this dissertation to be the written explanation of the themes collated with the findings from the other three studies of this research. Additionally, my analysis steps are akin to Pontis (2019) rather than strictly following the original steps as outlined in Scupin (1997), although I act as a single analyst, rather than using a group setting.³² (See Appendix E14 for an example of a chart made during the pilot study).

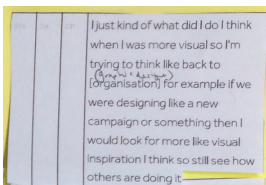
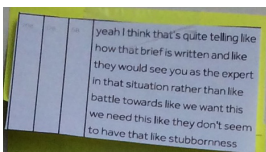


Figure 5.11 Printed extracts of transcripts as labels in the full study.

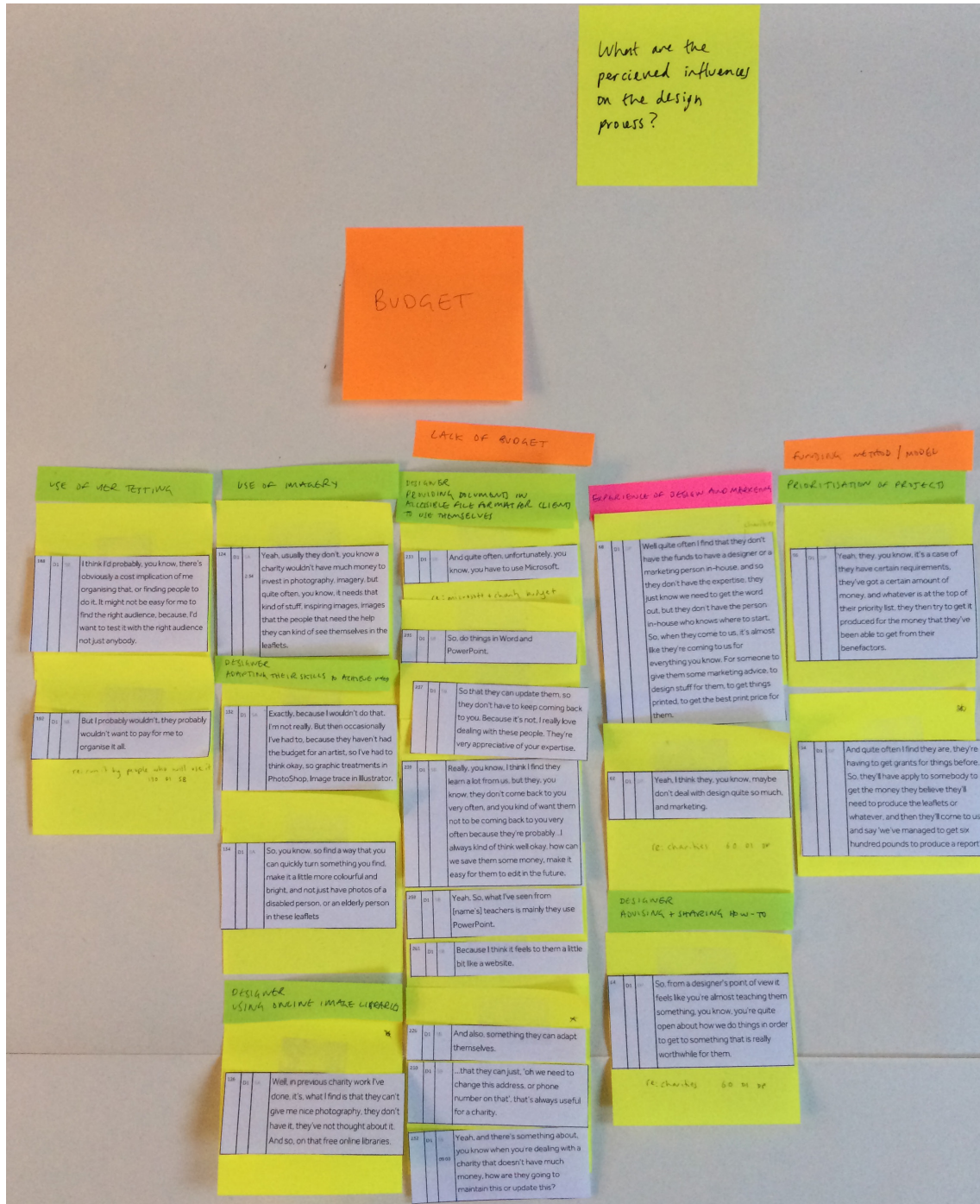
Another important departure from the original KJ method in this research is the point during the study that the data were organised. Commonly, the KJ Method is used after all data have been collected. For the pilot study for Study 4, I followed this format, organising the data from each interview after all four interviews were complete. For the full study I analysed the interview transcripts after each interview, before all interviews were complete. This change helped towards a greater awareness during each subsequent interview, both about the themes already discussed by designers and any new themes that had not yet been mentioned.

A weakness of analysing interviews individually is that subsequent interviews were biased by an awareness of themes from other interviews. However, the use of an interview guide and visual prompts were retained across interviews and the interviews were led by the interviewees' responses, so bias was reduced. Additionally, each interview was analysed independently without sight of the analysis of earlier

31 'Chart' is used in the discussion about the adapted KJ method used to analyse data in Study 4, as this is the term used by Kawakita (1986) in the original KJ method (Scupin 1997).

32 Pontis (2019) discusses the use of affinity diagrams as a group activity. Studies that use a single analyst include Tagaki (2015) who acted as a single analyst, and Norikoshi et al. (2018) who used a KJ Method expert.

Figure 5.12 Clusters of labels created during the full study.



interviews. The following sections outline the way I organised the interview data using an adapted form of the KJ Method.

During the label making step relevant thoughts about the phenomenon being explored are written onto cards (Scupin 1997, 235). In my pilot and full studies, I extracted ideas from the interview transcripts, and placed these onto labels.

Originally, in the pilot study, my approach to extracting ideas was to have as little structure as possible whilst using the KJ Method. This was in keeping with the ‘experiential and intuitive’ nature of the overall KJ Method approach (Scupin 1997, 236). When creating the labels in the pilot study, I read the transcripts and extracted ideas that related to the overarching topics of the research: ‘design practice’ and ‘influences on design practice’. The ideas were hand written onto self-adhesive labels³³ (Figure 5.10).

I reviewed this process at the end of the pilot study to consider the effectiveness of the method. I noted two weaknesses with the process:

- The words on the labels were my interpretations of the designer’s ideas;
- Many of the ideas on the labels were vague and unspecific, making identifying themes problematic.

In the full study I addressed these two issues. To address the first issue of analyst interpretation, rather than hand writing the ideas onto self-adhesive labels I printed out the interview transcripts (that had been reformatted to aid label creation, see Appendix E13) and cut out sections that represented relevant ideas (Figure 5.11). By using the printed transcripts rather than hand written labels, the context of the response and the interviewees’ words were preserved.

To address the second issue and aid the extraction of ideas that had greater relevance, and to identify themes, I used the principle of the

33 Also referred to as ‘paper notelets’.

Five Ws + One H method. Pontis (2019) advocates the use of this approach to code data before organising data using the KJ Method. The approach involves asking the data who, what, where, when, why, and how. My research is interested in the ‘what’, ‘why’, and ‘how’ aspects of design practice, and therefore what, why, and how questions were used. Rather than code the transcripts before data organisation, I used the following questions when extracting relevant ideas from the interview transcripts:

- What are the activities of design practice?
- What are the perceived influences on design practice?
- Why do the influences occur?
- How do the influences affect design practice?
- How do designers work with the influences on design practice?

During the label making stage of the full study, the labels were organised according to these five questions. (See Figure 5.12 of an extract of a paper chart, and Appendix E15 for a full chart).


After the labels are created they are grouped into ‘clusters’ (Pontis 2019, 152).³⁴ Clusters are groups of labels that refer to similar themes. In this part of the process, Scupin (1997, 236) suggests that intuition rather than logic should guide the grouping of labels. Conversely, I would suggest that inference is being applied at this stage, inferring broader themes from a designer’s specific design experience.

Once the labels are grouped into meaningful clusters a theme is assigned to each cluster. During this stage of data organisation, several clusters might be combined into one theme, labels might be moved to another cluster, or labels duplicated so that a label appears in more than one cluster.

34 For the purposes of my research I use the terms labels, clusters, and themes. The original KJ Method uses labels, teams, families (Scupin 1997), perhaps using terms that relate to human activity and the method’s roots in anthropology.

Figure 5.13 A chart visualising interviewee insights from the pilot study.

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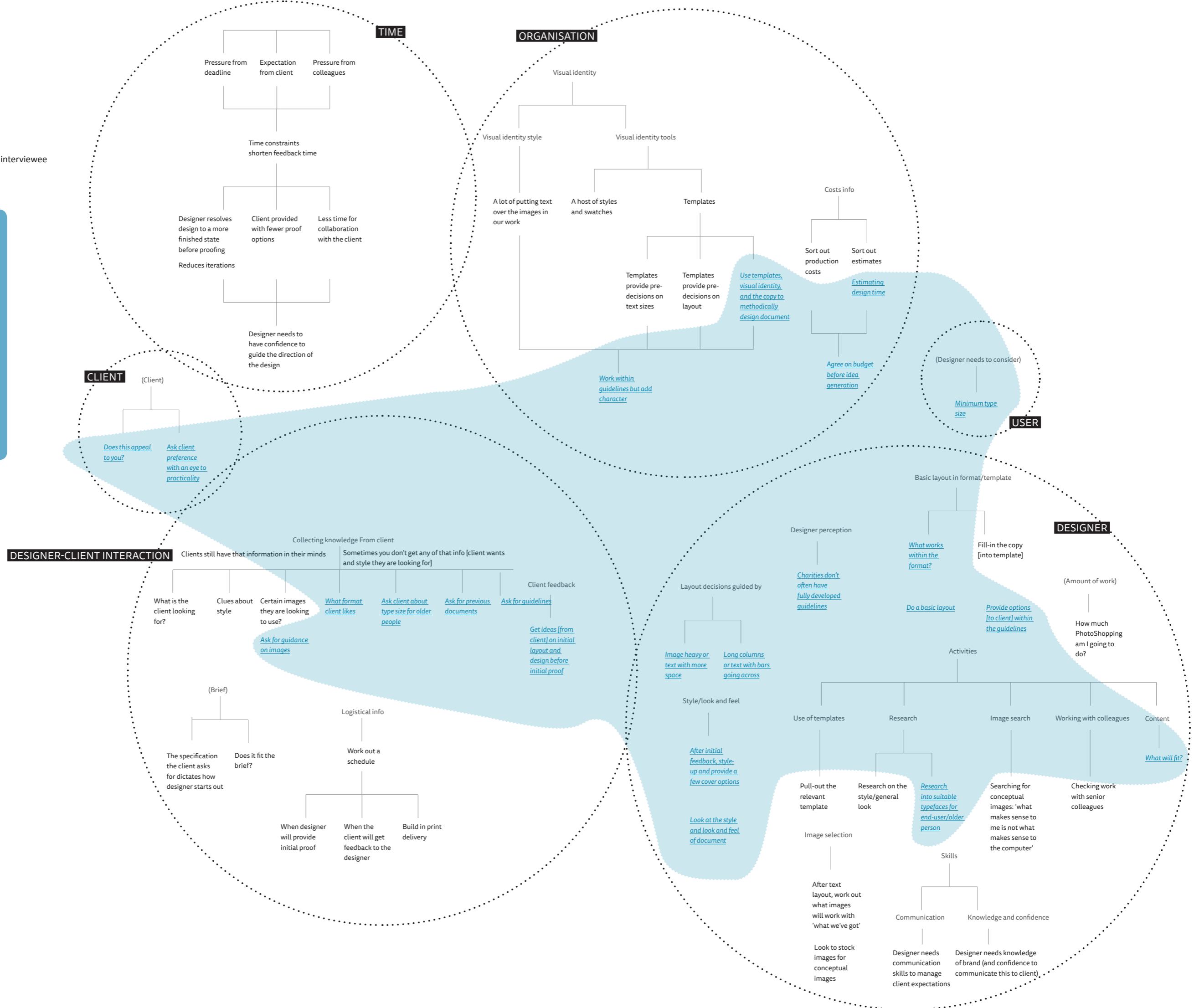


Figure 5.14 Digitised version of labels made from interviewee insights from the full study.

D1 | Information designer | 23 years experience

Designs for commercial companies and charities
 Type of work includes adverts, brochures, leaflets, reports, and websites

Key:

phase in design practice

theme

cluster

Designer's own process

Scenario A

Scenario B

Designer's process outcome

Scenario A outcome

Scenario B outcome

Designer's process outcome inferred

Scenario A outcome inferred

Scenario B outcome inferred

PDF guidance

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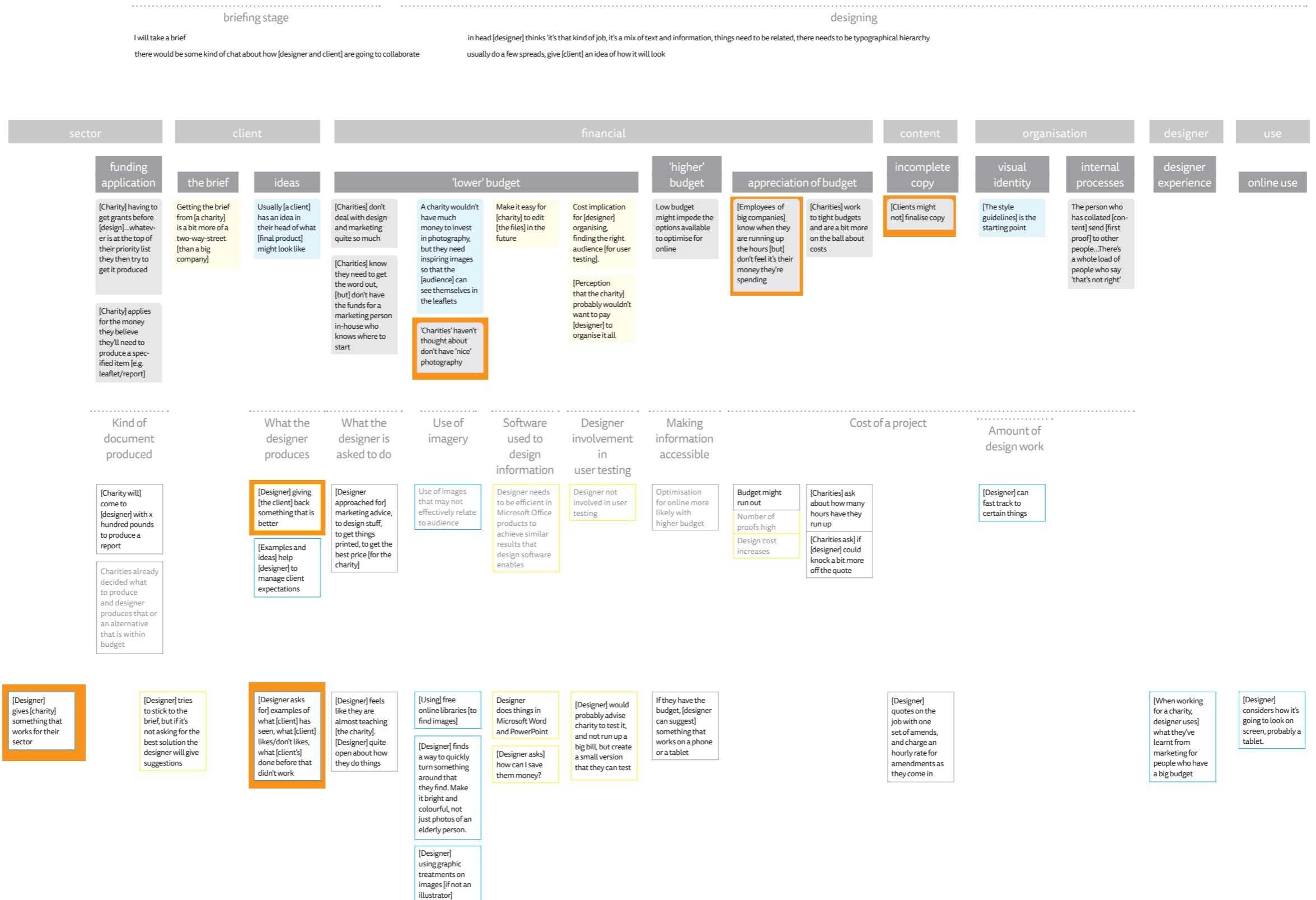
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What are the activities of a design process?

What are the perceived influences on the design process?
 +
 Why do the influences occur?

How do the influences affect the design process?

How do the designers work with the influences on the design process?



The original KJ Method suggests having no more than ten themes. Pontis (2019) advocates four to six themes. During my study I allowed a maximum of ten themes so that nuances in large themes were maintained. For example, the theme of a 'financial' consideration on design practice is present in every interview transcript. Rather than group all into one large theme titled 'financial', I separated out the labels into clusters that represent more specific themes. This meant that ideas about the financial consideration on design practice appear across themes.

In the original KJ Method, Scupin states that the chart is a sketch that represents patterns found in the labels and includes arrows indicating cause and effect relations (Scupin 1997, 236). The chart making for this research consists of digitising the labels to produce charts of each interview, and then combining these into one chart digitally. During this collation and digitisation, labels continued to be re-clustered, amalgamated where ideas were the same, and theme names were revised. The digitised charts developed for the pilot and full studies of Study 4 are discussed below.

5.6.7 The pilot study charts

In the pilot study the charts created are similar to those of Eames' diagram, whereby considerations are organised as a wobbly Venn diagram and a 'space of design' is indicated where the areas of these considerations overlap. Figure 5.13 is a sample of a pilot study chart.

In these charts, data related to design practice are grouped into circles and labelled with relevant themes (e.g., 'time'). Items of data that relate to a response given by a participant when discussing the design scenarios are depicted in blue text. These data are positioned in the chart so that an area can be highlighted. The data not in the blue 'space' relate more to the interviewees discussion of their design practice in general, while the data in the blue 'space' relate more to the interviewee's response to how they would work within the domain of housing options. What this kind of chart is unable to show effectively are processes within communication design

practice that are integral to the success of providing effective information for housing options. Thus, the charts for the full study were altered to display more than just the considerations relevant to the domain.

5.6.8 The full study charts

Figure 5.14 is an example of a chart made for one set of interview data in the full study. To give more structure to the charts in the full study, the questions that were incorporated into the adapted KJ Method (see Section 5.6.6), are used to organise the data. The 'labels' are organised into:

- What are the activities of a design process?
- What are the perceived influences on the design process? Why do the influences occur?
- How do the influences affect the design process?
- How do designers work with the influences on the design process?

The labels are colour coded. Blue and yellow are used where participants responded to the design scenarios A and B respectively. Grey and white are used where participants discussed their own design practice. This is to identify aspects of design practice that are particularly relevant to the domain of housing options and the third sector. Instead of organising the themes into overlapping circles (as per the pilot study charts, see Figure 5.9) the labels are positioned horizontally (see Figure 5.14).

To address the silos issue, the approach returned to Eames' 'areas' that overlap. A collated chart of interview data from trained designers was created in which:

- labels that denoted the same considerations were merged into one label;
- labels that were associated with general design practice but useful to build a picture of design practice were included but made transparent to 'knock' them back;
- labels that indicated activities that were specific to their experience, e.g., 'usually they're not that organised' regarding clients that the trained designer worked with day-to-day;
- labels that reflected a designer's bias, e.g., 'lack of trust' in client

In this collated chart, words of the trained designers were paraphrased or made clearer. For example, concerning the use of accessibility guidelines that instruct that text should be at twelve point, a designer mentioned: ‘You often get people who say “it doesn’t look very nice now, why is it that many pages?”’. This was shortened to ‘the visual interest of the document might be affected’ and ‘the page extent might increase’.

The full chart demonstrates two main things. Firstly, by grouping ideas into themes, the size of each theme indicates where designers spent most time discussing aspects of design practice. Secondly, the use of blocks of blue that overlap each other indicate where particular considerations overlap and are pertinent to design practice within the domain of housing options.

In the charts for trained designers, the use of design software was important for keeping a record of the kinds of responses. In each KJ chart label the time at which the response was made was recorded. This meant that each response could be mapped onto whether the participant was referring to:

- their own design practice;
- design scenario A (design of a guide from a super-major-sized TSO);
- design scenario B (design of a self-help document from a small TSO).

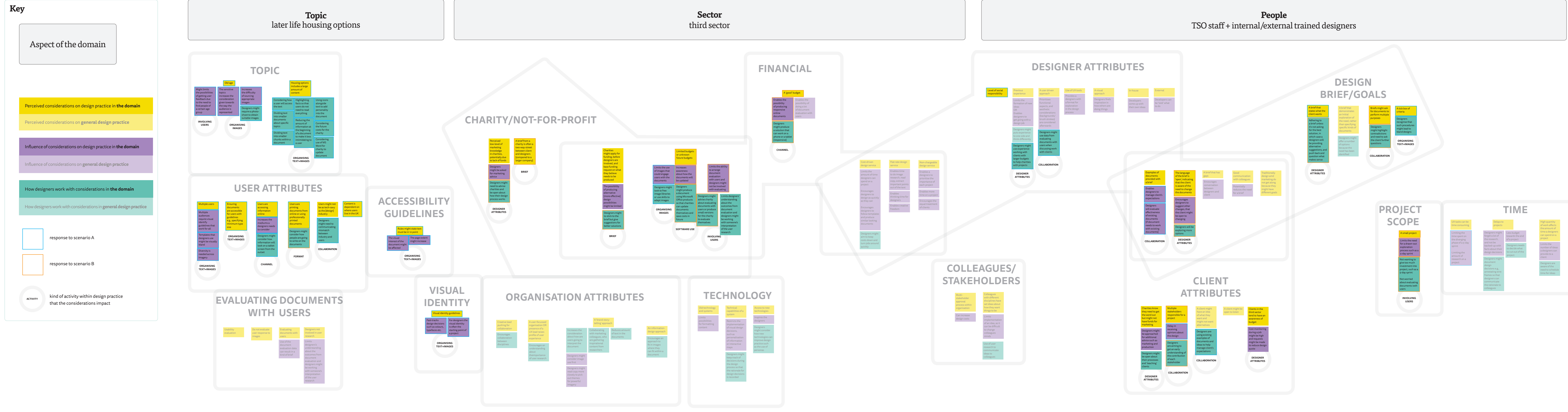
For the digitised charts, each label was assigned an object style for each of the three categories of response listed above. This enabled control over the way data could be displayed. For example, all responses to the design scenarios could be highlighted more than responses to general design practice. This exercise required data synthesis to be combined with the use of design principles such as proximity, similarity, and difference to represent interview data visually.

5.6.9 Study 4 chart: Trained designers

The penultimate step of the KJ method is to collate the individual charts into one main chart. The visual ‘style’ of the individual charts of Study 4 were the result of organising paper notelets into groups. Consequently, the collated chart of trained designers’ practice was a collection of small digitised notes

Figure 5.15 'A chart of design practice in the domain of later life housing': Visual representation of trained designers' insights about considerations made during design practice and how designers work within these considerations.

PDF guidance
To navigate the content select the Hand tool - in the Common Tools toolbar, or press the space bar, and drag with the mouse or trackpad to move around the page.
To get an overview of the content zoom out using the keys command and - (Mac) or control and - (PC)
To continue reading subsequent pages it is recommended that the zoom is set to 100% before continuing.



containing relevant aspects of design practice. Having collated these notelets into one chart, the observations made about the Study 3 chart (see Section 5.5.9), and the tools available within design software (e.g., use of styles to track kinds of responses, use of transparency to lessen responses about general design practice), were used to enhance the collated chart for Study 4. The following techniques used to create the Study 4 chart are:

- grouping categories of considerations in less regular shapes;
- using colour coding to identify –
 - perceived considerations on design practice,
 - influence of considerations on design practice,
 - how designers work with considerations;
- use of transparency to distinguish between –
 - design practice in the domain of later life housing,³⁵
 - design practice in trained designers' general design practice.
- use of colour coding to distinguish between –
 - responses to the design scenario for a larger TSO,
 - responses to the design scenario for a smaller TSO.
- addition of sections (rather than colour coding) to indicate the kind of activities that the considerations might impact.

These techniques developed a chart that included the collated responses, but highlighted the responses most pertinent to the domain. Additionally, through the collation of the trained designer charts a fourth aspect of the domain was identified, indicating that the four aspects of the domain are:

- content;
- topic;
- sector;
- people.

35 The more relevant and, therefore, salient insights in the chart of trained designers were incorporated into a collated chart of design practice for the domain of later life housing options (see Section 5.9)

Designer	D1	D2	D5	D6	D7	D9
Categories of activities	Discussing brief with clients	Liaising with client	Liaising with clients	Questioning the brief	Questioning the brief	Reviewing brief
		Advising [strategy]	Working with briefs			
	Designing	Researching	Exploration	Exploratory work	Research	Reviewing existing documents
		Thinking		Looking at existing documents	Reviewing existing documents	
		Understanding users	Involving users	Mapping user journeys	Putting themselves in the shoes of users	
		Understanding function	Working on copy	Read and understand content	Advising on content	
				Organising content		
		Providing ideas	Applying creative concepts	Wire framing	Suggesting alternative ideas	
			Visualising ideas	Visualising	Considering visual display of content	
		Show designs to client to demonstrate how a document would work		Evaluating/reviewing designs	Discussing user insights with clients	Discussing with client
				Collaborating with colleagues	Brainstorming with stakeholders	
			Logistics			
		Costing				
		Scheduling				

Table 5.2 Activities of trained designers identified during interviews. Extracted from interview data from Designers D1, 2, 5, 6, 7, and 8, who discussed stages of their processes.

Table 5.3 (page 185) lists these aspects of a domain demonstrating how these are different to the domain of private retirement housing, for example. Within these aspects were groups of considerations, for example, the attributes of a charity or not-for-profit organisation. Within these groups are particular considerations, for example, perceived low-level of marketing knowledge. The exercise of organising the collated interview data in this way resulted in a chart that displayed:

- aspects of a domain;
- categories of considerations;
- specific considerations;
- activities that the considerations impact.

These aspects and groups of considerations were collated with findings from the visual analyses and focus group to develop a chart of design practice for the domain of later life housing options (see Section 5.9).

The collated chart for study 4 was used to help describe the activities and considerations trained designers might be working within, discussed in the following sections.

5.7 Activities trained designers undertake during design practice

The first part of the interviews for Study 4 opened with a discussion about designers' own practice. This was partly to begin discussion with a familiar topic as well as enabling designers to move into the mind-set of thinking about considerations they make during design practice. From these introductory discussions, activities were discussed. These were collated and organised into themes during the adapted KJ Method analysis. The categories of activities that emerged from the data are shown in Table 5.2, and briefly discussed below.

Trained designers are liaising with clients and questioning the initial brief that they are given. They are researching, thinking, and exploring the project by reviewing existing documents. They are spending time understanding users, mapping user journeys, putting themselves into

the shoes of users, as well as involving users in the development of designs. In terms of content, designers are reading and understanding the copy, organising the content, and advising clients. In some circumstances designers might re-write copy. Designers are liaising with clients and stakeholders to brainstorm, review designs, and discuss user feedback (when available). Additionally, trained designers are organising the logistics (or print, for example), costing jobs, and scheduling stages of the design projects.

This ‘vignette’ of trained designers’ activities will not be new to most trained designers. However, whilst discussing how they might approach a project within the domain of later life housing, trained designers noted considerations they would need to make. These considerations had a bearing on several categories of activity including the way they might approach the organisation of content the way they might be involved with the evaluation of documents with users. Such considerations are discussed in the following section.

5.8 Considerations trained designers address during design practice

The considerations that trained designers discussed were identified as:

- topic;
- user attributes;
- accessibility and visual identity guidelines;
- working for a third sector organisation;
- financial considerations;
- designers’ attributes
- clients’ attributes;
- design brief attributes.

This section introduces these considerations, using interview data to create a narrative of how trained designers work within them.

5.8.1 Topic

Trained designers discussed how the topic of later life housing options raised considerations concerning a topic associated with old age:

... it's quite a sensitive subject ... (D6 and D8).

The activities that these considerations impacted included: user involvement –

... that might be quite restrictive [for getting user feedback]

... if [designer] wants to find people of a certain age when you want to do user feedback (D8);

use of images coupled with the consideration of limited budgets –

... [it is] a big thing is not making people look lonely ... it's quite a hard subject to illustrate or use photography (D6);

A charity wouldn't have much money to invest in photography, but they need inspiring images so that the [user] can see themselves in the leaflets ... (D1)

Trained designers also noted the amount of information and how they might approach it:

... reducing the amount of upfront information to make it less intimidating ... wondering if [text] could be broken up better...into slightly smaller chunks ... looking in a lot more detail about how that text is laid out, how it's accessed by the user ... (D9)

... would try and use icons [in existing document] and look at adding more personality through it ... anywhere there's a fact, pulling it out so people don't have to read everything ... (D6).

Additionally, trained designers would consider how TSOs would manage updates to information by considering using non-design software so that TSO document producers could update documents themselves.

... break down the guide into something smaller ... you're able to give an organisation factsheets in Word, and they can keep those updated more regularly... [organisation] only has to pay someone to make edits to the professionally designed bit ... (D9)

5.8.2 User attributes

Apart from considering the older user (as discussed above), the attributes of users were discussed in terms of needing to communicate with the multiple kinds of user, and how this might affect the document design:

... the view might be that the guidelines work perfectly for older persons, adult children, and that's a broad set of people to appeal to ... the templates and things [could] be quite vanilla ... (D2)

Trained designers also discussed the need to consider the paper quality of documents so that they supported the use of documents:

... people would be writing on it, the material used to print is also important so it's not difficult to write on ... (D6)

Additionally, trained designers considered themselves as advocates for older users in a design sector that can be quite 'tech-savy':

... the industry is tech-savy, but users might not be ... designer needs to be able to communicate this mismatch between industry and users ... (D7)

5.8.3 Accessibility guidelines and visual identity guidelines

Trained designers discussed the use of accessibility guidelines:

... when it comes to colours and things there are guidelines around font sizes ... (D7)

However, some trained designers were mindful of:

...things like accessibility...your rules say it has to be 12pt Arial in bold ... You often get people who say 'it doesn't look very nice now, why is it that many pages?' ... (D2)

Yet, visual identity guidelines were considered to be beneficial, particularly for third sector projects when limited budgets are a consideration:

... [the style guidelines] is the starting point ... [designer] can fast track to certain things ... (D1)

Additionally, it was noted about the larger TSO brief that:

... it's good that they've got a good brand structure in place already ... (D9)

5.8.4 Working for the third sector

Trained designers who had experience working with third sector organisations discussed their perception that smaller TSOs may have a low-level of marketing knowledge, potentially due to lack of funds:

... [TSOs] need to get the word out, [but] don't have the funds for a marketing person in-house who knows where to start ... (D1)

This kind of consideration may encourage a designer to use their existing knowledge, often gained by working with non-TSOs, to advise and assist smaller TSOs:

... from a designer's point of view it feels like you're almost teaching them something, you know, you're quite open about how we do things in order to get to something that is really worthwhile for them ... (D1)

A advantage of working for a TSO was noted that:

... getting the brief from the client is quite different [compared to a corporate client] with the charity ... there's a bit more of a two-way-street ... (D1)

5.8.5 Financial considerations

Financial considerations have been discussed as part of image choice and choice of channel (see above). However, financial considerations also impacted project scope and activities to involve users in document evaluation. Firstly, funding for design projects might be requested before designers are involved resulting in restricted possibilities:

... [Charity] having to get grants before [design]...whatever is at the top of their priority list they then try to get it produced ... [Charity] applies for the money they believe they'll need to produce a specified item [e.g. leaflet/report] ... (D1)

Secondly, trained designers discussed how limited budgets might lead to restricted involvement of designers in document evaluation with users:

... [there is a] cost implication for [designer] organising, finding the right audience [for user testing]. (D1)

This may mean that:

... [the designer] would probably advise charity to test it, and not run up a big bill, but create a small version that they can test (D1)

However, it was noted that lack of designer involvement in evaluation of documents means that:

... the play back from the research is usually fairly high level, it's still someone's own interpretation ... (D6)

When the budget is available for designers to be involved with the evaluation:

... [a designer] can really see where [users are] having difficulties [and] it's getting that emotional involvement, and understanding how people are feeling ... (D6)

Also, financial considerations were discussed that might affect the possibilities designers are able to offer in terms of the channel and format of documents:

If [the TSO] has the budget, [designer can suggest] something that works on a phone or a tablet ... (D1)

5.8.6 Designer attributes

The discussions about designer attributes mainly concerned the designers' general practice, rather than specific considerations for design for decision making. However, three comments were of note that:

- the level of social responsibility may affect how a designer works on a project;
- designers might use experience working with clients with larger budgets to help charities with project;
- user feedback is useful to designers when discussing design proposals with clients.

