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Spring 2024

## **The "Backpack" Methodology: A Research Methodology for First-Year Design Students**

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## **The “Backpack” Methodology**

A Research Methodology for First-Year Design Students

Alba Conejero I Gutiérrez

April 8<sup>th</sup>, 2024

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## Introduction

First-year design students often need to pay more attention to research or, at the very least, allocate the necessary amount of time and effort to it. Through my personal and teaching experience, I have realized that this happens for a few reasons: for first-year students, the task of “research” does not sound exciting, some of them do not realize the benefits of doing research and exploration, and others, do not know how to do research properly. Our job as design educators is to teach students how to solve problems and think creatively, and to do that; we also need to teach them how to research.<sup>1</sup>

The “Backpack” methodology is a research methodology designed for first-year design students. This methodology aims to help students collect their visual research and resources in one place, where they can make connections, reflect on their findings, and transform them into creative output. Also, it emphasizes exploration, creates research habits, and encourages a culture of sharing among students, which makes research fun.

In this thesis project, the methodology refers to the overarching strategy for identifying, capturing, and processing information. The “Backpack” system refers to the framework where all this information is captured, categorized, analyzed, and finally, becomes creative output. The methodology is “how,” and the “Backpack” system is “where” to capture and process research.

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<sup>1</sup> “Taking Research to the next Level in Project-Based Learning.” John Spencer, October 26, 2020. <https://spencerauthor.com/research-in-design-thinking/>.

## Literature Review

A review of literature related to the “Backpack” methodology shows the importance of using digital systems to capture, process, and share information with others. *Personal knowledge management* (PKM) systems have a positive impact on users. Studies have shown that PKM systems improve students' ability to collect, analyze, and share information. In 1998, Jason Frand and Carol Hixson gave a presentation on *Personal Knowledge Management* at the *Educom 98 Conference*; they presented the importance of students using technology to organize information that they value as individuals. Frand and Hixson argued that to be effective problem solvers; students need a PKM system as an extension of their brains to deal with information overload effectively.<sup>2</sup> A good design knowledge system applies strategies such as filtering and queuing to find collected information. Knowledge systems are the best way to avoid information overload.<sup>3</sup>

A study investigating how *Personal Knowledge Management* tools benefit university students, published in the *International Journal of Information and Management*, argues that most studies of students using PKM systems have positive outcomes. Students experience improvements in their process of collecting research, analyzing information, and sharing information with other students.<sup>4</sup>

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<sup>2</sup> Frand, Jason L., and Carol Hixson. “Personal Knowledge Management: Who? What? Why? When? Where? How?” *Educom 98 Conference*. Lecture presented at the Educom 98 Conference, October 15, 1998.

<sup>3</sup> Bawden, David, and Lyn Robinson. “Information Overload: An Introduction.” *Oxford Research Encyclopedia of Politics*, 2020. <https://doi.org/10.1093/acrefore/9780190228637.013.1360>.

<sup>4</sup> Rezvan Hosseingholizadeh, Atefeh Sharif, and Masoumeh Kouhsari, “PKM Tools for Developing Personal Knowledge Management Skills among University Students,” *International Journal of Information Science and Management* Vol. 16, no. No. 1 (June 2018): pp. 89-103.

Knowledge Management Systems are beneficial for students and individuals and have become an essential collaborative work tool for business corporations. *Fortune 500* found that corporations that don't share knowledge inside the institution have lost revenue of 31.5 million dollars a year due to decreased productivity and efficiency among the employees and are at risk of losing knowledge if an employee leaves the company. Research shows that when a corporation uses a knowledge system, its employees experience increased productivity and quicker and more effective decision-making, and it creates a sharing culture between coworkers.<sup>5</sup>

As shown in this literature, students will benefit from having a methodology and a framework to capture, categorize, reflect, and utilize their research. Knowledge has value, and design research is part of our knowledge as designers. It is fundamental for our creative process and creative outputs. Our research has value, and we must preserve it.

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<sup>5</sup> "Gestión Del Conocimiento En La Empresa; Ventajas y Buenas Prácticas," Master MBA Valencia, accessed April 26, 2023, <https://www.master-valencia.com/empresas/gestion-del-conocimiento/>.

## The “Backpack” Methodology Influences

The “Backpack” methodology has been partly inspired by Tiago Forte's Personal Management System *Second Brain* and Austin Kleon's *Steal Like An Artist* principles.

Tiago Forte's *Second Brain* principles are *borrowed creativity*, *the capture habit*, *start with abundance*, *you only know what you make*, and *make it easier on your future self*. The *borrowed creativity* principle refers to the process of getting inspired by ideas that already exist and mixing those ideas into your own. This principle emphasizes the importance of having a digital system where all these ideas can be collected and processed to be transformed into creative output. *The capture habit* refers to capturing ideas into a digital system to avoid forgetting about them. Our brains are for having ideas, not for storing them. *Start with abundance* refers to the advantage of “never starting from a blank page” on a project if research is constantly being captured and analyzed on a digital system. *You only know what you make* emphasizes the importance of engaging with the collected materials to remember them. An example of this principle is to write a summary of a book to remember its content. The last *Second Brain* principle is to *make it easier on your future self*. This principle emphasizes the importance of reflecting and analyzing the collected research when is captured, so your “future self” will know why that research was worth collecting.<sup>6</sup>

And last, Austin Kleon's *Steal Like An Artist* principles that have inspired the “Backpack” methodology are *you are only as good as the stuff you collect* and *carry a notebook and a pen*. These two principles emphasize the importance of being curious and capturing ideas, notes, resources, and visual research during the creative process.

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<sup>6</sup> Tiago Forte, *Building a Second Brain: A Proven Method to Organize Your Digital Life and Unlock Your Creative Potential* (New York: Atria Books, 2022).

## How | The “Backpack” Methodology Process

The “Backpack” methodology comprises six overarching stages: *research prompt, gather, capture, categorization, reflection, and utilization*. (Image #1, “Backpack” Methodology Stages) In this methodology, the term research includes ideas, visual research, notes, and resources. (Reference page 17, Where | The “Backpack” Methodology System, 3. Type).

