A Thesis Submitted to the Faculty of The College of Fine and Applied Arts in Candidacy for the Degree of MASTER OF FINE ARTS

Design Theory and Methodology

By
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May 15, 1992

## Approvals

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This thesis is dedicated to my parents Marie and Bill Tedeschi, my mother for giving me the encouragement and confidence to attend graduate school, my father for his enduring patience and for instilling in me the desire to learn.

Thank you both for your never ending love and support.

I wish to thank Alicia, whose hard work and dedication is a source of inspiration.

I also wish to thank my committee members Deborah Beardslee, Roger Remington and Pamela Blum for their helpful suggestions, encouragement and patience.

And, a special thank you to Roger for his wisdom and thoughtful advice, and to Deborah for the inspiration and excitement she instilled in me.

As my interest in the visual design process and investigation onto new methods of problem solving intensified, I began to ask questions about the relevance of process, methods, concept, and theory which we as designers and educators believe in and on which we rely.

Could the implementation of theory or a particular process improve design? The answer can be found in response to two contemporary challenges to designers: to be more responsive to audience needs and to be more analytical. Systematic analysis fosters the exploration of initial concepts, new insights and the ability to explore a wide variety of choices. A positive aspect occurs in the ability to adhere to a systematic analysis in that the end results are produced from in-depth explorations.

Designers and educators need to enhance, broaden and increase the number of options and choices they work with. They need to be rational problem-solvers. These all are goals. The way designers think affects their ability to solve problems. Problem solving channels ideas and analysis improves designers' explorations through attention to process and methods. Not all problems must be handled in this systematic manner, but these restrictions may enable designers to "see" problems in their simplest, abstract forms. From these simple, abstract forms follow interpretations and a sense of completeness. This completeness enables the designer to produce the most effective communication possible.
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Towards the end of my first year of graduate school I began to reflect on ideas for a thesis topic. I began to compile a reading list.

One important text, Peter G. Rowe's Design Thinking, gave a systematic account of the design process. Rowe discusses architectural design with comparisions from examples from more diverse areas of design study.

This book provoked my interest for the same reasons as an independent study with Professor Beardslee, which introduced me to creative problem-solving, exploration and utilization of design methods.

The culmination of this newly-gained knowledge, coupled with a year of intense, concentrated effort emphasizing design process under my core professor, Roger Remington's guidance, contributed to the direction of my thesis topic.

Professor Remington supported my topic decision. He extended an invitation to attend a summer workshop on Design Process sponsored by the Graphic Design Education Association. Professor Remington recommended several relevant books. He suggested I contact Professor Beardslee to determine if she would be interested in heading my thesis committee.

Professor Beardslee accepted the position of chief advisor. Professors Remington and Blum became my associate advisors. I asked each member for a specific reason: Professor Beardslee was the original catalyst behind the inspiration for my thesis topic; Professor Remington, a professor in my major, a fountain of resource and knowledge in Design Theory and Methodology. Professor Blum who
is also process oriented and interested in thought structures, as well as a fine artist, a painter, was someone I believed would challenge me as an artist and a graphic designer.

Autumn approached and I found myself in libraries and bookstores locating and reading diverse publications related to my topic.

The mid-September deadline for a thesis statement was quickly approaching. A documented initial thesis statement was required in order to obtain an authorized signature of approval from the Special Assistant to the Dean for Graduate Affairs.

A summary of the initial thesis statement follows:

The purpose of this thesis is to investigate methodology and design theory in graphic design. This project will investigate whether a "front-end" process is required for effective graphic design (see Appendix A).

As time progressed, it was necessary to elaborate and specify information found in various components of the proposal. The fundamental questions of who, why, what, where, when and how were answered in structures that ranged from a problem statement to the actual dissemination of the completed work.

A retrospective comparision of an earlier version of my thesis proposal (see Appendix B) to the final version (see Appendix $C$ ) reveals that considerable alterations occurred in the application of the poster series.

My initial concept for the applied component was that a series of posters would reflect specific design theories selected from the final version of the Design Theory and Methods Index (see Appendix D).

In the initial concept, each poster was to communicate a specific design theory selected from the Index. In the finalized project proposal the posters would collectively illustrate a theory through the process of using various methods. In other words, the theoretical emphasis was on the visual design process. The poster series would reveal the parts of the visual design process as well as the whole. These parts range from Problem Identification to Retrospective Evaluation. Various methods would be chosen from the Index. A page spread dealing with Irezumi (the art of Japanese tattooing) would be designed to simulate how an actual product could be created through the process of using various methods.

Timeline

A firm grasp on my goals and objectives allowed me to implement a plan of action which took the form of a timeline (see Appendix E). Deadlines needed to be met. One important deadline was the completion of the application for the thesis show. Meetings with all committee members present, made difficult to coordinate because of busy and often conflicting schedules, needed to be arranged far in advance. My progress approximated anticipated due dates so that no major problems occurred.

Research:
Design Theories and Methods Index

Research began over the summer as soon as my topic was determined. Professor Beardslee and Professor Remington both suggested readings that I eagerly devoured. An early start was needed because it would be difficult to digest all the materials that had to be covered. Research led me to begin a Design Theories and Methods Index.

The Design Theories and Methods Index is a computerized data base retrieval system that contains a compilation of theories and methods collected and combined in one Index from a variety of disciplines. The Index is intended to be used by educators and professionals of visual communication for locating theories and methods quickly and with ease.

I began corresponding with others interested in Design Theory and Methods, such as Professor Meredith Davis of North Carolina State University; Professor Kevin Byrne of the Minneapolis College of Art and Design, and Professor Steven Skaggs of the University of Louisville. With the help of these individuals and my committee members, I was able to compile a vast array of readings. These contributions would represent the bulk of data for the Design Theories and Methods Index, an open ended index that will expand over time.

After compiling the Design Theories and Methods Index it became necessary to research standard indexing styles. As I began to develop the Index, I contacted Barbara Polowy, the Arts and Photography librarian from the Wallace Memorial Library at the Rochester Institute of Technology. She made several helpful suggestions and recommended various resources. The Chicago Manual of Style, an important resource, helped me build an index by suggesting standard categories and widely used formats.

## Research

The bulk of my research was already completed by the time I began designing the poster applications. All readings regarding the design

Research: Visual

## Design

 Process andMethods Poster process and methods were taken from the Index itself.

The most significant resources were The Universal Traveler by Jim Bagnall and Don Koberg, Graphic Problem Solving for Architects and Builders by Paul Lasseau, and Design Thinking by Peter G. Rowe.

While investigating the visual design process, I came across three different models of organizing, approaching or analyzing the design process.

I believe the most universal breakdown of the visual design process is the two-step process by Allen Hurlburt as discussed in The Design Concept. Hurlburt divides the process into analysis, then synthesis. Koberg and Bagnall identify three stages of: Analysis, Conceptualization and Synthesis. The most in-depth process and the one I chose to follow consists of seven steps. Their sequence is as follows:

Problem Identification
Research and Analysis
Synthesis
Ideation
Evaluation
Implementation
Retrospective Evaluation.
I received this information from Professor
Beardslee during the first year graduate level Theory and Methods seminarat RIT. Professor Beardslee conducted a lecture in late October, 1991 about the visual design process. There, I received handouts (see Appendix F) that became a major resource for the application of the poster series as it began to take shape.

At this point in time, it was necessary to define the sequence of steps listed above. During Problem Identification, it is necessary to define and understand the nature of a problem. Research and Analysis represents the systematic inquiry for discovering facts or relationships which may aid in solving a problem. Synthesis is the discovery of interrelationships and patterns as one sorts through and organizes the parts of the problem. Ideation is the generation of conceptual solutions. Evaluation is the selection of designs from possible viable alternatives. Implementation can be defined as refinement and development of the final phases of production. Finally, Retrospective Evaluation, the determination of effects of the solutions, is useful for feedback in solving future problems.

It was also necessary to research methods. Methods are described as sub-procedures or tools used during the process of design. There are many variations in sequencing procedural steps as well as many different techniques or methods for accomplishing each operative step along the way. I choose (1) Mind Mapping, (2) Scoring and (3) Interaction Matrix.

