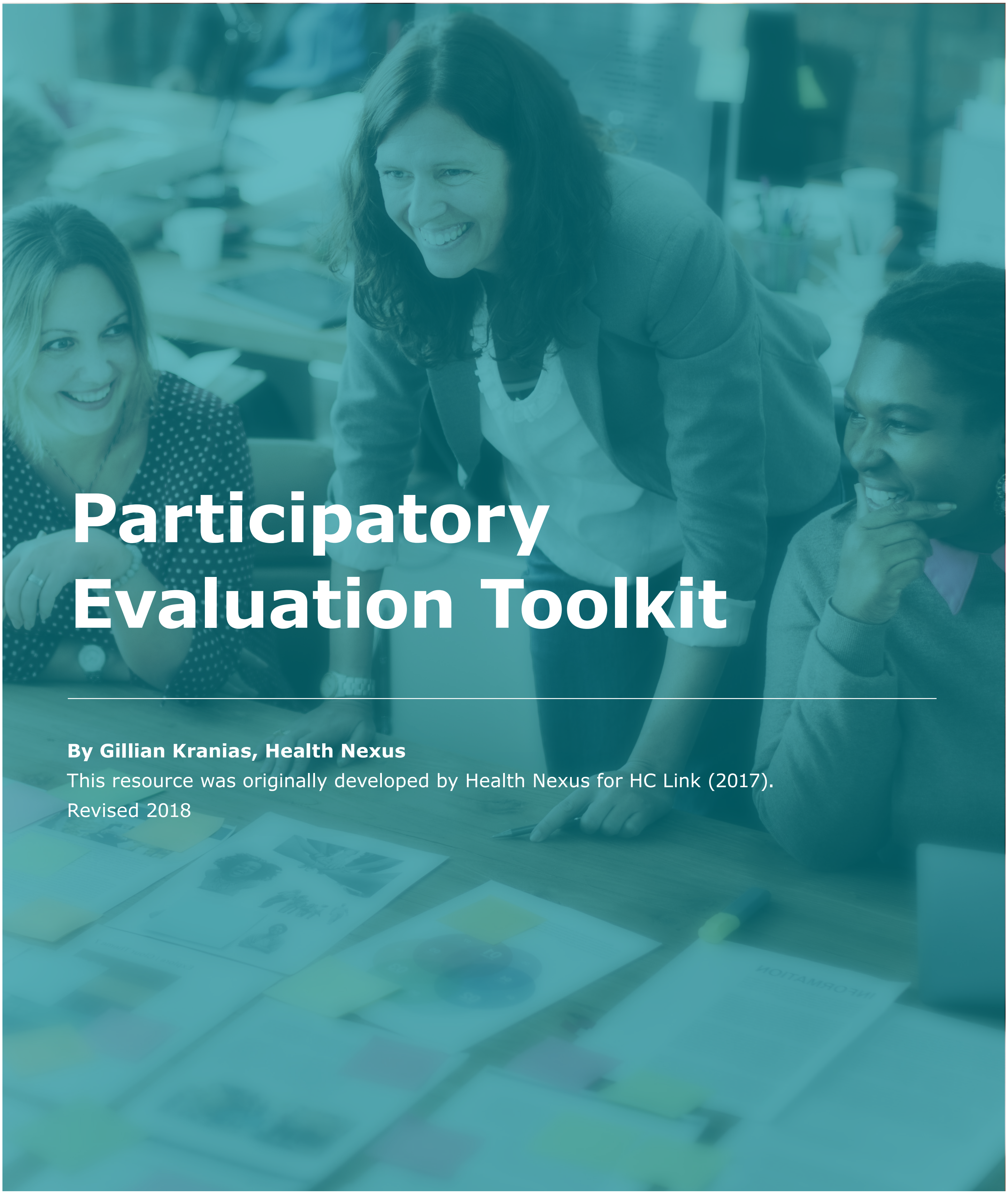

Participatory Evaluation Toolkit

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This resource was originally developed by Health Nexus for HC Link (2017).
Revised 2018

Healthy people, thriving communities
Des gens en santé, des communautés florissantes

Contents

Introduction

When we take time to evaluate, we gain insights and build shared understanding to better direct our work.

This toolkit is a companion to the resource *The Power of Reflection: An introduction to participatory evaluation techniques*. Use it to deepen your understanding of a participatory approach and to broaden your options for techniques to use with your community group or partnership.

The toolkit defines evaluation, identifies what makes participatory evaluation unique, and reviews some important considerations for any evaluation.

It describes key qualities to make sure your participatory evaluation activities are both empowering and effective, and outlines steps for coordinating evaluation activities. Following this are descriptions of seven participatory evaluation techniques to help you (re)inform, (re)align, and (re)energize your collaborative efforts. The techniques shared here are in addition to (and more complex than) the three techniques previously described in *The Power of Reflection* resource.

We hope these two resources will help you find an evaluation "shoe" that fits.

Read The Power of Reflection: An introduction to participatory evaluation techniques for a more general introduction and three simple techniques.