The first stage of the “Backpack” methodology is the *research prompt*. An instructor may give the student a *research prompt* or assignment, or the student may start “free/out of class” research independently. The student may not be researching for a specific prompt but may find something interesting and save it for later.

The second stage of the methodology is *gather*. The student is actively researching for a specific prompt, or the student may find something of interest by “accident.” This research can happen online or in the “real world.” When the student does research online, he is encouraged to research through different digital platforms for visual inspiration and resources. Some examples of digital platforms for visual inspiration are *Behance, Dribbble, Pinterest, Instagram, Designspiration, Reddit, Tumblr, LinkedIn, Google Images, YouTube, and Vimeo*. Also, some examples of digital platforms with resources for designers are *Envato Elements, Pixabay, Pexels, Unsplash, Free Pick, Anthony Bold Graphics, mockupworld.com, mockups-design.com, and creatoom.com*.

Students must gather visual inspiration and resources from different platforms and expand the research possibilities to multiple sites. The list of digital/online platforms to *gather* research is extensive. If the students are researching various platforms simultaneously,



it can become challenging to remember which platform-specific research was found or saved. If all research, regarding the platform of origin, is saved in their “Backpack” system, students will be able to find their collections easily. (*Image #2, Gathering Platforms*).

Students are also highly encouraged to gather research from the “real world.” An example of that process is if a student is walking down the hall in the art department and sees a poster that gets their attention, the student can collect that poster with their phone and add it to their “Backpack” system for their visual library. A second example is to encourage students to look for visual inspiration/ideas in the library through books and magazines — students can capture photos of specific pages or spreads and collect them in their “Backpack” system. This methodology aims to help students understand that design is everywhere and that students can get ideas and visual inspiration outside of digital or online spaces.

The third stage of the methodology is *capture*. *The* student has found something interesting and is ready to *capture* it in their “Backpack” system for future reference or to create a visual library. If the research is being captured from a digital space or platform, the student can copy and paste that capture or save that image/video. If the capture is happening in the “real world,” the student will take a photo or a video of that finding to *capture* it in their “Backpack” system.

The fourth stage of the methodology is *categorization*. The student categorizes the captured research in their “Backpack” system. Categorizing the research is essential to easily finding the research that has been collected later. Inside the “Backpack” system, the categorization step breaks down into these steps: *Inbox, Stage, Status, Type, Category, Niche, and Project* (*Image #3, “Backpack” System Steps*).

The fifth stage of the methodology is *reflection*. The “Backpack” methodology aims to challenge and emphasize design thinking in early students by reflecting on their captured research. Students should aim to answer some design thinking questions in their research entries. These questions can be established by the instructor or by the students. An example of questions for a motion design class could be: What is the message/story of this piece? How do the tone, music, design, and animation techniques showcase this message? Can you explain how this animation has been done? An example of broad questions established by the students could be: What do I find interesting about this piece? How can I implement this into my work?

Lastly, the sixth stage of the methodology is *utilization*. Once the student has reflected on a research entry, the student can use the captured research as project inspiration or as a resource. Students are encouraged to share their reflections during class discussions and research entries with their classmates.

## Where | The “Backpack” Methodology System

The “Backpack” methodology is designed to adapt to different digital platforms, a sketchbook, and folders on a computer desktop. Although the method can be applied in a sketchbook or a desktop, students are encouraged to use it on a digital platform. The benefits of using it on digital platforms over in a sketchbook or on a desktop are the ability to do quick searches, storage space, portability, and sharing possibilities.

Some popular digital platforms where students could apply the methodology are *Notion*, *Evernote*, *Milanote*, *Are.na*, *Monday.com*, *Trello*, *Obsidian*, *Apple Notes*, *Google Drive*, and more. Students are encouraged to explore these platforms and apply the methodology to their preferred one.

For this thesis project, the “Backpack” system will be implemented in *Notion*. In *Notion*, users can create customized systems; it is free for students and personal use and has a “template” feature, which allows the “Backpack” system to be shared with students.

Once the students have chosen a digital platform to adapt the methodology, these steps will need to be followed to create their “Backpack” systems: *Inbox*, *Stage*, *Status*, *Type*, *Category*, *Niche*, and *Project*. (Image #3, “Backpack” System Steps)

As a case study example, this research prompt will be followed: Design the packaging and labels for a trio of wine bottles produced by a local winery in Alabama.

### 1. *Inbox*:

All the collected research goes to the *Inbox*, where the categorizing process starts. The student can capture any research that may be of interest; every capture will become an entry in

their “Backpack” system. Students will be able to capture entries in two ways, from their laptops and their phones. Students will capture entries from the laptops using the *Notion* web clipper (Image #4, “Backpack” System – Web clipper), which will automatically send the pinned page to the *Inbox* or manually by dragging files and adding names. From their phones, students will use the *Notion* app widget, which will automatically send the selected research to their *Inbox* as well. (Image #5, “Backpack” System – App Widget). The entries can be ideas, visual research, notes, or resources. The students need to process their *Inboxes* weekly. It may become unmanageable if the student accumulates many entries without processing them. (Image #6, “Backpack” System – *Inbox*).

For this example, a photo of a wine bottle (research captured from the “real world”) will be sent to the *Inbox* (Image #5, “Backpack” System – App Widget).

## 2. Stage & Status

When the student is ready to start the process of categorization and reflection, the first step is to decide what the entry *Stage* is. By default, the *Stage* is set as “empty;” this makes the entry stay inside the *Inbox* filtered view (Image #7, “Backpack” System – *Stage Empty*). The *Stage* keywords are “Open” and “Archived.” (Image #8, “Backpack” System – *Stage*). If the “Open” keyword is added, the entry will move out of the *Inbox* and will go to the “Open” filtered view, where every entry with the keyword “Open” will appear. If the *Stage* keyword is set to “Archived,” the entry will be placed in the archived filtered view and will not be visible in any other filtered views. The student can unarchive an entry by changing the *Stage* keyword from “Archived” to “Open” or “empty,” the “Open” keyword will move it to

the “Open” filtered view, and deleting any *Stage* keywords will move the entry back to the *Inbox*.