5.8.7 Client attributes

Two aspects of the attributes of clients were discussed by trained designers. Firstly, that:

... [charities] work to tight budgets and are a bit more on the ball about costs ... (D1)

This suggest that working in the third sector requires trained designers to be mindful of budgets and to work with TSO clients to make the most of restricted budgets.

Secondly, the scenarios prompted one trained designer to note:

... it doesn't sound like there's one person that [job] is going to come from ... it would be important very early on to understand the contribution of different individuals on the project ... (D5)

5.8.8 Design brief, project scope, and time

The attributes of design briefs were discussed. The brief from the larger TSO:

... already [lays] out and idea of what [the client] wants ... (D8)

The brief from the smaller TSO:

... seems less closed ... in terms of what [a designer] can do ... so there's more to explore ... (D3)

A trained designer noted a 'less closed' brief suggests that:

... [a client] might hopefully be a bit more open to changing other things ... (D9)

Yet:

... some of what the brief outlines...[client] is asking for [leaflet] to sing and dance ... (D8)

To work with such design briefs trained designers are:

... asking questions ... picking out things that contradict each other ... (D8)

... [having] a conversation with the person who's filled out [the brief] ... (D3)

The sections above have outlined a ‘vignette’ of how designers work within the considerations and how these might impact design activities. During the synthesis of Study 4 interview data and the formation of the charts for Study 3 and 4 observations about design of documents and their design practices came together to form a picture of document design existing in the domain. To collate all study findings, observations from the visual analyses and user perceptions gathered during the focus group were mapped on to a ‘chart of design practice for the domain of later life housing options’, as discussed in the following section.

5.9 A chart of design practice for the domain of later life housing options

A chart of design practice for the domain of later life housing options (Figure 5.16) was created by collating:

- findings from the visual analyses;
- findings from the focus group with users;
- chart of TSO document producers design practice;
- chart of trained designers design practice.³⁶

The visual features of the chart were developed from the iterative process of creating Study 3 and 4 charts, including:

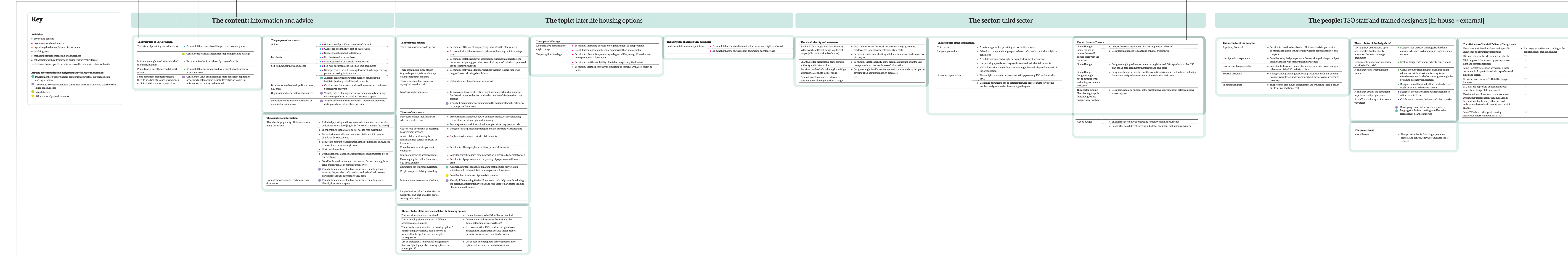
- depicting the four aspects of a domain in order to group the categories of considerations;
- rectangles to enclose considerations and activities associated with a category of considerations;
- overlapping rectangles to demonstrate shared considerations across categories;
- overlapping edges of rectangles to indicate connection between

36 The insights made by trained designers about their general design practice were not included in the collated chart of design practice. These insights may be useful to identify areas from general design practice that could be incorporated into design practice in the housing options domain. Future studies could explore this further.

Table 5.3 The four aspects of a domain

Aspects of a domain	The domain of later life housing options	Private retirement housing
Topic	Later life housing options	Later life housing options
Content	Information and advice	Promotion and choice
Sector	Third sector	Private sector
People	TSO staff and internal/external trained designers	Private retirement home staff / trained designers

Figure 5.16 A diagram of design practice to direct thinking about the design of documents in the domain of housing options



categories;

- colour coding to identify the kinds of activities within design practice.

This chart was developed to direct thinking towards how considerations impact design activities, the value of design activities to mitigate potential negative impacts, and where ‘good communication design’ principles and practices (observed in the reviewing of documents) could be beneficial within the domain. This includes:

- for the development of content, consider the value of visual rhetoric to support reading strategies;
- for the organisation of words in a self-training documents, consider the developing a library of graphic features to support decision-making activities;
- for the organisation of channel and format of documents, consider how online can be more action-led and the social affordances of paper during conversations;
- for the involvement of users, consider how the feedback provided through advice lines can be incorporated more fully into design projects where time constraints might be a factor;
- for the management of design jobs and collaboration among colleagues consider the importance of the design brief in the communication process.

Such observations, about the value of design and design practice within the domain of later life housing, are discussed further in the following chapter.

In summary, this chapter has explained design practice and ways of exploring this with diagrams and charts. To explore design practice, interviews were conducted with TSO document producers and trained designers. Interview data were collated into charts to aid thinking towards the considerations and activities that are pertinent to designing

documents for later life housing options. The following chapter brings together these findings concerning design practice with the findings from the visual analyses and focus group in order to address the broad aim of the thesis and offer suggestions for design practitioners. It additionally draws together observations about the research approach that are relevant for design practitioners, researchers, and pedagogy.

6 Discussion

This research project explored ‘*what* graphic designers design, and *how* they do it’ (van der Waarde 2018, 356) within the domain of later life housing options. The aim was to offer insights grounded on a practical footing concerning how document design and design practice contribute to the effective provision of information that supports decision-making activities. The objectives were to:

- 1 identify ways of describing design and design practice graphically to direct thinking towards significant considerations and activities;
- 2 elucidate processes within communication design practice that are integral to the success of providing effective information;
- 3 identify principles from good document design relevant for, and applicable within, document producers’ existing practices.

To achieve these objectives four studies formed two layers of exploration: reviewing of documents; and an exploration of design practice. This chapter firstly discusses the implications of this layered, multiple-study approach and its contribution to the epistemological challenge of identifying ways of describing design and design practice. Secondly, aspects of document design and design practice are discussed in relation to considerations, activities, and document design features deemed integral to the effective provision of information for decision making.

6.1 Implications of the research approach

As discussed in the Introduction, researching design practice in the real world presents complexities. Firstly, entering the research project

with a general idea of what to look for (Gray 2018) led to an exploratory approach whereby visual analyses were carried out in two phases and in parallel with a focus group. An outcome of this approach led to Gray's second complexity: the need to revisit stages of research (Gray 2018). Consequently, this research was conducted in a layered and iterative manner whereby studies informed the direction of the research approach and findings were collated to form insights. This section discusses the techniques used throughout the research project that facilitated the collation of findings and insights from multiple studies.

6.1.1 Involving users early in a research project

Users were involved during the early stages of this research as an opportunity arose to work with a third sector organisation in the first year of study. This opportunity was used to contribute towards an understanding of the domain and existing documents. TSO document producers, users of later life housing options documents, and I engaged in discussion about:

- older people's experience with documents and events;
- what the documents look like; the content; the ease of use; and whether the documents are considered useful and appropriate for planning ahead and decision making.

An advantage to having these broad aims and conducting these discussions early in the project was that it contributed to my knowledge about the domain and existing documents. This understanding fed into observations made in the visual analyses and helped build familiarity with documents before speaking with document producers.

A limitation of conducting the focus group at the beginning of the research was the broad focus, rather than evaluating the effectiveness of significant graphic features to support decision making. However, through collation of the findings from the visual analyses, focus group, and interviews studies, significant aspects of document design (such as the potential value of visual rhetoric, see Section 6.2.2) were identified. By collating these study findings, avenues for further participant

studies were identified (see Section 6.2.4). Consequently, although the early involvement of users did not yield outcomes about effective graphic features that support decision making, the findings contributed towards building a picture of existing document design in the domain of later life housing and towards identifying significant graphic features that support decision making.

6.1.2 The use of a framework to direct thinking towards document design

Coupled with the focus group, the development of a framework for the visual analyses also contributed to an understanding of the domain and document design. Two frameworks were developed to facilitate looking at graphic features in housing options documents: an initial framework and an extended framework. As I entered the project with a general idea of what to look for, the process of developing an initial framework became part of knowledge generation through the research into and collation of:

- complexities and considerations (other than document design) associated with decision making for later life housing;
- intentions of the documents within the domain;
- benchmarking criteria for good document design.

This collation developed an initial framework that offered a consistent way of looking at documents (Walker 2012, 181), and additionally offered:

- a way of understanding the domain of later life housing;
- a way of understanding how documents fit within the ‘decision ecology’ of later life housing;
- a way of getting to know the documents and how graphic features related to document functions.

As the research project progressed, revisiting the framework and developing it further for the extended analysis offered the following advantages:

- a way of unpacking graphic features to understand differences between kinds of documents;

- a way of identifying significant graphic features that support decision-making activities.

A limitation to the use of the initial framework was that, although the intentions of organisations and documents were incorporated into the framework, the document functions were presumed a priori. To address this limitation, the extended analysis focused on the use of words and images (rather than assigned functions) with the aim of identifying graphic features used to facilitate decision-making activities. This demonstrates the importance of using a framework flexibly so that thinking is guided by, rather than limited by, the framework when conducting visual analyses.

6.1.3 The use of graphic means in the visual analysis of documents

The use of the framework was coupled with ways of recording observations made during the visual analyses. The approaches used included:

- breaking a document down into its component parts through the use of tree diagrams and colour coding (in the initial analysis);
- use of thumbnails and colour coding (in the extended analysis).

Both visual analyses used a tabular format to organise graphic features so that observations could be made about the kinds of features used. These techniques are discussed below with reference to their usefulness in visual analysis studies.

6.1.3.1 Using tree diagrams, page thumbnails, and colour coding to unpack graphic features

The initial visual analysis utilised the ‘layout layer’ step in the GeM Model (Bateman 2008) and tree diagrams akin to those of Norrish (1987). Both facilitated analysis across a spectrum of design features in documents (rather than just one, which is the case with some visual analysis studies). The addition of colour coding revealed how graphic features that supported certain functions were located across documents. This helped to identify differences among the visual

presentations of different kinds of documents. For example, the guide and factsheet documents included a greater quantity of content and graphic features that informed users, whereas the self-training and self-help documents featured content and features that more heavily supported a reader with decision-making activities.

In the extended analysis thumbnails were used to unpack the graphic features in documents and focus more on the words and images used. For example, observations were made regarding task-based activities whereby questions were embedded within paragraphs (in the guide document) versus questions formatted using greater typographic differentiation (in the self-training document). How effective these task-based activities are when embedded in paragraphs, versus those separated from other content on the page, warrants further studies within the domain of decision making for later life housing options.

Additionally, the technique of using thumbnails retained the context in which graphic features were positioned on the page in relation to other graphic features, acknowledging that for graphic features ‘spatial relationship may be every bit as intentional, essential, and effective’ (Waller 2012, 250) as their individual parts. Further use of thumbnails to investigate the relationship between graphic features would be valuable and would contribute to identifying visual differences between the kinds of documents for decision making.

Both approaches and techniques have implications for visual analysis studies, design pedagogy, and use in real-world design practice. For visual analyses and design pedagogy, application of the two approaches offers techniques for unpacking how graphic communication contributes towards understanding document function both at a document level (graphic features located across a document) and at a graphic feature level (different features on a page). For design practice in the real world, unpacking documents according to function using visual techniques can form part of an evaluation of whether graphic language is being used to support intended document functions. For example, evaluating whether a self-training document includes appropriate graphic

features throughout the document that support reflection, sharing, and discussion. Further exploration into the possibility of these techniques would be beneficial for understanding later life housing documents, and to other domains, such as Power of Attorney, where decision making is required.

6.1.3.2 Using tables to organise graphic features

Grouping significant graphic features into tables was another important technique used in both visual analyses. In the initial analysis, features that were identified as supporting different functions were grouped together (these graphic features and their relevance to design for decision making are discussed further in Section 6.2.4). This use of tables enabled the comparison of how different kinds of documents addressed different functions. For example, to encourage sharing and discussion it was observed that the self-training document used typographic differentiation to draw attention to quotes about later life housing experiences. Conversely, in the guide document, text within paragraphs (i.e., less typographic variation to the self-training document) encouraged readers to discuss possibilities with family.

This kind of comparison led to the development of tables in the extended visual analysis that focussed observations on these different kinds of graphic features, highlighting their relevance for design for decision making. For example, a table of graphic features that addressed active reading strategies was developed that demonstrated different levels of typographic differentiation used within the sample of documents (see Section 3.8.2).

The use of the tabular format to organise graphic features within visual analysis has applications within design pedagogy, to facilitate thinking and learning about how different kinds of graphic features and typographic differentiation are more or less effective in supporting reading strategies. Additionally, it has application within design for decision making to:

- consider ‘visual rhetoric’ (see Section 6.2.2);

- visually differentiate documents (see Section 6.2.3);
- develop a library of graphic features that supports appropriate decision-making activities such as reflection, sharing, and discussion (see Section 6.2.4).

As well as the graphic means of recording visual analysis outcomes, visual means were also used in the interview studies for this research to facilitate the understanding and synthesising of interview data. These techniques are discussed in the following sections.

6.1.4 The use of graphic means to understand interview data and collate findings

Within the two interview studies, graphic means of presenting data were explored. The implications of these approaches concern the use of:

- paper and digital techniques;
- different spatial arrangements to organise and synthesise data.

The visual means of presenting data and their implications are discussed in the following sections.

6.1.4.1 Using paper and digital techniques to organise data

Techniques involving the use of paper (the use of paper notelets and development of paper charts) and the use of digital software (the use of tools within design software, and design principles, to develop digital charts) were used to organise interview data.

The process of organising paper notelets in the first stage of Study 4 facilitated the ordering of interview data and familiarisation with interviewee responses. This approach supports the concept of ‘affordances’ (Gibson 1979). As Mangen (2017) states: ‘affordances are opportunities for action’ (280).¹ The tangible nature of physically organising

1 For example, the affordances of different reading devices such as a tablet or paper book enable different kinds of sensorimotor interaction (Mangen 2017, 280).

notelets that contained extracts of interviewee responses facilitated the organisation of notelets and grouping of notelets into themes. The adaptation made to the KJ method for this research was the addition of questions to draw out the ‘what’, ‘why’, and ‘how’ aspects of design practice. This facilitated greater focus on aspects relevant to design practice and the development of themes.

The digitisation of the labels in the second phase of data evaluation offered greater control over the organisation of participant responses and themes. Design software tools were used to:

- identify different kinds of activities;
- differentiate responses from TSO document producers and a trained designers;
- differentiate responses regarding –
 - general design practice,
 - design practice specific to the third sector,
 - scenario A (large TSO),
 - scenario B (small TSO);
- differentiate the kinds of design practice activities.

The data could then be manipulated to visualise, for example, all responses by trained designers that related to the domain of later life housing rather than their general design practice. Consequently, the way data was visualised helped draw out relevant findings and insights for design practice in the domain of later life housing and for decision making.

6.1.4.2 Using spatial arrangements and colour coding to group and synthesise findings

Three kinds of charts were developed over the course of the ‘exploring design practice layer’ of the research project: a chart of TSO document producers (see Figure 5.9); a chart for trained designers (see Figure 5.15); and a collated ‘chart for design practice for the domain of later life housing’ (see Figure 5.16). The charts were arranged to represent

aspects of the domain and categories of considerations, and individual considerations and activities:

- at the ‘aspects and category’ level –
 - the Study 3 chart used circles and lines (lines are akin to those in the webs created by van der Waarde (2018)) to spatially organise responses,
 - the Study 4 chart used overlapping uneven shapes (akin to the uneven shapes of Eames’ (1969) diagram),
 - the ‘chart of design practice’ used rectangles that overlapped at the edges to demonstrate connections between categories of considerations;
- at the individual ‘considerations and activities’ level –
 - the Study 3 and the ‘chart of design practice’ list the considerations and the kinds of activities they influence,
 - the Study 4 chart uses layers according to considerations, influence, and how designers work within considerations.

The approach to developing these charts involved an iterative process that facilitated thinking towards how to arrange data visually as well as facilitating the synthesis of findings and insights. For example, the merits of the charts in Study 3 and Study 4 were evaluated (e.g., the different displays of considerations and activities: the use of colour-coded bullet points in Study 3 versus the use of colour-coded layers in Study 4) and informed the development of the ‘chart of design practice’ (e.g., the use of colour-coded bullets was deemed more suitable for visually communicating which considerations influenced which activities). This demonstrates that graphic means of visualising data have epistemological and communicative value for researchers (supporting existing views of the value of making diagrams (e.g., Frascara 2001)). Additionally, the three spatial arrangements facilitated different ways of ‘looking’ at the data to direct the formation of knowledge about the considerations for design practice:

- shapes enclose lists of considerations and activities, and visually separate the categories;
- connecting lines are a visual indication that there are connections

between categories;

- overlapping shapes visualise the areas where specific considerations are shared across categories.

Together, these three techniques can help direct thinking towards particular considerations. For example, in the ‘chart of design practice’ (Figure 5.16) we can see that the attributes of third sector organisations are linked to financial considerations.

Within the ‘considerations and activities level’ of the charts, colour coding further facilitated the identification of how considerations impact design practice activities. In the Study 3 chart, activities were colour coded to better identify how considerations affected each kind of activity. This was used in the final chart of design practice to aid the identification of how design practice works within these considerations to provide effective information for later life housing options.

The use of these techniques in this research demonstrates the value of visualising data to communicate and direct thinking towards significant aspects of a domain, how these aspects interlink, and how considerations made (associated with these aspects) impact design practice and consequently the effectiveness of document design. This has value in real-world discussion, as well as research. For example, directing thinking towards areas of a domain that require further or re-directed funding in order to improve effective information and advice provision. In the case of this research it was identified that financial considerations, such as limited budgets, are interwoven into the third sector and its design practices, and that these can impact project scope and the effectiveness of print and online documents. Of interest would be further exploration about using such visual means to facilitate discussion and effect positive change within third sector design practice. For example, to contribute towards discussions about the importance of funding within this domain, or how TSOs can ‘do more for citizens with less, or do less with greater effect’ (Design Council 2013, 4).

6.1.5 Using design scenarios as prompts in interview studies

Another approach that was used in the research project was the development of visual prompts used in interview studies. These were design scenarios, formed of a design brief and a list of considerations pertinent to the design project, and examples of existing documents (see Section 5.6.3). These were presented to trained designers to prompt ideas about how they would approach the design of later life housing documents.

The use of these design briefs naturally focussed discussion on the merits of design briefs and their integral role in the development of effective document design (see Section 6.2.7.1). A limitation to these visual prompts was the artificial nature of the scenario, that is, lack of discussion with the clients (that would occur during real projects) about aspects of the design brief. This suggests that the lists of considerations, which aimed to provide an overview of what the designers might need to consider, were not effective at providing enough information for the interviewees to discuss how they would work within this scenario. Further development of design scenarios to elicit design knowledge, in particular tacit knowledge, would be of interest.

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The discussions above highlight that a layered and iterative research approach supports the notion that an iterative process utilising ‘information design aids’, familiar to design practitioners, can be beneficial in acquiring and synthesising research findings. This is particularly the case for trained designers entering the field of design research where iterative processes used in their existing design practice may be more familiar than co-design methods (of which experienced design researchers (e.g., Donetto et al. 2015) are familiar). Consequently, such an approach can help design practitioners enter the field of design research.

Additionally, the process of developing a framework can guide an early researcher in a real-world domain where multi-disciplinary perspectives have a bearing on effective document design. The use of tangible

methods of data organisation and the development of charts, skills also familiar to trained designers, can facilitate the organisation of study data to arrive at insights that lead to recommendations for real-world design practice. The following section expands on the research findings and insights that emerged from using these approaches and techniques.

6.2 Aspects of document design and design practice integral to effective information provision

The collated ‘chart of design practice’ for later life housing options was used to identify significant aspects of document design and design practice integral to effective provision of information in the domain (and third sector). Firstly, the chart suggests that a domain can be described by these four broad areas:

- content;
- topic;
- sector;
- people.

Within these four areas are considerations and activities of design practice. The categories of considerations that document producers in the domain of later life housing are working within include:

- attributes of information and advice provision;
- purpose of documents;
- quantity of information;
- attributes of users;
- use of documents;
- topic of old age;
- attributes of accessibility guidelines;
- visual identity and awareness;
- attributes of the organisation;
- financial considerations;

- attributes of the designers;
- attributes of TSO staff;
- attributes of a design brief.

Within these considerations are activities, including:

- developing content;
- organising words and images (document design features);
- organising the channel or format;
- using software;
- involving users;
- managing projects, marketing, and awareness;
- collaborating with colleagues and designers.

These considerations and activities are discussed below in relation to aspects of design practice and document design features that, based on this research project, are deemed integral to design for decision making.

6.2.1 Considering impartial content

A theme present in conversations with TSO document producers was the nature of providing information that results in non-directive (ambiguous) written content. Delivering independent, unbiased and impartial information (FirstStop 2019) is an important aspect of the delivery of information and advice by third sector organisations. This is particularly the case for factsheets, where content developers tend to follow the ‘language of the law’ whereby content will state, for example, ‘you have a right’ to certain provisions. However, where there is a divergence between what is stated in the law and what local authorities are able to provide, the language may change to ‘local authorities should do this, but if they don’t this is what you have to do’.² Additionally, particularly for information advice to beneficiaries who are using level one information (general information and awareness), document producers

2 Quoted comments are from P6 of the TSO interviews.

are not advising on the best options. Instead, information is provided for the beneficiary to think through options, consider their circumstances, and make decisions for themselves.

Reading such impartial content may lead to user perceptions, evident in the focus group, that there is a large quantity of information and it is difficult to know where to start (see Section 4.3.6). Additionally, observations by TSO document producers were that people seeking information about housing options might be requesting TSOs to ‘tell me what to do’ and that content should be formatted to assist these kinds of user needs (see Section 5.5.4).

The organisation of content can contribute to helping beneficiaries who are seeking more direction about their options, whilst retaining the ‘neutral’ nature of impartial information and advice. This dissertation affirms that (although further research in the domain is required, see Section 6.2.4) this can be achieved through:

- visual rhetoric;
- visually differentiating documents;
- graphic features that support decision-making activities;
- choice of channel and format;
- use of images.

These aspects of document design are discussed below.

6.2.2 Using ‘visual rhetoric’

‘Visual rhetoric’ is an established concept within graphic communication. Kinross argued that information-focussed documents (e.g., railway timetables) use structural features, such as tabular arrangements, to communicate with ‘eloquence’ (Kinross 1986, 20) meaning that information-focussed genres (which includes, this dissertation posits, information and advice documents) are not void of rhetoric. Furthermore, behavioural economics and financial decision-making studies suggest that it may not be possible for authors of functional

communications to avoid biasing readers' choices (De Meza et al. 2008) (Waller 2011b).³ Therefore, understanding the potential of visual rhetoric for design-making documents is important to this domain.

A number of studies that consider the 'rhetoric of "good" design' (Moys 2017, 210) for documents suggest that good design can:

- facilitate a reader to act on a message in a document (Larson 2010);
- increase the perceived value of an organisation (Townsend et al. 2010);
- facilitate interaction between reader and organisation (Black et al. 2012);
- increase the perceived usability of a document (Kurosu et al. 1995; Tractinsky et al. 2000; Sonderegger et al. 2010);⁴
- improve a user's judgements regarding trust and usefulness (Li et al. 2010).

Aspects of visual rhetoric were evident in studies for this research. In the focus group, aspects of documents were considered 'authoritative' and 'trustworthy' by participants (see Section 4.3.3–4). Additionally, the self-training document was considered a useful starting point for readers who had little knowledge of housing options (see Section 4.3.6). The aspects of document design that initiated these perceptions were:

- the originators being not-for-profit and associated with local councils;
- the clear presentation of information.

Firstly, the indication of the originators of information was noted as an important aspect of a document for users when assessing the trustworthiness of information (see Section 4.3.3). An observation made by a participant in the focus group concerned how seeing that a

3 TSO document producers working in larger TSOs commented that they are aware of the use of behaviour change and nudge but not whether this was incorporated into documents for later life housing options.

4 Conversely, Tuch et al. (2012) suggest that aesthetics does not enhance perceived usability, and demonstrate that poor usability has an effect on users' perceived aesthetics of online shops.

document was from a trusted source, such as a charity, and supported by an authoritative source, such as a council, were important aspects of documents that distinguished them from organisations trying to ‘sell’ options. Conversely, document producers working for smaller TSOs discussed the difficulty they face with awareness and the visual identity of the organisation often due to the TSO being different things to different people (see Section 5.5.8). Additionally, the extended visual analysis identified that smaller TSO visual identities might not convey identities well or consistently enough across the documents (see Section 3.8.4). This collation of study findings suggests that further development of smaller TSO visual identities, and their connection to ‘authoritative’ organisations, could be strengthened to demonstrate their relevance and usefulness for decision making. Additionally, it indicates the role of visual identity in the forming of user perceptions about the organisation and kind of information, warranting further research into visual identities within the domain of later life housing options.

Secondly, the clear presentation of information relates to typographic differentiation. Moys (2014a, 2014b) evaluated documents based on low, moderate, and high levels of typographic differentiation, and demonstrated that documents that moderately exceed the difference threshold were perceived to be ‘accessible, credible, objective, and informative’ (Moys 2017, 214).⁵ Comparing the factsheet and self-training document with Moys’ (2014a) levels of typographic differentiation, it could be considered that they sit within the spectrum of the moderate area, displaying:

... a high degree of orderliness, with regularly spaced columns and graphic objects. ... reinforced by the use of rules and boxes and the even distribution of space throughout the layout (Moys 2014a, 49).

The self-training document (see Figure 4.2) and the factsheets (see Figure 4.3) used in the focus group, both use regularly spaced columns, rules, boxes,

5 This perception differs from perceptions of high differentiation that would be ‘patronising’ ‘in your face’ ‘shouting’ to grab attention (Moys 2017, 214).

and an even distribution of space. However, the self-training document uses graphic features that display greater typographic differentiation and are not as regularly spaced as the factsheets. This suggests that the design for decision making in the domain of later life housing should consider the use of:

- moderate typographic differentiation to convey ‘authoritativeness’;
- greater typographic differentiation in documents that are intended as ‘starting points’ among the perceived information overload.

Additionally, the use of design options such as ‘progressive disclosure’ (Waller 2017b) may have relevance particularly for self-training documents, to encourage full engagement with task-based decision-making activities. ‘Progressive disclosure’ means that content is organised to not:

... overwhelm people with information, but lead them through it by establishing their full engagement, and sense of relevance before revealing further levels of detail as needed. This also establishes mental schemas within which new information can more easily be handled (Waller 2017b, 7).

Further research into whether and how housing options documents use such design options would be of interest.

Another aspect of the findings related to typographic differentiation was the use of accessibility guidelines. Document producers were aware of the need to develop accessible documents, for example, by using minimum type sizes (see Section 5.8.3). Yet trained designers discussed how such guidelines could result in ‘bland’ documents (see Section 5.8.3). Such discussion supports arguments that rigid use of guidelines contradicts the usefulness of ‘design to articulate the content structure ... use of layout ... start[ing] each topic on a separate page ... [that] result [in] a document that is easier to read strategically – to skim, scan and search’ (Waller 2011a, 14). This suggests that further exploration into graphic features that ‘carry rhetorical connotations’ and how these can be used to ‘encourage users to engage with information from the outset’ (Moys 2017, 218) is needed in the domain of later life housing, as well as how these can be used in partnership with accessibility guidelines. Furthermore, typographic differentiation could be useful to visually differentiate documents for decision making, as discussed in the following section.

6.2.3 Visually differentiating the purpose of documents

A proposition made during the extended visual analysis was that different kinds of housing options documents could have different page structures (see Section 3.8.5). The guides and factsheets documents, which contained greater quantities of factual information, used lower levels of typographic differentiation compared to the self-training and self-help documents. The reasons for this were not explored in this research. However, from the interview studies, it was noted that non-trained designers use word processing software (e.g., Microsoft Office) to produce documents, whereas trained designers use design software (e.g., Adobe Creative Suite). The impacts of this were not explored but warrant further exploration into the effect of software use on document design. For example, the factsheet document analysed in the visual analyses was produced using Word, whereas the self-training document was produced in Adobe InDesign. It is clear from these two documents that the design software affords greater control over page layout, but further exploration into the effects of software on document design, and their application within the domain, is needed.

The importance of being able to control typographic differentiation is relevant to the recommendation of this dissertation that kinds of documents could be more consistent across the domain of housing options and provide users with ‘strong[er] expectations about how [the document] will be organised, and how to read it’ (Waller 2011b, 18). Additionally, as Waller (2012) suggests ‘graphic literacies are needed not only by readers, but by creators of documents ...’ (236). In discussions with TSO document producers, it was noted that non-trained designers use knowledge of existing conventions of visual organisation. For example, formatting documents in columns akin to newspaper layout (see Section 5.5.7). For such document producers, further considering the visual differentiation of housing options documents could:

- provide guidance on the purposeful use of visual organisation (rather than simply borrowing from existing genre);
- standardise the kinds of visual organisation used across the domain

of later life housing (thus, contribute towards a more joined-up approach to information and advice provision – an area of which a TSO document producer suggested needed improvement, see Section 5.5.8).