These three methods were chosen because they were best suited to the stages in the process that were being investigated. I used Mind Mapping during Problem Identification, Scoring in Research and Development and the Interaction Matrix in the Synthesis stage.

Mindmapping was clarified by reading Tony Buzan's Use Both Sides of Your Brain. I had prior experience with this process during an independent study with Professor Beardslee.

I discovered Scoring by reading RSVP Cycles by Lawrence Halprin. William Pena's Problem Seeking provided information about the Interaction Matrix.

Method definitions were compiled from research. The definitions were included in the series posters. The definitions are as follows:

Scores are symbols of processes which extend over time and cannot be separated from the process itself. There is no one method of scoring. Scoring processes vary. They are at the heart of the process of creativity.

A Mind Map is a type of brainstorming with words or images. Rather than starting from the top and working down in sentences or lists (linear thinking), one should start from the center or main idea and branch out as dictated by the individual ideas and general form of the central theme.

The mind should be left as free as possible. Any thinking about where things should be placed or whether they should be included will simply slow the process. The idea is to recall everything one's mind thinks around the central idea.

Theory is also another important word that needs to be defined at this point. The following definition was given to me by Professor Remington. A theory is a set of generalizations related by a net of deductive thinking and arrived at by stages of discovery, verification and comparison.

## Project

 Development: Design Theories and Methods IndexIn order to begin the Design Theories and Methods Index specific categories needed to be developed and organized. Categories would contain information to systematically make the information easily accessible to the user. I originally began with the following categories: Theory or Method (keyword), Title or Entry, Name, Author, Publisher, Volume/ Issue, Source, User/Contributor, Date and Origin/ Discipline. This list was brought to the attention of Barbara Polowy as the result of a suggestion from Professor Remington. Barbara recommended a few changes. A second list was then prepared (see Appendix G).

The first draft of the Index was compiled in early November, 1991. I began by inserting information given to me by Professor Remington (see Appendix H ) and a reading list sent to me by Professor Byrne (see Appendix I).

I encountered several problems during initial stages of the Index due to my unfamiliarity with the computer software being used. It was recommended that I document the Index on Filemaker II by The Claris Corporation. Due to the file's limited space I needed to shorten column widths and experiment with typefaces and point sizes. I originally selected 10 - point Helvetica and in the end up using 8 - point Helvetica Condensed instead.

The first presentation of the Index occurred in early December, 1991, during my first full committee meeting. Suggestions which I incorporated were to give credit to those who had contributed; to indicate the sources of my material and to distinguish between published and unpublished works. The idea of separating Theories from Methods was also discussed, but eventually rejected.

I decided to begin working on an Introduction to the Index, something to familiarize the user with its context (see Appendix J) and purpose. I attempted to answer some of the questions raised during the committee meeting. I decided to give credit to contributors in the form of short biographies about each. I also established that only unpublished work would be coded and located under a category entitled Locator. This information made it possible for the user to easily contact the author or repositor of a particular work.

In early January, I received a reading list (see Appendix K) from Professor Skaggs which included an unpublished discussion paper he had written entitled, Ways of Knowing (see Appendix L), which I also included in the Index. This is an example of work that was coded so that the user could easily locate it even though it is currently unpublished.

Once again, I found myself needing to research indexes more carefully, with guidance from The Chicago Manual of Style. The Topic category of my Index had become too congested. I adopted a format from the Manual that suggested using Subject in conjunction with Topic. Topic was defined as narrow and concrete, and Subject as something broader and less sharply defined.

Later it was suggested by committee members to standardize my discipline and subject categories (see Appendix M) in order to create a sense of unity.

In mid-January, I submitted the second draft of the Index to the committee and requested approval to move on to the application phase of my thesis preparation.

Research for the poster series was complete. It was time to apply this research. The main communication, the visual design process,

## Project

 Development: VisualDesign
Process
and
Methods Poster was the common thread that linked the poster series together. As each poster in the series progressed and as the process began to unfold, each step contained a method for aiding the design development.

During one meeting Professor Remington and Beardslee discussed the choice of content to be contained within the simulated page spread. Because of the seriousness of the visual design process, Professor Remington suggested I choose something of contrast; something esoteric. Later, I "mind mapped" the word esoteric to investigate new ideas. From the mind map I chose the word "body decoration" and eventually investigated Irezumi, the art of Japanese tattooing.

My thesis show was quickly approaching. I was informed that gallery space would be limited. I decided to produce a total of four posters.

## Poster One

The first poster would describe the seven steps of the visual design process in general terms. Each poster would include a brief definition of a particular method. Embodying the method and for visual impact a one-line introduction about Irezumi, was included. The content for the process and methods information would be simulated in an actual page spread. The page spread is intended to be from a publication dealing with body
decoration. The initial poster set up the standard format and system of all elements for the remaining three posters in the series.

It was necessary to represent a sense of unity and similarity, a system throughout the series, in order to link one poster to the other. I wanted to express a sense of growth and development in order to echo the message of the central theme, the visual design process. Therefore, placement and color were key factors. Taking the advice of my committee, I created a written diagram that would document and organize the intended visuals (see Appendix $N$ ) before I began any preliminary sketches.

The most obvious link to unify the series was a consistent finished size for each poster. I chose a format that measured $14^{\prime \prime} \times 22^{\prime \prime}$ On the right hand side of each poster was a vertical bar (see Appendix O). As the posters progress in the series, the color of the bar changes from light to dark. This bar ispart of a coding system for recognition. It acts as a unifying element as well as a subtle message conveying to the viewer that as the process develops and becomes more concrete, so does the color.

The bar was also a designated area where images and information used in the creation of the Irezumi page spread of the central theme would appear. The actual page spread was located on the bottom left hand side of the bar. The design elements used were words and/ or images, and color. As the poster series develops and becomes more concrete so does the Irezumi page spread. Type is added, colors chosen and images selected.

Method text is located in the foreground of each poster. Located in the same position on each poster is an image (silkscreened) in the background to reflect the method used.

## Poster Two

The second poster in the series dealt with Problem Identification. There I used a mind map (see Appendix P) which is a form of brainstorming and is an important stage at this point in the process. From this mind map, I chose key words. These words were also used in the layout, appearing within the colored bar on the right hand side.

## Poster Three

The third poster explained Research and Analysis. Scoring aided in the selection of color and imagery used in the Irezumi publication spread.

## Poster Four

The fourth poster represented Synthesis. The method used at this stage was the Interaction Matrix (see Appendix R). The Interaction Matrix aided in the exploration of the emotional and pragmatic aspects of Irezumi. It allowed me the opportunity to combine very different issues of Irezumi which in turn provided unique ideas related to visuals that were used in the page spread.

In the beginning stages of the poster series, I struggled with the placement of necessary components (see Appendix S). I needed to create clear zones of information. Professor Beardslee and Professor Remington made it clear that placement was a key element to the success and legibility of the series and should be handled with the utmost care.

Early on, I began experimenting with the format of the posters (see Appendix T), not knowing in which direction to go. Professor Beardslee suggested I let the format come as a result of the process. As soon as I "let go", stopped struggling with size, shape, and form, and delved into the process itself, the format evolved naturally.

Conclusion

In conclusion, I discovered that, in fact, following a theory and applying methods indeed broadens and increases the number of options and choices one is able to work with.

The reference materials that have been compiled will be a great source of information and reference to other visual communicators.

I believe I have successfully completed the objectives I had placed upon myself and have been able to incorporate the knowledge regarding design theory and methodology gained while at RIT.

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## Thesis

Statement

## Design Theory and Methodology

The purpose of this thesis is to investigate methodology and design theory in graphic design. This project will investigate whether a "front-end" process is required for effective graphic design. Theory and Methods will be analyzed through the use of examples from contemporary graphic design.

Physical outcomes for the thesis will be a book of terms, process documentation and a series of posters or postcards.