The student would indicate the status of the entry with the *Status* keyword; the keyword can be “Not Started,” “In Progress,” or “Complete.” This keyword won't affect the filtering of the entries, but it is an excellent indicator of each entry's progress stage (*Image #9, “Backpack” System – Status*). For this example, the *Stage* will be set to “Open” (*Image #8, “Backpack” System – Stage*) and the *Status* to “In Progress” (*Image #9, “Backpack” System – Status*).

### 3. *Type*

The student will indicate the type of entry using the *Type* keyword. The *Type* keywords are “Idea,” “Visual Research,” “Note,” or “Resource” (*Image #10, “Backpack” System – Type*). This keyword will help categorize the different entries for easy, broad access. “Idea,” as the name indicates, are ideas or thoughts the student will capture in the “Backpack” system to avoid forgetting about them. These ideas can be rough, and they may need further development. Also, these ideas may not be related to anything the student is currently working on but may be necessary for future projects and reference. Collecting these ideas/thoughts is important so the students can always refer to them in the future. “Visual Research” consists of images, videos, graphics, designs, etc.; it can be anything visually appealing to the student. Also, this “Visual Research” can be from digital platforms (Behance, Pinterest, Instagram, etc.) or in the “real world.” “Note” are notes, conclusions, or reflections in a longer format than ideas; they may be from personal reflection, external sources, or research. “Resource” refers to anything that may be helpful for the student during their design process. Examples of resources are mock-up files and

YouTube tutorials. The student must collect these resources so they can be easily accessible without having to search for them again.

For this example, the label design of the wine bottle photo is going to be used as visual inspiration — the *Type* keyword will be set as “Visual Research” (*“Backpack” System – Type, Image #10*).

#### 4. *Category, Niche & Project*

Categorizing is essential to finding information inside any system, significantly if the “Backpack” system has grown over time. Students can decide the keywords in the *Category* stage; this will vary depending on the essence of the entry and the student's interests. The *Category* should include broad keywords such as “Graphic Design,” “Motion Design,” “Photography,” “Video,” etc. (*Image #11, “Backpack” System – Category*). Then, the student will add specific keywords under the *Niche*. The keywords under the *Niche* should describe the entry and its highlights. (*Image #12, “Backpack” System – Niche*). For example, if a student captures a visual identity project, the *Category* keywords could be “Graphic Design” and the *Niche* keywords “Identity,” “Logo,” or “Case Study.” The categorizing process is essential so the student can find any needed research quickly and easily.

The *Project* keywords will be used to quickly categorize any entries that may be useful in a specific project (*Image #13, “Backpack” System – Project*). The *Project* keyword will group all the keyword entries into the same filtered view and create a project mood board (*Image #14, “Backpack” System – Moodboard*).

For this example, the *Category* keywords will be set as “Graphic Design” and “Illustration” (*Image #11, “Backpack” System – Category*). The *Niche* keywords will be set as “Color” and “Decorative” (*Image #12, “Backpack” System – Niche*). Finally, the *Project* keyword will be linked to the “Wine Label & Packaging” project and grouped with all the other ideas, visual research, notes, and resources related to the same project.

## **Design & Exhibition of the “Backpack” Method**

The “Backpack” method's concept is a metaphor for the action of research and capture inside a framework. As if the students were collecting valuable assets and putting them inside their backpacks to take with them, with time, they would have a backpack full of valuable assets for their creative process.

The “Backpack” methodology exhibition consists of five displayed pieces whose objective is to represent, inform, and teach the audience's exhibit what the “Backpack” methodology is and how to implement the “Backpack” system into their creative process.

The displayed pieces are a collage, a set of three infographic posters, a fold-out poster, a website, and an animated tutorial.

The collage (*Image #16, Collage*) abstractly represents some of the “Backpack” methodology objectives: exploration, growth, and creative development, to create a habit of collecting and capturing research, and to build a second brain. At the center of the composition, the photograph of a human symbolizes a methodology designed for people. A map of lines representing roads symbolizes exploration — every road represents exploration and discovery. Flower and moth illustrations symbolize growth and creative development. The data infographic and the two brain illustrations represent the habit of collecting in a digital system that the “Backpack” methodology aims to help students develop.

The three infographic posters are designed to inform the audience about the “Backpack” methodology and system. The first poster explains the methodology and its objectives (*Image #19, Infographic Poster 1*), the second poster informs about the six overarching stages of the



“Backpack” methodology (*Image #20, Infographic Poster 2*), and the third poster informs about the “Backpack” system and the possible digital platforms where the system can be implemented. The posters are designed on a grid system, symbolizing the methodology's framework. Lastly, the hexagon represents the six overarching stages of the “Backpack” methodology.

The fold-out poster is a giveaway for the exhibition attendees and contains information about the “Backpack” method. It has a QR code and link to the “Backpack” method website, which provides extended information about the method and system (*Image #18, Fold-Out Poster Back*). The website also has a link to the “Backpack” system implemented in Notion, which students can download free of charge, and an animated tutorial on how to use the “Backpack” system in Notion.

## Conclusion

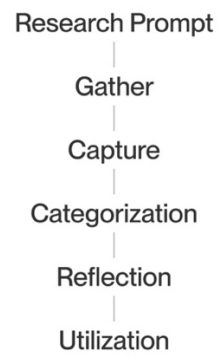
In conclusion, the “Backpack” methodology is a research method designed for first-year design students that addresses the challenges students face when conducting research. It is based on the belief that design research is fundamental to the creative process. It emphasizes the importance of exploring, collecting, categorizing, reflecting, and utilizing findings to transform them into creative output.

The “Backpack” methodology's adaptability allows students to create their “Backpack” systems on their preferred digital or analog platform. Students are encouraged to use digital platforms like *Notion* to easily capture, categorize, find, and share their research, enhancing their creative process and outcomes.

With time using this methodology, students will be able to have a *backpack* full of an inspiring visual library, helpful resources, ideas, and notes of the things they care about and want to create. (Image #15, “Backpack” System – Visual Library).