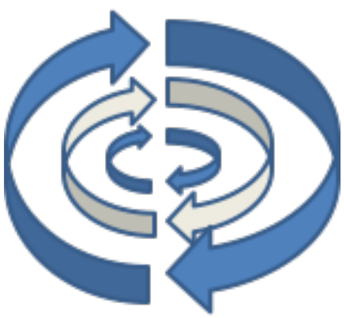
Evaluation is the Power of Reflection

"Fundamentally, evaluation means getting feedback... in a deliberate, systematic way..."[1]

Evaluation can:[2]

- **Make judgments** — to what extent do people experience this group/partnership as welcoming?
- **Facilitate improvements** — what helps, what hinders, and how could we do things differently?
- **Generate knowledge** — what are the most significant impacts we have made together?

Although we often expect evaluation to happen at the end of something, evaluation and evaluative thinking are part of feedback loops that can be helpful at any time.[3] Popular Education/Participatory Action Research theory calls this loop Action-Reflection-Action.[4] Continuous Quality Improvement talks about the Plan-Do-Study-Act cycle.[5]



Evaluation can happen at many levels:

Micro – *What were the impacts of that event last weekend?*

Intermediate – *What is working with our meeting procedures and what can we do better?*

Macro – *Given changes over the past year, which most pressing needs should we address?*

Participatory Evaluation is Unique

To take a participatory evaluation approach means to invite and facilitate more involvement and co-leadership from the people most directly involved with and affected by your activities.[6]
If you are from a small community-based group, these people will first and foremost be your own group members. If you are from a broad partnership, the people you invite to be more involved should reflect the range of individuals and groups involved with and affected by your activities. Reflecting its equity and social justice roots, participatory evaluation devotes extra attention and resources to ensure that equity-seeking people and groups take their rightful place as co-leaders in all activities – from choosing evaluation questions and designing a plan through to collecting information or stories and analyzing results.

Considerations and Resources for any Evaluation

Decision-making

Participatory evaluation activities involve lots of decisions. Consensus based decision-making aligns with the values and objectives of participatory evaluation. Check out the Consensus Decision-Making website to jumpstart, or enrich, your knowledge and skills to build and check for consensus within your group/partnership.

Ethics

Several ethical issues can arise in evaluations, especially when we engage people outside our immediate group or partnership. Canada's *Tri-Council Policy Statement on Ethical Conduct for Research Involving Humans* provides principles and guidelines for both research and evaluation situations. Take time to consider its three core principles: respect for persons, concern for welfare, and justice.[7]

Respect for persons involves regard for individual autonomy, and highlights the importance of "free, informed and ongoing consent" for participants in any evaluation activity. Access Alliance offers great guidance, and a checklist to help you develop a consent form, in their *Community-Based Research Toolkit* (pages 137-139).

The Paloma-Wellesley Guide to Participatory Program Evaluation also has an excellent section on ethics (pages 38-45).

Bias

No evaluation effort is free from human bias in design and interpretation. Bias can result from factors ranging from social location (life experience, world view, preconceptions) to circumstance (lack of time, bad weather). A bias check helps you identify strategies to reduce unwanted bias. The University of Kansas Community Tool Box provides guidance for reducing bias in "How to Encourage the Critical Stance" within the section *Thinking Critically*.

Here are a few questions to get you started on a bias check:

- Where might bias impact how we prioritize and word our reflective questions (e.g. leading questions)?
- Might we be inclined to engage one group of people (e.g. service providers) and overlook another (e.g. faith leaders)?
- Might we be inclined to probe for information based on incorrect assumptions (e.g. that women are not interested in a particular kind of activity)?
- Might the type of discussion facilitator we choose impact who feels safer to share dissenting opinions?

Explore where bias may influence the design and facilitation of reflection activities as well as your analysis of results. Then put plans in place to avoid or reduce unwanted bias. Later, identify and note any significant biases in your evaluation results (e.g. "we forgot to explore if youth were more likely to raise concerns about the program location than other groups").

Why Choose a Participatory Approach?

Here are some of the most common reasons for using participatory approaches and tools, adapted from the online Community Tool Box at the University of Kansas.[8]

Advance equity among partnership members.

Participatory evaluation gives everyone the chance to be a full partner in determining directions, effectiveness, and potential improvement for your collective efforts. "It can provide a voice for those who are often not heard."[9]

Emphasize the most relevant questions.

With the people most involved and affected at the design table, you will have the knowledge base to build a stronger evaluation plan. "[Y]ou're much more likely to aim your work in the right direction…"[10]

Build collaboration skills.

Participating group members and partners will deepen their skills in listening, critical reflection, collaborative analysis and consensus decision-making. A new group culture can evolve.

Spark creativity and innovation.

Participatory reflection dialogues (and arts-based activities you can blend with them) take evaluation "out of the box" and into spaces of co-learning, innovation and creative action.

Apply insights to action.

A report can be shelved, but people who engage in participatory evaluation will apply and share your results in complex and interdependent ways. They will naturally convert insights to action within your partnership, and wherever else they go.

Reflect your culture and values.

Participatory processes generally match "…with the philosophy of community-based or grassroots groups or organizations."[11] They also match well with the diversity, structures, and limited resources of many community partnerships.