Thesis
Proposal

Draft 2
Project Title:
Designer and Address:

## Problem Statement:

## Documentation of Need:

Mission Statement:

## Design Theory and Methodology

Carla Tedeschi
79 Kirklees Road
Pittsord, New York 14534
To investigate methodology and design theory used in graphic design.

| Audience: | Educators of Graphic Design <br> Graphic Design Students <br> Graphic Designers |
| :--- | :--- |
| Context: | Design Studios <br> Workshops and Seminars <br> Educational Facilities (Classrooms, lecture halls ) |

This project will investigate the stage or stages in graphic design before implementation occurs. In other words, the "front-end" process will be examined and methods in aiding this process will be explored.

This project will explore and document a visually invisible process.
This project will examine the graphic designer as he/she engages in the practice of visual communication problem solving.

The importance of this project will be to validate that, in fact, successful graphic design does not rely solely on aesthetics and quesswork; but rather, graphic design can be described as a series of logical steps, a systematic account of sequences and procedures, not excluding the eureka factor.

The project will be analyzed by selected theories and methods chosen from the Design Theories and Methods Index. The chosen theory and methods will be analyzed by actual practice and application. The design processes selected will be thoroughly investigated by way of visualized and written documentation.

The initial project assumption is that a "front- end" process is a necessary sequential set of steps, that, when followed, will produce effective graphic communication of quality.

The project، Design Theory and Methodology is a "front- end "process or tool that will enhance and aid in the production of effective graphic design. A Design Theories and Methods Index will be compiled, a documentation notebook will be produced along with a series of posters created using the design process and selected methods. The project will prove that theory and methods are prerequisites of effective graphic design.

Objectives:

Process and

## Strategies:

Build an awareness of design theories and methods in order to enhance the creation and quality of graphic communication.

Identify that successful graphic design problem solving does not need to be based solely on an aesthetic rational or random quesswork. In other words, the project will show that the philosophy of art and beauty are not the only grounds on which to determine the creation of a creative graphic design solution.

To identify a series of sequences and steps found during the design process and apply appropriate working methods at turning points in the process.

To identify that the "4ront- end" process is a necessary component in successful graphic design.

The designer, educator and student will be able to list a variety of "frontend" processes and identify those who are working on, researching or contributing to them.

The graphic designer, educator and student will be able to read, see and understand the systematic documentation or journey of various sequences and events made during the design process with the aid of various methods

## Design Theories and Methods Index

The design theory source index will be compiled by researched lists taken from my research, Professor R. Remington, Professor D. Beardslee, adn Instructor Kevin Byrne.

The index will be in alphabetical order and include origin
The design theory source index will be analyzed/reviewed and a selection of specific design processes/theories will be choosen.

## Series of Theory and Method Posters

A series of posters dealing specific theories selected from the design theory Index
Respectively, every poster in the series will communicate one theory
Solutions for each poster will be generated by implementing the theory into actual practice

The posters will begin from the abstract (single theory or word) and proceed to the concrete (designed poster).

Revised
Thesis
Proposal

Draft 11 2/4/92

## Project Title:

## Designer and Address:

## Problem Statement:

## Mission Statement:

## Design Theory and Methodology

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This project will investigate the stage or stages in graphic design before implementation occurs. In other words, the "front-end" process will be examined and methods in aiding this process will be explored.

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The initial project assumption is that a "front- end" process is a necessary sequential set of steps, that, when followed, will produce effective graphic communication of quality.

The project, Design Theory and Methodology is a "front- end "process or tool that will enhance and aid in the production of effective graphic design. A Design Theories and Methods Index will be compiled, a documentation notebook will be produced along with a series of posters created using the design process and selected methods. The project will prove that theory and methods are prerequisites of effective graphic design.

## Goals:

## Objectives:

## Process and

 Strategies:A sharing of information with peers, colleagues, students and educators
A way to make educators, designers and design students aware that a "front- end" process occurs and may aid in successful graphic design.
The Theories and Methods Index is a tool to aid educators, designers and design students in locating sources or specific publications that refer to works of interest.

The poster series can be used as a tool by instructors to aid in the introductory education of the design process and specific methods.

Build an awareness of design theories and methods in order to enhance the creation and quality of graphic communication.

Identify that successful graphic design problem solving does not need to be based solely on an aesthetic rational or random quesswork. In other words, the project will show that the philosophy of art and beauty are not the only grounds on which to determine the creation of a creative graphic design solution.

To identify a series of sequences and steps found during the design process and apply appropriate working methods at turning points in the process.

To identify that the "front- end" process is a necessary component in successful graphic design.

The designer, educator and student will be able to list a variety of "frontend" processes and identify those who are working on. researching or contributing to them.

The graphic designer, educator and student will be able to read, see and understand the systematic documentation or journey of various sequences and events made during the design process with the aid of various methods

## Design Theories and Methods Index

The Design Theories and Methods Index is a compilation of theories and methods taken from a variety of disciplines.

The index is a computerized database retrieval system that allows the user to search for information by any one of the main categories, be subject, author, topic, discipline, etc.

The index will be in alphabetical order by author.
The Index categories will include:
Theory and Method name (Topic)
Discipline
Periodical (author, title of article, title of volume, issue number, date)
Book (author, title of book, author, publication, publisher) Locator

The Design Theory and Methods Index File will be reviewed and a specific design process and methods will be chosen before several graphic manifestations can occur.

The Design Theories and Methods Index will be a first stage, open-ended research fiile.

## Series of Theory and Method Posters

A series of posters dealing with the design process will be executed using key methods selected from the Design Theory and Methods Index

Respectively, every poster in the series will communicate a stage in the design process. The posters will be a "translation" of the process.

Solutions for each poster will be generated by implementing the process into actual practice and appropriate methods will be applied.

The posters will begin from the abstract (single theory or word) and proceed to the concrete (designed poster).

Target audience for the poster will be first year graduate graphic design students.

The posters will be a resource to the target audience.
Implementation of each poster will be documented, both written and visualized.

## Documentation

Documentation will be a systematic and logical review of sequences and events made during the process.

Written: Research, Index File, notebook, notes.
Visual: Possible charting, diagramming, sketches, thumbnails, roughs, finished (comped) posters.

## Pragmatics:

Dissemination:

Evaluation Plan:

Committee members: Professor Deborah Beardslee, Professor Roger Remington and Professor Pamela Blum. Libraries, Bookstores, Collegues, Professors

College of Fine and Applied Arts, RIT Bevier Gallery. Possibly the GDEA , design classrooms and educational facilities.

Share project information with colleagues, peers and educators. Possibly use the Design Theories and Methods Index File and Posters in a classroom situation.

Theories: A set of generalizations related by a network of deductive thinking and arrived at by stages of discovery, verification and comparison.

Methodology: A systematic and logical process for controlling or monitoring change.

Process: (Sequence) A series of interrelated actions or events.
Design-Visual Communication: (Design) The arrangement and coordination of the parts of details of any object, by means of which the whole achieves a certain effect or impression, or produces a certain result. A visual pattern or composition.
(Visual) Based on the use of sight; visable.
(Communication) The transmission or exchange of ideas, information, etc.

Documentation: The collection, storage, and dissemination of recorded information in an intergrated system for efficient use and easy accessibility.

Front End: The part of the design process before implementation.
Tool: Any instrument or means neccessary to the efficient prosecution of one's profession or trade.

Problem Identification: To define and understand the nature of a problem.
Research and Analysis: The systematic inquiry in order to discover facts or relations which may aid in solving the problem at hand.

Synthesis: To discover interrelationships and patterns: to sort, to sequence or order the information or parts of the problem.

Ideation: Generate conceptual solutions and prepare alternative preliminary designs.

Evalution: Selection of design solutions from viable alternatives.
Implementation: Refinement, development and production of the final form.
Retrospective Evaluation: Determination of effects of solutions for feedback into future problems.