## Reference Images

Methodology | *How*



*Image #1, “Backpack” Methodology Stages*



*Image #2, Gathering Platforms*

System | *Where*



*Image #3, “Backpack” System Steps*

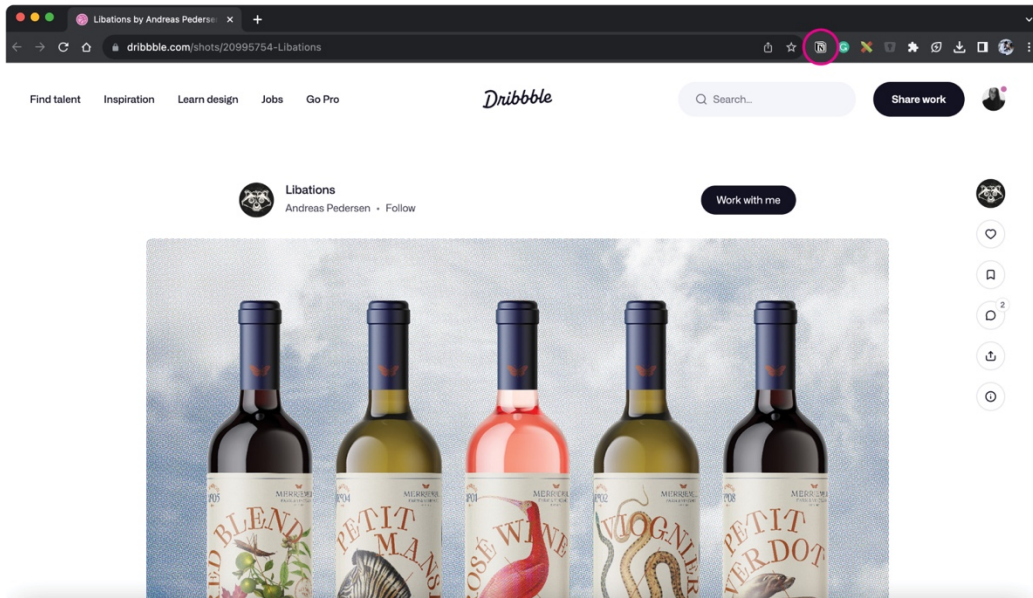


Image #4, "Backpack" System – Web Clipper

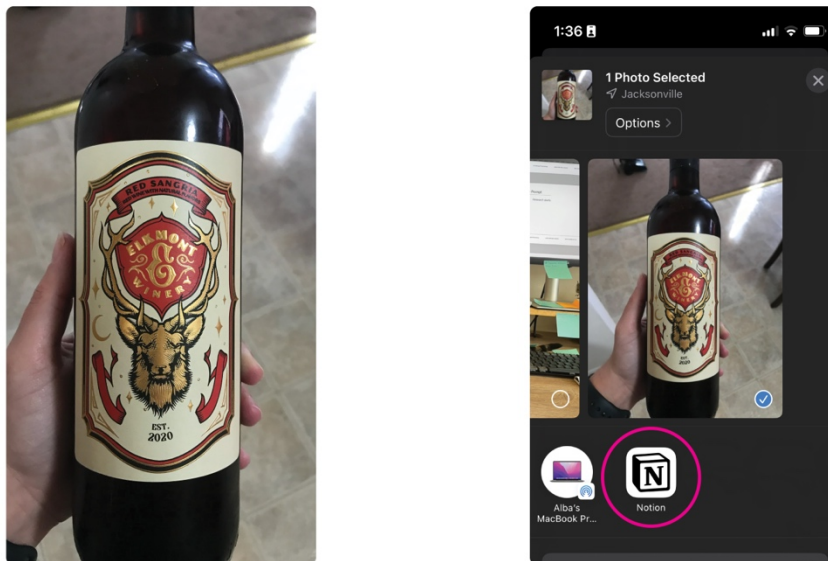
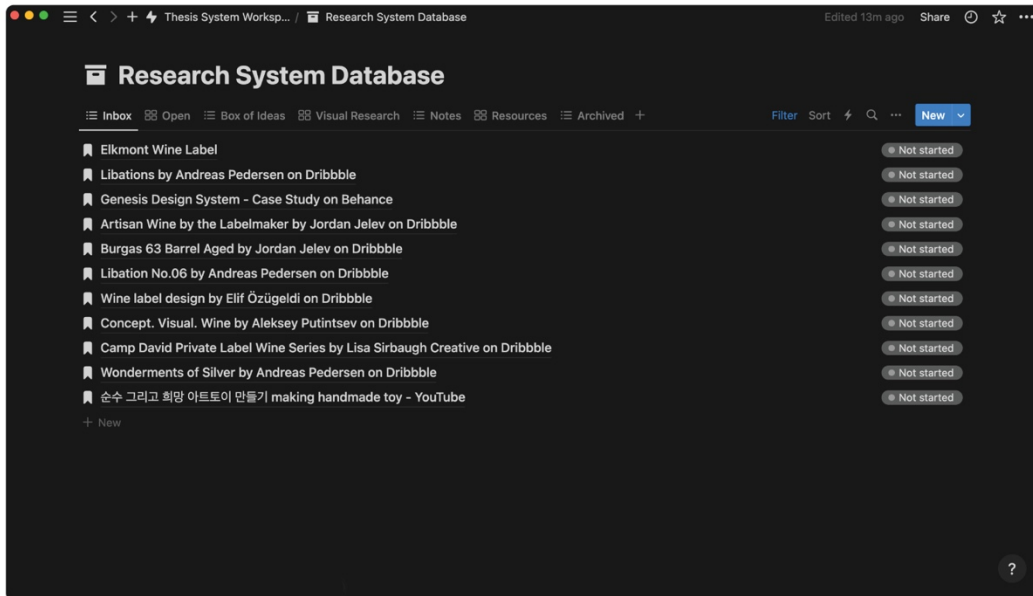
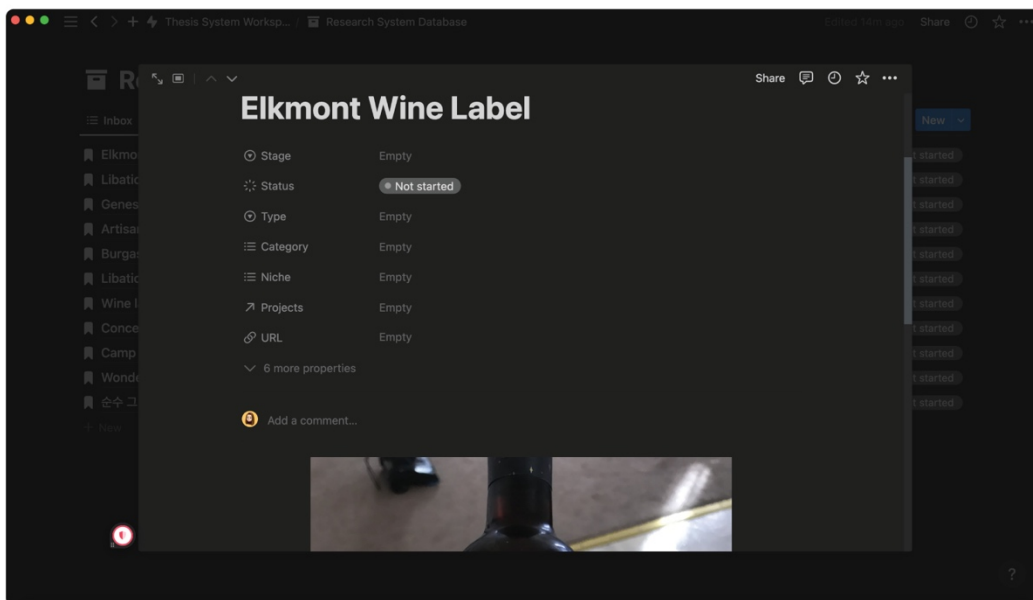