Further research would be of interest to explore, for example, the topic, artefact, and access structures (Waller 1988), the different kinds of writing style (see Section 3.8.1) for the different kinds of documents, to support the following different document intentions:

- **guides** should be short and easy to digest documents that give an overview of a topic (Age UK 2020; FirstStop 2020a), introduce options and explain where to find out more (Age UK 2017b; Elderly Accommodation Counsel 2017a);
- **factsheets** should provide further information about topics (Age UK 2020; FirstStop 2020a);
- **self-training documents** should support people with the activities of thinking ahead (Care & Repair England 2015) and signpost to further information;
- **self-help documents**⁶ should help people identify potential difficulties and signpost to information and advice that might be available for these specific topics (FirstStop 2020c).

Additionally, exploration of design options recommended for legal content (such as those discussed by Waller (2017b) regarding terms and conditions documents) that could support different kinds of documents would be of interest. For example:

Layered text [that] use multi-column layouts to present information at different levels of complexity in parallel. They might, for example, offer a heading layer for skim-reading, an explanation layer, and a legal language layer. Layering can prioritise the consumer-friendly explanations, while still referring to legal concepts when necessary (Waller, 2017b, 8).

6 FirstStop uses the term 'tool' instead of 'document'. For consistency, 'document' is used in this dissertation.

Swim-lane layout [that] show[s] the respective responsibilities of different parties to a contract, and can be effective in demonstrating imbalances in power relations (Waller, 2017b, 10).

Decision support [that] ... can take the form of flow charts or interactive displays where figures can be entered and scenarios played out (Waller, 2017b, 10).⁷

The suitability of such design options would require further research into the effectiveness of these options for later life housing information. Furthermore, such design options that are suitable for terms and conditions documents, may be additionally relevant to domains, concerned with decision making for later life, such as making decisions about Advance Decisions, Lasting Power of Attorney for health and welfare, and Advance Statements (Independent Age 2016, 24). Such decision making involves the consideration of more complex information than later life housing options, and may benefit from recommendations discussed above.⁸

Additionally, development of guidance and consistency could incorporate and encourage use of good practices already being used in some TSOs within the domain. This includes observations made during the visual analyses of the:

- use of headings phrased as questions that can increase recall (Hartley et al 1980);
- use of summaries and headings (Lorch et al. 1995);
- use of clear document structure, to make document intentions

7 This kind of design option would be more suited to a digital channel and, potentially, the further development of the HOOP document (EAC Elderly Accommodation Counsel (2020a), which has (since the beginning of this research project) undergone changes to its interface and usability.

8 Studies involving documents in Advance Directives (Ads) includes the materials developed by Tamayo-Velázquez et al (2010) whereby conversation starter documents were found useful in discussions about ADs. Work involving the implementation of an online service to provide assistance to those acting on Power of Attorneys, rather than for those making decisions about their Power of Attorney, was published by UK government in 2020 (Gov. uk 2020). Linguistic analysis has been carried out on Power of Attorney documents (Passos et al. 2019). It seems that further research into the design of such documents would be beneficial.

clear and support strategic reading strategies (Black et al. 2012).

It could also encourage document producers to consider what actions users might be able to perform with the documents.⁹ For example, document producers could choose appropriate kinds of document, page structure, and graphic features depending on whether the document was a tool for enquiry and thought, or an aid to learning (Waller 1979). Such practices could also more clearly differentiate the functional documents of TSOs from the promotional documents produced by private retirement home providers. Further research into this area of document design would be of interest, alongside the use of graphic features to support decision-making activities, as discussed further in the following section.

6.2.4 Using graphic features to facilitate discussion and reflection

Visual differentiation could also be coupled with a library of graphic features that supports decision-making activities. The opportunity to reflect on circumstances and the implications of different choices is considered an important aspect of effective information about housing options (Clough et al. 2004, 189). Graphic features were identified in the visual analysis that facilitate such task-based reading strategies included those that encourage:

- reflection;
- comparison;
- discussion.

In discussions with document producers, it was evident that these graphic features were intended to ‘break-up’ the content (see Section

⁹ Sless (2018) posits that organisations often ask the wrong question when developing documents: ‘They ask, “What information should go into the document?,” when they should be asking, “What actions should people be able to perform, easily and quickly, with the information given?”’ (Sless 2018, 131). Also, Garner et al. (2012) propose that ‘intentionality’ be part of the evaluation process of health information.

5.4.2). This dissertation posits that these kinds of graphic features are also significant to design for decision making, firstly to encourage reflection and comparison, and secondly to facilitate conversation about later life housing options.

Further research would be of interest to develop the observations made in the visual analyses regarding the development of a library of graphic features that support:

- reflection of home and self;
- comparison of options;
- discussion and sharing with others.

Regarding facilitating discussion, participants in the focus group identified that the self-training document could be a good ‘starting point’ for thinking about later life housing options. Consequently, further research into graphic features that support discussion, and how documents themselves can spark discussion could be useful within the domain of later life housing. For example, an area of interest is the development of ‘conversation starter’ documents (e.g., Common practice 2020a; van Scoy et al. 2017). Although measuring the success of these kinds of documents on a person’s future actions is limited,¹⁰ it has been shown that those who play conversation games have higher rates of planning after playing the game (van Scoy et al. 2017).¹¹ A conversation game would provide a valuable addition to the battery of resources TSOs currently offer, and would go beyond providing ‘practical conversation tips for older people and their families to consider’ (Independent Age 2016, 31).

Although graphic features were identified as supporting discussion, the combination of observations from users in the focus group and from

10 For example, documents are not the only factor in encouraging discussion (see Section 2.6.2). Additionally, as the van Scoy et al. (2017) study demonstrates, study limitations include: the use of convenience sampling; not recording cultural factors; not using a control (i.e., no use of the conversation game); and the use of stipends to increase participation. Such factors could all contribute to the effectiveness of discussion on decision making.

11 This conversation game was for Advance Care Directives.

document producers highlighted a dichotomy between the perceived user need for discussing options with others, and the limited supply of telephone advice services due to restricted budgets.¹² This user need places greater reliance on TSOs providing documents (online or print) that can effectively assist discussion about experiences, learning from others, and having a reliable outsider to help think through decisions (Clough et al. 2004, 146, 199). This can be accomplished by use of graphic features such as those identified in the extended visual analysis whereby content is formatted in pull-out boxes or embedded as bullets in paragraphs.

Furthermore, few graphic features were identified in existing documents that address the ‘top down’ process (Kools 2012, 44) of prior knowledge of housing options and their connection to later life care. Yet, housing and care were considered together in the factsheet and self-training documents. Further research is needed to, explore whether a separation between housing options and care would be advantageous to facilitating engagement with the topic of later life housing, or whether it would be disadvantageous to those requiring both.

These kinds of suggestions discussed chimes with the recommendation for citizen-centred communicative programmes and the development of documents that empower a user to use information for ‘discussion, deliberation, and exchange of views’ (Harding 2017, 26) to assist their decision-making activities. To this end, the observations made in the visual analysis could be explored further in future participant studies to evaluate:

- better visually differentiate the kinds of documents in the domain and evaluate their effectiveness in supporting different kinds of use at different points in the decision-making journey;

12 This was particularly reported on by document producers in smaller TSOs. However, restricted budgets were a consideration for all document producers.

- use different kinds of graphic features for reflection, comparison, and discussion, and evaluate their effectiveness in supporting decision-making activities;
- use of conversation starter documents for later life housing options.

The potential value of exploring these aspects of document design were not known at the beginning of this research but through collating the findings from four studies, these foci have been identified as potential avenues for future participant studies.

Additionally, the channel and format of such documents would be relevant to the development of such documents and to an effective 'battery of documents', as discussed in the following section.

6.2.5 The channel and format

Findings about the channel and format of documents indicate that:

- print documents are still required by older beneficiaries (see Section 5.5.4);
- print documents can trigger conversation (see Section 4.3.6);
- online documents can be more action-led than print (see Section 5.5.4).

The findings in the studies for this research do not indicate that one channel should be used over another. Instead, the two channels or print and digital should be considered complementary and the affordances of each considered. For example, regarding the print channel the relevance of affordances (Gibbson 1979) that printed documents offer, that online documents do not, could be considered further. The following two areas of the affordances of print are noted:

- the ‘social affordances’ (Harper et al. 2002, 314)¹³ of printed documents;
- the ‘immersion and transportation’ (Mangen 2017, 285)¹⁴ of printed documents.

Such affordances of paper documents have relevance to housing options documents. For example, existing studies about end of life care planning show that physical documents can facilitate conversation (Common Practice 2020b), suggesting that the affordances of a physical document may be important. Secondly, the effectiveness of graphic features that encourage reflection, and, therefore, immersion in decision-making activities, may be more effective on paper than on screen. This suggests that further studies into the affordances of paper within decision making in later life would be beneficial.

Conversely, the digital channel offers:

- lower printing costs for TSOs (see Section 5.4.5);
- an action-led approach to accessing information (see Section 5.5.4).

To work within limited budgets TSOs are often providing printed documents as online PDFs. Understanding how these can be used as both digital and printed materials (i.e., people print at home and use on screen) would be beneficial. TSOs are already providing digital documents that offer an ‘action-led’ approach such as the self-help documents that borrow graphic features from the questionnaire genre, leading a person through a set of questions that lead to advice relevant to their situation. Understanding how these different kinds of digital

13 Harper et al. (2002) found that people shared printed letters addressed to them with other members of the family and could use paper documents strategically with other members of the family. Firstly, by sharing a printed document with a family member a parent could exercise didactic practices, such as handing a flyer to a teenager to place in the recycling (Harper et al. 2002, 316). Secondly, by strategically placing a phone bill outside a teenager’s room so that on leaving the room they see the document, a parent can use this incident to ask a teenager about whether they had paid the bill, for example (Harper et al. 2002, 316). Although a web page or online document can be shared it does not afford the didactic and strategic opportunities of print.

14 Reading a digital device, as opposed to a paper book, may influence a reader’s experience of narrative cohesion when reading non-fiction text (Mangen et al. 2014).

documents can work together would be of interest. Additionally, from the findings it is clear that digital documents can offer benefits for TSOs (lower costs) and users (more action-led). However, this dissertation recommends further exploration into how print and digital documents can work together as a battery of resources for the public.

6.2.6 The choice of images

From the collated findings, two observations were made about use of images on documents for later life housing options concerning:

- the use of ‘real’ photographs of housing options;
- the use of illustrations instead of photographs.

Regarding ‘real’ images of the options available, users in the focus group indicated that ‘having those real photos with real houses this is what it is and this is what it can do for you’ (see Section 4.3.4) was an important aspect of documents for housing options. This suggests that documents for decision making about important life transitions, such as later life housing options, need to be transparent, displaying reality, rather than an invented scenario that is often be portrayed through stock photography. This was echoed by TSO document producers, who commented on being mindful of not misrepresenting later life housing options by using photographs that are selling a lifestyle (see Section 5.5.1). This is often the case when stock images are used and document producers are mindful of images needing to be ‘just right’ to represent reality as well as being positive (see Section 5.5.1). If stock images are to be used, trained designers unfamiliar with designing for the topic of later life should be aware of the values and assumptions with which stock images of older people can be imbued (Brookes et al. 2018, 381).

Awareness of assumptions and the sensitivity surrounding the use of photographs of older people were discussed with document producers. For example, the use of artwork (i.e., not photographs) was deemed to indicate the seriousness of information compared with marketing materials (see Section 5.5.1). Also, illustrations of topics, rather than

photographs of people, are being used on revised guide documents partly due to the sensitivity surrounding the use of photographs of those who have passed away (see Figure 3.45). These different uses of images were also observed in the visual analyses (see Section 3.83). This indicates that document producers are aware of the effects of using images on documents for decision making. However, further exploration would be beneficial to explore whether image choice impacts user engagement with the topic of later life housing, in order to build recommendations for image choice in documents for decision making in later life.

6.2.7 Managing design projects for later life housing options documents

The discussions above about significant aspects of document design could be beneficial to the management of design projects by providing common ground between document producers regarding:

- 1 what users should 'do' with the different kinds of documents;
- 2 a naming convention for kinds of documents;
- 3 visual differences between these kinds of documents;
- 4 graphic features that support decision-making activities;
- 5 how the choice of channel and format might impact effectiveness in supporting decision making;
- 6 how images can be used to differentiate information from marketing yet engage people with the topic of later life housing options.

Addressing these areas of document design could also facilitate the collaboration among those producing documents for decision making, through the development of design briefs, as discussed in the following section.

6.2.7.1 *Design briefs*

The six recommendations above could manifest in design briefs that function as a pivot and a form of communication among those involved with producing documents (for example, TSO staff and external

designers). During discussions with trained designers, two example briefs were used as visual prompts. Naturally, aspects relating to effective design briefs were discussed. Disadvantages of the briefs shown were:

- tick boxes of procedures can lead to ‘bland’ designs;
- asking documents to perform multiple functions;
- the language of the brief is ‘closed’, stating what the client wants rather than the ‘problem’ to solve.

Conversely, the advantages of the briefs shown were:

- inclusion of examples of existing documents;
- language of the brief is ‘open’, suggesting that the client is open to changing existing documents for more effective proposals.¹⁵

The six points above could contribute towards developing effective design briefs for later life housing options documents by focussing on a common language for document design in the domain.

Additionally, discussion among trained designers during Study 4 indicated that the activities of including user involvement in design projects and involving trained design in document evaluation are often driven by financial considerations (e.g., limited budgets). The involvement of users within the management of design projects is discussed in the following section.

6.2.7.2 Involvement of users

The involvement of users in design projects was discussed during conversations with TSO document producers and trained designers. From the conversations with document producers, it was clear that design practice in the domain of later life housing is not devoid of user involvement. The approaches include formal and informal means (see Section 5.4.4):

15 In the interview studies ‘open language’ was considered to be written in a way that indicated the client was aware of the need for change rather than requesting specific deliverables.

- directly through organised evaluation such as focus groups;
- indirectly through the collection of user and advisor feedback about documents and the information provided that results from advisor interactions with beneficiaries.

These two methods of capturing user feedback are used to develop new documents or revise existing documents. This dissertation posits that these two existing practices have additional potential:

- to incorporate user feedback into more than one project;
- to capture users' interactions with documents.

Regarding incorporating user feedback into design projects, this relates to observations by trained designers that financial considerations are often a limitation that hinders user involvement in design projects in the real world. In these instances, user feedback captured by TSOs directly and indirectly could be incorporated into the development of documents where evaluation is restricted by limited budgets.

User interaction with documents relates to recommendations that document producers evaluate users' opinions and interaction with documents over time and in the context of use (Black et al. 2012).

Within real-world design practices, such user involvement needs to be implemented in the early stages of a design project partly so that information can be disseminated in a timely manner (see Section 5.4.5).

The collation of indirect feedback could be considered similar to (not a replacement for) how documents are used in context and over time. Consequently, the value of indirect feedback, for example through conversations with advisors, could be given more recognition and used further throughout design projects.

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This chapter has brought together the findings and insights across the four studies to offer recommendations regarding techniques valuable to the exploration of design practice and aspects of communication design relevant for document producers designing for decision making. Additionally, it has indicated further avenues of enquiry regarding document design that supports decision making. The following final chapter summarises the contribution of this dissertation to design research methodology and to design practice for decision making particularly within the domain of later life housing options.

7 Concluding remarks

This research project set-out with the broad aim of offering insights, grounded on a practical footing in a real-world context, relating to how design and design practice contribute to the effective provision of information that supports decision-making activities. The three main objectives to achieve this aim were to:

- 1 identify ways of describing design and design practice graphically to direct thinking towards significant activities and considerations in the domain of later life housing options;
- 2 elucidate processes within communication design practice that are integral to the success of providing effective information for later life housing options;
- 3 identify principles from good document design relevant for, and applicable within, document producers' existing practices in the domain of later life housing options.

This concluding chapter summarises the key outcomes of the research project, in relation to the three objectives, following the detailed discussion of study findings in the preceding chapter (Chapter 6). To address the first objective, suggestions are offered for how to describe design and design practice graphically, drawing upon tools and techniques used in this research project. To address the second and third objectives, suggestions are offered – for practitioners within document design for decision making – that contribute towards effective document design and design practice. Throughout these discussions further areas of research are identified that would continue the exploration of the value of design and design practice.

7.1 The value of the research approach and ways of describing design and design practice graphically

The value of the research approach was its exploration of layers (the documents themselves, and the design practice that leads to their development) through multiple studies (visual analyses, a focus group, and interview studies). Findings from the visual analyses, user perceptions of documents, and existing design practices, were synthesised using various techniques to graphically represent design and design practice. This approach and the techniques used are offered here as useful tools for researchers and design educators aiming to elucidate process and explore design knowledge:

- 1 the synthesis of multiple studies to build a picture of design within a multi-disciplinary domain;
- 2 engaging with users at the beginning of a project to co-explore a domain and contribute to scoping a research project;
- 3 the process of developing a framework for visual analysis to gain familiarity with aspects of a multi-disciplinary domain and relevant aspects of communication design;
- 4 the use of tree diagrams, thumbnails of documents, and colour-coding techniques to provide a visual representation of document functions and use of graphic features across documents;
- 5 the use of tabular formats to aid comparison and collation of significant graphic features relevant within a particular area of design;
- 6 the use of digital charts to visualise interview data, build a picture of complex factors, and support a holistic perspective of research outcomes.
- 7 the use of design scenarios to prompt ‘thinking’ and ‘reflection’ on design practice to develop a picture of what happens during design practice.

Points 1–2 above (multiple studies and engaging users) are associated with a co-design approach (e.g., Walker et al. 2018; Rodgers 2017). This

research sits within the sphere of co-design, which includes advocating the combining of multiple perspectives (in the case of this research those of users and existing practitioners) to ensure outcomes of the research are usable and fit within existing practices. The approach used in this research project differs from a ‘fully’ co-design approach in that additional co-design methods could have been used. For example, workshops with stakeholders could have been organised whereby charts (such as those produced in Studies 3 and 4) were developed with stakeholders. Instead, in this research, the development of charts was used as a tool for analysis and synthesis of interview data, rather than as a co-design tool.

Nevertheless, this potential for expanding the use of co-design techniques indicates opportunities for further research that could contribute toward real-world discussions regarding design for decision making. For example, the visual charts created during this research could be co-designed further with stakeholders. The charts could then be used to direct thinking, by practitioners and policy makers in the domain, towards areas of information for later life housing that require additional, or re-directed, funding in order to improve information and advice provision.

Point 3 above (development of a framework) has value for others working within a multi-disciplinary research project. This includes the value of the development of a framework as well as the use of the framework in visual analyses. Firstly, the process of combining domain-specific considerations with existing benchmarking criteria for document design, can support a design researcher to become familiar with a multi-disciplinary domain and identify relevant foci for visual analysis. Secondly, the framework developed for this research, as shown in Figure 3.31, presents a working framework useful for directing the visual analyses of documents for decision making, particularly in the domain of later life housing. This framework has potential to be developed into a tool for practitioners to benchmark and improve documents for decision making, similar to the use of benchmarking criteria by Waller (2011d) for evaluating transactional documents. Furthermore, the framework could be included in the

development of a tool kit for practitioners involved with design for decision making (see Section 7.2).

Points 4–6 (using design skills and devices) relate to the use of design skills within research methods. This includes the use of visual means of recording visual analyses and the use of chart making. Firstly, regarding visual analysis methods, the use of tree diagrams, thumbnails of documents, colour-coding, and tabular formats facilitates the unpacking of documents to explore the graphic devices used. This not only aids the researcher during visual analysis (for example, identifying significant graphic features) but also provides visual aids for communicating with others regarding the use of graphic language. Such visual aids have value in design education for communicating with design students on the use and identification of graphic language, as well as offering a tool for students to use in their own visual analyses. Secondly, the development of charts (for example, Figures 5.9, 5.13, 5.14, and 5.15) facilitate the synthesis of factors and exploration of complex relationships between them (Frascara 2001, 169). As with the use of graphic means within visual analysis, the development of charts aids the researcher in exploring complex factors, and provides visual aids for discussion. As discussed above, further development of such charts, using a co-design workshop with stakeholders, would be valuable and open-up discussion for further improving design of information for decision making as well as design practice.

Additionally, further work would be of interest to develop the ‘chart of design practice in the domain of later life housing’ (Figure 5.15) into an interactive digital format. An advantage of a digital format would be the possibility of more clearly presenting the connections between the activities and considerations, yet retaining important detail regarding the ‘thinking’ that occurs as designers work within the context of design for decision making. Users of a digital chart could attain an overview of design practice by scanning the chart, and explore further details by interacting with the digital content such as clicking on an area of the chart to reveal additional content.

Finally, point 7 (the use of design scenarios) offers a technique for eliciting ‘tacit’ design knowledge regarding ‘how’ designers work. Design scenarios used in this research consisted of a design brief, a list of considerations relevant to the context of the project, and existing documents. Although the use of these design scenarios was limited (see Section 6.1.5), the scenarios were able to prompt responses from trained designers regarding how they might work within a context to develop effective documents for users. Further research would be of interest to develop the use of design scenarios. For example, the use of design scenarios in design education, in conjunction with a developed digital ‘chart of design practice’, could be used to engage students with real-world contexts in which design practice plays a pivotal role.

7.2 Suggestions for the implementation of good document principles and integral aspects of design practice

From the non-linear research approach and the techniques discussed above, study insights were collated that offer suggestions for practitioners involved with design for decision making that would both benefit users of information and aspects of design practice. These suggestions include:

- development of suitable aspects of visual rhetoric, such as typographic differentiation and stronger visual identities for smaller TSOs –
 - to improve user perceptions of the relevance and usefulness of information for decision making,
 - to support document producers with designing impartial content;
- development of a consistent naming convention and a way of visually differentiating the kinds of documents (guide, factsheet, self-training, and self-help documents) –
 - to support users to identify appropriate information materials for their circumstances,
 - to support document producers with a common language across the domain;

- development of design resources that can be shared across the domain, used to enhance users' experience of documents, and the design practice of document producers, including –
 - a library of graphic features that support decision-making activities such as discussion and reflection,
 - ways of visually differentiating documents to emphasise their purpose and differentiate them from marketing materials;
- further incorporating informal and formal user involvement into the development of document design;
- development of design briefs that incorporate the suggestions above to improve communication across the design practice within the domain.

The suggestions above could be combined into a tool kit for practitioners within the domain of later life housing, and then developed further in other domains that support decision-making activities (such as Power of Attorney). Such a tool kit could then inform the development of additional information materials. For example, further research would be of interest into the development of a 'conversation starter' document for later life housing options, to facilitate conversations among family and friends – such as those developed for Advanced Directives (e.g., Tamayo-Velázquez et al 2010). This kind of document does not seem to be offered currently in the domain. Use of co-design methods, such as workshops whereby users, document producers, and designers, can explore the development and effectiveness of such a document, would be of interest for further studies.

Additionally, the research outcomes suggest that further studies would be of interest into:

- 1 the affordances of print and digital documents, in the context of decision making for later life housing;
- 2 the use of images (illustration and photographic) in documents for decision making that aim at providing impartial content.

Of particular interest is how print and digital documents could work as a set of resources for different decision making contexts, utilising the affordances of each, and working within the funding limitations of TSOs.

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In summary, this dissertation has shown the contribution of design and design practice towards the effective provision of information for decision making and the value of design and design skills within research methods. In doing so it contributes to the growing body of design research that raises the status of design and design practice beyond a popular perspective of the aesthetic value of design towards an understanding of its public value.

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Glossary

Although this dissertation is predominantly a discussion about communication design, it focusses on information provided by third sector organisations about housing options in later life. The same terms are used in design and the third sector but carry different meanings. On the other hand, specific terms are used in design and for information about housing options that require clarification. A list of terms and acronyms used are included to clarify meanings, as far as they are used in this dissertation.

Adult child

‘Adult child’ refers to ‘a son or daughter who has reached the age of majority’ (Duhaime 2019), and who might support a parent when discussing housing options in later life. It is commonly used by third sector organisations (Hillier 2016).

Artefacts

See ‘Documents’.

Chart

‘Chart’ is used in this dissertation to refer to the visual representations of design practice that have been created during this research project.

Communication design

See ‘graphic communication’.

Design (verb/noun)

‘Design’ when used on its own can be a verb, e.g., ‘to design a booklet’, or a noun, for example ‘the design of a booklet cover’. This dissertation uses design as both a verb and a noun, but where possible qualifies the term (see ‘Design process’).

Designer

The term ‘designer’ is used to refer to two kinds of practitioners: ‘trained designer’ – someone trained in the discipline of graphic design or related subjects; and ‘non-trained designer’ – someone not trained in a design discipline but who performs design tasks as part of their everyday work (Owens 2012).

Design practice

‘Design practice’ is used in this dissertation to refer to the collection of activities and decisions involved with producing documents. These include design processes such as the visual presentation of words and pictures as well as managing considerations that may influence document design.

Design process

‘Design process’ refers to the stages designers work through when producing a document. For example, producing design ideas, testing prototypes with users, and readying a document for print would be stages included within a design process, which is often iterative.

Diagram

‘Diagram’ is used, by existing studies and discussions about design practice, that refers to a visual representation of design practice using techniques such as tree diagrams and webs. See also ‘Chart’.

Document

The term ‘document’ is used to refer to the objects being reviewed (guides, factsheets, self-help and self-training documents), following Matthew Lickiss (2020) that ‘as a word must be used [for descriptive purposes], “document” seems as good as any’ and is

‘directly relatable to real-world practice’ (74). This dissertation proposes that documents for housing options are ‘functional documents’ that ‘people read ... not merely to learn information, but in order to do something’ (Flower et al. 1983, 41). See also ‘Functional communications’.

Document producer

The term ‘document producer’ has been used to refer to both those trained in design (Moys 2011) and those not trained in design (Waller et al. 2016). This dissertation uses the term to refer to anyone involved with producing documents, such as content providers, information officers, or designers. The term ‘designer’ is then divided into two kinds: ‘trained’ and ‘non-trained’ (see ‘Designer’ and ‘Trained designer’).

Domain

‘Domain’ is used to refer to an area in which practitioners work that hold particular knowledge, impacted by influences, and have particular activities. This dissertation uses the term to refer to ‘the domain of later life housing options’. Domain is used by others to refer to considerations a designer is working with (Van der Waarde 2018). However, ‘domain’ is used in this dissertation to refer to the context that a designer is working within, in this instance it is the topic of housing options for later life.

Effective document design

‘Effective document design’ in this dissertation means ‘appropriate to its particular set of parameters defined in relation to audience, channel, content, client, context of use and purpose’ (Moys 2017, 210).

Functional communications

This dissertation argues that the documents for housing options fall into the category of ‘functional communications’. They contain information that the public need to understand. Others use the term ‘functional communication’ to refer to items such as forms and information packs from the government or private sector that are different to ‘persuasive communication’ designed to persuade a person to take a particular action (Waller 2011a). Although I argue

that documents for housing options should consider aspects of persuasive design, this is from the intention of engaging people in the topic, not to make a particular decision. This acknowledges the stated intentions of organisations who aim at impartiality.

Functional document

See ‘functional communications’.

Genre

Genres are names for artefacts that have ‘already been given a name by its community of users’ (Waller et al. 2010, 8) such as questionnaires and leaflets.

Graphic communication design

Graphic communication design is the action of illuminating or explaining ‘things using graphic language, which may be verbal, pictorial, or schematic, and presented on paper or screen’ (Walker 2017, 549) that has ‘a view toward having an impact on public’s knowledge, attitudes, or behaviour’ (Frascara 2004, 2). In this dissertation ‘communication design’ is used as a shortened version.

Graphic design

This dissertation supports the view that graphic design and communication design are synonymous (Walker 2017, 550). However, although ‘graphic design’ is considered to have moved on from its ‘narrow focus on finished print artifacts’ (Triggs 2019, 1), this dissertation uses ‘graphic communication’ predominantly to move discussion away from the common aesthetic perception of graphic design.

Graphic language

Graphic language ‘may be verbal, pictorial, or schematic’ (Walker 2017, 549). That is words, images, and configurations such as diagrams.

Information design

This dissertation supports the definition that information designers ‘work to make information clearer – for everyday life, business, education and science’ (IIID 2020) and are ‘identifying the problem

and analysing the context and audience before shaping the message' (Spiekermann 2017, x). The outputs of information design include those that would also be considered graphic communication including signage, contract design, and information graphics.

Layered research approach

'Layered research approach' is used in this dissertation to refer to the two foci of the research: document design and design practice; and the collation of multiple kinds of studies (visual analysis, focus group, and interviews) to arrive at recommendations about document design and design practice for the domain of later life housing.

Mixed-methods

See 'Multiple methods'

Multiple methods

'Multiple methods' is used to describe the research approach for this research, rather than the term 'mixed-methods' as the latter often refers to use of both quantitative and qualitative methods (Johnson et al. 2004). Although I maintain that mixed methods projects can be a combination of qualitative methods (Yin 2006, 42), and acknowledge that the term within-method triangulation is often used when referring to use of several qualitative methods (Gray 2018, 197), for the sake of plain language I use 'multiple qualitative methods'.

Organisations

See 'Third sector organisation'.

Sector

To distinguish it from the 'domain of housing options' (where particular knowledge about this area creates a particular context), 'sector' refers to a wider field in which an organisation operates. This research is concerned with the third sector.

Third sector organisation

The definition of 'third sector organisation' (TSO) includes '... neither public sector nor private sector ... [but including] both

registered charities and other organisations such as associations ...' (National Audit Office 2019). Local authorities also provide information about sheltered accommodation; however, this dissertation focuses on documents produced by TSOs as they provide information about all options and are aimed at the wider public.

Trained designer

See 'Designer'.