Engage in a fun and energizing way.

As one fellow consultant explained: "More people actively participate because it allows them to express themselves in different ways and gives them immediate feedback."[12]

Case story:

When low-income community members in a multi-sector neighbourhood partnership had time to reflect on the past year together in a small group within a larger evaluative discussion, they were able to identify and vocalize how one of their collective priorities (the development of affordable home ownership opportunities) was being neglected by the coalition as a whole.

Key Qualities of a Participatory Approach

Here are some principles to guide you as you plan and conduct your reflection and evaluation activities:

Clear values – Spending time to clarify values will create a solid centre of gravity for your process. Talk about, write down, and regularly refer back to your guiding values together.

Clear language – A grassroots activist, a municipal representative, and a community service provider likely use different words to talk about the power of reflection. Look at the variety of terms used in this toolkit and choose what's most clear for your partnership members.

Safer space – Reflection and learning go deeper when there is respect for critical and dissenting opinions.[13] Lead and respond with curiosity and cultural humility[14] to create an environment where any group member can raise a concern or a conflicting perspective.

Anti-oppression – Because of systemic inequities and oppression, differences in lived experiences (such as sexism or racism) and differences in access to resources affect members' participation and power within any group or partnership.[15] Make a commitment to talk about power and equity and to find new ways of working that support everyone to contribute.

Reflective practice (or reflexivity) – For an effective participatory evaluation process, "reflective subjectivity" replaces the "assumed objectivity" of an outside evaluator.[16] Acknowledge that every person is shaped by their values and experiences and use reflective practice techniques to identify and manage bias.[17]

Ecology – Any group, partnership or community is an ecology of complex interconnected relationships. With this in mind, choose evaluation activities which will also nourish good relationships, build commitment, raise community awareness, expand networks and strengthen your actions. Steer clear of any activity which might cause community members to feel "researched to death".[18] Good guidance can be found in writings about Indigenous research methods, which emphasize holism and reciprocity.[19]

Accessible "data"– Drawing, storytelling and other hands-on or arts-based approaches can gather complex and nuanced information and also encourage the involvement of people with different communication styles.[20] Try something different (for example, the paper quilts from *The Power of Reflection* resource).

Coordinating Your Evaluation Activities

1. Gather the right people

What's unique about participatory evaluation is that you invite the people most directly involved with and affected by your activities to co-lead evaluation from the very start. Often, old habits or rushed timing can get in the way of everyone being present from the beginning. If so, don't despair: find a way to re-open your process and bring in those people who want to be involved.

Tip: Be sure to read out the text on post-it notes when they are going on the wall, so that people who are not able to see them remain included. And, if you are sorting/ analysing ideas, periodically review what texts or images are being considered together.

2. Understand evaluation "feedback loops"

Evaluation takes a systematic approach to engaging the power of reflection. The feedback loop follows this pattern:

A. Decide on one (or more) guiding question(s).

B. Choose one (or more) information gathering technique(s).

C. Collect information (which can include perspectives and stories).

D. Explore: what? - Discuss and analyze the information you have collected.

E. Discover: so what? - Seek consensus about your conclusions and recommendations.

F. Discuss: now what? - Identify actions you can take based on what you learned.

Tip: As you develop your plan, refer back to the key qualities on page 7 of this toolkit and think about how best to build them into your plan.

3. Start simply

Select an evaluative question that is relevant to your group or partnership and not too complex to explore. Now choose one or two information gathering and analysis techniques. Some of the techniques in this toolkit include both information gathering and analysis discussions within the same session, through dynamic whole-group activities – how efficient!

Powerful Evaluation Questions

Select questions with the power to gather information and perspectives that take your group/partnership to a new level of understanding, strategy and synergy. See pages 5-6 of the companion *Power of Reflection* resource for questions that we have found to generate good participatory evaluations.

You can ask the questions directly (using techniques in this toolkit) or adapt them to best match your situation and your partnership's priorities.

Don't choose evaluation questions alone! Remember to gather a good representation of people when selecting your questions.

Tip: If you ask similar questions on several occasions, this can help people feel more comfortable with your reflection processes and can help you compare results over time (or across activities). In contrast, you may want to choose new questions to avoid being repetitive and to focus on new areas of learning.

4. Over time, build a culture of reflection

Once you have conducted a few simpler evaluation activities, your group/partnership may decide to build a more complex evaluation plan to facilitate larger, ongoing benefits. At this point, consider using 3-4 complementary techniques that "round out" your evaluation activities. You may choose to mix conventional with participatory techniques.

Tip:

Take a picture of your flipcharts and wall charts/images at the end of the session. You can paste these into a document or email and may not need to type up a report.

Expanding Your Menu of Options

Consider standard data collection techniques.
For guides on focus groups, interviews and/or surveys see See Important Resources along the Road (page 26). You can use more extractive data collection techniques and still emphasize participation during your evaluation design and data analysis phases (e.g. by using data placemats as described in Technique 7).

Adopt, or adapt, other participatory techniques.
Many participatory group process tools are well suited (or can be adapted) for evaluation contexts. See Important Resources along the Road (page 26) for materials that can be easily adapted.