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(*) Books read (.) Books to be read

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| Akin, 0 | Emerging Methods An Exploration of the Design Process |  |  | MIT |  |  |  |  | Environmental Methodology | Environmental methodology, protocol anaysis |  |
| ALA |  | Reader Profile | Law Practice Management |  |  |  | 1990 |  |  | Suney |  |
| Aleshire, KR |  | Online Data Bases: Time vs. Money | Computer User |  |  |  | 12-1987 |  | Methodology | Research, literature search, online database |  |
| Alexander, C |  | A Result in Visual Aesthetics | British Journal of Psychology |  | 51 | 4 | 1950 | Psychology | Theory and Methodology | Theory, hypoempincal methodology, experiment, comparing forms, verbal-visual translation |  |



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| Floreak, M |  | Designing for the Real World: Using Research to Tum a "Target Audience into Real People | Technical Communicaion |  |  |  | 1989 |  |  | Target audience |  |
| Friedman, $A$; <br> Zimring, C ; <br> Zube, E | Environmental Design Evaluation <br> Environmental Design <br> Evaluation Epilogue |  |  | Plenum Press |  |  | 1978 | Architecture |  | Environmental methodology, evaluation, surveys, interviews, reliability, obtrusive measures, simulation |  |
| Friedman, CP |  | Instructional Objectives |  |  |  |  | 1975 | Education | Instructional Objectives | Objectives, format, evaluation | * |
| Friedman, D |  | Introductory Education in Typography | Visibe Language |  |  |  | 1973 | Graphic Design | Typography |  |  |
| Frith, U | Processing of Visible Language Reading by Eye and Writing by Ear |  |  | Plenum Press |  |  | 1979 |  |  | Visible language, verbal-visual translation, hypoempirical methodology, language reception, language production |  |



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| Magid, LJ |  | PC's New Role: Meeting Facilitator | Los Angeles Times |  |  |  | 6-1987 |  |  | Computer technology, methodology, group dynamics, meeting facilitation (Monday, June 15, 1987: |  |
| Mann, J |  | Assessing Effectiveness Before a Design is Produced | Industrial Design |  |  |  |  | Industry |  | Methodology, evaluation, marketing effectiveness |  |
| Manning, RA |  | Notes on the Visual Differential Theory | Visible Language |  | 13 | 4 | 1979 |  |  | Conceptual model, visual differential, Osgood, Dondis, order mode, graphic mode, literal mode |  |
| Margolin, V | Design Discourse |  |  | University of Chicago Press |  |  | 1989 |  |  |  |  |
| Marketing |  | Marketing: The New Priority | Business Week |  |  |  | 11-1983 |  |  | Marketing, market research, consumers, new product development, methodology, focus groups |  |


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| Riche, MF |  | Who Says Yes? | American Demographics |  |  |  | 2-1987 |  |  | Methodology, polls, sunveys, demographym market research |  |
| Robledus, A |  | Picas \& Pixels |  |  |  |  |  |  |  | Marketing strategy | - |
| $\begin{aligned} & \text { Rosenfield, S; } \\ & \text { et al } \end{aligned}$ |  | A Naturalistic Study of Visitors at an Interactive Mini-Zoo | Curator 25 |  | 25 | 3 | 1982 |  |  | Environmental methodology, mini-zoos, research, education, learning, surveys, direc obsenvation |  |
| Rothenberg, Albert | The Emerging Goddess |  |  | University of Chicago Press |  |  | 1979 |  | The creative process in Art, Science and other fields | Creative thinking, creation |  |
| Rowe, PG | Design Thinking |  |  | MT |  |  | 1987 | Architecture |  | Systematic accounts of the design process in architecture, iconic, Asimow, decision tree, etc. |  |




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Design and Marketing of New
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Perceptual Mapping：
Consumers＇Perceptions of
New and Existing Products


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 Kevin Byrne
Post Office Box 9887
Rochester, New York 14623-0887 James E. Booth Building
Post Office Box 9887 Rochester Institute of Technology
College of Fine \& Applied Arts Pamela Blum

Timeline

Thesis Timeline for September 1991-June 1992
September 1991:

## 9-5 Fall Quarter Begins

9-5 Meeting with R.Remington: Review initial proposal.
9-17 Initial Statement due
9-26 Initial Statement approved
October 1991:
10-1 Meeting with RRR: Rework and refine proposal
10-8 Meeting with RRR: Continue refinements of goals, objectives and strategies
10-15 Meeting with RRR: Continue refinements of proposal
10-22 Meeting with RRR: Continue refinements of proposal
November 1991:
11-5 Meeting with RRR: Continue refinements of proposal
11-13 Final critique of proposal
December 1991:
12-3 Winter quarter begins
12-3 Meeting with RRR and Deborah Beardslee: Begin Theory and Method Index
12-10 Meeting with RRR and DB: Continue work on Index
12-17 Committee Meeting (1:00) RRR, DB and Pamela Blum: Review Index, discuss posters
January 1992:
1-7 Meeting with RRR and DB: Review changes on Index and research posters
1-14 Meeting with RRR and DB: Discuss possible Theory and Methods for poster
1-21 Meeting with RRR and DB: Continue poster development
1-28 Meeting with RRR and DB: Continue development and research
February 1992:
2-4 Meeting with RRR and DB: Continue research and development 2-11 Meeting with RRR and DB: Continue research and development 2-18 Committee Meeting: Begin Implementation

March 1992:
3-10 Spring quarter begins
3-10 Meeting with RRR and DB: Implementation of posters
3-17 Meeting with RRR and DB: Continue implementation
3-24 Meeting with RRR and DB: Critique Posters
3-30 Thesis Exhibit
3-31 Begin documentation of thesis
April 1992:
4-7 Documentation
4-14 Documentation
4-21 Documentation
4-28 First draft of thesis handed in to RRR, DB and PB
May 1992:
5-15 Committee Meeting: Sign Thesis
5-23 Graduation
June 1992:
6-12 Thesis due

## Beardslee's

Visual
Design
Process
Handouts

## $10 / 29$ The Design Process

## 1. Problem Identification <br> Defining \& Understanding the Nature of the Problem

## 2. Research \& Analysis <br> Systematic Inquiry - Discover Facts or Relationships that May Aid in Solving the Problem

## 3. Synthesis

Discover Interrelationships \& Patterns
Sort, Sequence, Order Information or Parts of the Problem

## 4. Ideation

Generate Conceptual Solutions
Prepare Alternative Preliminary Designs

```
(DRAWING BOARD)
PREPARINGG ALTERNATIUES
```


## 5. Evaluation

Selection of Design Solution from Possibilities

## 6. Implementation

Refinement, Development, Production of Final Form

## 7. Retrospective Evaluation

Determination of Effects of Solution for Feedback into Future ProblemsENTIRE PROCESS)

## Process!

(DIffgegit ways to appeoach tre 7 desion processes)

## Linear Process

## Circular Process



Starting at any stage and advancing to others in turn

## Feedback Approach



Moving forward while looping back to reconsider previous discoveries

## Branching Paths



Allowing specific events and the interrelation of separate stages to control progress

Awareness of all stages concurrently but emphasis on one or two steps at a time

## Problem Statements

Objectives

## Constraints <br> Discussion

# Requirements <br> Design Factors 1. Problem Identification <br> Key Words 

Sub - Problems<br>Attributes

Parallel Problems
Role - Playing
Case Histories
Rank - Ordering

Courses of Action
Interaction Matrix

Timetable

Facilities

> METHODS OC TOOLS TO AID IN STAGES?