Image #5, "Backpack" System – App Widgets



*Image #6, "Backpack" System – Inbox*



*Image #7, "Backpack" System – Stage Empty*

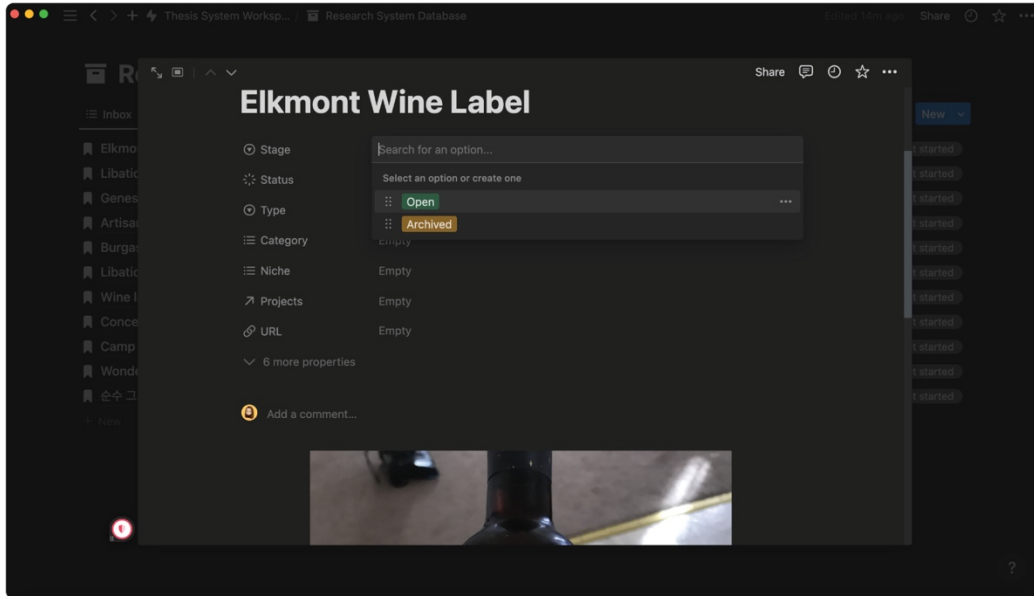


Image #8, "Backpack" System – Stage

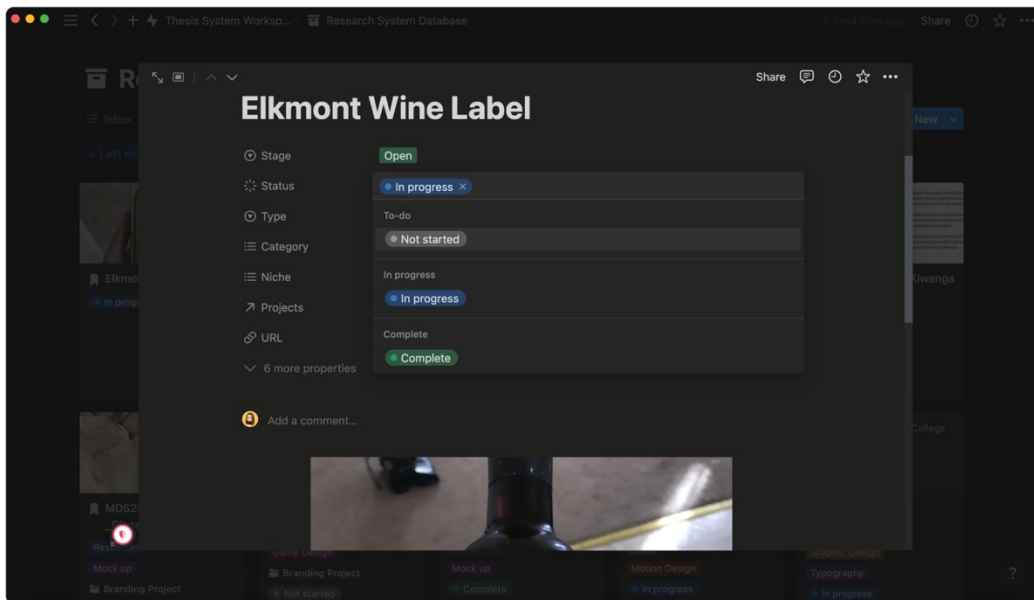
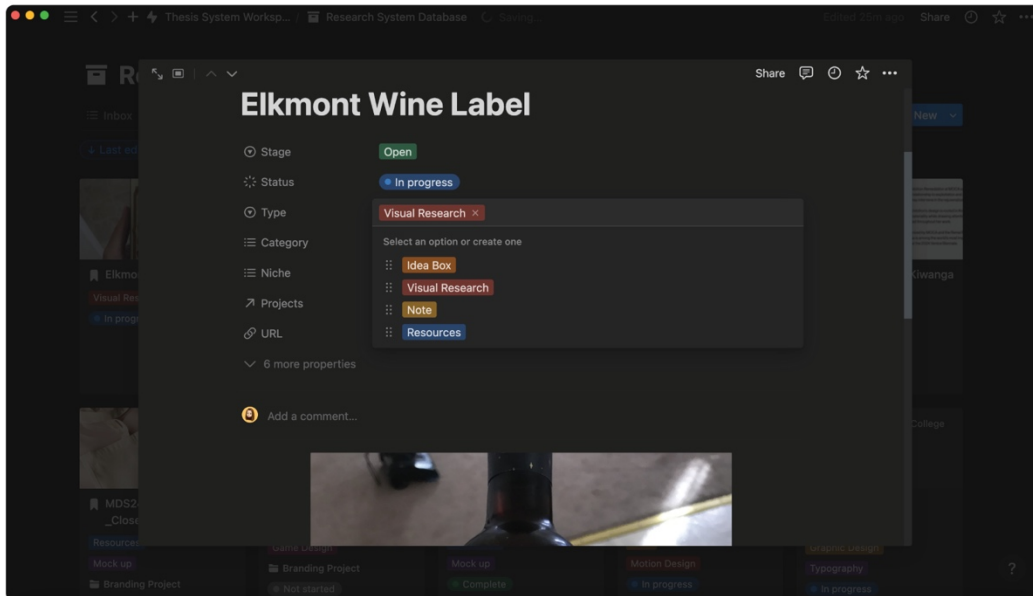
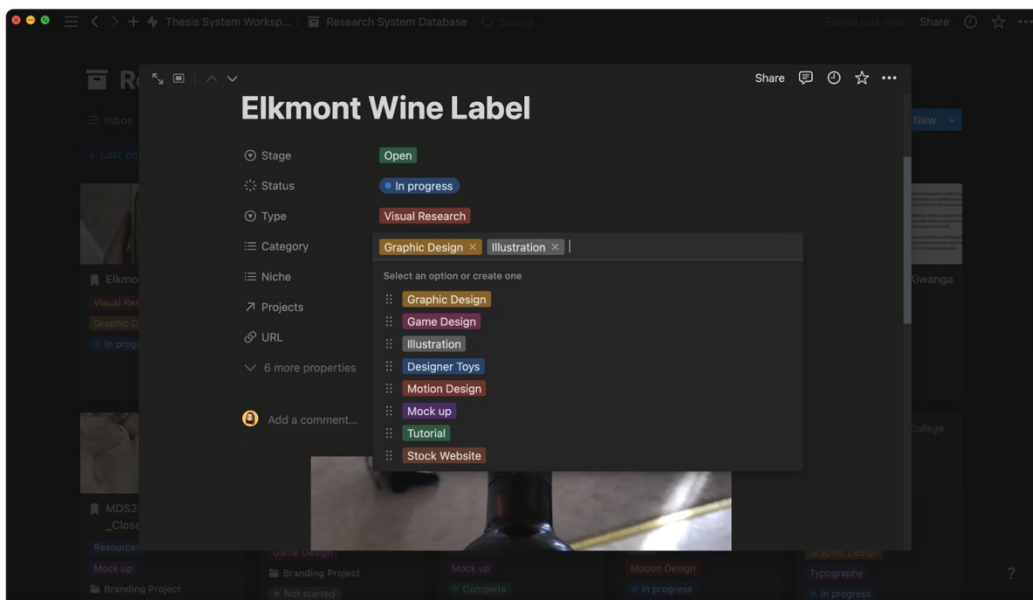