Participatory Evaluation Techniques

Many activities we do in partnerships have an evaluative component, so you may be familiar with some of the techniques described here but have just never considered them "evaluation".

- Evaluative Discussions (p. 11)
- Structured Reflective Interviews (p. 13)
- Hands-on Rating (p. 15)
- Spider Web Diagram (p. 17)
- Map it, Rate it, Discuss it (p. 20)
- Annotated Timeline (p. 22)
- Data Placemats (for data analysis) (p. 24)

In our companion resource *The Power of Reflection: An introduction to participatory evaluation techniques* you will also find these three techniques which are simple and a great place to start:

- Lineups
- Head-Heart-Feet
- Paper Quilt

Technique 1: Evaluative Discussions

Evaluative discussions are the backbone of participatory evaluation techniques. They have parallels to focus groups, but place more emphasis on the values and qualities of a participatory approach. They can be long (2-3 hours) or quick (10 minutes). Use them often, in different ways, to harness the power of reflection for your collaborative group. For longer evaluative discussions, try integrating other techniques from this toolkit.

Evaluative discussions can be used:

- To learn from those who know the community or the work you are engaging in, to help you plan better (formative evaluation).
- To identify what is working and what could improve your efforts, to inform changes as you go along and to identify learnings that will guide planning next time (process evaluation).
- To understand how well you have met, or moved towards meeting, your intended objectives and to learn about any unintended impacts (outcome or impact evaluation).

Logistics

SPACE	TIME	MATERIALS
• Enough space so that everyone can sit (or stand) in a circle • Tables are optional (with small groups, put flipchart paper on your table for notetaking within the circle)	• Flexible. If necessary, edit your questions to match the time available.	• Agenda with clear objectives, discussion plan with guiding questions. • Group guidelines that support group values, safer space and anti-oppression. • Flipchart paper, whiteboard and/or sticky notes. • Option: Prepare guiding questions in large font to post, or on copies for small group discussions. • Option: Object to pass for ensuring one person speaks at a time (to support group dynamics as needed).

Instructions

Share the discussion questions and facilitate dialogue. General group facilitation tips apply when facilitating evaluative discussions. Here are three key practices:[21]

- **Centering.**
  Centre yourself before you facilitate: arrive early, deep breathe, review plans – whatever works for you. Centre the group: welcome everyone, review the objectives/agenda/group guidelines, and invite questions/suggestions before you move on. If the group's focus is disrupted, suggest options to help the group re-centre (e.g. review guidelines and/or take a break and then regroup).
- **Listening.**
  Listen with your ears, your eyes and your intuition. Periodically check in with individuals or the full group to ensure you have heard correctly what was shared. Invite individuals to suggest wording for flipchart notes and ensure that the notes adequately portray any comments.
- **Assertive Expression.**
  Use "I" statements to identify what you are hearing or understanding, and invite/request further elaboration, response, or dissenting opinions (welcoming dissenting opinions can nurture a safer space). Assertive expression can sound like this: "I am sensing some discomfort in the room. Would you like to take a break and then we can come back to this, perhaps in smaller groups?"

Tips

- Integrate pair sharing and small group discussions within a larger group evaluative discussion. The key benefits to pairs and small groups are:

  1) more people can share their ideas (with five small groups, five people can share at the same time); and

  2) many people feel more comfortable expressing themselves in smaller groups.
- To support equity and anti-oppression in partnership evaluations, allow representatives of less powerful groups to share together first in a small group of "peers". This will strengthen their voice within the larger group discussion and increase the likelihood that their perspectives can influence the information you gather, the conclusions you draw, and/or the recommendations you make.
- Allow time for independent reflection. This creates more space for people with introvert personalities to contribute. Invite people to jot down their thoughts on note paper or use arts-based approaches to extend independent reflection time and express more complex reflections.
- Use sticky notes for reporting back and analyzing what is shared. Keeping notes in view of everyone supports a more participatory analysis of the reflections shared. Be conscious about who organizes and titles these sticky notes; find ways that include everyone, or that support people with less powerful positions to lead or co-lead.

Technique 2: Structured Reflective Interviews

Structured reflective interviews provide a small, safer and focussed space for people to share their experiences, perspectives, concerns and insights.

You might choose to use structured reflective interviews:

- After a significant event;
- Periodically (e.g. quarterly or annually) within regular partnership meetings;
- In the context of an evaluative discussion with community members; or
- During the evaluative phase of a strategic planning process.

Logistics

SPACE	TIME	MATERIALS
• This method can work in a variety of spaces. If you can, invite pairs to choose a preferred space, a cozy corner or outside perch, for their interview	• Variable. Usually 30-90 minutes depending on the depth of the interviews and the overall group size. • Allocate 2 minutes of report back time from each pair, and then add 10-30 minutes for the large group analysis.	• Interview guides – printed sheets with 1-4 questions for each person to read and take notes on. • Gentle bell/noisemaker – to gather people back to the large group. • Flipchart or whiteboard – for the facilitator to post/note the interview report backs and write highlights of the large group's analysis. • Option: Sticky notes – these can help each pair report back their main points to the group.