Appendix A: List of organisations

A list of organisations compiled from April 2017 to January 2018, that provide national UK information sourced from the following:

- the Housing Care website (Elderly Accommodation Counsel 2017b);
- the Information Standards list of accredited organisations (NHS England 2017);
- a Google search with the strings: 'housing for later life' and 'housing for older age'. These sources provided a list of 424 organisations

Source:	Size (income) as of 2017/18 (data from Charity commission.gov.uk or fca)	Organisation name	Kind of information provided					Kind of organisation					Notes about information provided/organisation	
			Non medical?	I&A for the public?	Content relevant to housing decisions?	Content that enables decision making in some form?	Information for the public related to general old age?	Registered Charity	Registered Society with Charitable Status	Company	Association/So ciety/Trust	Social enterprise		Independent body - not a provider of housing
424 GS = Google search			212	161	22	18	134	56	1	47	11			
			n=	182	50	113	0	24	0	0	0			
367 HC		Tenants Services Authority (abolished)	n/a											
368 TIS		Terrence Higgins Trust	n											
369 TIS		The AKU Society	n											
370 TIS		The Anaphylaxis Campaign	n											
371 TIS		The Brain Tumour Charity	n											
372 TIS		The Childrens Trust	y	y			n							
373 TIS		The Christie NHS Foundation Trust	y	y			n							
374 TIS		The Clatterbridge Cancer Centre NHS Foundation Trust	n											
375 TIS		The Dairy Council	n											
376 TIS + HC		The Disabled Living Foundation	n											
377 TIS		The Eve Appeal	n											
378 TIS		The Hepatitis C Trust	n											
379 TIS		The Hidradenitis Suppurativa Trust	n											
380 TIS		The Human Fertilisation and Embryology Authority	n											
381 TIS		The Lesbian & Gay Foundation	n											
382 TIS		The Mens Health Forum	n											
383 TIS		The National Institute for Health and Clinical Excellence	y	n										
384 TIS		The Roy Castle Lung Cancer Foundation	n											
385 TIS		The Royal Bournemouth and Christchurch Hospitals NHS Foundation Trust	y	y	n		y							
386 TIS		The Royal College of Psychiatrists	y	n										
387 TIS		The Royal Marsden NHS Foundation	n											
388 TIS		The Royal National Institute for the Blind	n											
389 TIS		The Safer Eating Company	n											
390 TIS		The Somerville Foundation	n											
391 TIS		The Stroke Association	n											
392 TIS		The World Cancer Research Fund	n											
393 TIS		The Zone	n											
394 TIS		The Eddystone Trust	n											
395 HC		Third Age Employment Network (TAEN)	y	y	n		y			y				
396 HC		Third Age Trust	y	y	n		y			y				
397 HC		Thomas Pocklington Trust (sight loss)	n											
398 HC		Thrive Homes Ltd (Gardening)	y	y	n		y	y		y				
399 TIS		Together for Short Lives	n											
400 TIS		Tommys	n											
401 TIS		Torbay and South Devon NHS Foundation Trust	y	y			n							
402 HC		Tourism for all	y	y	n		y			y				
403 HC		TPAS	y	y	n		y			y				
404 TIS		Trekstock	n											
405 HC		TSA (Industry body for Technology Enabled Care)	y	y	n		y							
406 TIS		Tuberous Sclerosis Association	n											
407 TIS		UK PIPS - UK Primary Immunodeficiency Patient Support	n											
408 HC		UKHCA (United Kingdom Homecare Association)	y	y	n		y			y	y			
409 TIS		United Lincolnshire Hospitals NHS Trust	y	y			n							
410 TIS		University Hospitals of Morecambe Bay NHS Trust	y	y	n		y							
411 HC		University of Bristol	y	n										
412 HC		University of the West of England	y	n										
413 HC		University of York	y	n										
414 TIS		Urostomy Association	n											
415 TIS		Vegetarian Society of the UK	n											
416 TIS		Venture People	y	y			n							
417 HC		Victim Support	y	y	n		y			y				
418 HC		Volunteer Centre Network Scotland	y	y	n		y			y				
419 HC		Volunteering England (can't find specific website)	n/a											
420 TIS		Web MD/Boots Web MD	y	y			n							
421 HC		Welsh Assembly Government	y	n										
422 TIS		West Hertfordshire Hospitals NHS Trust	y	y			n							
423 TIS + HC	£100,521,000	Which? - Elderly Care	y	y	y	y	y	y	y	y				Information across a range of topics for housing/sheltered housing/checklists
424 TIS		Yorkshire MESMAC	n											

Appendix B: Visual analyses

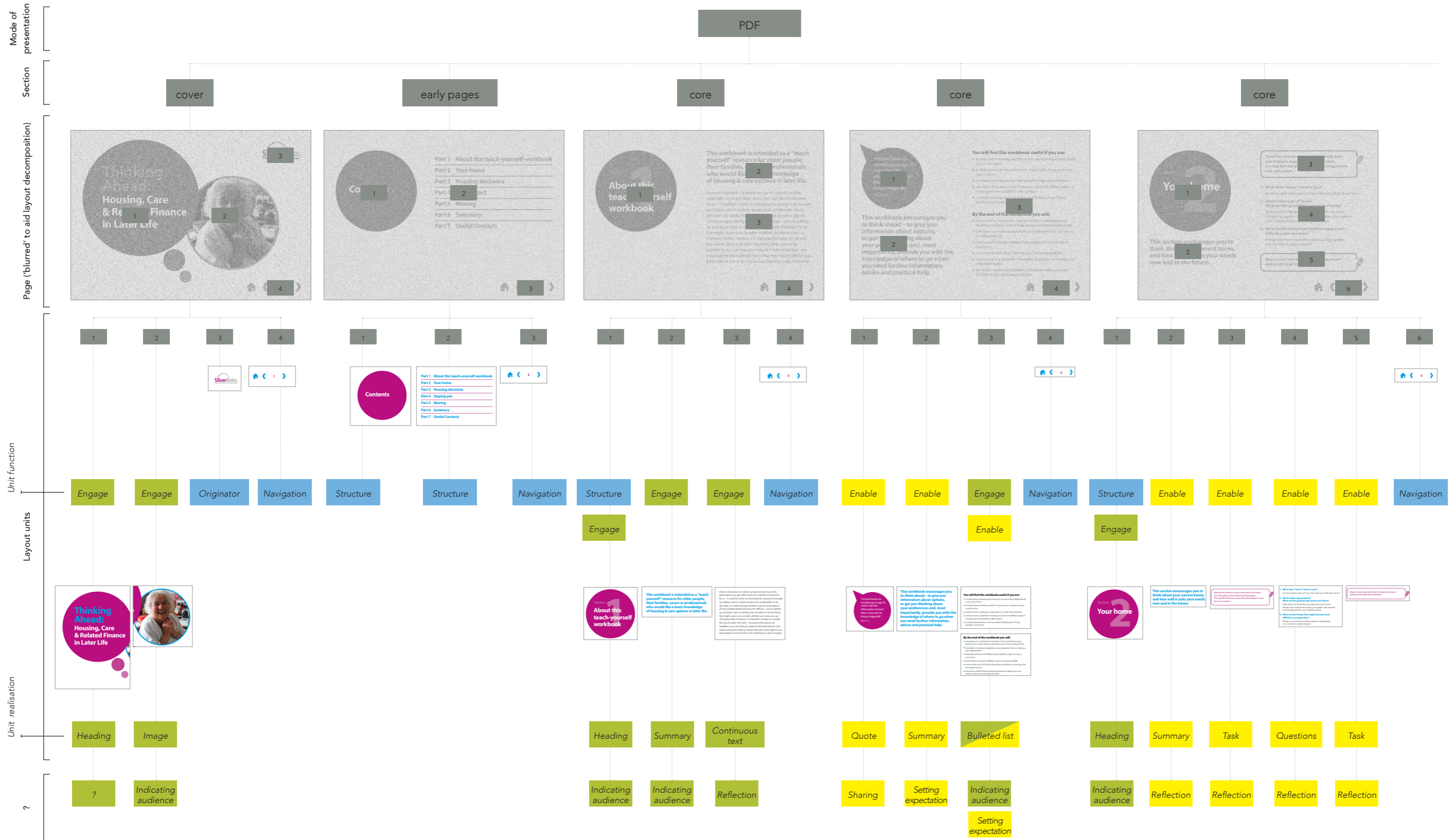
Documents for the initial analysis:

- B1: pilot tree diagram;
- B2: documents provided to the evaluators;
- B3: review sheets from the evaluators;
- B4: tree diagram for a guide;
- B5: tree diagram for a factsheet;
- B6: tree diagram for a self-training document;
- B7: tree diagram for a self-help document.

Documents for the extended visual analysis displaying the thumbnail visual representations of documents regarding the :

- B8: organisation of words in context of page and document layout;
- B9: organisation of images in context of page and document layout;
- B10: organisation of words and images in page and document layout;context.

B1: Pilot review tree diagram



B2: Documents provided to evaluators

Explanation sheet:

Document analysis: A review of the working method

Research aims

The PhD research aims are:

- To establish significant design features of documents that facilitate complex decisions; and
- To understand more about the design processes used to produce documents that aim to facilitate complex decisions.

The research focuses on documents that aim to facilitate complex decision-making activities for housing decisions in later life.

Two approaches are currently used to achieve the research aims:

- 1 Document analysis – to identify significant design features used in the documents; and
- 2 Interviews with producers of documents – to explore the design processes used to create the documents.

Why analyse documents?

The analysis task aims to identify the significant design features that facilitate complex decisions. The data gathered from the analysis will be used during the exploration into how the documents were designed, with the aims of understanding more about:

- How the significant features are formed during the design process; and
- The factors that occur during the design process that affect the implementation of significant design features.

A brief overview of the analysis method

The following steps were followed to analyse the sample document.

- Create a distorted digital image of the document so that layout units can be identified.
- Identify layout structure by identifying where layout units form distinct layout areas.
- Number the layout areas from the top left of the digital image.
- Create digital colour images of each of the layout units.
- Using the framework (see attached) identify whether the layout units are achieving one/several of the three functions 'engage', 'inform', or 'support'. These layout units become the significant features.
- If layout units are not achieving one of the three functions, label the function appropriately (e.g. 'navigation').
- Label the features of the significant layout units (e.g. 'heading').

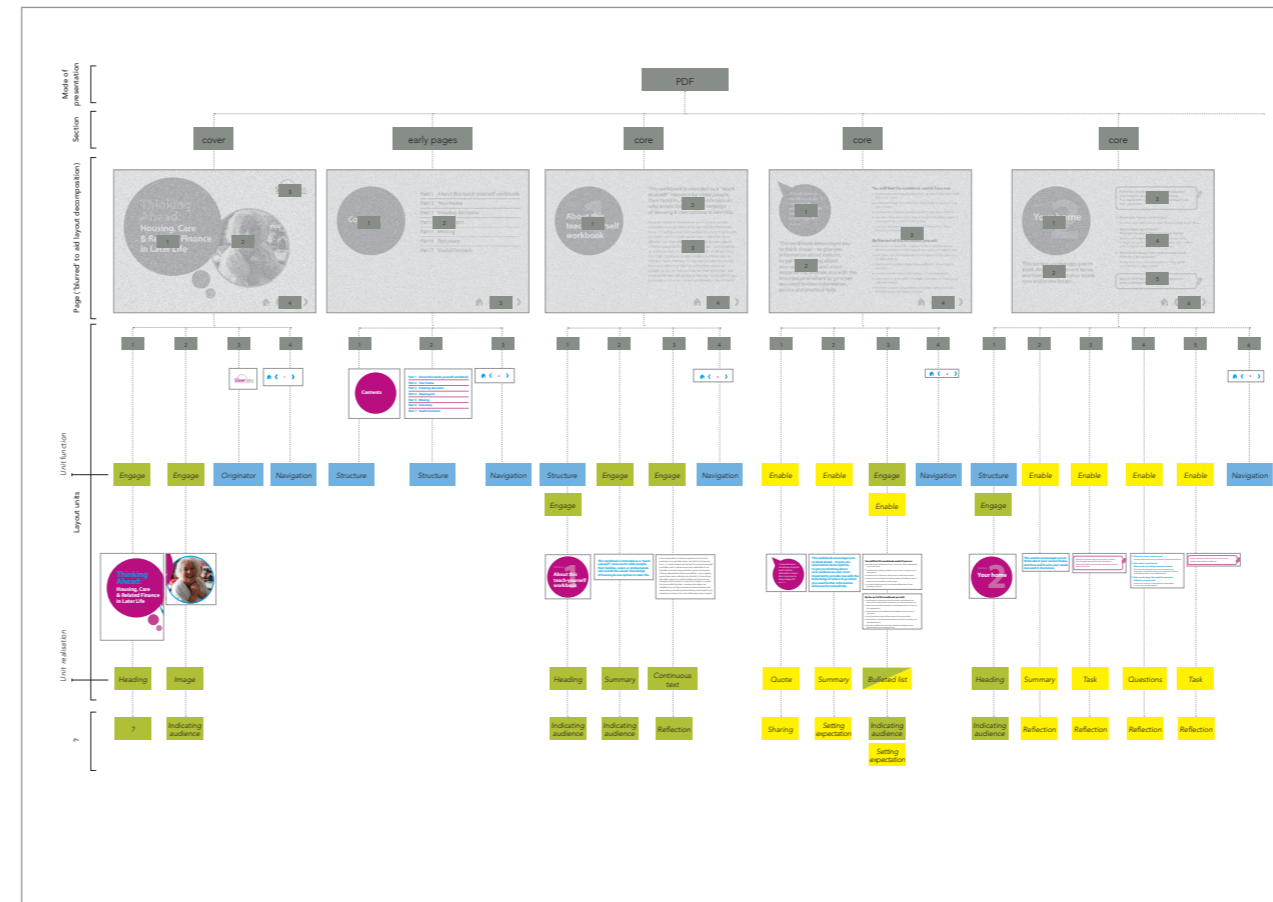
The aim of this review

The aims of this review are:

- To establish whether the analysis framework is purposeful and clear; and
- To challenge or validate the initial judgements made in the sample document analysis.

* A distorted image removes colour information, reduces legibility, and increases the purposeful white space that separate layout units. This reduces a descriptive approach at the beginning of the analysis process, enabling the judgement of how layout units are visually grouped together.

A3 print out of tree diagram:



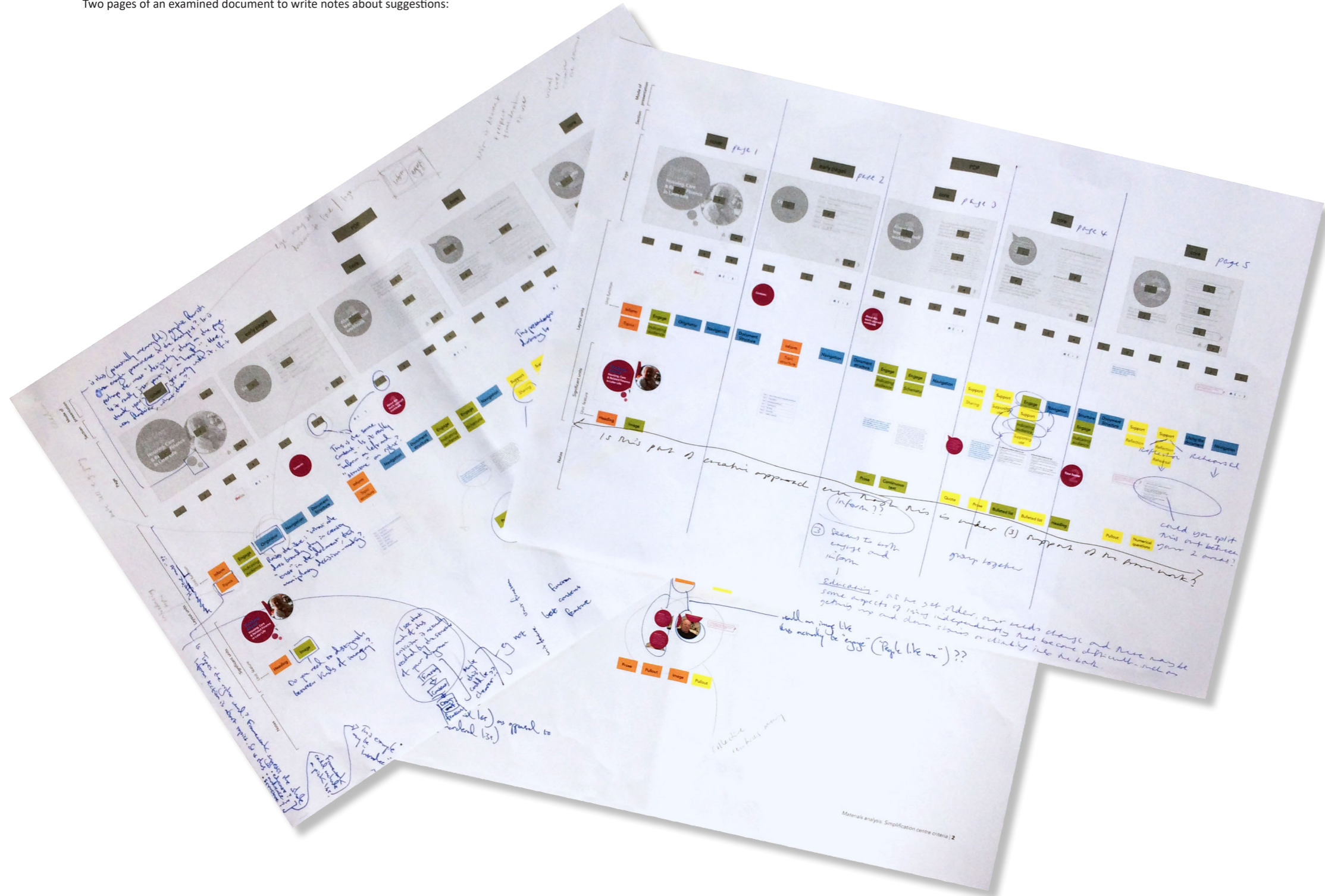
Initial framework:

1	Engage	How is relevance addressed? – how are intended audience/s indicated? How are schemata of 'housing in later life' addressed?
2	Inform	How are the materials educating the audience about the topic? – How the is topic explained? How is/are the topic/s structured to help prompt thinking, or focus on particular needs? <i>How are push/pull factors presented?</i>
3	Support	How are creative approaches used to enable identification of emotion, meaning, and aspiration? How do the materials support the sharing of experiences ? How are the materials supporting access to informed unbiased people ? How are the materials supporting 'rehearsal time', 'reflection' ? <i>How do the materials support effective use of the information material?</i>

B3: Pilot review evaluators sheets

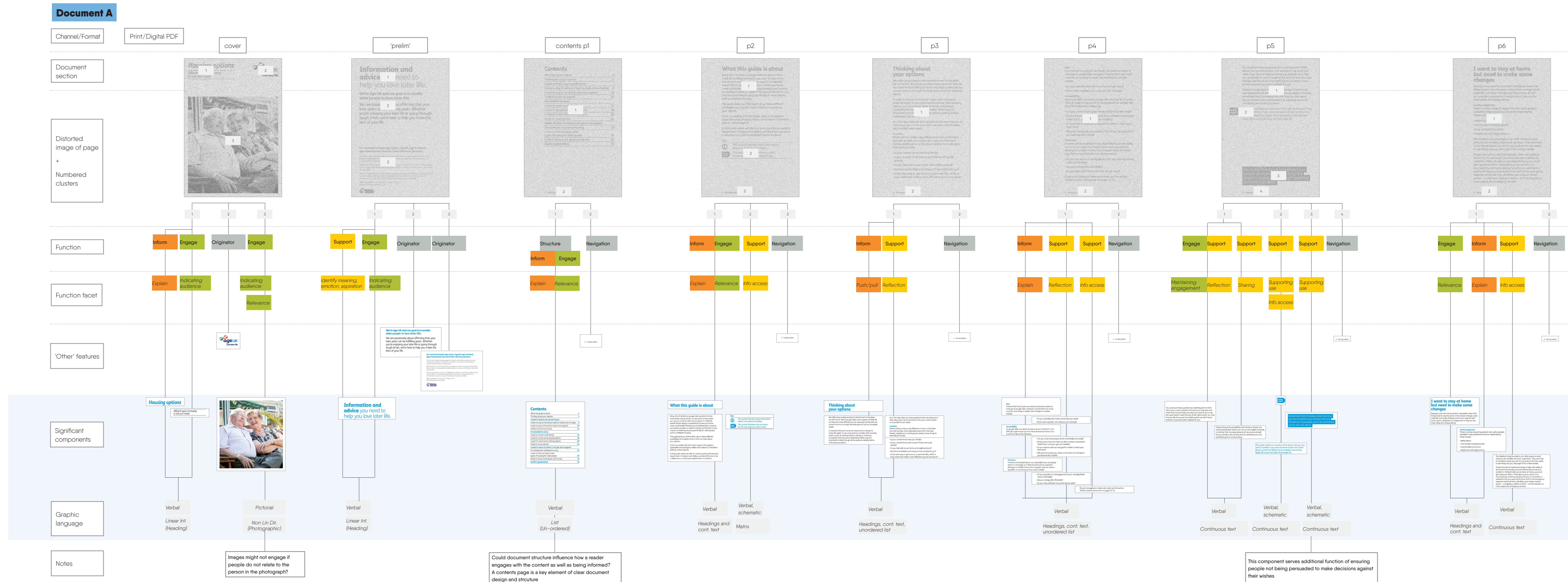
Examination sheets:

Two pages of an examined document to write notes about suggestions:

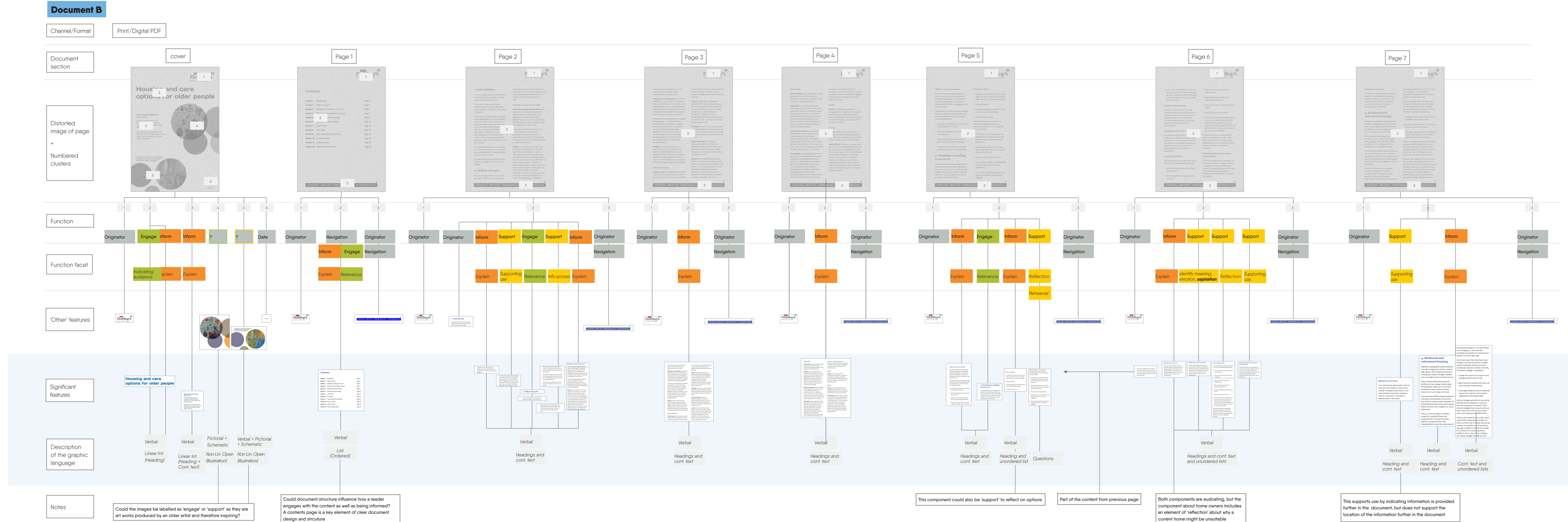


E34 Page	Review Point
1 A3 Overview	You may have this already, but when presenting, it may be useful to show your overview first but then perhaps present your analysis page by
2 A3 Overview	I found adding the page number next to cover, early pages, core useful
3 A3 Overview	Framework is 3 part, but 4 colour segments on document overview. - Green: engage - Orange: inform - Yellow: support - Blue: not sure what part of the framework this fits into but quite clearly highlighting important aspects of the document: - originator - navigation - document structure - using the document
4 Framework	Leading on from point 3 above, how does your Framework incorporate originator, navigation, document structure, using the document?
5 A3 Overview	When analysing each page would it be clearer if you were showing each stage of your framework in order: for example on page 1 you have Inform first, then Engage? On each analysis, I would go in order of your framework
6 Framework	Should your framework consider what proportion of a document is applied to each section of the framework? For example, using your framework, you would expect the first few pages to Inform and Inform and the later part of the document to Inform and Support
Page	KM Review Point
7 Core - Page 3	Based on the framework, the page analysis is missing Inform by Educating: (part of block 3) 'As we get older, our needs change and there may be some aspects of living independently that become difficult - such as getting up and down stairs or climbing into the bath'
8 Core - Page 4	Third column along you have Engage and immediately underneath Support. I would find it clearer if you grouped together Engage and Indicating audience and Support and Supporting use since these are two separate sections of the framework
9 Core - Page 5	Layout area 4 Support - could you split out reflection and rehearsal as it isn't clear to me what is rehearsal?
Framework - Support	What is 'rehearsal time'?
11 A3 Overview	I can't see how Section 3 of the framework - creative approaches is analysed
Framework - Support	What creative approaches identify emotion, meaning and aspiration? Are you suggesting it is the speech bubbles (quote), prose and bulleted list that target emotion, meaning and aspiration? If so, could this be clarified further?
13 Core - Page 6	Could you further split out between push/pull?
14 Core - Page 7	I also thought that this page also Informs by educating and push/pull
Core - Page 6, Page 8	Under Inform, you just state push/pull but your framework looks at how topics educate and how a document is structured - is this therefore missing from your document analysis?
Framework - all 3 sections	Your document analysis very precisely states a single or couple of words for each part of your framework - would it perhaps add clarity to your framework if you added these descriptive words (e.g. in Engage How is relevance addressed? - how are intended audience/s indicated ('indicating audience'))
Page	KM Review Point
17 A3 Overview	Unit feature (within subsection significant units then layout units) - is this somehow part of the creative approach? Creative approach is only shown under part 3 Support of your framework, yet I read your analysis to be across all parts of the framework. I was unclear on this.

B4: Document A tree diagram



B5: Document B tree diagram

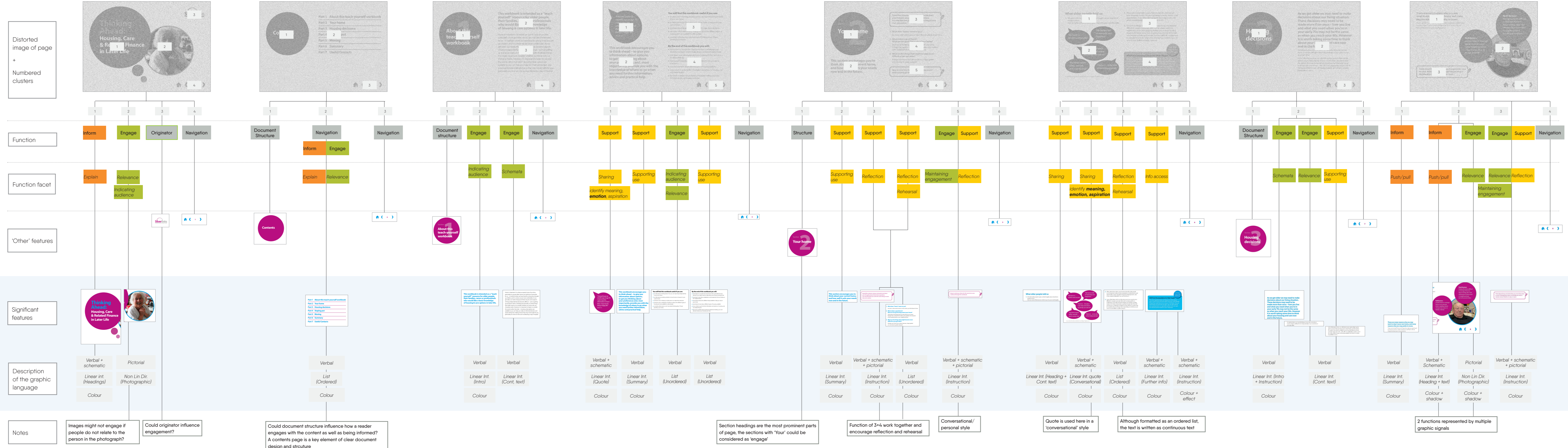


B6: Document C tree diagram

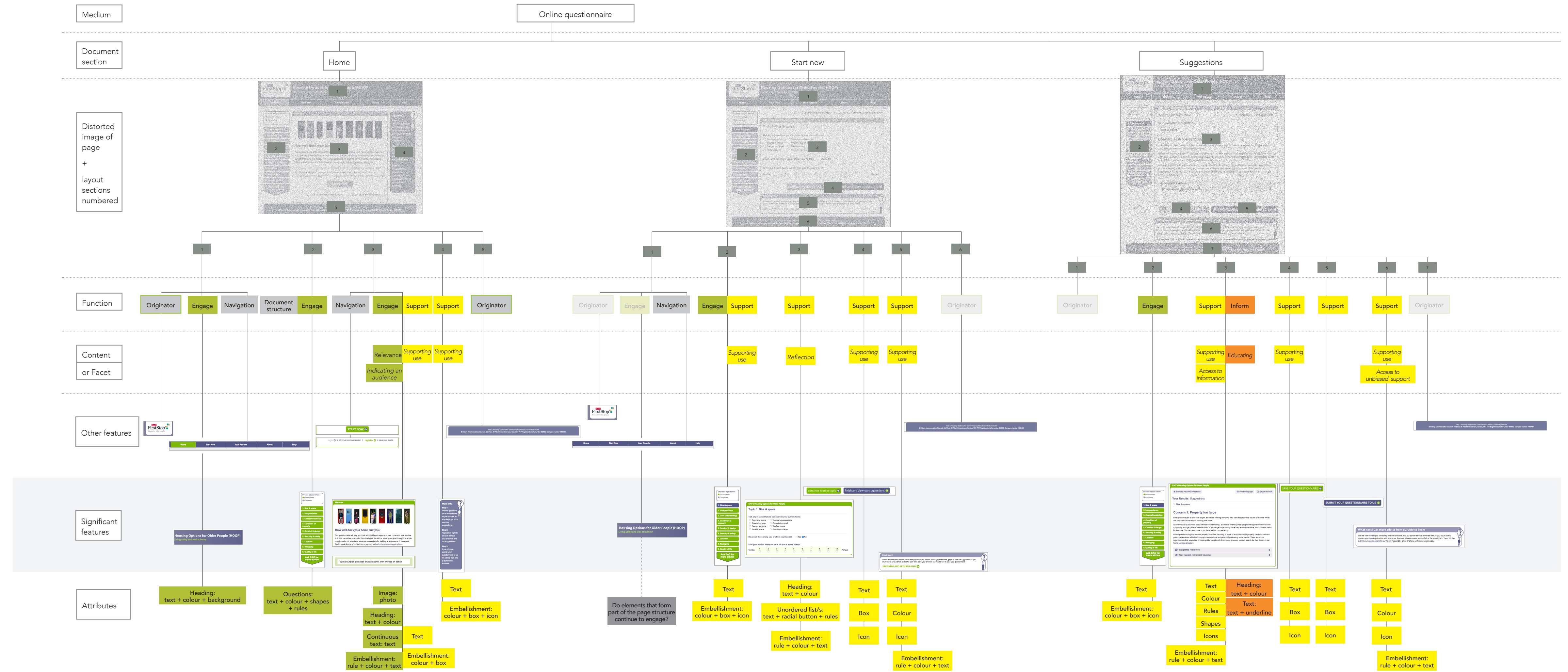
Document C

Channel/Format: Print/Digital PDF

Document section: contents page (page 2)



B7: Document D tree diagram



B8: Organisation of words in context of page and document layout

- A Indicating user
- M Multiple users
- R Relevance
- M Maintaining engagement

- E Explaining
- I Impartiality
- W Who is communicating
- I Information access

- K Previous knowledge
- I Identify meaning, emotion, aspiration
- R Reflection and rehearsal
- P Push pull factors
- S Sharing/discussion
- U Supporting use

Guide

Factsheet

Self-training

Self-help

B9: Organisation of images in context of page and document layout

- 4 Indicating user
- 24 Multiple users
- 8 Relevance
- 10 Maintaining engagement

- 5 Explaining
- 2 Impartiality
- 9 Who is communicating
- 7 Information access

- 3 Previous knowledge
- 1 Identify meaning, emotion, aspiration
- 6 Reflection and rehearsal
- 2 Push/pull factors
- 9 Sharing/discussion
- 1 Supporting use

Guide

Factsheet

Self-training

Self-help

B10: Organisation of words and images in page and document layout context

- 3 Indicating user
- 4 Multiple users
- 5 Relevance
- 10 Maintaining engagement

- 5 Explaining
- 2 Impartiality
- 3 Who is communicating
- 1 Information access

- 3 Previous knowledge
- 1 Identify meaning, emotion, aspiration
- 2 Reflection and rehearsal
- 2 Push pull factors
- 5 Sharing/discussion
- 10 Supporting use

Guide

Factsheet

Self-training

Self-help

Appendix C: Focus group with users

Documents related to Study 2, the focus group:

- C1: recruitment advert;
- C2: list of participants;
- C3: session 1 structure;
- C4: session 2 structure;
- C5: Feedback sheets used in the focus group;
- C6: participant responses to self-help document;
- C7: participant responses to fashseets;
- C8: participant responses to labelled photographs;
- C9: participants responses to leaflet pack;
- C10: coded transcript of session 2.