Image #9, "Backpack" System – Status

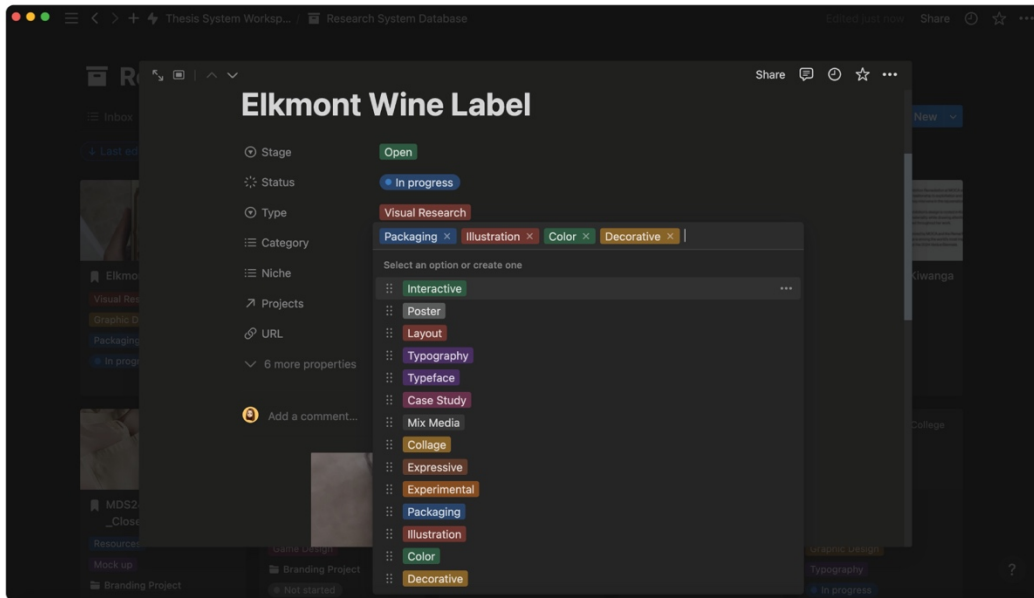


*Image #10, "Backpack" System – Type*

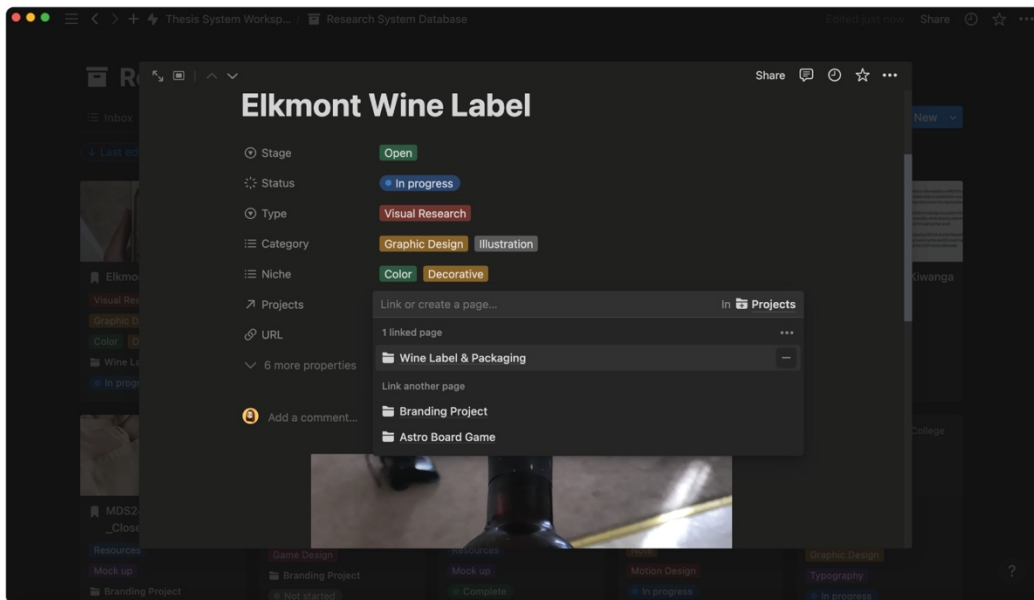


*Image #11, "Backpack" System – Category*





*Image #12, "Backpack" System – Niche*



*Image #13, "Backpack" System – Project*

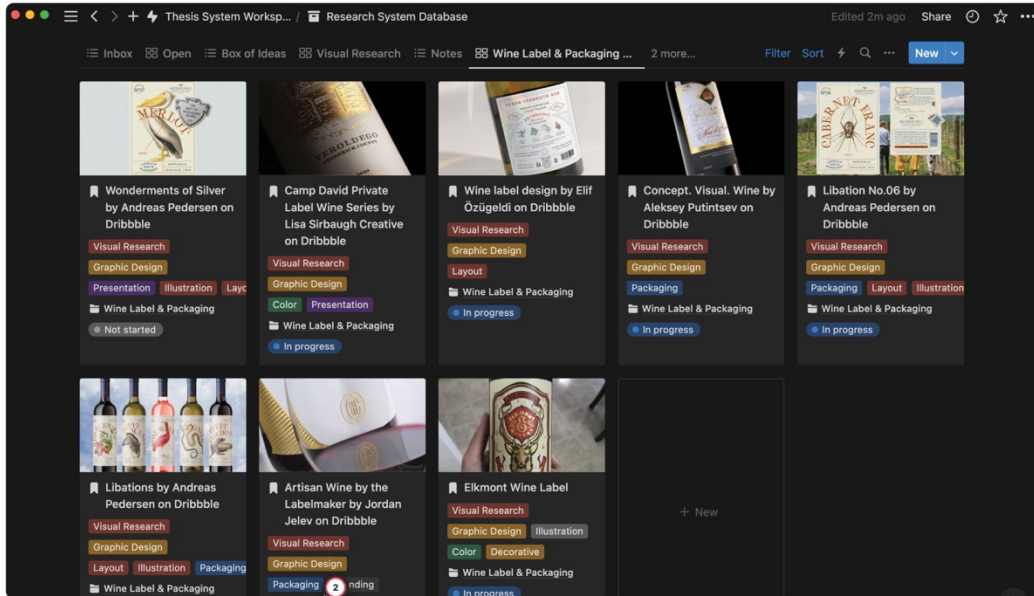


Image #14, "Backpack" System – Moodboard

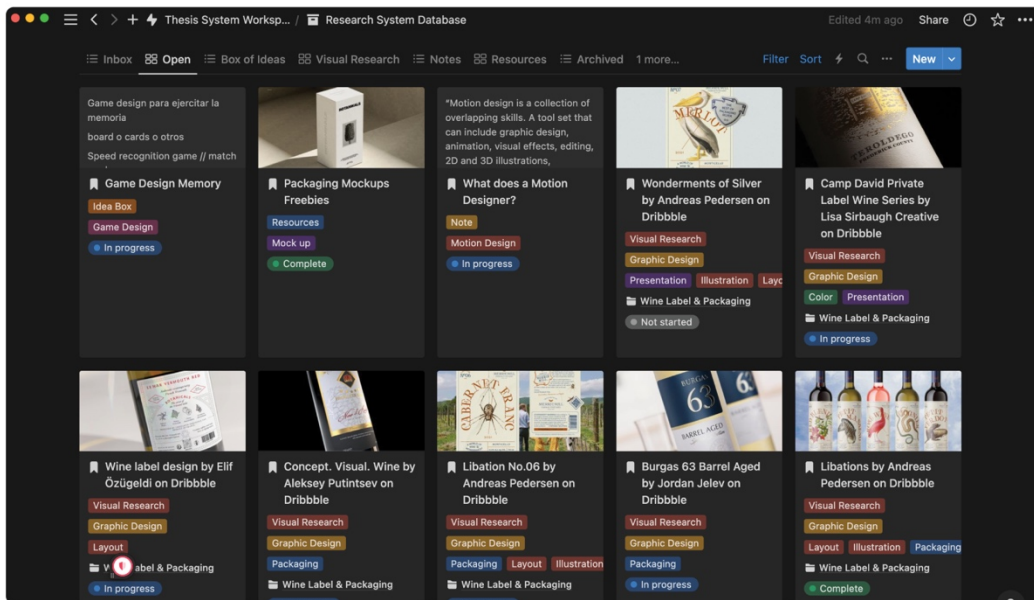


Image #15, "Backpack" System – Visual Library



*Image #16, Collage*



*Image #17, Fold-Out Poster Front*

**BACKPACK METHOD**  
**AN MFA THESIS EXI**  
**PROJECTS + SYS**

**01 RESEARCH PROMPT**  
 The student is given a research prompt or an assignment by an instructor, or the student may start a "freelance" research on their own. The student may not be researching for a specific prompt, but come across something of interest and save it for later.