Instructions

1. In pairs, participants take turns interviewing each other and taking notes following the interview guide.
2. Each pair shares with the larger group only a limited number of highlights and insights (e.g. 3-5) from their stories and discussion.
3. Together, identify and analyze patterns in the highlights and insights shared. Then explore implications.

Tips

- Structure questions so that they emphasize the positive. Or, following a discussion of concerns, identify strengths and how you can build on them moving forward.
- It takes time to break into pairs and to gather back. Allow for this, especially if your group is large.
- You may want to direct how people choose their interview partner:
  - o To build more shared understanding among partnership members, invite people to pair with a person they don't usually interact with.
  - o To strengthen the voices of equity-seeking individuals and communities, invite people to pair with someone who holds a similar life experience/social location. This will give them an opportunity to explore their experience and expand ideas in a supportive space, in advance of the large group discussion.
- To take an asset-based participatory evaluation approach, use the "Discover" phase of Appreciative Inquiry which uses structured reflective interviews to share energizing experiences and identify the qualities and underlying factors behind them.[22]

Technique 3: Hands-on Rating[23]

Hands-on rating invites people to rate a need, an experience or an impact using a scale. Often the rating is followed immediately by a reflective discussion within the group. Like many participatory data-gathering techniques, hands-on rating does not provide full anonymity. However, it does distance people from the information being analyzed, which is preferable in some situations. Hands-on rating works with any size group and can also be used at public events.

A few examples of how you can use hands-on rating:

- Within your collaborative group, explore a process-related question, such as "At what level do you think peers have been engaged?" as shown in the accompanying picture based on the work of the Northwest Toronto Service Collaborative.
- With workshop participants, evaluate levels of prior knowledge or experience. For example, poll participants on the way into a workshop on civic engagement with a question like "how many times have you met with a municipal representative (politician or staff) to discuss an issue or concern?"
- With the general public, gather data about their activities, preferences or knowledge, such as in such as in The Stop's Farmers' Market bean poll pictured on the next page.