C1: Recruitment advert
(scale 100%)

Thinking and planning ahead feedback

Have your say about
information provided to
the public to plan ahead
for housing decisions
in later-life

Join us for:

- Feedback sessions
- A talk about the Silverlinks project
- Complimentary lunch
and refreshments

We would like to hear your
feedback about information
materials provided to the public
to help with planning ahead for
housing in later-life. If you have
experience with information to
help with decisions, we would
like to hear from you.

Wednesday 14 June

10am – 2pm

**At West of England Care & Repair,
5 Hide Market, Waterloo Road,
BS2 0PL, Bristol**

For more information or to register to attend
contact Nia Hall at West of England Care & Repair:
email Nia.Hall@wecareandrepair.org.uk
call **0117 954 3923**



C2: List of participants

Participants in focus group	
	Role
U1	Volunteer
U2	Volunteer
U3	Volunteer
U4	WECR staff (focus group facilitator)
U5	Silverlinks staff (focus group facilitator)

C3: Session 1 structure

- **Opening question:** (5mins)
Thank you for attending. We'd like to start by introducing yourselves to the group. Please tell us your name, and your involvement with Silverlinks.
- + focus group facilitators introduce themselves
- **Overview of focus group:** (2mins)
The focus group will involve 2 sessions. The focus group as a whole will be audio recorded. Only the first session will be filmed as we are interested in how you interact with the information materials. The summaries for each session will be available to you (will provide details of this at the end of the focus group). Your participation is voluntary, if you wish to opt out of any part of the focus group. The first session is looking at specific materials, the second session (after the talk and lunch) will be a more open discussion about the 'thinking and planning ahead events' and general information materials available for planning ahead. Any questions?
- + Hand-out Info sheet + X2 Consent forms to each participant + allow time to sign the Consent form. Gather Consent forms.
- **Introduction to the task in session 1 + its aims:** (3–5mins)
 - **Definition:**
Throughout the focus group we will be using the term 'information materials', we mean information materials to be objects that provide information, be that in print or online (e.g. leaflets, website pages, online tools, booklets, PDFs). We are interested in your feedback about the information materials that are provided for planning ahead.
 - **Activity:**
In this session we will be giving you chance to look in-depth at the information materials for planning-ahead that are available via Silverlinks. These are: 1) A workbook, 2) factsheets, 3) images and 4) a 'pack of leaflets'.
 - **Type of feedback:** *We ask you to have two points of view: as 'volunteers' and as 'users of information for your own benefit'. We are interested to understand your feedback on 1) what the materials look like; 2) the content; 3) the ease of use; 4) whether they are useful to planning-ahead and decision-making.*
 - **Set-up:**
We have set-up four areas, each with different types of information materials: 1) A workbook, 2) factsheets, 3) labelled images and 4) a 'pack of leaflets'.
 - **Time:**
We will give you 5 minutes with each set of information materials, after which we will ask you to move to the next area. After this 20–30 minute exercise we will rejoin as a group and discuss any feedback you would like to share with the group.
 - **Note-taking:**
We are providing you with feedback sheets for this session, we would like you to fill-in the sections for each area. Each feedback sheet has your participant number inscribed, this is so that we can organise your responses.

On each sheet you have questions and then a section for feedback. We have additional sheets if you require more space. (If you would prefer not to write, please speak with us and we can transcribe for you).

– **Questions:**

if you have any questions whilst looking at the materials, feel free to ask.

- Give out feedback sheets.
- *Familiarise yourselves with the materials and begin feedback: (20–30mins)*
- At 5 minute intervals change to next set of materials
- **Transition question:**
Does anyone need more time with specific materials?
- **Ending question:** (10mins)
Since these materials demonstrate an array of different ways information can be provided, do you have any advice for us for how you would like this information to be provided to you 1) as volunteers and 2) as users of information to help with planning ahead?
- **Concluding the session:**
Thank you for participating. Next: comfort break, talk and then lunch.

C4: Session 2 structure

- **Introduction to the session and its aims:** (2mins)
 - **Definition reminder (if needed):**

Throughout the focus group we will be using the term 'information materials', we mean information materials to be objects that provide information, be that in print or online (e.g. leaflets, website pages, online tools, booklets, PDFs). We are interested in your feedback about the information materials that are provided for planning ahead.
 - **Activity:**

In this session we will be discussing the information materials and the 'Thinking and planning ahead events'. We have a wider variety of information materials compared to the first session.
 - **Type of feedback:**

We ask you to have your hat on as 'user of information materials', however we are also interested to know how you would use these information materials as a volunteer, so please provide feedback and let us know in what capacity you are providing your feedback. Reminder: We are interested to understand your feedback on 1) what the materials look like; 2) the content; 3) the ease of use; 4) whether they are useful to planning-ahead and decision-making.
- **Introductory question:** (3mins)

As a person who is 'planning-ahead' what was pivotal to your decision-making process?
- **Key questions 1:** (10mins)

For those who attended the 'Thinking and planning ahead' events: Have you found that any aspect of the 'Thinking and planning ahead' events encourage you to plan-ahead? If so, which aspects and what actions were taken?
- **Transition:** (3–5mins)

In front of us are information materials that are provided to help people plan-ahead for their housing. These include the materials from this morning, with additional items. We will give you a few moments to familiarise yourselves with these materials, and then ask a few questions.
- **Key questions 2:** (10mins)

*Would these materials be useful in the planning ahead journey, and why?
What would make these materials more useful in planning-ahead activities, and why?*
- **Transition question:** (5mins)

Have you found any other events, activities, or information materials useful to plan-ahead?
- **Key question s 3:** (10mins)

We realise that it may be hard to stay motivated when planning-ahead, would these information materials help keep you motivated to plan-ahead? + Do you use other tools/methods in other aspects of life that keep you motivated to do something?
- **Ending question:** (10mins)

Quick summary (3mins) + ending question:

How well does that capture what was said here?

Concluding the focus group:

Thank you for participating in this focus group, we appreciate the time you have taken to provide feedback. We will be writing the transcript and notes into a summary. If you would like to receive a copy of this summary, speak with Nia or Sarah.

C5: Feedback sheets (scale 20% actual size A4)

Participant number:

Silverlinks workbook – feedback sheet Page 1

Question 1:
Do you perceive this information material as authoritative or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Silverlinks workbook – feedback sheet Page 2

Question 2:
Do you perceive this information material as accurate or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Silverlinks workbook – feedback sheet Page 3

Question 3:
Is this information material inviting/not inviting to use for planning-ahead activities?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks workbook – feedback sheet Page 4

Question 4:
Can the information material be used appropriately in its physical context?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks workbook – feedback sheet Page 5

Question 5:
Do you feel that the information material is talking to you appropriately?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks workbook – feedback sheet Page 6

Question 6:
Do you feel that this workbook will help with planning-ahead and decision-making activities?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 1

Question 1:
Do you perceive this information material as authoritative or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 2

Question 2:
Do you perceive this information material as accurate or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 3

Question 3:
Is this information material inviting/not inviting to use for planning-ahead activities?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 4

Question 4:
Can the information material be used appropriately in its physical context?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 5

Question 5:
Do you feel that the information material is talking to you appropriately?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Silverlinks factsheets – feedback sheet Page 6

Question 6:
Do you feel that the factsheets will help with planning-ahead and decision-making activities?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 1

Question 1:
Do you perceive this information material as authoritative or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 2

Question 2:
Do you perceive this information material as accurate or not?
What elements of the design lead you to this decision?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 3

Question 3:
Is this information material inviting/not inviting to use for planning-ahead activities?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 4

Question 4:
Can the information material be used appropriately in its physical context?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 5

Question 5:
Do you feel that the information material is talking to you appropriately?
What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Labeled photographs – feedback sheet Page 6

Question 6:
Do you feel that the labeled photographs will help with planning-ahead and decision-making activities? What elements of the design lead you to this conclusion?

As a volunteer As a decision-maker

Participant number:

Additional feedback sheet

Feedback sheet for:

- Silverlinks workbook Labeled photographs
 Leaflets pack Silverlinks factsheets

Question number: 1 2 3 4 5 6

As a volunteer

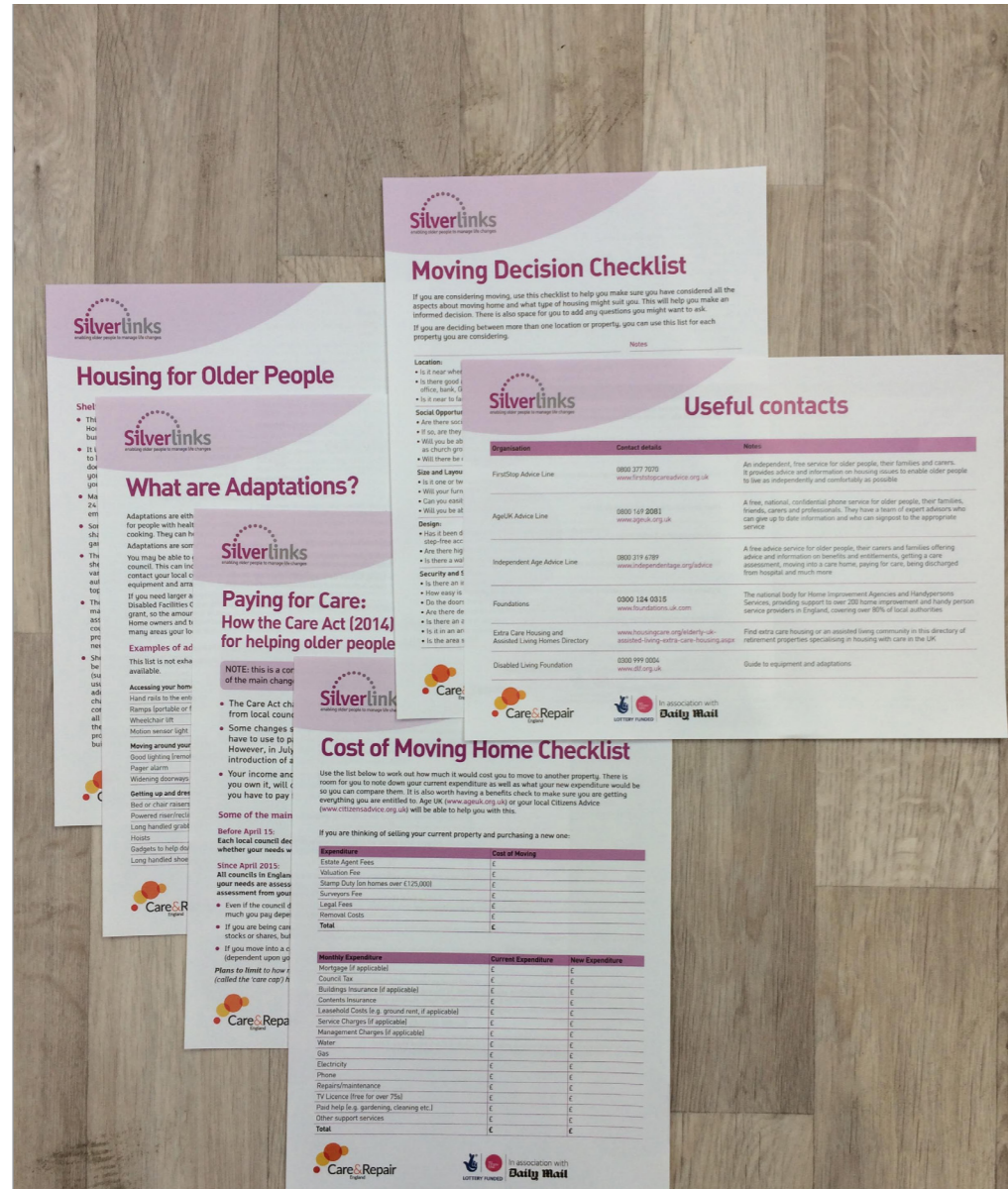
As a decision-maker

C6: Participant responses to self-help document



	As a volunteer	As a decision-maker
Is this information material inviting/not inviting to use for planning ahead-activities? What elements of the design lead you to this conclusion?	Yes, although there is a lot of it (U3)	Yes (U3)
Can the information material be used appropriately in its physical context? What elements of the design lead you to this conclusion?	Powerpoint slides – yes (U3) [As a] booklet – you can't click on 'buttons!' (U3) It's rather lengthy, more useful in a booklet with dividers to allow easier access (U3)	
Do you feel that the information material is talking to you appropriately? What elements of the design lead you to this conclusion?	Yes (U3)	Yes (U3)
Do you feel that the factsheets will help with planning-ahead and decision-making activities? What elements of the design lead you to this conclusion?	Most definitely, but probably in a meeting context rather than with an individual (U3)	

C7: Participant responses to factsheets



	As a volunteer	As a decision-maker
Do you perceive this information material as authoritative or not? What elements of the design lead you to this decision?	Useful Contacts [sheet]: Nicely presented. Comprehensive list of Contacts of use to many volunteers OR Older people (U1)	The Useful Contacts [sheet]: I don't fully understand purpose – too many organisations and some overlap with work of WECR (U2)
	The Moving Decisions Checklist [sheet]: I like it – helpful – but: i) ? at end – not sure is relevant; ii) on the 2nd page – space for questions – a lot formal having a 'heading' + what does yes/no/notes mean? (U2)	
	Very authoritative as they are professionally produced with clear, well written information. The endorsements at the bottom of the page help (although I'd rather it wasn't the Daily Mail!!!) (U3)	Very authoritative as they are professionally produced with clear, well written information. The endorsements at the bottom of the page help (although I'd rather it wasn't the Daily Mail!!!) (U3)
Do you perceive this information material as accurate or not? What elements of the design lead you to this decision?	Moving Decision Checklist [sheet]: Nicely presented. Good list of useful checks that could be of value for anyone considering moving. (U1)	
	Yes, the professional finish (U3)	Yes, the professional finish (U3)
Is this information material inviting/not inviting to use for planning ahead-activities? What elements of the design lead you to this conclusion?	Cost of Moving Home Checklist [sheet]: Nicely presented. Good list of moving costs. This could be very useful as part of any Planned move. (U1)	4 years ago would have been very useful. (U1)
	It is inviting, although it would take some time to become familiar with it. (U3)	I would find it useful for planning ahead as there are many useful pieces of information (U3)
Can the information material be used appropriately in its physical context? What elements of the design lead you to this conclusion?	Paying for Care [sheet]: Nicely presented form. Useful information for all Older people. (U1)	
	The paper is quite flimsy and I would prefer it to be in an indexed folder (U3)	The paper is quite flimsy and I would prefer it to be in an indexed folder (U3)
Do you feel that the information material is talking to you appropriately? What elements of the design lead you to this conclusion?	What are adaptations [sheet]: Useful information. Content comprehensive in relation to the many adaptations that could be made to enable self care. (U1)	
	Maybe a little detailed, but very interesting and useful! (U3)	Yes – lots of information. (U3)
Do you feel that the factsheets will help with planning-ahead and decision-making activities? What elements of the design lead you to this conclusion?	Yes, particularly the moving decisions checklist (U3)	Yes, particularly the moving decisions checklist (U3)

C8: Participant responses to labelled photographs



	As a volunteer	As a decision-maker
Do you perceive this information material as authoritative or not? What elements of the design lead you to this decision?	Yes. (U3) Clear photos + labels with specialist equipment aids (U3)	Yes. (U3) Similar reasons [to volunteer]: Clear photos + labels with specialist equipment aids. (U3)
Do you perceive this information material as accurate or not? What elements of the design lead you to this decision?	I presume it is accurate as they are photos taken in situ with 'real' people. (U3)	Yes the material looks/feels accurate because of the real life photos. (U3)
Is this information material inviting/not inviting to use for planning ahead-activities? What elements of the design lead you to this conclusion?	It is easily accessed so invites me to consider recommending to others. (U3)	Very inviting! (U3)
Can the information material be used appropriately in its physical context? What elements of the design lead you to this conclusion?	The photos are clear and large so the information can easily be used in its current form. (U3)	Quite practical to use in this format. (U3)
Do you feel that the information material is talking to you appropriately? What elements of the design lead you to this conclusion?	Yes - very straightforward. (U3)	Yes, but maybe needs some more detailed information with each one. (U3)
Do you feel that the factsheets will help with planning-ahead and decision-making activities? What elements of the design lead you to this conclusion?	Yes. (U3) Clear, quite large and appropriate. (U3)	Yes. (U3) Clear, quite large and appropriate. (U3)

C9: Participants responses to Leaflet pack



Green Booklet – Front:

Bit middle why phone number at front, as well as back – readers would expect to find it at back

Outline of map – doesn't add anything

P.2 Great

P.3 – not clear resources are for owner occupiers

Front cover – more authoritative if show working in partnership with/local councils, supported by/funded by, Charity/not for profit.

Would an index/contents section help
Housing options for 50 plus (see comment on Options leaflet below) But all other sources are for 60 plus.

(U1)

Housing options [leaflet]

Why this is a separate leaflet –

Reference to this in Green booklet

Back page is too detailed

therefore lacks authoritative approach

Confusing – no reference to age (U1)

One page Repairs etc. leaflet

Why separate leaflet –

Not sufficient emphasis on home from hospital [somewhere?] –

But like the logos of the various councils

(U1)

C10: Coded transcript of session 2

01	<p>F: This next session then, we'll chat more openly...I'll just run through the additional information materials I have put on the table...I'll run through all of them since we cut the last session short...We have the Silverlinks workbook as paper and online, the leaflets pack from West of England Care & Repair, we have the labelled photographs, the factsheets from Silverlinks. Added to the table are some brochures from FirstStop and also the HOOP tool, I'm not sure if you have come across the HOOP tool?</p> <p>P1/3: Not</p> <p>F: It's an online tool that runs through a series of questions, related to how you feel about different areas of your home. It then generates some ideas about where you can go for more information, so it doesn't give you answers but places you can go to get information. I have added this to the mix as it's quite a different to the other information materials we have on the table, obviously it being online means it's quite different information material.</p>
02	<p>In this session I am going to ask you a series of questions, Nia and Sarah may chip in with some questions as we go along as well, so it can be an open ended discussion about these materials.</p> <p>The first question is quite a general one, 'As a person who is 'planning ahead' what was or what could be pivotal to you making a decision and planning ahead and that process? Just as a general discussion point.</p>
03	<p>P1: Could you just say that again?</p> <p>F: What's pivotal to planning ahead and you being able to make a decision in terms of moving or adapting your own home?</p> <p>P3: I think it would probably be your health wouldn't it, that would be the main pivot really. How you felt you could cope, which is linked to your health.</p> <p>P1: I was going to say, what's pivotal is to be realistic, because if I'm thinking about my future now and say 'well I'm in great health now, I needn't move, I live in a 10 bedroom house blah blah blah', forgetting that in 15 years time if I'm still alive, I might not be...so kind of what is important is to be realistic.</p>
04	<p>F: So it's either like you say a trigger,</p> <p>P1: Yeah, it could be a trigger</p> <p>F: or it could be thinking about it realistically</p> <p>P3: Yes, that's the most important thing</p> <p>F: I ask that question because essentially what we are interested in is these information materials in front of us therefore how they help in that potentially pivotal moment where there is a trigger or you are thinking realistically, and how these information materials that are on the table might facilitate in that 'moving forward' once you've decided I need to be realistic, or I have a health issue.</p>
05	<p>F: In general, now that you've had a little time to look at some of the materials, would these [information materials] be useful in that planning ahead process? You're more than welcome to hark back to the feedback you gave in the first session if that helps you.</p> <p>P3: I mean there's so much information isn't there, between it all, that's the only thing I would probably comment on, that sometimes there's too much information. I know that lots of information is good, but it's sometimes that, you know, yeah, it's where do you start almost, which is the best one to start with.</p> <p>P1: I was going to refer to former comment I've made on the questionnaire, is that there are so many different leaflets, there's so overlapping, there's so much repetition...</p> <p>P3: Yes</p> <p>P1: Certainly in that pack [WECR leaflet pack] I'm confused. And if it's for me (and I'm not elderly), when I'm elderly, when I'm 15 years older – it might be later, it depends on the audience – I would think it's quite difficult.</p>
06	<p>F: So the pure volume sometimes is...</p> <p>P3: I think volume. I find that about that booklet [Silverlinks workbook]. It's almost easier online because you can flick through quicker.</p>

A lot of info
too much info
overlapping

lots of
is good
rep

length
of booklet

	<p>P1: Yes.</p> <p>P3: But that booklet is quite lengthy.</p> <p>P1: It's quite interesting, sorry, very interesting, I've not seen this [Silverlinks workbook] because one of the comments I made about the green booklet [WECR leaflet in the pack] is that there is no contents or index.</p> <p>P3: And that's what I put, two things, about these [Silverlinks factsheets] I put that on the feedback sheets. They would be much more useful to me in a folder with an index.</p> <p>P1: Yeah. Funny as this reminded me, it's got a contents list.</p>
07	<p>P3: It's got an index, but in a folder where you can go to, you know that thing of having to find, I don't know it's just that physical thing of having something – a little folder with a little index where you can go to the right place. That's maybe the way I work.</p> <p>F: Having those cues to find your way through...</p> <p>P3: That's it. If something's quite lengthy like that one is [Silverlinks workbook], then you're probably not going to start at page 1 and go through to the end.</p> <p>SV: No, I suppose that's kind of, I mean I think some of those leaflets probably reflect what's in that workbook.</p> <p>P3: They do don't they.</p> <p>SV: They're a shorter version almost, but a contents would help.</p> <p>P3: Yes, it would definitely help with those. Because these [Silverlinks factsheets] are quite interesting. But that one [Silverlinks workbook] is more about the planning, going through a process, and this one [Silverlinks factsheets] is just information.</p>
08	<p>F: Actually that's a general comment about the overload of information, even if there is all of that information there may be overlap, having that ability to navigate through easily is important by the sounds of it in terms of being able to digest and finding your way through it...</p> <p>P3: Yes. Just thinking about the online version of that one [Silverlinks workbook], the computer version, is having links maybe from that one [workbook] to these [factsheets], so that if you wanted to look at the official bit.</p> <p>SV: I there are actually...</p> <p>P3: Oh there are official links, where you can click on it and get to [them].</p> <p>F: In a way we have covered the next question, but what would make these materials more useful? So you've mentioned the navigation element of it, so the ability online is there to be able to jump to other documents, is that useful?</p>
09	<p>P3: See it would be for me, but I don't know whether putting myself in the place of people who are...it's quite difficult.</p> <p>P1: I would add to that, because the thought occurred to me that the target audience are the elderly people who might, or not have a disability, who are making a decision blah blah blah, but I wonder if there's another target audience, and the target audience are maybe the children who want to advise their parents...</p> <p>P3: Oh yeah, I would think most definitely</p> <p>P1: So the comment you just made about having the link...</p> <p>P3: See that's where I'm almost thinking, because I have parents who are in mid-to-late eighties, so I'm thinking that...</p> <p>P1: So if you're looking up for them...</p> <p>P3: if I was looking for them, for me that's how I would use it, I would be looking...that's why I find these [Silverlinks Factsheets] quite useful, really sort of factual, authoritative, these look very authoritative, yeah so that's what you were perhaps looking to see.</p>
10	<p>F: Reassuring in a sense?</p> <p>P3: Yeah, so what are they entitled to, what could we do, you know...the facts</p> <p>F: So in terms of how any of these materials could be improved, therefore, it really does depends on who is using them, therefore it connects to printed and online. Potentially online is more useful if you are familiar with that tool and can then access more information potentially.</p>

	<p>F: Any more questions about the materials in front of us on the back of that?</p>
11	<p>P3: [indicating to the photographs] I like these. I think this, especially if someone has made the decision that they are going to stay in their own home, which is almost a bit down the line isn't it. I just think having those real photos with real houses, real people just makes it that much more accessible. This is what you can have, you can see the pictures.</p> <p>F: Is that something that helps maybe, because there are some real photographs in this Silverlinks workbook...</p> <p>P3: Yes</p> <p>F: Do you think that is an important element in these information documents, that having that reality is a useful point to get the information across to people?</p> <p>P3: It's almost because they're not as professional in that way, if you know what I mean, it's just that it gives you that little more – I don't know what it is, it's an odd thing to say – sometimes professional means [in-take of breath] puts people off.</p>
12	<p>SV: That's a similar point to something I touched on in the talk earlier, it's that kind of, you know – is a leaflet trying to sell you something, whereas that [labelled photographs] isn't.</p> <p>P3: No, it's telling you quite simply, this is what it is and this is what it can do for you.</p> <p>SV: It's not trying to get you to have anything. That's interesting.</p> <p>F: It shows that it is a real object as well. The trust is there you can see physically what it is. It's not something that you are going to go along to the showroom and it's something completely different, and you feel like you have been miss-sold something I guess.</p> <p>P3: Yeah. And it's just looking at things like, it looks like lots of the houses you see, you know...</p> <p>N: It's normal</p> <p>P3: Yes, it's normal. Actually it reminds me of someone I visited, and it has steps like that she couldn't get out.</p>
13	<p>F: Moving on slightly then. Part of the session is also about the events that you go to, or even go to outside of this realm, and whether you have found any other events, activities or information materials that you have come across on your travels that may be useful to planning ahead?</p> <p>P3: I don't really as part of the Red Cross it's completely different in that way. I visit people just coming out of hospital, so it's a different situation, I don't go to events.</p>
14	<p>P1: I can't think of any, as if I had I would like to think that if I had I would have contacted Nia, Nia knows I'm not frightened of coming forward about ideas. One of them was having a contact card, as a contact for people to network, but she's got that.</p> <p>N: What information do you think, when you are at events, what goes like what do people get drawn to more or take away more?</p> <p>P1: The comment I made about that one [WECR leaflets pack] that we made earlier is there are too many leaflets, I just want to give out one document which says these are the services, ignoring the comments about the contents, that would be a key one really. You give it to not just the potential client group, but you give it to your other contacts who are trying to persuade to them. A lot of what I do is try and market the service not to the clients but to the other professionals who can then refer the clients, that's a key thing, other organisations who might not know anything about Care & Repair.</p>
15	<p>– tissue –</p> <p>P1: So some of the stuff I do is trying to market Care & Repair services to other organisations and there is then a question mark as to whether the leaflets that we've got meet that requirement. I've thought about that now.</p> <p>P3: Different audience</p>
16	<p>P1: It's what I've said earlier on, it depends on your target audience, which is probably an answer to a different question. The question about when I go to meetings, so I meet who want to know about it, and all you are giving them is the information that you give to potential clients, and there is a question there.</p> <p>F: It's almost that you need a 'selling point'?</p> <p>P1: Yes, I'm raising it as an issue.</p>

	<p>F: So we want the reality, and the facts, and the easy navigation through a lot of information for the people who are in the situation, but actually a really succinct selling document for people who are professionals in the field.</p> <p>P1: Yes.</p> <p>P3: It's quite interesting. Do people want leaflets and paper, or do they actually want to talk.</p>
17	<p>P1: Well, when I've given talks we tend to give it out at the end. And some are just not interested, you feel kind of embarrassed. And then some people say oh yes I'd like one, I don't know whether they are doing it out of politeness as I'd better take one, he's asked, so I'd better take one. It's a good point. What we do do though we always say at some of these events is you know 'well I don't know whether I want to take it I might not need it', [we say] well ah yes, you might know someone else who might benefit from the services. So they put it in their handbag. Do they give it to somebody on the bus....yeah we try to do that. So again, is that fit for purpose for that situation, when a friend is giving it out to another elderly person, is that fit for purpose, well it might well be.</p>
18	<p>F: It's an interesting fact that comes up in information design, that something is designed for a specific purpose, it then gets quickly disseminated around that they get so far removed from what they were intended for. Sometimes they were intended to be used with a professional for example giving somebody chance to ask questions, and then 5 steps down the road someone doesn't have that professional in front of them, so it might not be as useful as it once was. That's an interesting thing about what we have here and online, how was this designed, and what was it designed for and then how do people actually use it. It's an interesting topic.</p> <p>P1: At that 'healthy homes talk' do you know what I mean by the healthy options...it's the same thing – trying to market the services, that's why Care & Repair do the talks to market their services, so what leaflet (I don't actually know what leaflets are given out) there's a question about are the leaflets suitable for that type of audience.</p>
19	<p>F: It must be difficult to have so many, when resources need to be put into services as well, it's almost that there's one thing that needs to fit all.</p> <p>P1: Or try to, yes.</p> <p>N: I think it's really interesting because what you're comment P1 we have different leaflets for different purposes, but then who is the audience, because we have got the services one (the green one) then there's the catalogue as well. In a way the services one is quite useful for the professionals as much as it is for the potential clients and individuals but that doesn't come across as clearly. And then we've got the flyers because they're just quicker to read, but they're getting towards healthy homes.</p>
20	<p>P1: I've made a comment about these flyers there's inconsistency, it's inevitable that you get inconsistency because they one is published at a different time. And I don't know because the information in the flyer is really contained in the booklet. What I don't know, and they do that by asking the potential client, what do they actually prefer? It's easy for me, I have put on questionnaire, why have you got the leaflets, because most of the information on the leaflets is in the booklet. But that's not for me to say, as an outsider, what would the client prefer. Do they prefer a booklet or leaflets? You could ask them. I'm probably not the right volunteer to ask, if you ask P2, she's been a recipient, they might look at it differently. My personal view is 'why have we got all the leaflets'. But I do like the fridge magnet. I've actually got it on my fridge at home. I think that's brilliant.</p>
21	<p>P3: That is.</p> <p>P1: I've been so critical.</p> <p>N: It's just a tag line and it's a number. It's actually describing everything you guys have just been saying about what's good and what's bad about marketing. I think the service user engagement, or needs assessment, something like that would be really valuable to us because it could be that someone like it online, some people like it in leaflet form, but then kind of really getting into what that means – perhaps how much information is perhaps presented would be really beneficial for us I think. And that's something we haven't explored. So that's a really good comment.</p>