## User Identification

## User Ergonomics

User Motivation
Literature Search

Environment
Sub-Problem Analysis
Function
Questionaires
Experienial Facoors 2. Research \& Analysis Ineriews
Mechanics
Bi-Polar Scales
(SEMANTIC PIFFEEGNTR,
Aesthetics

Market Environment

Archetypes

Production
Constraints

Unobtrusive Measures
Direct Observation

|  |  | Scoring (RSUP cycles) |
| :---: | :---: | :---: |
| Production | Constraints | IDENTIFUING PARTLCUAA RELATIONSHIPS WO/N A CONTEXT. |

Analogous Problems

# Dependent Variables <br> (wuman) <br> Classification 

Independent Variables

Connections

## 3. Synthesis

Venn Diagrams
(SET THEORY I FINDIASG INTERRELATIUNSIMPS BETWECN 2 BODIES OF INEQRMATIONJ Interaction Matrix

Outlines of Sub-Problem Solutions
Structured Relationships

| Obvious Solutions | Remove Mental Blocks | g <br> Biocogy <br> ORIS |
| :---: | :---: | :---: |
| Trendy Solutions | 4. Ideation | Synectics <br> (Geroon) |
| Ideal Solutions | Morphologis | Charts |
| Other Possibilities | Lateral Thinking |  |

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& \text { (BRANCHING) }
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## Selection

Feasibility Analysis Rank Ordering

Reappraise Objectives 5. Evaluation

Goals
Constraints
(Budget, size,
viewing, etc.) Requirements

Definite Requirements

Facilities

Finalize Design

## Define Conceptual Ideas

Structural Ideas

Physical Ideas<br>Time / Task Schedule<br>\title{ Construct a Model 6. Implenentation }<br>\section*{Construct Variants}<br>Compare Variants with Feasibility

Production

Specifications

> Schedules

Documents

Production Supervision

Efficiency Design Performance
Resolution of Objectives Questionaires
Effectiveness 7. Retrospective Evaluation Interviews

Solution of Sub-Problems

Incorporation of Requirements

Handling Constraints
Bi - Polar Scales
Observation

List
of
Categories

# Theory and Methods Index File: Possible Categories 

Topic
Discipline

Periodical: Author<br>Title of Article<br>Title of Publication<br>Volume<br>Issue number<br>Book: Author<br>Title of Book<br>Place of publication<br>Publisher<br>Date

## Appendix H

## Remington's

Front
End
Tool
Kit

1. Problem Solving Process
2. Steps in Design Process
3. Communication Theory Grid
4. On Indicating Magnitude
5. Research Methods Paper
6. Program Development Materials
7. Marketing/Analysis Questionnaire
8. Marketing Proposal Outline
9. Proposal Outline
10. Business Plan Article
11. Business Plan Sample
12. Reader Profile Guide.
13. Data Sheet
14. Project Proposal Outline
15. Writing Instructional Objectives
16. Interface Design Criteria
17. Content/Means Typographic Matrix and Misc. Matrices
18. Nine ways of Organizing Content
19. Designer/Client Process Form
20. Semiotics Analysis Sheet
21. Sample Interpretent Matrix
22. Semiotic Construct
23. Project Planning Time Schedule sample
24. PERT Chart sample
25. Typographic Variables
26. TypoGraphics Guidelines
27. Structuralism Paper
28. Typographic Unit Grid
29. Hierarchy Project
30. Multi-Level Writing
31. Experimental Typography
32. Process for Identity Marks
33. Visual Identity Process
34. Visual Identity Element Matrix
35. Identity Marks Classification Matrix \#1
36. Identity Mark Classification System \#2
37. Identity Mark Classification System \#3
38. Morphological Diagrams
39. Morphological Box of the Typogram
40. Modified Morphological Box of the Typogram
41. Identity Symbol Generating Method
42. Identity Evaluation Matrix
43. Identity Appropriateness Form
44. Graphic Identity Standards Guide
45. 10 Best Book List
46. Bibliography for Graphic Designers

Koberg/Bagnall
Lasswell
Wurman
Wiersma
C. Plummer
C. Plummer

Robledas
ALA
Remington/Deprez
C. Friedman

Apple Computer Inc.

Hodik
McCoy

Remington

Adobe Catalog
Document Design Center
Smith
Westinghouse
Moyer
Jewett
D. Friedman

Remington
Siegel and Gale
Remington
Swinehart
Graphic Design Archive
Bare
P. Hill

Gerstner
Gerstner/Remington
Zimmermann
Remington
Remington
PitneyBowes
Remington
Yale
47. Reading List on Methods from MCAD
48. Notes on Methodology
49. Case Study Article
50. Design Evaluation Article
51. Thirty Clarifying Responses
52. Criticism Article
53. Evaluation Form
54. Discrepency Evaluation Cycle
55. Audience-Centered Analysis
56. Semantic Differential
57. Learning Styles
58. Intelligence Article
59. US Postal Regulations for Envelopes
60. Handy Hints
61. Pioneers in Graphic Design List
62. Graphic Design Curriculum
63. Canon Diagram
K. Byrne
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K. Byme

Screven
Ghory-Goodman
Bennington
C. Plummer

K . Byrne
Zakia
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Revised 10/26/91

| Kevin By | 's Reading List: Design M | Methods |  |  |  | age 1 |
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| Author | Title | Date | Publlsher <br> (If Book) | Source (if Perlodical) | Volume / Issue | Toplc (Key Words) |
| Akin, O | An Exploration of the Design Process <br> In EMERGING METHODS.... |  | MIT Press |  | - | environmental methodology protocol analysis |
| Aleshire, K R | Online Data Bases: Time Vs. Money | $1987$ <br> November |  | Computer User |  | methodology, research, literature search, online database |
| Alexander, C | A Result In Visual Aesthetics | 1960 |  | British Journal Of Psychology | 51 (4) | theory, hypoempirical methodology, experiment, comparing forms, verbal-visual translation |
| Amer. Society Of Industrial Designers | Proposed Contract Forms |  | ASID |  |  | methodology, design management, design business, ASID |
| Anderson, B | Decision Making With Multiple Futures In THE COMPLETE THINKER |  |  |  |  | methodology, decision making, decision tree, multiple futures |
| ilgood, S; <br> allerson, D ; <br> enefield, A | Exhibit Design And Visitor Behavior: Empirical Relationships | 1988 July |  | Environment And Behavior | 20 (4) | environmental theory, hypoempirical methodology, zoo, visitor behavior, exhibit design, evaluation, correlational procedures, case study |
| ring, R C; <br> yman, S G | Developing Non Verbal Operating Instructions | 1985 May |  | Proceedings, 32nd Intemational Technical |  | vis com theory, vis com methodology, document evaluation, task analysis, graphic instructions |


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Geoffrey Broadbent On Current
Directions In Design Methods
DESIGN:SCIENCE:METHOD


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People At The Zoo

Product Evaluation By Jury, In
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An Investigation Of Computer 1979
Coaching For Informal Learning
Activities
Worrying And Learn To Love
'Design Evaluation'
Why Designers Should Stop
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Evaluate Or Mutilate? That Is The
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's Reading List: Design Methods

Animal Kingdom


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| Kevin Byr | 's Reading List: Design M | thods |  |  |  | ıge 6 |
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| Author | Title | Date | Publlsher (If Book) | Source (If Perlodical) | Volume / Issue | Toplc (Key Words) |
| Fechter, J | The Key To This Factor Is Human |  |  | The Residential Roundup |  | methodology, human factors |
| Friedman, A ; Zimring, C; Zube, E | Environmental Design Evaluation: Epilogue, In ENVIRONMENTAL DESIGN EVALUATION | 1978 | Plenum Press |  |  | environmental methodology, evaluation, surveys, interviews, reliability, obstrusive measures, nonobtrusive measures, bsimulation, |
| Frith, U | Reading By Eye And Writing By Ear, In PROCESSING OF VISIBLE LANGUAGE | $1979{ }^{\circ}$ | Plenum Press |  |  | visible language, verbal-visual translation, hypoempirical methodology, language reception, language production |
| Gagne, R M; Wager, W; Rojas, A | Planning And Authoring Computer-Assisted Instruction Lessons, In INSTRUCTIONAL SOFTWARE: PRINCIPLES AND | 1984 | Wadsworth |  |  | computer-aided instruction, methodology, learning theory |
| Golzols, J W; Czikszentmihalyi, MC | Aesthetic OpInlon: An Empirlcal Study | 1969 Spring |  | Public Opinion Quarterly | 33 (1) | vis com theory, hypoempirical methodology, experimental aesthetics, aesthetic evaluation, expert:nonexpert, correlational |
| Graham, J | Getting The Best From Your Creative Staff | 1979 <br> October |  | Industrial Design |  | creativity theory, methodology, idea development, deadlines |
| Green, P E; Wind, Y | New Way To Measure Consumers' Judgments | $1975$ <br> July-August |  | Harvard Business Review |  | vis com/product theory, methodology, survey research, conjoint measures, perceptual maps, cluster analysis, case study |