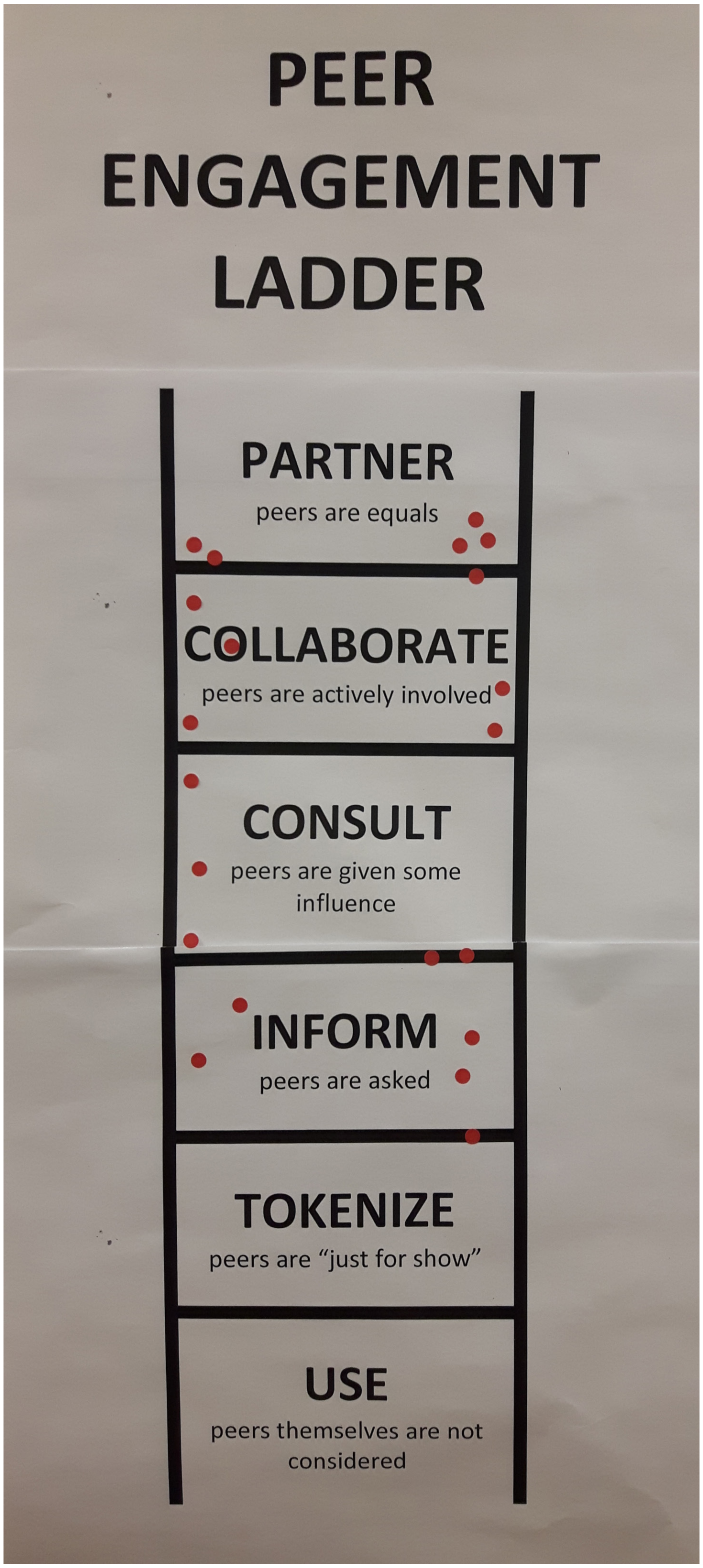


Photo credit: Josina Vink

Logistics

SPACE	TIME	MATERIALS
• Wall space or a table.	• Sometimes the data gathering can happen at the same time as other activities. • In the context of a group evaluative discussion process, allow a few minutes for the rating, and then 10-20 minutes for a debrief.	• A picture, or containers, with scale markings. • Counters (e.g. people chose stickers for paper and beans for bottles in the examples shared here). • Option: Use different coloured counters to represent the demographics of different groups of respondents (e.g. volunteer/paid staff).

Instructions

1. Identify your question and your rating scale.
2. Find a way to visually portray the scale on a poster or with containers - be creative!
3. Distribute "counters" (e.g. stickers, beans or plastic tokens) and invite people to choose the rating that best answers your question.
4. After they have completed a rating, invite people to write a comment (e.g. on a sticky note). Or, in group settings, facilitate a debrief dialogue to explore the reasons behind the ratings and/or the implications of the rating results.
5. If you want comparative data, repeat the same question with different groups, at different intervals (e.g. every three months or every year), or in before and after (pre-post) situations.

Tips

- To draw out more diverse qualitative insights, begin your debrief with pair or small group discussions.
- For public events, have a table facilitator to help clarify the question(s) and process. This also will ensure that no one tampers with the ratings.

Technique 4: Spider Web Diagram[24, 25, 26]

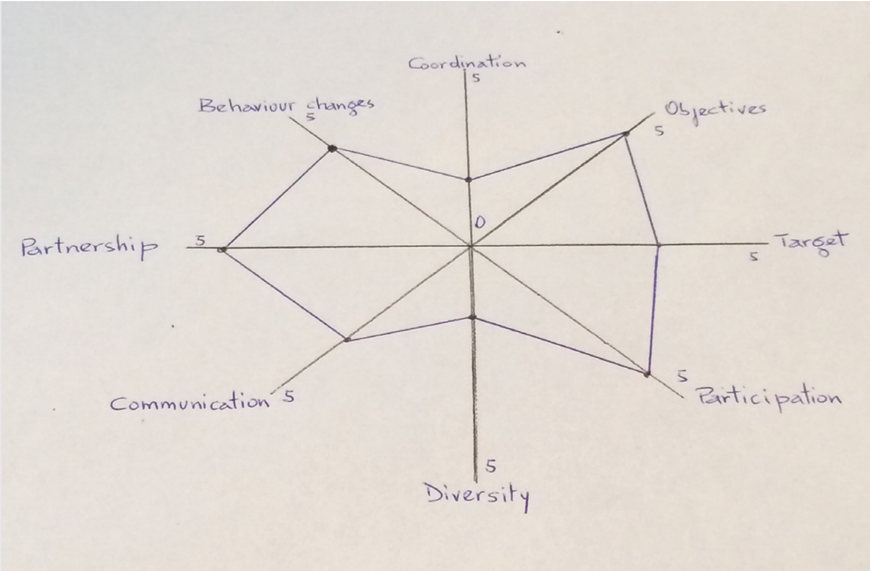
The spider web diagram is a technique with many other names (e.g. evaluation wheel or outcomes star). It is a simple and visual way to collect perspectives on a series of questions related to a specific activity or a general partnership effort. The technique is highly flexible.

You can use a spider web diagram:

- To identify impacts of a workshop or program;
- To highlight differences to compare different groups' perspectives;
- As a basis for self-assessment and self-improvement conversations within a community organization or partnership; or
- For rapid prioritization and decision-making within a team.

Logistics

SPACE	TIME	MATERIALS
• Wall space	• Variable. You may need only 15 minutes at the end of a workshop or as much as 60-90 minutes for a large group reflection.	• Large sheet of paper or white board on the wall. • Coloured markers or stickers. • Option: Draw a smaller spider web diagram on individual sheets for people to assess first on their own or in pairs.



Instructions

1. On your paper or whiteboard, draw a large cross and then a large X on top of the cross as pictured here. You can adapt this to have an odd number of lines (match to the number of topics you will explore).
2. Explain the purpose of the activity.
3. Suggest, or develop together, a set of topics which the group will assess. Here are a few examples: coordination, achievement of objectives, communities reached, level of participation, diversity, communication, partnership, behaviour change.
4. Write the selected topics in the boxes at the end of each arm and clarify together what each means.
5. Explain that each arm is graded from 0 at the centre (lowest level) to 5 at the outer edge (highest level). Adapt the scale if necessary.
6. Ask people to score each topic based on their personal perspective. If you have given out individual sheets of the spider web diagram, people can mark their score on the corresponding arm with a dot.
7. Next, the group will:
   a. Discuss the scores for each topic and the reasons behind them;
   b. Explore why some topics have a lot of agreement and others have more variety in scores; and
   c. Work towards a group consensus score (or range) for each topic.
8. Join the agreed-upon scores by connecting the dots to show a spider web figure, as seen below. This spider web image shows the stronger and weaker aspects of your results. The weakest aspects are closer to the centre and the strongest aspects are closer to the outside.
9. Discuss what changes might improve your work together.