	<p>P3: That's interesting, because I didn't see these, I quite like that it's [the WECR green booklet] simple it's clear and yeah there's nothing...it's not too much.</p> <p>P1: That's the main one. The leaflets are just what's in there. All that's missing is a contents page.</p>
22	<p>F: That's interesting, you've raise a point, that I didn't have as a question. It's difficult for you to give an answer, so I appreciate that there might not be an answer, if you had the hat on as someone coming at these all at once is there anything on the table that you would be drawn to in terms of the format, the format or the document itself?</p> <p>P3: It depends where you're starting doesn't it.</p> <p>F: If you take what you mentioned, the trigger point or being realistic as being pivotal to the decision making. You're literally at the start of that journey.</p> <p>P3: I suppose if you are at the start then you are thinking about the workbook there [the print version] or the online version. That's probably where you'd start, because the Care & Repair is about when you've decided what you want doing in your home...</p>
23	<p>P3: ...so you have already decided and come to that point I suppose that you are going to adapt where you are rather than move. So I suppose if you are starting from the beginning the workbook is the place that you would want to start.</p> <p>F: In a way a jumping point on to other information.</p> <p>P3: Yes.</p> <p>F: Appreciate that's a difficult question.</p> <p>P3: It's interesting, because my husband and I have discussed moving etcetera and it's, well I'm 61, and I don't want to have to move twice in that sense do you know what I mean, that feeling. So I am sort of in that little bit, but it's still, well I want to live in a similar sort of environment for as long as possible. Because it's that sort of feeling of actually if I have to walk upstairs every day that's good for me, so it's looking at that [Silverlinks workbook] at the right time.</p>
24	<p>F: This connects to that in a way, if you are at the start of the planning process, what might keep you motivated. So you may be at a point where you want to do something, but you don't necessarily need to do anything, so would any of these information materials, you have mentioned going to this first maybe, would these keep you motivated to keep going? Heath is probably a big thing...</p>
25	<p>P1: I had a comment made to me by someone sitting in the car, she's mid-eighties. She said she'd moved, but she said 'I moved after her husband died'. And she said, she was kind of giving me advice, she was saying if ever you move, move before your partner dies. I quite really moved by that. Because, I don't know if it's relevant or not, because I actually, my neighbour, one of my neighbours is 93 and I go and see him, and I feel terribly sorry he's on his own, and he says I've got such happy memories, I feel my wife is with me, I feel she is in the house. So if you are going to move, move with your partner.</p> <p>P3: No I see what you mean, because otherwise, you can see that sort of...</p> <p>P1: ...So your husband...sorry, I shouldn't make it so personal. And that never occurred to me until...The opposite is my brother, I have to get this off my chest, so I might as well now, so my brother who is 72, he's moved. His wife died, he moved.</p>
26	<p>P1: ... And he was absolutely determined that when he moves it would not just be his last move, but that is would be his last move and that if ever he became disabled he could live in that flat on his own, without his three children having to look after him. He even told me that he stocked up his freezer up with food, he's not like me. So that he wouldn't have to ring up his children to provide him with food. And he's only 72, you know at that young an age. Going back to that particularly</p>

	<p>particularly the first comment about if you are going to move, you might not think it necessary to move now. But there are reasons why you might want to move...</p>
27	<p>P1: ... I mean I'm very resistant I can't be unique. I find that I am living in far too big a house and I keep putting off the idea of down-sizing. But how long can I realistically put it off?</p> <p>F: That does link to...</p> <p>P1: To what information should you, yeah...</p> <p>F: Yes, how can the information help you with thinking 'ok, yes, I keep putting it off, but I have just read what ever it is I have just read' and that makes me think, or it gives me the confidence.</p> <p>P1: Yes, gives you the confidence. Because moving, it's obvious, I feel I'm reluctant to move because possibly don't like the element of change and that would introduce a tremendous down side, there must be a plus side.</p>
28	<p>F: That comes back to the reality and also the stories and then talking to a volunteer who has been through that experience, that might take away – it was P1 who used the word anxiety in your talk – yes it will be a change, but actually somebody else has been through it, and that anxiety can be taken away. I think somehow what I am interested in, and what you guys [S + N] produce in terms of the information, how can that help with the leap that you have to make.</p> <p>P1: How can the information, yeah...</p> <p>F: So it does link to the topic entirely. So in a way it has come full circle, because clearly all of these information materials that are on the table are right depending on what position you are in in terms of the 'journey' for want of a better word. And it depends where you are on that journey as to where you will go to get that information.</p> <p>P3: Yes.</p>
29	<p>N: That's interesting isn't it, that we are pinpointing then that there are different points in people's lives different triggers. Information that I find useful when I am going somewhere is telling me where or not it's for me or not. So you know, do you have a health condition, are you thinking about staying or leaving, or you know are you trying to plan ahead. It's questioning you, so that you're thinking is that the right information for me or is that the right information for me? Because then you are ignoring the one that you don't think is right, and it's your responsibility to make that decision rather than us pre-empting the decisions you should be making. I think that's probably where we are falling short, because we are trying to cover everything. Rather than just pinpointing.</p> <p>F: It's sign-posting isn't it, I think you [SV] mentioned sign-posting in the talk, where people need to go to, when they might not know where to go to, because it's so new to everybody.</p>
30	<p>P3: Yes, it's sort of covering everything there isn't it from who you are, to do you buy somewhere smaller, or go into care, and they are quite big different decisions almost, especially the sheltered housing/care element that starts to become quite different. A different stage.</p> <p>N: Speaking from maybe my perspective, at my age, I like information there. So, I find nothing more frustrating than when I go on a website trying I'm to follow it intuitively and it's not. And it's the same with paper isn't it, you want to be able to, like with the contents page – that's what important to me I'll absorb it, I'll move on. And if it's not then...</p> <p>F: There's some kind of stat isn't there about how long people stay on a website, or probably similar to documents, it's seconds, before people decide to move on and try and find the information somewhere else.</p>
31	<p>P3: Yes, you often, although you are thinking about planning ahead, you probably just go in thinking I want to know about this, rather than... this is assuming that people are incredibly organised isn't it, and I don't think most people are, just from people I've met. It's all very ad-hoc. It's like, usually a crisis, something that's happened that will push you into doing something, then you want to focus on one particular thing. I'm not sure how many people actually go in to that very organised planned – a certain sort of person does that, I don't think that's the majority.</p> <p>N: It's often reactionary, rather than planned.</p> <p>P3: Yes.</p>

	<p>And that point you get so much information, it's not just about that one thing, but everything and it's totally overwhelming and of course you are going to prioritise your health rather than everything else.</p>
32	<p>P3: Part of it is, if you are planning ahead, it's that admission that yes I am getting older, and it's sort of things that people don't want to confront.</p> <p>F: This links back to the Silverlinks factsheets, that P1 mentioned earlier, some of this information is what you would need at any time when moving.</p> <p>P3: Yes</p> <p>F: So even though you are at a point of not wanting to admit you need to move.</p> <p>P3: Yes, you do that when you were 20.</p>
33	<p>N: And the budgeting as well.</p> <p>F: It's kind of normalising the process, you might have been hear before actually...maybe it's helpful to hark back to when you did move?</p> <p>P3: That's the trouble isn't it, for most people it's an incredibly stressful experience, going to put them off isn't it.</p> <p>F: This links to my final question which is about other tools that you might use throughout the rest of your life, that get you moving in terms of...</p> <p>P3: Or don't get you moving</p> <p>F: Precisely, that may be websites that you have gonn onto, in other aspects of you life, do people use lists, do people use documents to organise ideas. At the end of the day all of this is about a specific moment in time, but actually we use tools elsewhere in our lives. I don't know if you've got any example that you use on a daily/weekly/yearly basis.</p>
34	<p>P3: I'm a real planner, I've got lists galore, diaries calendars. I know that I'm not the norm, from lots of people I meet, lots of people are quite disorganised, I know that from the Red Cross volunteering, from mostly elderly people I go to are quite disorganised in a way. So that's something that is difficult isn't it, getting people who haven't been used to being organised or somebody else always did it for them. Dare I say, because of the probably generation of older people that it tends to be the women isn't it, someone would have done things for them, I've met a couple of women, I actually visited a couple where he was the one that was terminally ill, and she had anxiety about the fact that she was going to be left on her own, because he'd done everything, you know.</p>
35	<p>N: Paperwork</p> <p>P3: That's quite hard isn't it.</p> <p>F: Suddenly take on a role that you haven't had any experience with.</p> <p>P3: Yes. It does happen the other way around obviously.</p> <p>F: You are dropped into the unknown, it comes back to not knowing where to go for information.</p> <p>P3: That's right, you're not usually the person who does all the looking, the searching around, the dealing with institutions, especially if one partner has always looked after the finances.</p> <p>F: It might come back down to, having that person to talk to.</p>
36	<p>P1: I was just about to say that actually, yes because if you are an organised person, you probably don't necessarily need...</p> <p>P3: No that's right.</p> <p>P1: It's useful talking to somebody, by talking to them that brings out the ideas to plan to start...</p> <p>P3: Somebody else doing the organising for you by making the lists or whatever.</p> <p>P1: Either that, or by actually, because by talking to someone you are actually addressing the issues...</p> <p>P3: Clarify your thoughts.</p> <p>P1: Yes</p>

	<p>P3: That's what I am thinking about most of the elderly people I have met in the last 6 years, I would say most of them prefer talking to reading. When I've offered them information or whatever, they much prefer me to decipher it and talk about it. Some will, some will happily take, and to a certain extent it depends on their education as well, and for some there's always that fear of paper or anything that looks authoritative to be honest. They'd much rather talk about it to someone.</p>
37	<p>P1: Regards to clients on making space, it's kind of the opposite, I find the big challenge, or the many challenges of making space they are very determined people. It's most odd actually. That all of the ones I've worked with, it's very difficult, you try and hint at a suggestion, you've got to be careful how you speak, how you put it out there and they will be immediately say 'no no I don't want that' – I'm not just just talking about discarding things – so there are different sorts of people, not just one or the other that they're organised or they're disorganised. The making space clients, must be in theory you'd think they were in the disorganised category, but a lot of them are not, in terms of well it's possible that they are because they have got to the stage because they are so disorganised, but they are not open to suggestions, but that might not be disorganisation. So talking to them might not help at all. I think there's so much in between, I totally agree with what you are saying.</p>
38	<p>P3: Yes, I understand...I think it's quite a different thing from being disorganised.</p> <p>P1: Yes.</p> <p>F: There's an attachment as well</p> <p>P3: Yes.</p>
39	Summary – see notes
40	Summary – see notes
41	Summary – see notes
42	<p>P1: Just one point that I made in my notes, is that one of the things that I think is worth putting over is the basis of the organisation that it's as a charity and not-for-profit. If you are standing up and giving a talk, something I always say is we're not an organisation that's there out to make a profit. And the literature should reflect that better. I don't know if that fits in with your overall questioning, it was just on my mind.</p> <p>N: I think it's linked to trust though isn't it.</p> <p>P1: Trust, yes, why should I come to Care & Repair. And if I arrange to help then we need to engage the trust.</p> <p>F: Is that a content thing do you think, or is it that people are familiar with marketing materials I guess, so does the look and feel of them give that impression that their not from a not-for-profit. Or is it the need to be very explicit?</p>
43	<p>P1: My view is that it should be more explicit. On one of the leaflets it's got for example, it's got the three councils, and I know that it's not always of benefit to say we work in partnership with, or we're funded by, but it's my personal view it's the confidence of the individual knowing that a) we're funded by the councils; we're not-for-profit like we're not like the tradesman down the road. So when I do a presentation I always introducing that, obviously I'm a volunteer and if I didn't believe in it blah blah blah but that hasn't got much validity, but in terms of the leaflet it's precisely that point.</p>
44	<p>P1: I cannot understand why the phone number is absolutely everywhere. It's on the front page, it's at the bottom of each page, then it's the back. Sorry, I've made that comment, if you look for the phone number you expect it to be at the back.</p> <p>P3: I think that's it great that it's everywhere.</p> <p>P1: Oh you think it's great...Ok...</p> <p>P3: I do, because that's the most important thing isn't it really. When you can't find find the contacts.</p> <p>F: That just shows the difference...</p> <p>P3: People have different things...</p> <p>P1: Different perspectives that's right.</p> <p>N: It's that linking it to being able to talk to someone isn't it. Talk to someone and get information.</p> <p>P3: Yes</p>

45	<p>F: I think that just shows...</p> <p>P3: People are different</p> <p>F: Unless you guys have anything to add [to SV and NH] or noticed that I missed anything in the summary?</p> <p>N: Really interesting points, it's useful for all of us I think. Thank you so much.</p> <p>F: Thank you for giving us your time. I'll be writing up a summary, this will be given to them [Care & Repair], it will be within the next three weeks, the plan is to give the summary to Nia who will send it on to you.</p>
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● Factors related to late life housing options

□ Content

□ Content using documents

□ Users / kinds of user

■ Format / channel

■ Content

Appendix D: Interviews with TSO document producers

Documents related to Study 3, interviews with TSO document producers:

- D1: sample of an email request sent to TSO document producers;
- D2: list of TSO document producers interviewed;
- D3: information sheet given to participants;
- D4: consent form completed by participants;
- D5: semi-structured interview guide;
- D6: sample interview transcript;
- D7: sample of a coded transcript;
- D8: list of activities within TSO document producers' design practice;
- D9: list of influences on TSO document producers' design practice.

D1: A sample of an email request sent to TSO document producers

Analysis of documents for housing in later life

Rachel Warner <Rachel.Warner@pgr.reading.ac.uk>

Wed 24/01/2018 09:34

To: [REDACTED]

Hi [REDACTED]

A belated Happy New Year to you, I hope this email finds you very well.

I have been analysing the design of documents for housing in later life (from an information design point of view), and thought some of the early outcomes might be of interest to you, and it would certainly be interesting to hear whether they are useful to the work that [REDACTED] carries out.

Also, I am hoping you would be willing to meet again, as it would be useful to conduct a semi-structured interview with you to consolidate some of the topics we have discussed in the past, for use in the PhD research?

Again, I am very willing to meet at a location and time that is convenient to you. You mentioned [REDACTED] before, so might be a good place to meet?

If you are willing, I can send you fuller details of the semi-structured interview aims if this would be useful.

Best wishes,

Rachel

D2: List of TSO document producers interviewed

TSO document producers interviewed in study 3		
	Title	Organisation
P1	Advice & Information Development Advisor	Medium-sized TSO
P2	Project manager	Small-sized TSO
P3	Website manager	Super-major-sized TSO
P4	Partnership and Engagement Associate	Small-sized TSO
P5	Senior information officer	Super-major-sized TSO
P6	Technical advice support officer	Super-major-sized TSO
P7	Designer	Small- and Medium-sized TSO
P8	Designer	Small- and Medium-sized TSO

D3: Information sheet provided to participants



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Information Sheet and Consent Form *Design processes used in organisations*

Background

This research is looking at design processes used by organisations that provide information materials to the public about housing in later life. The research is part of the PhD research of Rachel Warner at the University of Reading Department of Typography & Graphic Communication. The focus of the research is on the designs of the information materials, and the design processes that lead to decisions made about the designs.

Aim

The interview will ask questions relating to the design processes used in organisations that provide information about housing in later life.

Researchers

Professors Alison Black and Sue Walker have supervised the project which was devised by Rachel Warner. Rachel Warner will also conduct the interview.

Interviewee involvement

You will be asked about your role and experiences of producing information materials during a semi-structured interview.

Arrangements

The interview will be carried out at a convenient location for the interviewee. The interview will be voice recorded, with your permission, and notes will be taken. The voice recording will be fully transcribed and summarised. You will be sent a summary of the interview.

Terminology

Information materials – printed or online documents that provide information.

Design – the finished look, functionality, and visual presentation.

Design process – the stages and activities involved in producing information materials.

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Confidentiality

Any names and personal details of interviewees (including names of other parties given during the interview) will be removed from the interview notes during transcription. After transcription, the voice recording will be deleted.

Purely for University of Reading's records, you must supply your name and address and sign the consent form. This information will be stored securely by the Department of Typography & Graphic Communication, University of Reading, for five years.

Ethical review

This application has been reviewed by the University Research Ethics Committee and has been given a favourable ethical opinion for conduct.

D4: Consent form provided to participants

Page 3

Design processes used in organisations

Consent

I have read and had explained to me the information on this project.

(please tick to confirm)

I have had explained to me the purposes of the project and what will be required of me, and any questions I had were answered to my satisfaction. I agree to the arrangements described above in so far as they relate to my participation.

(please tick to confirm)

I agree to the voice recording of the interview.

(please tick to confirm)

I understand that participation is entirely voluntary and that I have the right to withdraw from the project at any time, and that this will be without detriment to any care or services I may be receiving or may receive in the future.

(please tick to confirm)

I have received a copy of this Information Sheet and Consent Form.

(please tick to confirm)

Name:

Signed:

Date:

Address:

For contact details about this research see page 1 above,
or e-mail: Rachel.Warner@pgr.reading.ac.uk, a.black@reading.ac.uk

D5: Semi-structured interview guide

Project: Design processes used in organisations – Semi-structured interview guide

Research questions	Questions to respondent
What are the existing information materials for housing in later life?	What information materials does the organisation provide?
	Who are they for?
	What do they aim to do?
How do employees utilise their knowledge and skills (in the sector and in design)?	What is your role in the design of these information materials?
	Could you talk through how document X was produced by you and your colleagues?
	How is it decided that an information material is ready for publication?
	In what way is your knowledge of the sector used when producing the materials?
	In what way is your knowledge of the design of materials used during the process?
When and how are decisions made about typographic and graphic elements?	How are decisions made about the way the text is formatted?
	How are decisions made about the images that are used?
	Is there a visual identity for the organisation? How does this impact the design?
	How are decisions made whether the information is printed or hosted online?
How are users involved in the design process?	In what way is the intended audience considered during the design process?
	Are changes made to the materials based on user experience with materials?
What are the challenges that organisations face that affect the design process?	Does the organisation face challenges when producing information materials?
	How do these challenges affect the design of the information materials?
	Are there solutions to the challenges? Do you have examples of solutions?

D6: Sample interview transcript

Concept coding	Row	Timespan	Speaker	Content	Process coding
	1	1:23.4 – 1:41.7	I	Could you give me an overview again of the types of information documents FirstStop provide, or EAC provide maybe more widely, and who they are aimed at and effectively what they are for really?	
	2	1:41.7 – 2:05.0	P1	Sure, so we've really got two main types of publication. The first one is, falls under the category of factsheets and guides. So these are more traditional public-facing text-based information sheets, documents, whatever you want to call them, that will talk through certain topics. So, you know, we've got one on buying a retirement property, one on benefits, one on housing and care options,	
	3	2:05.0 – 2:14.5	P1	choosing and paying for care. All these different topics that we encounter under the banner of housing and care for older people.	
	4	2:14.5 – 2:21.2	P1	That's that side, and then on the other side we've got, as our flagship, we've got HOOP, which is our self-help publication.	
	5	2:21.2 – 2:35.3	P1	We've got a few other bits and pieces like that sort of self-trainers and more sort of self-help tools that we have online as well as offline. But HOOP by far and away is the main one that we're promoting and pushing at the moment.	
	6	2:35.3 – 2:39.4	P1	So that's the sort of two groups in terms of the information that we produce.	
	7	2:39.4 – 2:56.8	I	That's really interesting, because you, something came up as I was looking at all of your documents, and it's the terminology of them, so 'factsheets', 'self-help guides' that kind of thing. I'm just wondering how you guys came about those terms really. It's quite interesting.	
	8	2:56.8 – 3:28.2	P1	So, for us 'guide', we've got two guides. We've got housing and care options for older people, and choosing and paying for a care home. Now we call them our 'guides' for I suppose two main reasons. One practically how they appear to people when they get them. We've always generally produced those as an A5 booklet, a bound booklet, which has got a bit more of a professional finish and gloss, and design to it.	
	9	3:27.7 – 3:28.5	I	So you print those?	
	10	3:28.5 – 3:53.2	P1	Yeah, we get them printed up for us, sent in in bulk, and sort of, then we can distribute them from our office. And they have always been our flagship documents in terms of advice publications that we hand out to people. Those are our sort of flagship ones, the main ones that we send out to	

D7: Sample of a coded transcript

Concept coding	Row Timespan	Speaker	Content	Process coding
(VISUAL) IDENTITY			EAC, we've got FirstStop, we've got HousingCare which is what most people, how most people come across us. And then we've got HOOP as well, as kind of almost a different thing. So we can be different things to different people. So, obviously we're producing these and our name and our logo is on it and through it.	
	102 32:47.6-32:51.2	I	And you're using some colours from the logo in a way?	
	103 32:51.2-33:25.2	AH	Yeah, this guide it does differ from other guides that we've done in terms of the design of it slightly anyway. You know, we've still got the circles and things on the front that kind of, and the imagery that we are using, our picture set and things like that. There's plenty of similarities with other things that we've done, but this one has moved away slightly. And then that's partly because we wanted to localise this to Cambridgeshire, we wanted to have something that was engaging, perhaps in a way that our other guides aren't.	COMMISSIONING PHOTO
	104 33:25.2-33:35.0	I	OK, and those decisions were kind of made on the imagery, was it, as well as how you were going to fit in the Council logo?	
DESIGNER UNDERSTANDS CHARITY MESSAGE	105 33:35.0-34:12.8	AH	Yeah. I mean, on the design front, so when we're doing a brand new design we have a Designer that we use, that we go to, to get that work done. Just say, 'here's the basic text, this is the kind of thing that we want to achieve', and then she'll come up with three or four designs, and we'll go yep, that one's brilliant. So she's pretty good and gets us as far as the message that we try to convey. So certainly plenty of similarities with this and our A5 guides. But there are slight differences, you know, the font and the basic structure are all fairly similar.	USING EXTERNAL DESIGNER GENERATING IDEAS FOR DOCUMENT APPROVING/CHOOSING DESIGN
	106 34:12.8-34:20.2	I	And the imagery, then, do you know if the designer is using stock imagery? You said you've got an image set?	
	107 34:20.2-34:28.9	AH	Yeah. We've got an image set ourselves that is many years old now I think, that were photographs taken for us.	
	108 34:28.9-34:30.8	I	OK, so they were commissioned?	
	109 34:30.8-34:40.0	AH	They were commissioned, so they're our own photo set. But I think in recent years she's taken to using stock images more.	

D8: List of activities within TSO document producers' design practice

ACTIVITIES

Developing content ^{AC}

- Researching existing available information and advice ^{O4 AC}
- Researching other organisations ^{O1 AC}
- Researching content ^{O2 AC}
- Understanding the complex legislation ^{O2 AC}
- Creating content from talking to colleagues ^{O2 AC}
- Rewriting 'found' content in plain english ^{O2 AC}
- Writing documents ^{O2 AC}
- Writing factsheets ^{O1 AC}
- Sift information and highlight relevant information ^{O2 AC}

Ensuring accuracy of weblinks ^{O2 AC}

Organising words and images ^{AD}

- Formatting document content ^{O5 AD}
- Developing a style for factsheets ^{O1 AD}
- Adapting existing documents for new designs ^{O1 AD}
- Adapting documents from existing online tools ^{O1 AD}
- Designing new documents based on existing documents ^{O4 AD}
- Re-branding existing documents ^{O2 AD}
- Comparing with existing documents ^{O5 AD}
- Considering word count ^{O5 AD}
- Considering length of document ^{O5 AD}
- Balancing quality of content with length ^{O5 AD}
- Laying out text so that it is readable and sections are on one page ^{O5 AD}
- Using subheadings to break-up large bodies of text ^{O5 AD}
- Considering partners within design ^{O1 AD}
- Using stock imagery ^{O4 AD}
- Designing website for 'mobile first' ^{O3 AA}
- Use images to capture people's attention ^{O1 IC}

Using software ^{IH}

- Use of Word (when documents are not deemed to need to be professional) ^{O2 IH1}
 - Use of Word (restrictive nature of software discourages use of boxes and therefore encourages continuous text) ^{O5 IH}
 - Content created in Word ^{O5 IH}
- Factsheets created in Word ^{O5 IH}

Involving users ^{AE}

- Listening to users ^{O1 AE}
- Commissioning bespoke user research ^{O3 AE}
- [Users] reviewing existing documents ^{O4 AE}
- Seeking user involvement ^{O5 AE}
- 'formal' through focus groups ^{O5 AE}
- 'informal' through constant feedback via enquiries ^{O5 AE}
- Putting oneself into shoes of the user ^{O2 AE}
- Using user feedback during revision of content ^{O4 AE}
- Managing [users] expectations [as an I&A org] ^{O1 AE}
- Monitoring access to print and online information ^{O5 AE}
- Monitoring downloads of PDFs ^{O1 AE}
- Delivering talks ^{O2 AE}
- Delivering workshops ^{O2 AE}
- Filtering user feedback for action ^{O5 AE}

Informal user feedback ^{O1 IJ}

Managing and marketing ^{AA}

- Promoting documents ^{O1 AA}
- Marketing ^{O5 AA}
- Distributing documents ^{O1 AA}
- Overseeing the programme ^{O2 AA}
- Managing stock-levels ^{O5 AA}
- Reviewing guides ^{O5 AA}
- Overseeing web content ^{O5 AA}
- Creating new guides ^{O5 AA}
- Updating guides [every 1-2 years] ^{O5 AA}
- Updating factsheets ^{O1 AA}
- Creating videos ^{O5 AA}
- Printing documents ^{O2 AD}
- Providing information through multiple channels (PDF/Factsheets-printed/Films) ^{O2 ID}
- Outlet of information documents (doctors/councils/AgeUK Local) ^{O1 IE}

Collaborating ab / Working with colleagues

- Collaborating with other organisations ^{O4 AB}
- Delivering training sessions [with colleagues] ^{O2 AB}
- Training [employees of org] ^{O5 AB}
- Answering queries [from colleagues] ^{O5 AB}
- Providing advice to colleagues ^{O5 AB}

Working with designers ^{AF}

- Commissioning designers (to pretty-up documents) ^{O2 AF}
- Briefing designer ^{O1 AF}
- Writing a brief ^{O5 AF}
- Providing ideas on how we want it to look ^{O1 AF}
 - Providing the structure and flow ^{O1 AF}
 - Providing format that we want ^{O1 AF}
 - Indicating format ^{O2 AF}
 - Providing layout ideas ^{O2 AF}
 - Suggesting layout ^{O4 AF}
 - Suggesting headings ^{O4 AF}
 - Using existing document layout ^{O4 AF}
 - Providing designer with content ^{O4 AF}
- Choosing design options provided from designer ^{O1 AF}
- [External designer] Provides advice on content quantity ^{O2 AF}
- [External designer] Provides layout options ^{O2 AF}

D9: list of influences on TSO document producers' design practice

CONSIDERATIONS

Old age ^{1C}

- Struggle with imagery – perception of old age and not wanting to mislead/misrepresent ^{01 1C}
- Appropriate imagery (often an image needs to be used as an alternative may not be available) ^{04 1C}
- Media attention (people therefore have muddled view of technical landscape and therefore can have negative consequences) ^{05 1A}

The way housing options are provided

- Localisation: information is developed with this in mind ^{01 1A}
- Terminology for options (different across localities/councils) ^{02 1A}
- Provision is localised therefore localised information is needed ^{05 1A}

Information and advice provision ^{1A}

- Advice provision (nature of advice leads to equivocal content) ^{05 1A}
- Lack of a joined-up approach to I&A to the public ^{04 1A}
- The type of partners necessitate the use of print rather than email ^{02 1A}

Time ^{1L}

- Time (need printed packs at short notice therefore use online printers) ^{02 1L}
- Time (sometimes information needs to be published in a timely manner, therefore seeking user feedback needs to be factored in to include enough time) ^{04 1L}

Funding/budgets ^{1K}

- We are able to do less helping people to think through things themselves through an advice service, we've reduced how many calls we get, it's important that we give people the tools to do that themselves, on our websites and our factsheets ^{01 1K}
- Developing an app is more expensive than a website for us at the moment ^{01 1K}
- They are printed ourselves. Even when we've gone to an external organisation to have them all printed up they are still just simple stapled, just to keep the costs down ^{01 1K}
- **Funding process/requirements** ^{1K}
- Funders: useful to have positive feedback from users for the funders ^{01 1K}
- Lack of resources lead to responsive approach ^{01 1K}
- Initiative funding (bank) ^{02 1K}
- Other I&A offerings shrink due to funding ^{01 1K}
- Use of WordPress for blog, then developed into a website (funding body provided training) ^{02 1K}
- Resources (providing PDFs is less resource-intensive) ^{04 1K}
- Limited budget (do not have a large budget for photoshoot) ^{04 1K}
- End of financial year drives deadlines ^{03 1K}
- Financial implications (in back of minds that design agency proofs cost, conscious of time and rates) ^{05 1K}
- Funding pressure in terms of printing ^{05 1K}

Purpose of documents ^{1B}

- Document type (text-based info sheets / flag-ship self-help) ^{01 1B}
- Document type (explaining what the initiative is/awareness) ^{02 1B}
- Terminology (factsheets – specialist+focussed; Guides – overview) ^{01 1B}
- Terminology (information guides/ factsheets) ^{05 1B}
- Battery of resources (Guides as first port-of-call and signpost to factsheets) ^{05 1B}
- Purpose of document (people refer to them after talks) ^{02 1J}
- Activity of initiative (talks, therefore document format chosen to support use at talks) ^{02 1J}

Use of documents/users ^{1J}

- Audience: written for the older person ^{01 1J}
- User type: already in contact with organisation – simple and stapled; not in contact – professional finish ^{01 1J}
- Multiple audiences (engaging young-older people/adult children) ^{02 1J}
- Type of audience influencing print quality ^{02 1J}
- Use of language (later life rather than elderly) ^{03 1J}
- Online can be more action-led (it's moving in that direction, or a sense that people are saying 'tell me what to do' ^{05 1J}
- Multiple audiences (older person/ adult children/advisors) ^{05 1J}
- Printed resources are important to user group (mindful when fitting content onto a page and impact on number of pages user will need to print) ^{05 1J}

The organisation ^{1D}

- Holistic approach to providing advice ^{01 1D}
- Responsive (rather than anticipatory) approach to providing information [due to restricted funding] ^{01 1D}
- Designing documents can be a straightforward process especially in a small organisation where goals are clear ^{04 1D}
- Demographic of larger organisation ^{03 1D}
- Organisation approach (mobile first/ website structure) ^{03 1D}
- Shared resource across organisation is used ^{03 1D}
- Organisations approach to documents ^{05 1D}
- Behaviour change and nudge (organisation level) ^{05 1D}
- **Organisation 'procedures'**
- NHS information standards (process manual, adapted for use within organisation) ^{05 1D}
- Annual production schedule ^{05 1D}
- Query log spreadsheet (user feedback throughout year are logged by advisors) ^{05 1D}
- Production manual ^{05 1D}

Awareness/identity of organisation ^{1E}

- Awareness (promotion deferred to partners/org struggles) ^{01 1E}
- Identity has been something that organisations struggle with (multiple offerings/different things to different people) ^{01 1E}
- Perception of branding (putting a logo on document) ^{02 1E}
- Awareness of organisation is a challenge (larger charities or local authorities are usually the first port-of-call) ^{04 1E}
- Re-brand of organisation

Staff in organisation ^{1G}

- Colleagues used as 'approvers' of documents (factual/design) ^{01 1G}
- Multiple specialist knowledge within organisation ^{01 1G}
- Perception of design (professional = professional finish and design) ^{01 1G}
- Use of genres to design in-house (newspaper style/familiar style) ^{01 1G}
- Documents re-used by new initiatives after funded project has finished ^{02 1G}
- Perception of content + format as separate: get content right and format afterwards ^{01 1G}
- Skill gap in building websites ^{02 1G}
- Use own opinion to sign-off designs ^{04 1G}
- Challenge: sharing knowledge across organisation's teams ^{03 1G}
- Transdisciplinary: a mix of specialisms ^{05 1G}
- Multiple stakeholders within organisation (multiple perspectives) ^{05 1G}
- Colleagues comment on updated document ^{05 1G}
- Discretion of organisation employees/owner responsible for document (sifting through user feedback/already have an idea about changes/using user feedback to confirm or rethink changes) ^{05 1G}
- Use templates ^{05 1G}

External/in-house designer ^{1H}

- Use external designer: designer understands message organisation is trying to convey ^{01 1H}
- Designer is external (knows how to set them out/knows organisations style) ^{02 1H}
- First draft is indication of whether content is right/complete (visualising content laid out helps) ^{02 1H}

Appendix E: Interviews with trained designers

Documents regarding Study 4, interviews with trained designers:

- E1: list of trained designers interviewed in the pilot study;
- E2: list of trained designers interviewed in the full study ;
- E3: information sheet provided to participants;
- E4: consent form provided to participants;
- E5: pilot study interview guide;
- E6: full study interview guide;
- E7: design scenario A for pilot study;
- E8: design scenario B for pilot study;
- E9: design process table used in the pilot study;
- E10: scenario A materials used in full study;
- E11: scenario B materials used in full study;
- E12: sample transcript from Pilot study;
- E13: sample transcript from full study;
- E14: sample post-it-note sheet for DP1 from the pilot study;
- E15: sample first round of coding for D1 from full study.