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Hardiman, G W;
Zernich, $T$

Author
Kevin By i's Reading List: Design Methods


Some Considerations For The
Measurement Of Preference In
The Visual Arts
Judgments
A Factorial Approach To The
Analysis Of Variances In Esthetic
1949
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The Challenge Of The Case
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## Appendix J

Index
Introduction

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Rochester, New York 14623-0887
James E. Booth Building
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Skagg's
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List



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BIBLIDGRAPHY CARD NUMBER 39


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## AUTHOR MORT, DOvid

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| TITLE___O_ On SIgns__ |

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AUTHOR___ D. S. Clarke__________
TITLE___Principles of Semlotic
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TITLE_Comparative Studies of How People Think
PUBLISHER_Harvard Unlversily Prass
CITY___Cambridge, Massachusetts
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AUTHOR Pelrce's Theory of Slgns as Foundation for Pragmatlsm
TITLE John J. Fitzgerald
PUBLISHER Mouton \& Co.
CITYParls
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TITLEAn Introduction to the Philosophy of Charles S. Peirce
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## AUTHOR Rudolf Arnheim

TITLEVlsual thinking
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CITY Berkeley
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AUTHOR Roger M. Downs and David Stea (editors)
TITLEImage and Environment: Cognitlve Mapping and Spatial Behavior
PUBLISHER AIdIne Publishing Co
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DATE 1973
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AUTHOR Thomas A. Sebeok
TITLEThe SIgn and its masters
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## AUTHOR John A. J. Gowlett

TITLEAscent To Civilization; The Archeology of Early Man
PUBLISHER Alfred A. Knopf, Inc.
CITY New York
DATE 1984
ADOITIONAL INFO:


## Skagg's

Unpublished
Discussion Paper:

## Ways

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Knowing

Basic communication theory tells us that the flow of messages goes like this:

## Sender > Signal/Channel > Receiver

A designer's clients can be said to be the sender, the printed piece becomes the signal, the audience receives the message. In this working paper, I want to take a closer look at the reception of the message. In particular, I want to offer a model of the process of reception. A model that is sympathetic to a designer's needs and intuitions. A model that allows for a more comprehensive conception of the act of decoding than that which is commonly held in our profession, yet a model that avoids unnecessarily fine distinctions.

What can we say about reception? That it is partially a physiological and perceptual process. That it is also a process that turns basic percepts over to a higher level of processing known as cognition. That cognition involves memory, experience, associations. We know that branches of psychology study the ways in which perception and cognition operate and that a great deal remains to be explained.

From another perspective, we are aware that a branch of linguistics, known as semiotics, takes the interaction of signal and receiver to be 'sign'. We understand that this study of signs takes a less empirical route than do the psycho-sciences and that semiotics has yielded both insight and confusion about the nature of signs.

Taken together, psychology and semiotics offer a great deal of information about reception. But the the semiologist and the psychologist speak different languages when they discuss these issues. Their jargon, disputed even within their own camps, is certainly a hinderance to any attempt to create an overview that encompasses both spheres. Certainly, the graphic designer has a desire to understand what happens when his work is absorbed by the receiver. But is it possible to steer clear of the snarls posed by the brambles of semiotics, the thicket of psychology? Is it possible to arrive at a conception that seems both clear and forthright, complementing general theories while giving particular insight to
*CA. August 1990
*See for instance: "Design Speak vs. Communicating For Success". RitaSue Siegel, CA. June 1990
*Îndeed, all the arts could probably be included here
the designer?
Designers rarely think that the reading of their signals involves anything more than simply 'getting the message' - as if 'getting it' was a single activity. This atomistic view of reception sometimes leads to rather byzantine and heated discussions about the value of a given solution. The dispute between Joe Duffy and Tibor Kalman played out in pages of CA magazine* is a case in point. Duffy's design firm had devised a new look for Classico tomato sauce. It featured a jar that resembled the kind used in home preserving. The label employed references to an earlier, simpler time. Kalman felt that such ploys were deceptions - that, in fact, the tomato sauce was prepared in a large factory, that the ingredients were no more fresh than other similar products. The Classico label, to Kalman, was a lie.

Throughout this whole conversation, the 'meaning' and the 'symbolism' of the Classico packaging were discussed as if they existed physically upon the label along with the list of ingredients. By taking the act of the audience's reception to be a homogenous, unified process, Kalman and Duffy missed the chance for a more insightful and precise discussion. The ability to articulate their views, perhaps that viewpoint itself, was severely constrained and the discussion became more heated as their frustration increased.

The discussion between Kalman and Duffy was noteworthy only because it serves to illustrate that even the most penetrating, stimulating discourse about design breaks down into a haze of blurred, ambiguous concepts. Their debate is repeated a hundredfold every day in design studios and classrooms. The problem is not, as some have suggested* that designers are non-verbal creatures who need grammar transplants. The problem is that very little serious work has been done by graphic designers to understand the process of visual communication. This need is especially acute when it comes to understanding the process of reception.

There is a profound contrast between the graphic designer's* notion of reception (as an unsegmented lump) and that of the psychologist's or semiologist's. From their positions, reception certainly is not a single, monolithic event. If reception were a pie, psychologists in particular seem to delight in seeing just how finely that pie can be divided. First, there is perception which itself is split into peripheral neurological systems (such as the action of rod and cone cells in our eyes) and into basic 'executive' functions such as feature detection or attention. Then, there is cognition which at some fuzzy point takes over from perception and which involves memory, associations, and the accumulation of knowledge. Finally, there is the formation and operation of the personality along with the behavior that may be expected to ensue.

Meanwhile, semiotics often pretends that signs exist without the need for such inconveniences as sense organs, brains, people.

Semiotics tries to describe of the nature of signs themselves.
Reception to the semiologist is simply the act of joining a 'signifier' to a 'signified'. It is that very wedding of signifier/signified that constitutes the sign, For to the semiologist, signs are not external 'things' but are the union of percept and concept. The semiotician is less interested in slicing the pie of reception itself; is more interested in categorizing all various flavors of pie that exist. The psychologist divides, the semiotician multiplies.

Graphic design theory, if such can be said to exist, must rest upon the twin supports of semiotics and psychology. It must interconnect and complement them, extend and enhance them. Yet, can a designer find it worthwhile to master these areas of inquiry without re-interpretation? I think not. I believe graphic designers need a paradigm that is respectful of the general theories yet one that is more immediately relevant to a designer's problems - and to a designer's instincts.

So, here is our problem: how might graphic designers deal with this problem of reception - how do we slice the pie? With semiotics and psychology as backdrop, what concepts can we pull forward that have utility for us? These are big questions, but they are important questions and a discussion of the issues seems overdue. The model presented below is intended to form a departure point for that discussion.

I suggest that designers need slice the pie into quarters. Designers need to consider four processes of reception in order to adequately function as encoders of visual messages. Slicing the pie into more pieces will not provide significantly more insight into the graphic design process - fewer pieces would inadequately account for the responses to visual signals. Here are the four processes - the four ways of knowing - that I propose graphic designers consider:

Reception - The Four Processes

Formulation
Classification
Extraction
Accommodation

## Formulation

Formulation consists of all the perceptual/cognitive events that result in a person seeing a particular structure to a visual surface. The process is called formulation, the resulting received structure I call the surface order. Formulation allows us to see unified clusters or groups of visual 'stuff', even before that 'stuff' is identified, 'understood'. It is formulation that attracted the interest of the gestalt psychologists. The principles that they isolated proximity, similarity, closure, etc. - seem to guide or affect formulation as a process, probably reflecting our need for
information to be packaged in the most efficient possible way . Through formulation, there is a sense of proportion, of relatedness between items, a sense of units and sub-units. A structure is bestowed upon raw visual data and that structure - that surface order - is offered to higher cognitive levels for further processing.