Tips

- Opinions of two groups (youth/adults) can be compared on the same diagram. Use a different color code for members of each group.
- Revisit a previously made spider web diagram to compare changes over time (e.g. on an annual basis for assessing your partnership health or as a pre-post test to assess training impacts on individuals).
- In a group with separate “facilitators” and “participants” (e.g. at a training workshop), the facilitators may choose to leave the room so that participants can confidentially discuss their individual assessments and generate a collective spider web diagram on the wall.

Technique 5: Map it, Rate it, Discuss it[27]

This technique is useful for evaluating a program or initiative with distinct sessions (e.g. 6 weeks) or phases (e.g. phases of an advocacy campaign). For a similar technique that is better suited for ongoing efforts, see *Technique 6: Annotated Timeline*.

Logistics

SPACE	TIME	MATERIALS
• A long empty wall is best. For a small group, a large table may be enough.	• 30-90 minutes	• A series of flipchart sheets is best. A large whiteboard might also do the trick. • Enough dot stickers, or enough markers, for participants to post their ratings. • Extra markers and flipchart sheets for the facilitator(s) • Option: Sticky notes

Instructions

1. To prepare, post flipchart papers along the wall from left to right. Each page will represent one distinct session or phase of the initiative you want to evaluate. In chronological order, write the title for each session/phase at the top of the sheet.

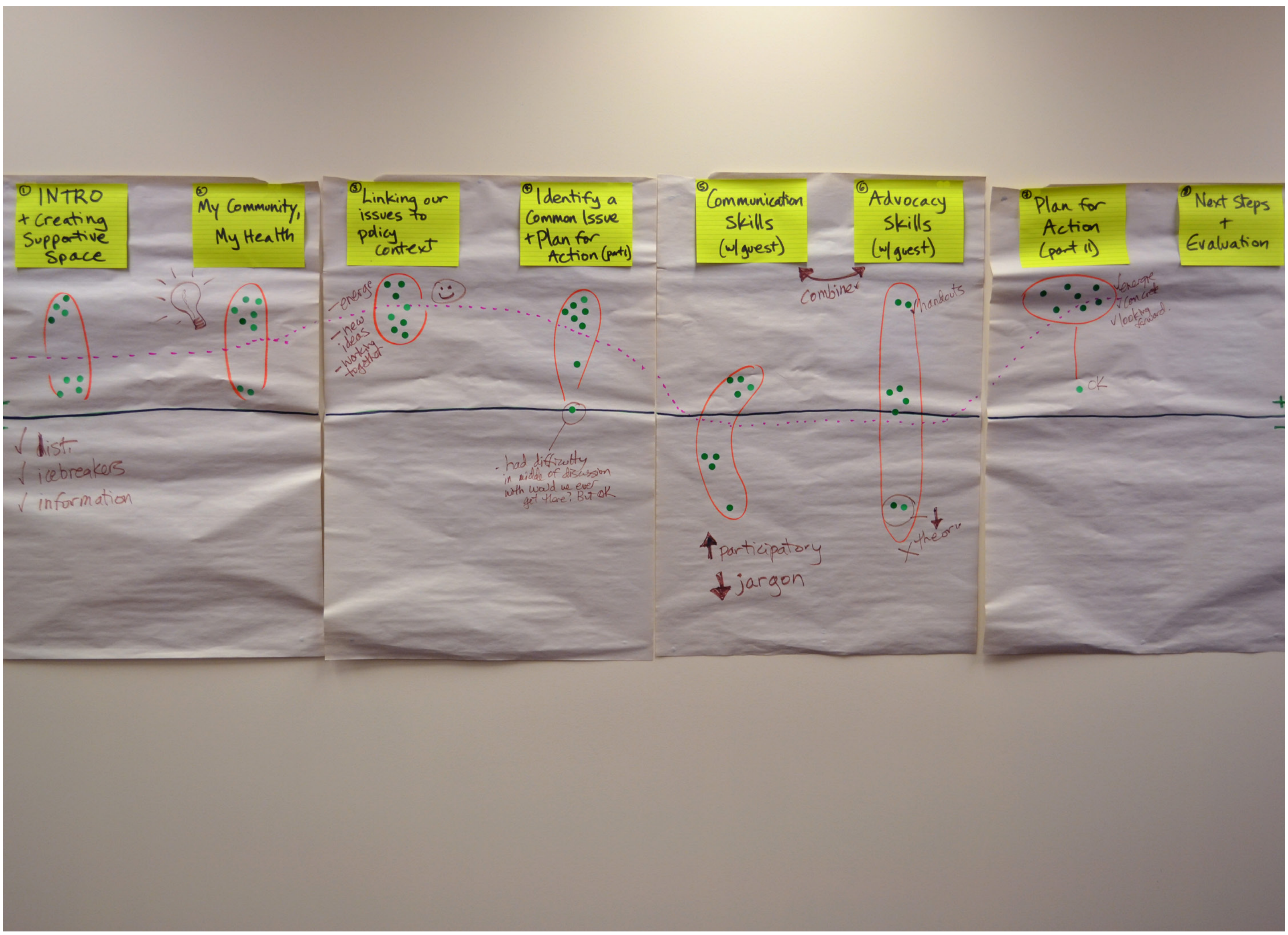
2. **Map it:** Start your reflective discussion by recalling each session/phase. Work your way from left to right across the wall. Invite people to share what they remember, such as key topics, activities, or people. This jogs people's memory and brings back to life the different sessions or phases of your collective journey. Make a few notes next to the title on the sheet.