E1: List of trained designers interviewed in the pilot study

Trained designers interviewed in the pilot study					
	Title	Sector	Length of experience	Interview structure	Visual prompts
DP1	Graphic designer	Higher education	3 years	discuss own process scenario A scenario B process table	Design brief A Design brief B Existing document B Process table
DP2	Information designer	Higher education	9 years	discuss own process scenario B scenario A process table	Design brief A Design brief B Existing document B Process table
DP3	Graphic designer	Marketing	5 years	discuss own process scenario B scenario A process table	Design brief A Design brief B Existing document B Process table
DP4	Designer	Various	28 years	discuss own process scenario A scenario B process table	Design brief A Design brief B Existing document B Process table

E2: List of trained designers interviewed in the full study

Trained designers interviewed in the full study					
	Title	Sector	Length of experience	Interview structure	Visual prompts
D1	Information designer	Commercial and charity organisations	23 years	discuss own process scenario A scenario B process table	Design brief A Design brief B Existing document B Process table
D2	Creative director	Educational, commercial, not-for-profit organisations	25 years	discuss own process scenario A scenario B process table	Design brief A Design brief B Existing document B Process table
D3	Graphic designer	Higher education	19 years		
D4	Graphic designer	Higher education	3 months*		
D5	Designer	Higher education	8 years		
D6	Senior digital designer	Consumer organisation	5 years	discuss own process scenario A	Design brief A Existing document A
D7	UX designer	Consumer organisation	8 years	scenario B	Design brief B
D8	UX designer	Media corporation	4 years		Existing document B
D9	Information designer/ Graphic designer	Higher education	11 years		

* D4 was not included in the data as they did not meet the criterion of 3 years design experience. This was revealed during the group interview with D3, D4, and D5.

E3: Information sheet provided to participants



**University of
Reading**

**Department of Typography & Graphic
Communication**

2 Earley Gate
Whiteknights, PO Box 239
Reading RG6 6AU

phone [REDACTED]
fax [REDACTED]
email typography@reading.ac.uk

Researcher (principal): Professor Alison Black

Email: a.black@reading.ac.uk

Phone: [REDACTED]

Student: Rachel Warner

Supervisors: Professors Alison Black and Sue Walker

Information Sheet

Full study: Design processes used by designers

Background

This research is looking at design processes used by designers who produce information materials for the public. The research is part of the PhD research of Rachel Warner at the University of Reading Department of Typography & Graphic Communication.

Aim

The aims of the interview are to find out about: design processes used in your previous and current design practice; factors that influence your design process; potential approaches to two scenarios that will be presented to you; and to discuss existing design processes that are documented in manuals and research papers.

Researchers

Professors Alison Black and Sue Walker have supervised the project which was devised by Rachel Warner. Rachel Warner will also conduct the interview.

Interviewee involvement

You will be asked about your design process and factors that influence the process during a semi-structured interview. There will be opportunity to discuss your design process using previous projects as examples and sketching to visualise your approach (if required). You will be presented with two scenarios and asked to comment on how you would approach them, and the influences that might impact the design process. You will also be presented with a table of existing documented design processes and asked to comment on them with reference to your own experience.

Arrangements

The interview will be carried out at a convenient location for you. The interview will be voice recorded using a dictaphone or laptop, with your permission, and notes will be taken. The voice recording will be stored on Rachel Warner's University digital storage space (n-drive), fully transcribed and summarised, and the audio file will be deleted after transcription. You will be sent a summary of the interview.

Terminology

Information materials – printed or online documents that provide information.

Design – the finished look, functionality, and visual presentation.

Design process – the stages and activities involved in producing information materials.

Confidentiality

Any names and personal details of interviewees (including names of other parties given during the interview) will be removed from the interview notes during transcription. Any client-confidential information that is mentioned will be anonymised. After transcription, the voice recording will be deleted.

Purely for University of Reading's records, you must supply your name and address and sign the consent form. This information will be stored securely by the Department of Typography & Graphic Communication, University of Reading, for five years.

Ethical review

This application has been reviewed by the University Research Ethics Committee and has been given a favourable ethical opinion for conduct.

E4: Consent form provided to participants



Researcher (principal): Professor Alison Black
Email: a.black@reading.ac.uk
Phone: [REDACTED]
Student: Rachel Warner
Supervisors: Professors Alison Black and Sue Walker

Department of Typography & Graphic Communication

2 Earley Gate
Whiteknights, PO Box 239
Reading RG6 6AU

phone [REDACTED]
fax [REDACTED]
email typography@reading.ac.uk

Consent form

Full study: Design processes used by designers

I have read and had explained to me the information on this project.

(please tick to confirm)

I have had explained to me the purposes of the project and what will be required of me, and any questions I had were answered to my satisfaction. I agree to the arrangements described above in so far as they relate to my participation.

(please tick to confirm)

I agree to the voice recording of the interview.

(please tick to confirm)

I understand that participation is entirely voluntary and that I have the right to withdraw from the project at any time, and that this will be without detriment.

(please tick to confirm)

I have received a copy of this Information Sheet and Consent Form.

(please tick to confirm)

Name: _____

Signed: _____

Date: _____

Address: _____

For contact details about this research see above,
or e-mail: Rachel.Warner@pgr.reading.ac.uk, a.black@reading.ac.uk

E5: Pilot study interview guide

Project: Design processes used by designers – Semi-structured interview guide

Research questions	Questions to respondent
How do designers utilise their knowledge and skills?	What are your years' experience as a designer?
When and how are decisions made about typographic and graphic elements?	If you had to name your design role, what would it be?
How are users involved in the design process?	Describe your ideal design process when producing documents for the public - using examples of previous work if needed - diagramming the process with the paper and pencil provided if required
What are the challenges that designers face that affect the design process?	Talk through the ideal design process that you would apply to the following scenarios - Scenario 1 - Scenario 2
	What might the compromises to your design process and methods be in these scenarios?
Does the practice of designers reflect design processes documented in manuals and research papers?	Give your thoughts on the process chart (e.g. how does this compare with your own processes and compromises that you might need to make?)

E6: Full study interview guide

Project: Design processes used by designers – Semi-structured interview guide

Research questions	Questions to respondent
How do designers utilise their knowledge and skills?	How many years' experience do you have as a designer?
When and how are decisions made about typographic and graphic elements?	If you had to name your design role, what would it be?
How are users involved in the design process?	What type of work do you engage most in as a designer?
What are the challenges that designers face that affect the design process?	What are the phases of your design process? - using examples of previous work where appropriate - diagramming the process with the paper and pencil provided if required
	Are there factors that influence your design process?
	Talk through the phases of the design process that you would apply to the following scenarios - present scenario A + discuss - present scenario B + discuss
	What are the factors that might affect your design process in these scenarios, and at what phase?
Do the practices of designers reflect design processes documented in manuals and research papers?	How do the processes in the table compare with your own design process and the factors that might influence it?

E7: Design scenario A for pilot study

Scenario one

Client:

Small not-for-profit organisation providing information about housing for older people

Project title:

Re-design of our leaflet: housing options for older people tool

Brief:

As well as our web-based tool we also have a printed leaflet that is handed out at events and used by caseworkers with clients who do not have internet access.

Our current version of the leaflet is outdated in appearance and content. We would like it redesigned so that it can be used by older people who are considering their housing options

We hope to make the leaflet more 'user-friendly' and useful, therefore, we are aware that the size may need to change from 1/3rd A4 (when folded). We are happy to consider suggestions you have about this.

We want the leaflet to use the colours used in the web-based tool, although we are not set on how much colour is used and where it is used. The font can differ from the web-based tool, and we're happy to hear suggestions about which font to use.

Considerations for the design and content:

- Sections 1-7 in the same order, but the presentation of questions/answer boxes can be changed to fit the overall design.
- A summary page to give clients the option of recording their 'overall' results in a table at the end so that they can prioritise next steps.
- Factual information, this is useful for caseworkers who use the toolkit as an aid and write-up notes afterwards. This is also useful if people choose to submit their results to the national advice team.
- Completely redesign the cover (we know using images can capture people's attention, but we do not want to suggest that life is all 'smiley happy older people')
- A new introduction section and next steps section
- Additional content for each section that provides short suggestions for further information

Considerations

- We are a small not-for-profit with limited budgets for design and print. Funding restricts our design capabilities from a creative point of view and the machinery we have to print the documents
- We can be different things to different people, so we have always struggled with an identity
- We work with other organisations, and this partnership needs to be reflected in our guides through the use of logos, or content provided by the partner
- Our leaflets are used by multiple stakeholders – the older person using them on their own, and advisors using the leaflets with older people

Scenario one – existing document

Section 7: Location

Shops Quiet/stress free
 Buses etc Close to family
 Familiarity/like area Close to friends
 Feeling safe Close to help
 Good neighbours Other key facilities
 Pleasant/healthy

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for location overall.

Section 8: Managing

Housework Changing curtains
 Laundry Decorating
 Bathing Gardening
 Shopping Stairs
 Cooking Having visitors
 Changing light bulbs

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for managing overall.

Section 9: Quality of life

Able to pursue your interests Do you have enough human contact
 Peace of mind

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for quality of life overall.

Summary

Whether you stay living where you are, or decide to move, what aspects of your home matter most to you? Please mark your top three priorities as 1st, 2nd and 3rd.

Section	My priorities
1. Size and space	
2. Independence	
3. Cost	
4. Condition of property	
5. Comfort and design	
6. Security	
7. Location	
8. Managing	
9. Quality of life	

Factual information about your home

Please tick (✓) as appropriate


1. Type Flat Maisonette
 House Bungalow
 If relevant, which floor do you live on?
 Do you have a garden? Yes No

2. Tenure Owner-occupied: Rented from:
 With a mortgage Council
 Paid for Housing Association
 Freehold Private Landlord
 Leasehold Other

3. Household How many people are there?
 How many pets?

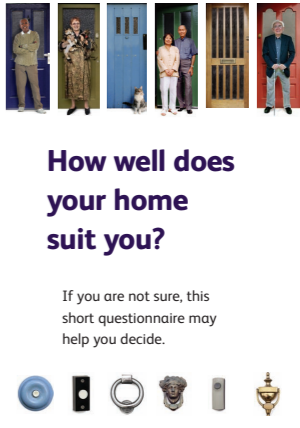
4. Is it the present situation that concerns you, or how things may be?
 Present Future Both

5. Is there one thing that is causing you most concern?



How well does your home suit you?

If you are not sure, this short questionnaire may help you decide.



How well does your home suit you?

Answer the questions in the following nine sections to say how satisfied you are with what your home provides.

When you've finished, come back to this page for our suggestions as to what to do next.

What next?

For ideas on how to tackle some of the common problems we face as we get older, read our guide *Housing and Care Options for Older People*. For your free copy, phone: 0800 377 7070 or email: info@firststopadvice.org.uk

FirstStop Advice for older people
 Call the Advice Line on 0800 377 7070

To discuss your specific problems, worries – or ambitions – in more detail, speak to one of our advisors. FirstStop Advice is a free and independent service, provided by EAC and staffed by Advisors with a huge range of knowledge and experience.

If you have access to the Internet, visit the EAC FirstStop website. This provides pages of practical ideas, a directory of home services that might be helpful to you, as well as information on local sheltered and retirement housing estates, in case you want to consider moving home.

Section 1: Size and space

Put a tick ✓ for mainly satisfied or a cross ✗ for mainly dissatisfied.

Number of rooms Garden size
 Room sizes Parking space

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for size and space overall. (See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 2: Independence

Safe from eviction Independence from your family
 Able to suit yourself Able to keep pets
 Happy to be responsible for the house

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for independence overall.

Section 3: Cost (affordability)

Mortgage/rent Water
 Maintenance Transport
 House insurance Services charges
 Heating/hot water Help in your house
 Council Tax TV Licence

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for cost overall.

Section 4: Condition of property

Roof Plumbing/drains
 Structure Free of damp
 Plastering Windows
 Wiring Doors
 Gas fittings Fences
 Water supply

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for condition overall.

Section 5: Comfort and design

Looks nice and feels like home Decoration
 Warm Furnishings
 Light and sunny Bath/shower
 Convenient layout Arranged to suit

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for comfort overall.

Section 6: Security/safety

Free of hazards (worn carpets, slippery surfaces etc) Feeling safe at home
 Help at hand (if you fell) Home secure if out (if you fell)
 Fire precautions

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for safety overall.

10 PERFECT —————> 6 JUST OK —————> 5 NOT GOOD —————> 1 TERRIBLE

E8: Design scenario B for pilot study

Scenario two

Client:

A large not-for-profit organisation providing information about housing for older people

Project title:

New guide for housing options for older people

Brief:

We are producing a guide that covers the extra support people could get at home to make their home more comfortable, and options for moving that could be a good option, as well as covering the options for sheltered housing and care homes.

The guide will give basic information about the different possibilities and explains how to find out more.

The guide is aimed at people who are thinking about their future, or those who are beginning to find it more difficult to manage their own home. It encourages people to think about all their options so that they have the best chance of making the right decision.

The guide is required for several reasons:

- Around one third of all homes are headed by a person over current retirement age. Yet, housing that is not fit for purpose can contribute to vulnerability through increased risk of falls, injury and social isolation
- Home adaptations and repairs increase independence, help prevent falls, reduce length of stay in hospital and delay care home admission
- Downsizing to more manageable accommodation, or considering specialist housing communities, can also reduce the risks and may reduce social isolation
- Fragmented information exists online, there is a need for all this information to be in one booklet so that people can read one guide and consider all their housing options.

Equality and diversity considerations:

- People who have a disability or mobility problems will need accessible properties, so accessibility and adaptations are referred to throughout the guide
- Not all people own their own homes or have a lot of equity or income. The guide will present options that are inclusive of those in such situations, such as council housing, housing associations, seeking funding for home adaptations, and how to boost your income
- There will be regional variations as to housing supply and availability (and cost) across the UK, this will be borne in mind

Considerations for the content and layout:

- Needs and diversity of the target audience have been identified and met, with consideration given to the health literacy levels of the audience
- User feedback has been sought, assessed and included as appropriate
- Product is designed according to the organisation's style guide, where appropriate.
- Product is designed to be accessible by the target audience (as far as budgets allow)
- Product is in plain language, is free from spelling or grammatical errors and free from medical or social care jargon; medical terms are explained where necessary

Considerations

- We are a nation-wide advice organisation, but the options available to our clients vary locally and for each individual. this requires an equivocal approach, but, feedback on our guides is often than people come away not knowing what to do
- Funding pressures restrict abilities to place large orders of print, and often we're balancing the need to have sections such as a notes pages with the cost of printing those additional pages
- Many of our clients print out our factsheets and guides to use offline, yet some of our guides do well online and not so well in print. We need to meet a diverse range of needs.
- We have a visual identity and a set of templates that we use for all our guides

E9: Design process table used in the pilot study

Note: Although these are displayed as columns, the processes are **iterative** steps

Design Council's Double Diamond design process model (2007) Product design	Conley (2004) Human Centred Design	AIIGA (2003) Graphic design	Karjaluo (2014) Communication design	idX (2007) Information design	Sless (2008) Information design	Frascara (2015) Information design
Discover	Understand situation	Defining the problem	Discovery	Familiarising with the subject matter	Scoping	Identification of a need
Define	Structure criteria	Envisioning the desired state	Planning	Familiarising with the user	Benchmarking	Collection of information
Develop	Explore alternatives	Defining the approach to achieving the desired state	Creative	Proposal	Prototyping	Development of the design strategy
Deliver	Evaluate and refine concepts	Inciting support and then action	Application	Designing	Testing	Design development and production of prototypes
	Execute design	Seeking insight to inform the prototyping of the solution		Evaluating	Implementing	Evaluation
		Prototyping potential solutions		Refining, implementing	Monitoring	Redesign
		Delineating the tough choices				Fabrication and implementation
		Enabling the team to work as a team				Evaluation of final performance
		Choosing the best solution and then achieving it				Design revision/ adjustment
		Making sure people know about your solution				
		Selling the solution				
		Rapidly learning and 'tacking' based on your success and failures				

E10: Scenario A materials used in full study

Appendix B | 2

Brief A

[This is a design brief that has been adapted for use in interviews. The original document was produced by a large not-for-profit organisation. Information relating directly to the organisation has been removed, the format of content has been standardised for the interview, all other content is as per the original document]

Design brief

[This is a document drafted at the start of a guide update, and covers background on why the guide is required]

Name of guide:

Housing options: Different types of housing to suit your needs

Topic to be addressed:

Explains the different types of housing options for people as they get older and are starting to find it harder to manage around the home.

Brief description of content:

This guide covers the extra support people could get at home and repairs and adaptations which could make the home more comfortable. It also looks at whether moving somewhere smaller or nearer friends and family would be a good option, as well as covering sheltered housing and care homes. The guide gives basic information about the different possibilities and explains how to find out more about your options.

Who is this guide aimed at?

This guide is aimed at people who are thinking about their future, or people who are starting to find it more difficult to manage in their home. It encourages people to think about all of their options so that they have the best chance of making the right decision.

Why is this guide required?

Around one third of all homes are headed by a person over current retirement age. Yet, housing that is not fit for purpose can contribute to vulnerability through increased risk of falls, injury and social isolation.

Home adaptations and repairs increase independence, help to prevent falls, reduce length of stays in hospital and delay care home admission. Downsizing to more manageable accommodation, or considering specialist housing communities, such as extra care housing or sheltered accommodation, can also reduce the risks and may reduce social isolation.

While there is fragmented information online, there is a need for all this information to be in one booklet so that people can read one guide and consider all their housing options. Considering all their options will increase the chances of a streamlined process of change that can help older people maintain their independence for longer.

Do particular equality, diversity or inclusion issues apply to this guide?

People who have a disability or mobility problems will need accessible properties, so accessibility and adaptations are referred to throughout the guide.

Not all older people own their own homes or have a lot of equity or income. The guide will present options that are inclusive of those in such situations, such as council housing, housing associations, seeking funding for home adaptations, and how to boost your income.

There will be regional variations as to housing supply and availability (and cost) across the UK, this will be borne in mind.

Continued on next page

Appendix B | 3

Production process

[This is an internal document which the organisation updates throughout the production process to ensure they have met the content and design principles]

The system checklist	Sign and date
The needs and diversity of the target audience have been identified and met, with consideration given to the health literacy levels of the audience.	
The evidence is up-to-date and has been derived from appropriate sources. The evidence is presented in a clear manner, reflecting the weight and quality of the evidence and it is clear where there is little or no evidence.	
User feedback has been sought, assessed and included as appropriate.	
Product has been peer reviewed by a suitable person.	
Product has been proofread for grammar, spelling and punctuation.	
Product is designed according to the organisation's style guide, where appropriate.	
Product is designed to be accessible by the target audience (as far as budgets allow).	
Product has been approved for publication by final authorised approvers.	
The Final Product Checklist	Sign and date
Product features the production or last review date as well as the date of next review.	
Product is in plain language, is free from spelling or grammatical errors and free from medical or social care jargon; medical terms are explained where necessary.	
Sources of evidence are clearly signposted where appropriate.	
The Information Standard logo is displayed correctly for certified organisations.	

Scenario A

[This scenario is provided to enable a discussion about the potential influences on a design process, it is not expected that you would be provided with this information if working for the client in real-life]

Client:

A large not-for-profit organisation providing information about housing for older people

Potential influences on the design process:

The sector

- The nature of advice for housing in later life leads to equivocal content
- The options for housing in later life differs across the UK and information often needs to be developed with this in mind

The organisation and employees

- We follow a process that meets the Information Standard, for the 'design' this means that 'you design each product to be accessible by the target audience (as far as budgets allow)' (quote taken from the Information Standards)
- Employees who are responsible for producing information for the public are recruited from information and advice or relevant backgrounds (not always with a design background)
- The colours used to design information is led by the organisation's visual identity
- Templates are used to design guides (in design software) and factsheets (in Word)

Financial

- A lot of charities are moving away from print because of budgets
- Advisors have funding pressures in terms of printing, therefore factsheets need to be produced to use online

Type of information and formats

- Guides
 - 'Public facing' and older-person focussed
 - First port-of-call for the public
 - A5 documents produced as booklets and online PDFs
 - Printed by external Printers
- Factsheets
 - For advisors, and more for adult children rather than the older person, although they are written with the older-person in mind
 - A4 documents
 - Provided to local branches of the larger organisation as PDFs
 - Printed by the advisors in the local branches
 - Content is on a specific topic and more detailed than the guides
- Website
 - Some of the information that is in the guide is also available on the organisation's website

The 'users'

- The information will be used by multiple types of people:
 - the 'older-person'
 - 'adult children'
 - the organisation's advisors
- People who are looking for information about housing in later life often already have an idea in mind about what the process will be, therefore the advice service needs to manage expectations
- People are saying 'tell me what to do' and information online can be more 'action-led'
- Having printed resources is very important to the 'client group'

Housing options

[Logo]

Different types of housing to suit your needs



[code]

	2
	3
me changes	6
ort	10
	12
	14
	16
	20
	24
pport	25
	30
	32
	33

E11: Scenario B materials used in full study

Brief B

[This is a design brief that has been adapted for use in interviews. The original document was produced by a small not-for-profit organisation. Information relating directly to the organisation has been removed, the format of content has been standardised for the interview, all other content is as per the original document]

Mini HOOP ['Housing Options for Older People'] design brief

Our organisation is currently in the process of updating and redesigning the appearance of our Housing Options for Older People (HOOP) toolkit.

As well as having our online HOOP tool we also have a leaflet version that can be handed out at events and used by local caseworkers when clients do not have internet access, we call this 'Mini HOOP'.

The current version of Mini HOOP has been provided to you.

This version is quite dated, in both appearance and content, and we are keen to have it redesigned so that it can be used by older people who are considering their housing options.

We are hoping to make Mini HOOP more 'user-friendly' and useful; as a result we are aware that the size of the publication may have to increase from its current 1/3rd A4 size (when folded). We would be happy to consider any suggestions that you might have on this.

We would want the new Mini HOOP to use the colours used in the web-based HOOP tool, although we are not set on how much colour is used/where it is used. The font can differ from the web tool and once again we would be happy to listen to suggestions from you on this.

Parts to keep from the existing Mini HOOP

- Sections 1 – 7, in the same order. However, the presentation of the questions/answer boxes can of course be changed to fit the overall design. Feel free to play with space, It's not important to fit 3 sections on one page if you have a better idea of layout.
- A summary page. This does not need to look the same as it does now, but we do want to give clients the option of recording their 'overall' results in a table at the end, so they can prioritise their next steps.
- Factual information. This is useful information for local caseworkers who use the toolkit as an aid and write up their notes afterwards. Also if people choose to submit their results to the national advice team, this information is important. If possible it would be useful to give people a 'comments' box/section (this could replace the existing Q5 "is there one thing...")

Parts to remove

- Text Page – The page starting "Answer the questions in the following nine sections to say how satisfied you are with..." We are still going to need a text page that advertises the other Organisation's services/resources, but the content will need to change.
- Front Page – This can be completely redesigned. We will need to confirm a title later as we are still in discussion over what it should be.

Continued on next page

New Content – text page

'Intro section'

HOOP – Your housing MOT!

Simply work your way through the sections in this leaflet, answering the questions as you go. The aim of HOOP is to help you think about your current housing situation and identify ways in which you can improve it; it is for this reason you will notice 'suggestions' after some questions which can help answer some common housing questions. Once you have completed the questions come back to this page for information on what to do next.

'Next Steps'

Our national advice team are experts in housing, care and related finance. If you have any questions about any issues that you have identified when completing HOOP then please give us a call, we might even be able to put you in touch with a local advisor.

Number: 0800 377 7070

Open: Mondays, 8am – 7pm and Tuesday to Friday, 8am – 6pm.

Email: [email address here]

'HOOP online'

If you have access to the internet, then you may wish to complete our online version of HOOP, which contains more of our helpful suggestions and allows you to submit your results to an advisor. In addition, our HousingCare website contains a database of every retirement housing development in the country and is therefore a useful starting point for those wishing to move.

HOOP online [url here]

HousingCare [url here]

New content – Suggestions

Increasing income – After 'Cost' (section 3)

If you are struggling with certain housing-related costs then now might be a good time to have a benefits check to ensure you are receiving all that you are entitled to. Speak to an Advisor on 0800 377 7070 for more information.

HIAs – After 'condition of property' (section 4)

Home Improvement Agencies (HIAs) are not-for-profit organisations set up to help older people with repairs, improvements and adaptations. You can search for your local HIA at wwwFOUNDATIONS.UK.COM or you can ring us on 0800 377 7070.

Moving – After 'location' (section 7)

If you are considering a move, then you may wish to find out more about retirement housing. These developments offer the independence of your own front door, whilst having access to other services on site. Ring us on 0800 377 7070 to request a list of developments in your area, or visit our website [url here]

Care & Support – After 'Managing' (section 8)

If you feel that you would benefit from some help at home then you may wish to request an assessment by the Adult Social Care team of your local council. They can help by providing equipment, carer visits or putting you in contact with other local organisations.

Scenario B

[This scenario is provided to enable a discussion about the potential influences on a design process, it is not expected that you would be provided with this information if working for the client in real-life]

Client:

A small not-for-profit organisation providing information about housing for older people

Potential influences on the design process:

The sector

- The nature of advice for housing in later life leads to equivocal content
- The options for housing in later life differs across the UK and information often needs to be developed with this in mind
- The use of imagery can be a struggle due to the perception of old age

The organisation and employees

- The content will be written by employees and then provided to the designer to format
- The employees of the organisation will approve the design of documents
- Employees who are responsible for producing information for are from a different backgrounds including town planning, benefits, and legal (not always with a design background)
- Awareness of the organisation is a challenge. The organisation's identity is something that the organisation struggles with as it is different things to different people.

Financial

- The resources for the telephone advice line is reducing, therefore documents need to help people think through the topic of housing for later life for themselves
- Costs are kept low by using formats that can be printed simply by the organisation or by external printers
- Developing PDFs is less resource intensive than producing printed documents (opinion of employees of organisation)
- Developing an App is more expensive than a website (opinion of employees of organisation)
- Stock images are used as there's often not enough budget for a photo shoot

Type of information and formats

- Guides
 - Provide overview of topics for housing and care for older people
 - A5 bound booklets and online PDFs
 - Printed by external Printers
- Factsheets
 - Provide detailed and specialist information
 - A4 stapled documents
 - Printed by the organisation employees in-house
- Self-help tools
 - A flagship online tool (website)
 - Online PDFs

The 'users'

- The information will be used by multiple types of people:
 - the 'older-person'
 - 'adult children'
 - the organisation's advisors
- People who are looking for information about housing in later life often already have an idea in mind about what the process will be, therefore the advice service needs to manage expectations
- Having printed resources is very important to the 'client group'

Section 7: Location

Shops	<input type="checkbox"/>	Quiet/stress free	<input type="checkbox"/>
Buses etc	<input type="checkbox"/>	Close to family	<input type="checkbox"/>
Familiarity/like area	<input type="checkbox"/>	Close to friends	<input type="checkbox"/>
Feeling safe	<input type="checkbox"/>	Close to help	<input type="checkbox"/>
Good neighbours	<input type="checkbox"/>	Other key facilities	<input type="checkbox"/>
Pleasant/healthy	<input type="checkbox"/>		

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **location** overall.

Section 8: Managing

Housework	<input type="checkbox"/>	Changing curtains	<input type="checkbox"/>
Laundry	<input type="checkbox"/>	Decorating	<input type="checkbox"/>
Bathing	<input type="checkbox"/>	Gardening	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	Stairs	<input type="checkbox"/>
Cooking	<input type="checkbox"/>	Having visitors	<input type="checkbox"/>
Changing light bulbs	<input type="checkbox"/>		

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **managing** overall.

Summary

Whether you stay living where you are, or decide to move, what aspects of your home matter most to you? Please mark your top three priorities as 1st, 2nd and 3rd.

Section	My priorities
1. Size and space	
2. Independence	
3. Cost	
4. Condition of property	
5. Comfort and design	
6. Security	
7. Location	
8. Managing	
9. Quality of life	

Factual information about your home

Please tick (✓) as appropriate

1. **Type** Flat House Maisonette Bungalow

If relevant, which floor do you live on?

Do you have a garden? Yes No

2. **Tenure** Owner-occupied: Rented from:

Also available interactively at www.HousingCare.org



How well does your home suit you?

Section 1: Size and space

Put a tick ✓ for mainly satisfied or a cross ✗ for mainly dissatisfied.