Imagine seeing the title page of a book. Before you are ever aware of the title, or even that the page is a title page, the light pattern (Saussure, from the semiotic perspective would say soundpattern or signifier) that constitutes the visual surface is handled by rods, cones, and neurons. Along the line it is packaged into distinct clusters of information. These very first steps have happened so quickly and at such an early stage of cognition, that we are not aware that the process has occurred at all. The gestalt principles that govern the process seem to be so natural that they are likely to be ascribed to the visual elements themselves, not taken to be a perceptual/cognitive function. Yet it is at this very early stage of perception that much of the information that will be read and transformed into meaning has already undergone a series of perceptual transformations preparing it for higher cognitive levels.

Formulation is virtually instantaneous. It also seems to be 'transparent', in the sense that we are not aware that we are doing it. Surface order seems to flash upon our consciousness as a given. So it would seem that it is a sub-conscious activity. Yet, despite being beneath the threshold of consciousness, there is no function more important to the practice of graphic design than anticipating formulation when encoding a surface. Because not only is it the form, the structure, the surface order that carries the message forward toward consciousness - it is the emotional response to the surface order that renders 'expression'.

Does formulation differ substantially between people or between cultures? I would like to know more about this issue. Intuitively, one would expect a great deal of diversity between cultures at higher, conscious, levels of cognition. But such a basic sensory function as formulation might be a 'wired-in' program, basically universal (though affected by such 'abnormalities' as nearsightedness, etc). A given typographic arrangement may be variably interpreted as elegant or rude, old-fashioned or contemporary, depending on the life histories of the various perceivers, but the text will be seen as consisting of the same clusters of words. Although you may have a different sense than your neighbor of the "personality" of a typeface, if you and your neighbor are literate in English and share the same degree of visual acuity, there should be little disagreement about its legibility. Legibility is a surface order issue.

Many of the misunderstandings that occur in the discussion of design solutions arise through a failure by the parties to clearly discriminate between levels of decoding and the emotional
responses that each level of decoding produces. Formulation is a structuring process. The result of that process - surface order - leads to discussions about formal relationships, proportion, unity, legibility, complexity, and the ability to decode information efficiently. While surface order inherently triggers an emotional response, formulation on the part of the perceiver is not, in itself, a function of emotion but innate, subconscious, decision-making regarding spatial organization.

Formulation is...
Perceptual, Gestalt-linked
Instantaneous
Subliminal and Subconcious
Innate, we are all 'wired' from birth to formulate
Invariable across cultures (virtually)

## Classification

Classification is a process by which the surface order acquires a potential, or provisional, identity. It involves the placement of the new surface order into a 'slot', a category, based upon the receiver's previous experience. Do not be confused by my use of the term 'classification'. I know that many things are classified; a poem may be classified as sad or short or abstract. The kind of classification I'm referring to here is strictly based upon the characteristics of the visual arrangement known as surface order. It's function is to link the new surface order with broad classes of things you've seen before.

As an example, let's return to the title page. We have seen how the visual surface is formulated to produce a surface order. When that surface order is delivered to higher levels of cognition, it is compared to previously perceived arrangements. Some of these remembered surface orders may have turned out to have been title pages for books. If the new surface order bears a sufficiently close relationship - a family resemblance - to these prior experiences, then an expectation is created that this new thing is also a title page.*

Classification takes place because of our cognitive ability to associate new perceptions with previous ones. There are many kinds of associations that occur at all stages of perception and cognition, but classification is special. I believe that classification - the use of particular schemas or templates for incoming surface orders - is a critical process for graphic designers to consider. There are three reasons why it is so crucial: 1) it's a subconcious process, 2) it's an implicit issue in most discussions of target audience, but seldom recognised as such, and 3) it provides a connection with the semiotic concept of semantic marker (this term will be explained shortly).

## A largely subconscious process

Most of the time classification is a process that happens subconsciously. Classification prepares us for full interpretation of the messages in our environment, we do not need to be aware of the operation of the process itself. But it is possible to bring classification into our awareness and to make it a topic of discussion. One such instance is when we speak of 'style'. When an object is in the "Art Deco style", the surface order has been assigned to a class of surface orders that the perceiver has learned to call by the name "Art Deco". Style is important in art history, but not all surface classification is linked to such monumental cultural gateposts. For instance, if you are driving through a commercial strip, you are continuously monitoring the objects you see. Shop placards, street names, traffic signals and advertising posters all offer themselves for attention. The ability to quickly file objects into categories on the basis of surface characteristics, makes it unnecessary to read irrelevant verbal messages or to decode all the objects in the perceptual field unless they agree, on the level of surface order, to the classification that you seek. So you are able to isolate all the "placard-like" signals, for example, before extracting the full information. And so one may say that something is in the "style" of a street sign.

## An implicit issue

Perhaps because classification occurs at a subconscious level most of the time, it tends to a hidden factor in the planning of visual communication. While the marketing manager may be concerned that a proposed design won't 'reach' a given audience, the parties in the discussion have a difficult time pinpointing exactly what the problem is. How often one hears, "It simply looks wrong - it looks good, but wrong for this audience." The inability to be more articulate about what, precisely, is wrong and how it is wrong hampers efforts to reach a suitable conclusion.

A case of misclassification occurred when a fine Louisville designer was asked to design a label for a whiskey to be marketed in Mexico. The whiskey was aimed at an "upscale" market and it was important that the label denote elegance and sophistication. The resulting design was spare and understated. The distiller, the marketing team, the designer were sure they had a winner. But in market tests, the label performed disasterously. The reason? In the experience of the intended audience, the pricier products have tended to have quite complex labels; the more "cluttered" a design is, the more it is considered to be a reflection of quality. The clean, spare, restrained design was classified "cheap liquor" - precisely the reverse of the way the surface order would have been classified in the United States.

A connection with the concept of semantic marker There is, in semiotics, the idea that units of meaning arrange themselves in relation to other units of meaning. For instance, 'red' is somehow positioned closer to 'hot' than it is to cold. Within this 'semantic field', this web of meanings and relatedness, there are certain stressed concepts that act as landmarks. These are known as semantic markers. It is intriguing to speculate that the schemas that result from classification could be analogous to semantic markers. To think of them as such, provides a connection between the psychological and the semiological traditions. It would seem that much further work could be done investigating this concept.

The schema is of central importance to graphic designers. It forms a foundation that can be manipulated in quite subtle ways. With slight variations, one can produce an objective rendering, an emulation, a parody, using the same schema as the base concept. Perhaps the schema is the fount of symbolism.

## Cultural variation and classification

The story of the Mexican whiskey label suggests that classification is a process that is strongly linked to culture. This is not surprising since, to a far greater degree than formulation, classification makes use of a person's prior experiences and memories.

A case in point was relayed to me by Jack Kehoe, the former director of the University of Georgia Program Studies Abroad Program. Once, he and a colleague visited a small town in Italy. It was his friend's first trip abroad. Walking through the streets of the town, his friend noticed the abundance of posters pasted on the walls bordering the street. Each poster proclaimed an exhibition in large centered capital letters, "Mostra: Luigi Pellegrini", "Mostra: Alberto Rossi", "Mostra: Bernadetta Cosano".

## MOSTRA ALBERTO ROSSI

The layout of these posters very much resembled those seen in ArtForum and other fine arts magazines familiar in the United States. The colleague remarked on the flourishing state of the arts in this small, provincial town. Only later, after a fuller reading, did it become clear that these were obituary notices. They were
exhibitions, but at funeral hames, not art galleries! The formal black borders and prominent names were very similar in composition to the gallery notices advertised in the United States. Their surface order was certainly remote from the discrete, almost hidden fine print of an American newspaper's obituary page.

There are other examples of the variability of surface classification between cultures. Spare compositions making use of grids have been popular in central Europe long before the "Swiss style" graphics of the mid 20th century. Centered, symmetrical typography making use of ornamentation have tended to be popular in Great Britain for centuries.