**02 GATHER**  
 The student is actively researching for a specific prompt, or the student may find something of interest by "accident." This research can happen online or in the "real world." The Backpack methodology aims to help students understand that design is everywhere and that ideas and visual inspiration can be found outside of digital or online spaces.

**03 CAPTURE**  
 The student has found something of interest and is ready to capture it in their Backpack system for future reference or to create its visual library. If the research is being captured from a digital platform, the student can copy and paste the image or save that image locally. If the capture is happening in the "real world" — the student will take a photo or a video of that thing to capture it in their Backpack system.

**04 CATEGORIZATION**  
 The student is categorizing the captured research in their Backpack system. Categorizing the research is essential to easily find collected research later. Inside the Backpack system, the categorization breaks down into these steps: Inbox, Stage, Status, Type, Category, Niche, and Project.

**05 REFLECTION**  
 The Backpack methodology aims to challenge and emphasize design thinking in early students through the reflection of captured research. Students should aim to answer some design thinking questions in each of their research entries. These questions can be established by the instructor or by the student. An example of questions for a motion design class could be: What is the message/story of this piece? How do the tone, music, design, and animation techniques showcase this message? Can you explain how this animation has been done?

**06 UTILIZATION**  
 Once the student has reflected on a research entry, the student can use the captured research as visual inspiration or as a resource. Students are encouraged to share their reflections during class discussions and to share their research entries with their classmates.

**07**  
 Inbox  
 Stage  
 Status  
 Type  
 Category  
 Niche  
 Project

**06**  
 Research Prompt  
 Gather  
 Capture  
 Categorization  
 Reflection  
 Utilization

**04.15.24**

**BACKPACK METHOD**

Collect visual research and resources in one place

A research method for first-year design students

designed to adapt in different platforms

**AN MFA THESIS EXI**

LEARN MORE ABOUT THE BACKPACK SYSTEM



albaconejero.com

Research Prompt Gather Capture Categorization Reflection Utilization Designed By Alba Conejero

Image #18, Fold-Out Poster Back



04.15.24

# A research method for first-year design students

**Objectives** Visual Research  
Resources  
Connections  
Creative Output  
Exploration  
Sharing Culture

**Process** Research Prompt  
Gather  
Capture  
Categorization  
Reflection  
Utilization

The Backpack methodology is a research methodology designed for first-year design students. This methodology aims to help students collect their visual research and resources in one place where they can make connections, reflect on their findings, and transform them into creative output. It also emphasizes exploration, creates research habits, and encourages a culture of sharing among students, which makes research fun.

With time, students will be able to have a backpack full of an inspiring visual library, helpful resources, ideas, and notes of the things they care about and want to create.

Designed By

Alba Conejero

*Image #19, Infographic Poster 1*

# Backpack methodology process (06)

## 01 Research Prompt

The student is given a *research prompt* or an assignment by an instructor, or the student may start a "free/out of class" research on their own. The student may not be researching for a specific prompt but come across something of interest and save it for later.

## 02 Gather

The student is actively researching for a specific prompt, or the student may find something of interest by "accident." This research can happen online or in the "real world." The Backpack methodology aims to help students understand that design is everywhere and that ideas and visual inspiration can be found outside of digital or online spaces.

## 03 Capture

The student has found something of interest and is ready to capture it in their Backpack system for future reference or to create its visual library. If the research is being captured from a digital platform, the student can copy and paste that capture, or save that image/video. If the capture is happening in the "real world" — the student will take a photo or a video of that finding to capture it in their Backpack system.

## 04 Categorization

The student is categorizing the captured research in their Backpack system. Categorizing the research is essential to easily find collected research later. Inside the Backpack system, the categorization breaks down into these steps: Inbox, Stage, Status, Type, Category, Niche, and Project.

## 05 Reflection

The Backpack methodology aims to challenge and emphasize design thinking in early students through the reflection of their captured research. Students should aim to answer some design thinking questions in *even* of their research entries. These questions can be established by the instructor or by the students. An example of questions for a motion design class could be: What is the message/story of this piece? How do the tone, music, design, and animation techniques showcase this message? Can you explain how this animation has been done?

## 06 Utilization

Once the student has reflected on a research entry, the student can use the captured research as visual inspiration or as a resource. Students are encouraged to share their reflections during class discussions and to share their research entries with their classmates.

Designed By

Alba Conejero

Image #20, Infographic Poster 2

Collect visual research  
and resources  
in one place

Designed to adapt  
to different platforms

Digital Platforms

Notion  
Evernote  
Milanote  
Are.na  
Monday.com  
Trello  
Obsidian

Categorization  
Process

Inbox  
Stage  
Status  
Type  
Category  
Niche  
Project

(07)

The Backpack methodology is designed to adapt to different digital platforms, a sketchbook, and folders on a computer desktop. Even though the methodology can be applied in a sketchbook or a desktop — it is highly encouraged that students use it in a digital platform. The benefits of using it in digital platforms over in a sketchbook or the desktop are the ability to do quick searches, storage space, portability, and sharing possibilities. Some popular digital platforms where the methodology could be applied are Notion, Evernote, Milanote, Are.na, Monday.com, Trello, Obsidian, and more. Students are encouraged to explore the different digital platforms and apply the methodology in their preferred one.

For this thesis project, the Backpack system will be implemented in Notion — in Notion users can create customized systems, it is free for students and personal use, and it has a "template" feature — which allows the Backpack system to be shared with students. Once the students have chosen a digital platform where to adapt the methodology, these are the steps that will need to be followed to create their Backpack systems: Inbox, Stage, Status, Type, Category, Niche, and Project.

Designed By

Alba Conejero

Image #21, Infographic Poster 3



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