Number of rooms	<input type="checkbox"/>	Garden size	<input type="checkbox"/>
Room sizes	<input type="checkbox"/>	Parking space	<input type="checkbox"/>

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **size and space** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 2: Independence

Safe from eviction	<input type="checkbox"/>	Independence from your family	<input type="checkbox"/>
Able to suit yourself	<input type="checkbox"/>	Able to keep pets	<input type="checkbox"/>
Happy to be responsible for the house	<input type="checkbox"/>		

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **independence** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 3: Cost (affordability)

Mortgage/rent	<input type="checkbox"/>	Water	<input type="checkbox"/>
Maintenance	<input type="checkbox"/>	Transport	<input type="checkbox"/>
House insurance	<input type="checkbox"/>	Services charges	<input type="checkbox"/>
Heating/hot water	<input type="checkbox"/>	Help in your house	<input type="checkbox"/>
Council Tax	<input type="checkbox"/>	TV Licence	<input type="checkbox"/>

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **cost** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 4: Condition of property

Roof	<input type="checkbox"/>	Plumbing/drains	<input type="checkbox"/>
Structure	<input type="checkbox"/>	Free of damp	<input type="checkbox"/>
Plastering	<input type="checkbox"/>	Windows	<input type="checkbox"/>
Wiring	<input type="checkbox"/>	Doors	<input type="checkbox"/>
Gas fittings	<input type="checkbox"/>	Fences	<input type="checkbox"/>
Water supply	<input type="checkbox"/>		

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **condition** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 5: Comfort and design

Looks nice and feels like home	<input type="checkbox"/>	Decoration	<input type="checkbox"/>
Warm	<input type="checkbox"/>	Furnishings	<input type="checkbox"/>
Light and sunny	<input type="checkbox"/>	Bath/shower	<input type="checkbox"/>
Convenient layout	<input type="checkbox"/>	Arranged to suit	<input type="checkbox"/>

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **comfort** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

Section 6: Security/safety

Free of hazards (worn carpets, slippery surfaces etc)	<input type="checkbox"/>	Feeling safe at home	<input type="checkbox"/>
Help at hand (if you fell)	<input type="checkbox"/>	Home secure if out	<input type="checkbox"/>
		Fire precautions	<input type="checkbox"/>

Are any of these causing you stress or affecting your health? Yes No

Give a score out of 10 for **safety** overall.

(See foot of page for help with scoring.)

Now continue through sections 2-9, looking at other aspects of your home.

How well does your home suit you?

Answer the questions in the following nine sections to say how satisfied you are with what your home provides.

When you've finished, come back to this page for our suggestions as to what to do next.

What next?

For ideas on how to tackle some of the common problems we face as we get older, read our guide *Housing and Care Options for Older People*. For your free copy, phone: 0800 377 7070 or email: info@firststopadvice.org.uk



Call the Advice Line on 0800 377 7070

To discuss your specific problems, worries – or ambitions – in more detail, speak to one of our advisors. FirstStop Advice is a free and independent service, provided by EAC and staffed by Advisors with a huge range of knowledge and experience.

If you have access to the Internet, visit the EAC FirstStop website. This provides

pages of practical ideas, a directory of home services that might be helpful to you, as well as information on local sheltered and retirement housing estates, in case you want to consider moving home.

10 PERFECT —————> 6 JUST OK —————> 5 NOT GOOD —————> 1 TERRIBLE

E12: Sample transcript from Pilot study

Concept coding	Row	Speaker	Content	Process coding
	1	I	So, the first question is what are your years' experience as a designer?	
	2	HT	My years, it's almost three years, just under three years now.	
	3	I	Okay, and if you had to name your designer role, put a title on it, what would it be?	
	4	HT	I think it would just be Graphic designer.	
	5	I	Okay, yep, and the main part of this interview is about your design practice, so, what I've got is one main question about your design practice, and as well as talking through what you think you design practice might be, I've also got some paper so if you wanted to draw out anything, please go ahead and do so, maybe a workflow or something, so it's there if you want to use it. But what I'd like you to do is describe your ideal design process that you use when producing documents. And what I mean by documents is, as per the information sheet, anything that is produced in print or online really.	
	6	HT	Okay, the ideal process. I suppose ideally, I'd get a full brief with any information from the client about what they are looking for and, you know, any sort of clues about what style they want, and that sort of thing.	
	7	I	Ah, okay, so that's what you would expect to get in a brief?	
	8	HT	Hopefully, yes, ideally, because obviously sometimes you don't get any of that, but they still have that information in their minds anyway, so, you send them something and they go 'oh I was expecting this other thing' and you go 'okay, that could have been in the brief'.	
	9	I	Yeah, so you've got expectations of what the ideal brief would be as well?	
	10	HT	Yeah, so obviously all the logistical information as well, and stuff about if they have certain images they are looking to use? If they've got a visual identity they want to apply, any of those things. And then, after that we'd, ideally, we'd be able to sort out the estimates and the production costs and work out a schedule then that includes when I'm going to get an initial proof to them and when they're going to provide me with feedback. Maybe two or three stages of that. And then, obviously building in the print delivery at the end of that.	

Interview notes | HT | 07.08.2018 | 1

E13: Sample transcript from full study

Row	Speaker	Topic	Content
1	I	DP	Very briefly could you explain how you describe yourself as a designer, the title you'd give yourself as a designer, and how long you've been working in that particular field?
2	D7	DP	Okay, so, I'd describe myself as a UX designer. And I'd say that's all about finding out what people actually want to do on a digital tool or digital product. And then trying to help people do that in the best way.
3	I	DP	Okay
4	D7	DP	What we try to uncover first is what is actually the problem that we're trying to solve, so we spend a lot of time doing different types of research to find out what is the problem that the user has on whatever the product it that you're working on.
5	I	DP	Okay

Row	Speaker	Topic	Content
6	D7	DP	Once you've uncovered that problem, find out how the currently get around that problem, and how essentially how we can help and make that easier.
7	I	DP	And you do that through?
8	D7	DP	Through research, yeah.
9	I	DP	So is that user testing? Lot's of different ways?
10	D7	DP	Yeah, so it depends what it is. For [product] for example, we ran a methodology called Top Tasks, which is to identify what's most important to customers. Essentially, it's quite a long process, but essentially what you do is you figure out what are all the possible tasks that people might be trying to do on our website. So, it could be lots of things, finding out how much it costs to go to a Care Home, what kind of Care Homes there are, etc. And you put together a really long

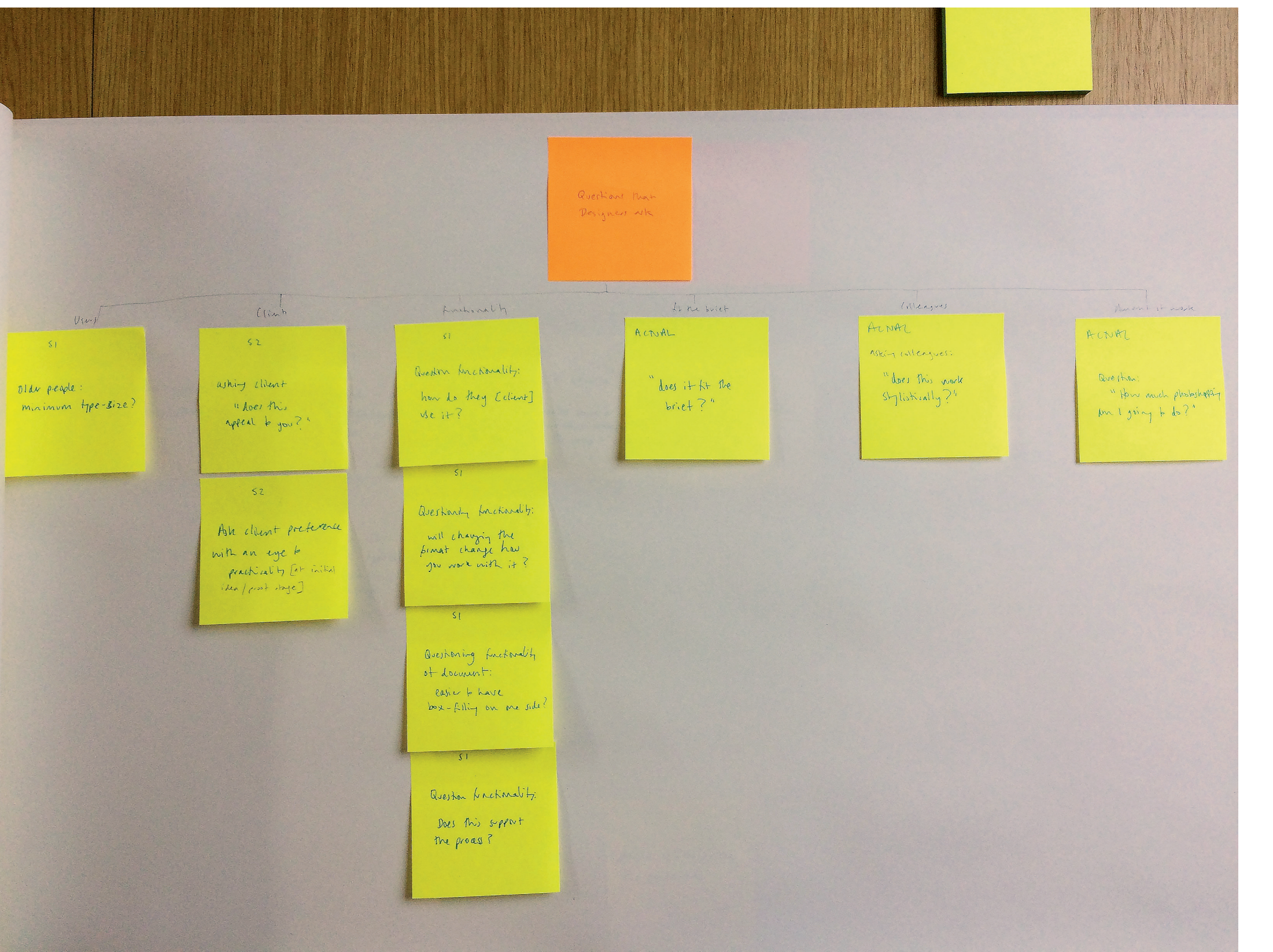
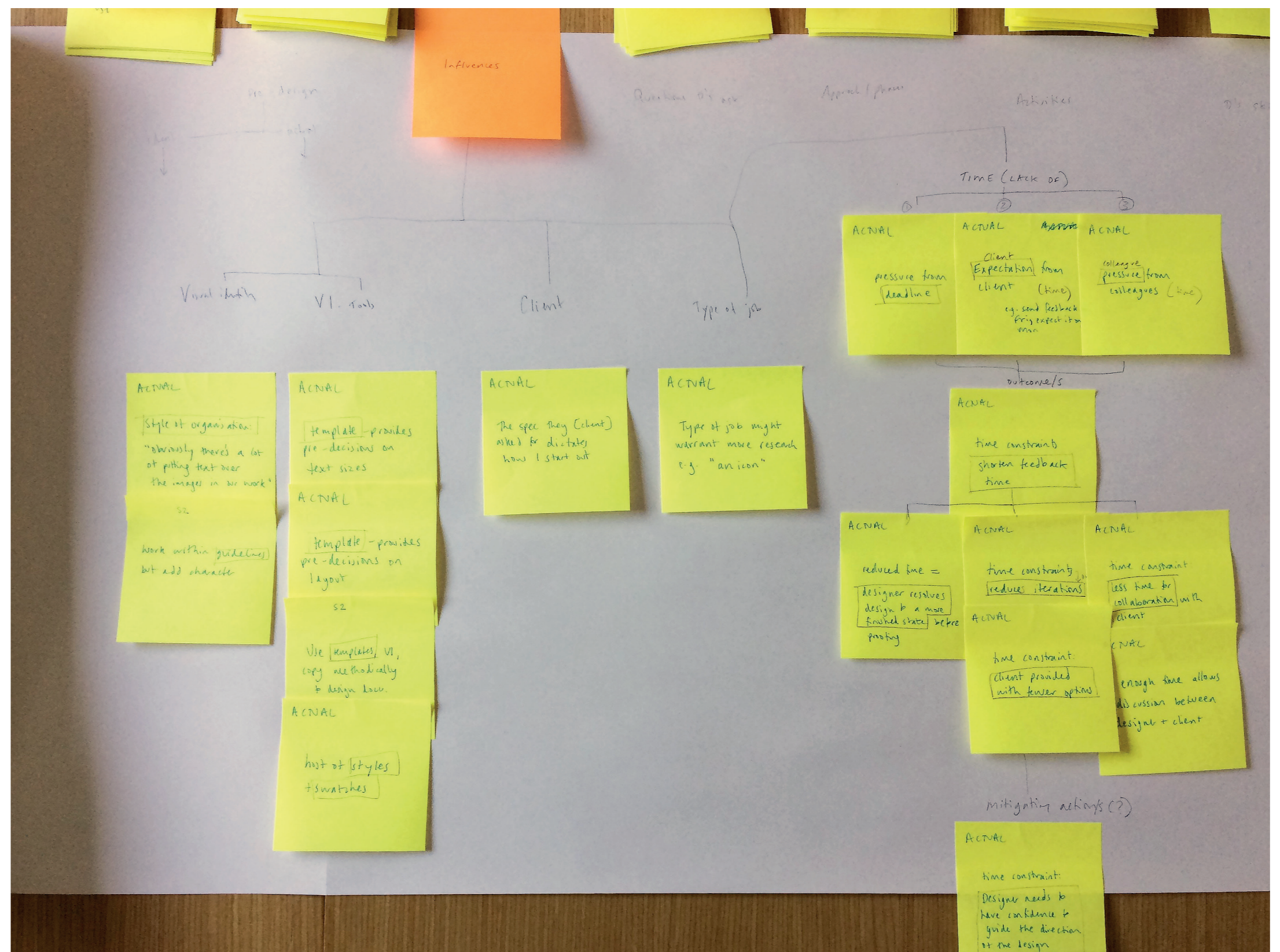
Row	Speaker	Topic	Content
			list. I think we ended up with about 500. And then you, and you work together with all the stakeholders, [name] for example, yeah so the content managers, product owners, people from a marketing perspective, and a technical perspective, and everyone gets together and just, yeah, we all work on this list of what are the possible tasks. Then we'll go through that list and they'll be lots of duplications because we get that list from different sources, which could be from GA or...
11	I	DP	Is GA?...

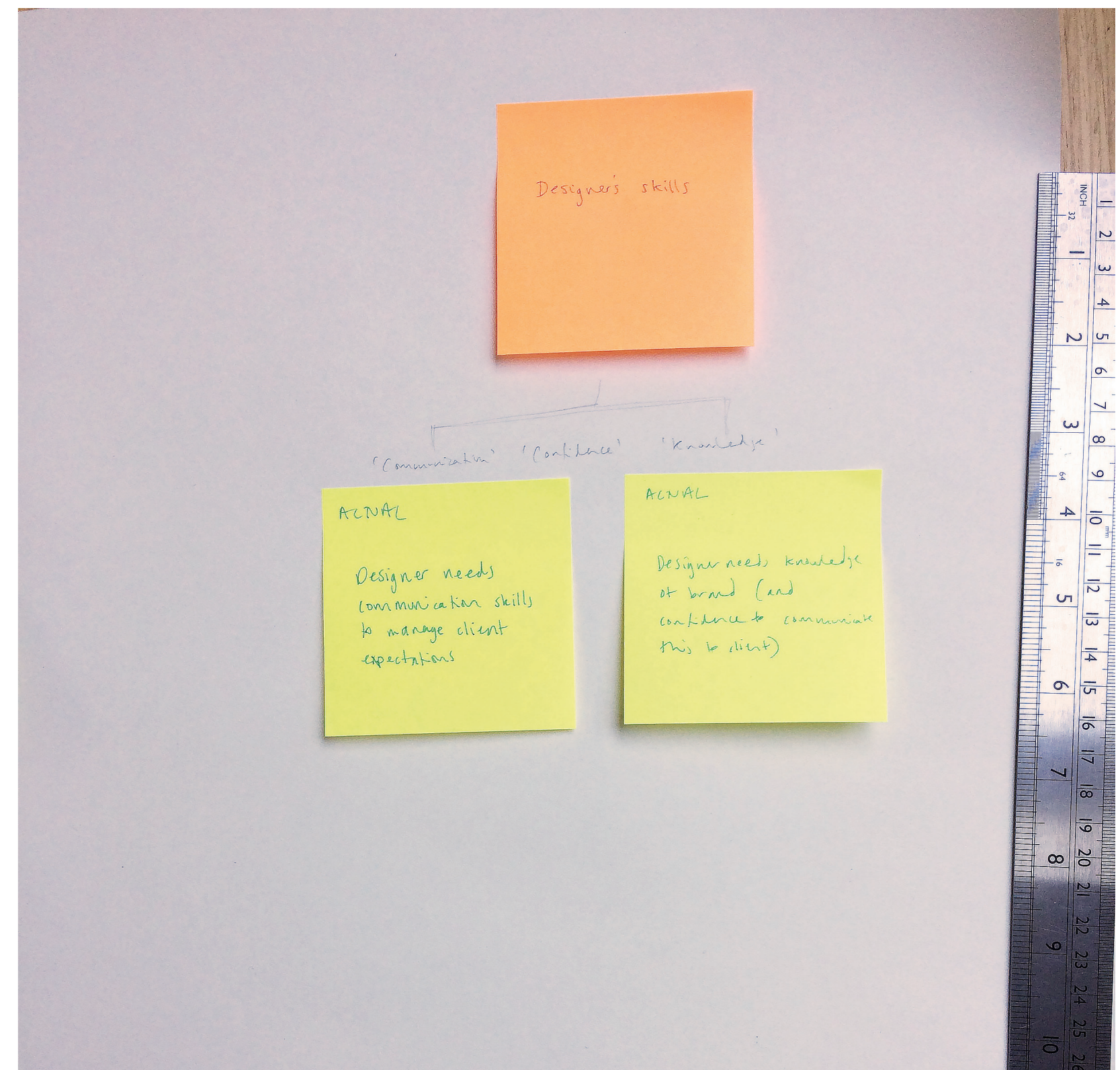
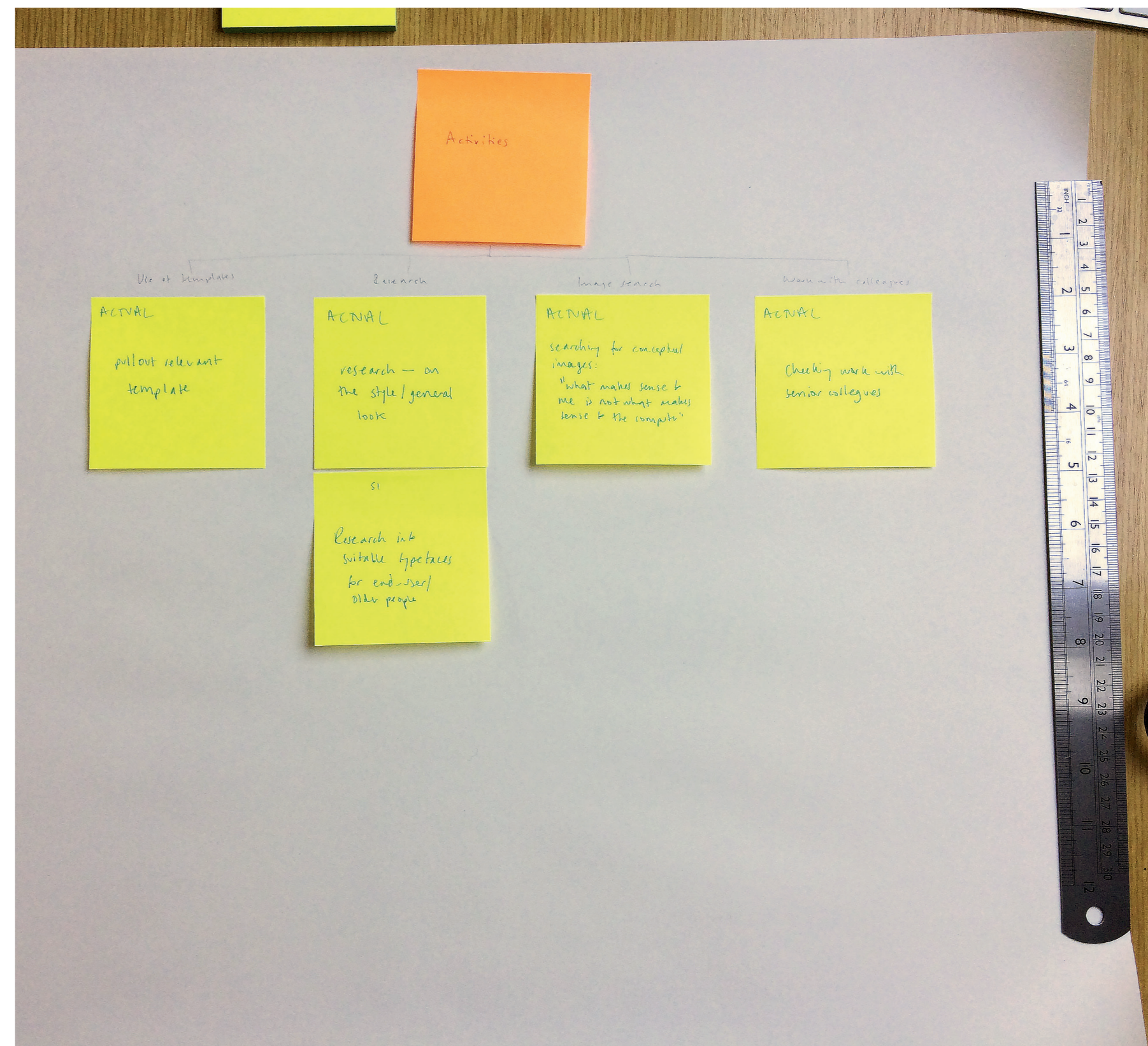
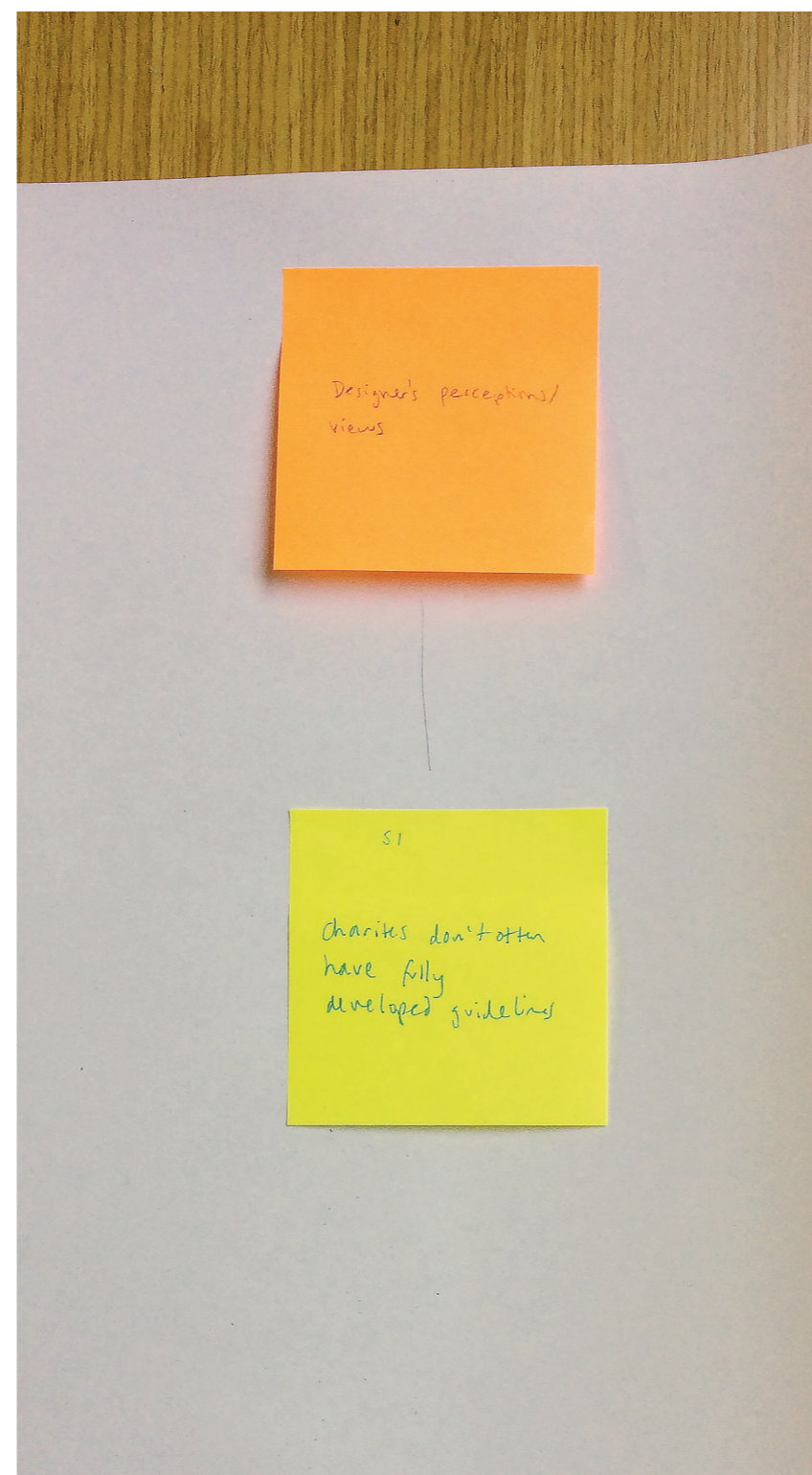
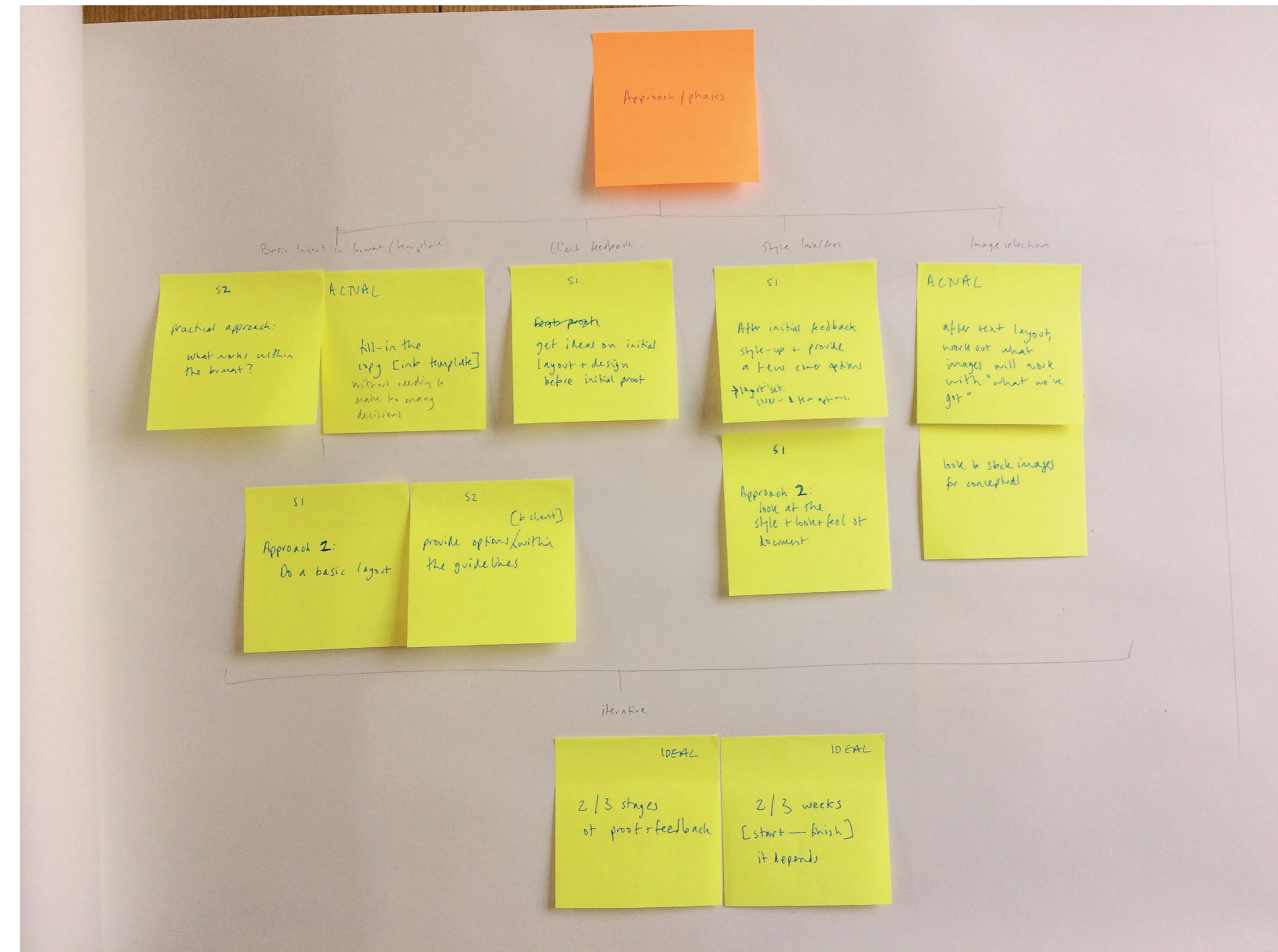
D7 | Interview: 21.11.2018 | Transcription: 29.11.2018 | 1

I = Interviewer | D7 = participant | DP = designer's process | SA = response to scenario A | SB = response to scenario B

E14: Sample post-it-note sheet for DP1 from the pilot study







Layout
decisions

SZ

design decisions
guided by

- 1 - image heavy
- 2 - text more space

SZ

design decisions
guided by

- long columns
- text with less
going across

Lone wolves

SZ

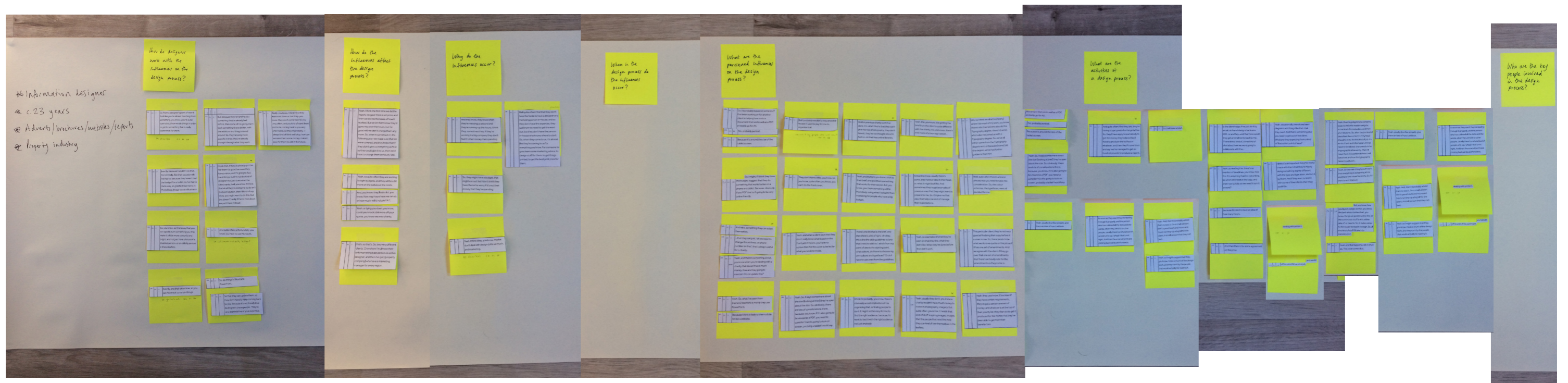
Brief has same
qualities as the
in-house work
we do

ACTUAL

Access to servers

E15: Sample first round of coding for D1 from full study

D1 coding | 1st round



D1 coding | 2nd round