Even within a given culture, surface classification changes through time. "Russian Constructivist" is classified in a different way by Americans today than Americans in 1926. The names for styles often reflect this. The prefix "neo" in "neo-classic", for instance, indicates a style that paid homage to the classic period through emulating (but not copying) that earlier period's surface order. As soon as a particular classification becomes part of a culture's shared vocabulary, the style becomes linked with that place and time, becomes a schema of the then and there.

Surface classification is...
Based upon surface order only
Subconscious
Associative, therefore based on prior experiences
Related to semantic markers
Culturally variable

## Extraction

Classification gives us a potential, or provisional, identity about a visual surface. Extraction is the pulling out from that surface the full denotative message. Classification happens so 'quietly' that it hides in the receiver's subconscious. However, the receiver is very much aware of extracting. When someone, looking at an image on a poster, describes the image as a cellist alone on a darkened stage preparing to play, or that there is a concert Friday night at 8:00, the information is extracted from the image and the typography of the poster. Extraction is the reading of an image or text. If classification can be described as a procedure that categorizes, extraction can be described as a procedure that interprets.

To clarify their distinctive features, consider each process as a producer of progressively larger chunks of information. The product of the process of formulation is surface order. The product of the
process of classification is schema. The product of the process of extraction is message. Or, you can think of it this way: During formulation, the focus is on how something is. During classification, it is on what kind of thing it is. During extraction, the focus is on which specific thing it is.

Perhaps because we are conscious of it, extraction seems to be more accessible to verbal articulation. Because of this, it is easy to be fooled into thinking that the extracted message constitutes the entire message of the surface, and to be totally unaware of the roles played by formulation and classification. Yet these three processes each have their role to play.

Imagine that a visual surface were a packaged gift. You receive the package, noting its size, shape, proportion, color, weight (formulation). Perhaps you shake the package to see if it rattles or shifts. On the basis of these features, you guess that it contains, perhaps, a shirt (classification). What you are doing here is placing the known physical qualities into a context of potential items that bear a family resemblance to the physical qualities you've observed. You hypothesize a provisional, or potential identity. Finally you open the package and pull out the gift - "Hey, it's a shirt!" (extraction). At this point your knowledge of the particular shirt, with its full description of color, pattern and style vivid and clear as you behold it, seem to wash away the hazy imaginings of "shirtness" you may have harbored while opening the package. You are left with the awareness of having received a shirt. The extracted content (the message) somewhat diminishes the consciousness of the preceding stages. So it is with the process of extraction. The pulling of full message content from the "container" of surface order, through the intermediate stage of classification, is such a powerful force, and one to which the perceiver is so attentive, that other levels seem to recede into a haze of subliminality.

Our gift analogy fails in one important sense: no matter what kind of container the shirt is placed in, it will be the same shirt when it is extracted. Messages are much more slippery. During visual communication, each stage of the process has an influence on the others. If the container is strongly classified as " $x$ ", it may impart some of that " $x$-ness" on its content " y ".

Take, for instance, the effect classification has on message content. Consider the following example:*

## TAE CAT SAY TIA

The ambiguous letterform " H " is half way between an " H " and an " A ". The fact that most people read the word CAT suggests that the message extracted has been influenced by the classification of the visual surface order as part of the category "English word". CHT
does not fit the category, while CAT does. SAY and SHY however are equally potential members of the category "English word", and so confusion lingers. TIA, on the other hand, offers no potential content in either interpretation as long as it is contained in the category "English word", but would be interpreted as TIA (aunt), by anyone from Latin America because it belongs to the category "Spanish word", whereas TIH offers no content. In' the world of visual messages, gifts in shirt boxes become shirts.

Extraction is...
Conscious and sub-conscious
Denotative and connotative
Culturally determined and therefore highly variant, even to sub-cultures
Contains the message
Strongly influenced by personal experiences

## Accommodation

To understand the concept of accommodation, we must go back momentarily to classification. We spoke of the effect of association and personal experience and how these not only influenced, but permitted classification to occur. Of course, these past experiences and associations were themselves the result of the previous reception of information.* So there must be a final element to the receptive act that includes the retention of incoming information in the mind.

Before the Behaviorist tradition removed from psychology all agents of action except for the functions of muscles and glands, there was the concept of apperceptive mass. Your apperceptive mass is all the attitudes, beliefs, understandings and viewpoints that make you you. A concept deriving from the 17th century German philosopher G. F. Leibnitz, it refers to the fact that our mental experience seems to be whole-cloth, not simply a collection of isolated scraps. In the 19th century, J. F. Herbart extended the concept by stressing that apperception functioned because new ideas could be taken in, or accommodated by an existing complex of ideas. Though the ideas of Leibnitz and Herbart were considered preposterous by psychologists in our own century (among other things, Herbart seemed to believe that ideas existed as actual physical 'lumps'), their view of the mind as active agent, processing new information by the use of prior information seems uncannily to foretell the semiologist's notion of signs as well as the the course of research into artificial intelligence.

Given that bit of background, we can define accommodation as the process during which the received message is taken in by the apperceptive mass. The new information affects to some degree the
condition of the apperceptive mass. It literally 'changes your mind'. You make the message your own. The new message might reinforce, contradict, or dissociate itself from your previously held ideas. Regardless how much may be remembered or forgotten, the message has some influence on the apperceptive mass. As Herbart recognized, ideas do have a way of bouncing off each other.

Accommodation is a method of "resetting the dials" of cognition in preparation for the next reception. An English speaker, having encountered the word "TIA", makes a new category for Spanish words, or at least for this particular Spanish word. Accommodation permits experience to play its part in the unlimited chain of messages. The product of accommodation is a change in the apperceptive mass itself-knowledge.

Accommodation is ...
unconscious and subconscious
Culturally determined, therefore highly variable Influences and shapes apperceptive mass

I've tried in this paper to offer a model of the way in which people receive information. It is a model that is based on a synthesis of ideas from semiotics and psychology. I believe that by considering the reception of their messages according to these processes, discussion of the merits of any particular design will be facilitated. It's certainly not clear that holding to any particular theoretical model will make someone more creative, yet it is equally unclear that holding to a particular theory impairs the creative facility. At the very least, the formation of basic theory - by designers, for designers - can provide some insight about what we do. And this alone is justification for those of us who have never been satisfied to hold the Nike ${ }^{\text {® }}$ "just do it" attitude.

# Standard <br> Discipline <br> and <br> Subject <br> Categories 

| Standard Disciplines | Standard Subjects |
| :---: | :---: |
| Anthropology | Typographic Variables |
| Industry | Theory of Learning |
| Urban Planning | Engineering Design |
| Business | Theory |
| Social Sciences | Instructional Objectives |
| Mathernatics | Information Entropy and Life |
| Sign Theory | Process Model |
| Dance and Theatre | Visual Perception |
| Environmental Design | Questionning and Thinking Matrix |
|  | Theory of Visual Perception |
|  | Validity |
|  | Graphic Design Process |


| Standard Disciplines | Standard Subjects |
| :---: | :---: |
| Psychology | Critical Thinking |
| Art | Methodology |
| Philosophy | Environmental Methodology |
| Graphic Design | Matrix |
| Design | Apple Desktop |
| Education | Identification |
| Architecture | Environmental Methodology |
| Science | Creative Thinking |
| Industrial Design | History |
| Linguistics | Brain Functioning |
| Engineering | Evaluation |
| Human Ecology | Vis com theory |

Architectural Model

Communication Theory

Project Planning

Programmed Instruction

Creation and Applied Imagination

Product Theory

Creation

Identity Appropriateness

Systematic Process

Fusion Methods

Written
Diagram


Visual
Design
Process
Poster
Series


problem identification


Spebera a be peet teriay to
arsess lo beyis tisporwing

wevece of etw the eforoxion o







Hoed a mexyon


nt nawn mover 10

synthesis





Method:
Mind
Mapping



## Method:

Scoring


Method:
Interaction
Matrix



Placement
Exploration



PRocess


Poster
Format
Exploration



Design Process


Problem Identification


Research and Analysis


Synthesis


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