3. **Rate it:**
   a. Draw a line from left to right across the middle of the row of flipchart sheets. Explain that this line represents a mid-point (average or "ok") rating. Next, invite each person to rate each session/phase by placing one dot in a high, average, or low location on that sheet. The facilitator may choose to leave the room during the rating if this will increase people's comfort.

   b. Although the dots offer rather crude quantitative assessments, they will generate a clear enough judgement to focus a deeper evaluative discussion. Invite people to look at and reflect on the lows and highs, as well as the "ok" ratings. You can, at this point, take a different coloured marker and highlight the average assessment rating for each session (see picture).

4. **Discuss it:** Invite people to share their reflections. Write these qualitative comments onto the sheets (directly, or via sticky notes). Discuss why the top-rated sessions were successful, and why others were rated lower. If ratings varied widely for the same session, explore why. Identify any lessons learned. Explore what could be changed for improvements, in the future. Optionally, the group can break into small groups (with guiding questions) and then report back on select sessions or phases.

5. Wrap-up your evaluation with a *"so what?"* discussion. Explore new understandings and prioritize recommendations for integration into future plans and activities.



Technique 6: Annotated Timeline[28, 29]

This technique offers a highly interactive way to reflect on your group or partnership's actions over the past year (or a series of years). It helps orient new members and strengthen member relationships. It is often used in combination with a celebratory event or a planning session.

Logistics

SPACE	TIME	MATERIALS
• A long empty wall is best. For a small group, a large table may be enough.	• 30-120 minutes.	• Big piece of paper – either a series of flipchart sheets or a sheet from a large roll of craft paper. If the timeline is not too long, a large whiteboard might also do the trick. • Enough markers, in a variety of colours, for participants to write with. • Option: Photos from your activities, old posters or media clips. • Option: Large sticky notes

Instructions

1. To prepare, cover a wall from left to right with a series of flipchart papers or a roll of craft paper. Draw a line from left to right through the centre of the paper. Then add in date markers (years, seasons, or months) along the line.

2. Invite everyone to reflect back on the time period and to write, draw their memories or post pictures along the timeline (see picture). You may distribute markers and invite people to the wall directly or ask people to write on sticky notes first and then post.

Photo credit: Tanya Gerber

3. Review the memories noted. Invite people to talk more about what they have posted. This jogs people's memory or shares details that some people may not know. In a positive way, you can also highlight any differing experiences among members. A dynamic and collective "story" will emerge.

4. Optionally, you can add another layer of analysis by inviting people to identify events on the timeline that seem to group together. Next, ask them to generate a title for each grouping that describes the general focus and energy of that segment of time. At this point, people's perspectives may conflict. Exploring those differing opinions can generate useful insights.

5. Pose questions that invite deeper reflections about the timeline: How did one focus or activity impact the next? Are there particular qualities and strengths of our partnership that persisted throughout the timeline? Was anything lost? Write the answers to these questions onto the timeline directly or on large sticky notes.

6. Wrap-up your evaluation with a *"so what?"* discussion. Document any recommendations that your partnership should integrate into future plans and activities.

Tip

- Asking people to write on sticky notes first (see step 2) will bring forward more varied perspectives but there will also be more repetition and thus step 3 will take longer.

Technique 7: Data placemats (for data analysis)[30]

Whether you collect information (data) in ways that are highly participatory or not, your partnership or group can still benefit from having more eyes and minds to consider the findings and build conclusions for action. By preparing good "data placemats", information is more accessible for collective analysis. Within the placemat, you can integrate quantitative data (e.g. numbers) with qualitative information (e.g. perspectives and stories).

Logistics

SPACE	TIME	MATERIALS
• A comfortable space for your group to sit in one circle and perhaps to break into small groups as well. • Tables are very helpful for consulting and commenting on paper documents.	• 1.5 to 3 hours.	• Data visualisation printouts, such as placemats, for each person. • Sticky notes and pens for everyone to write comments. • Large flipchart or whiteboard with markers for the facilitator.

Instructions

1. To prepare:
   a. Gather data using any technique: registration forms, evaluation forms, interviews, focus groups, or any of the participatory techniques found in this toolkit.
   b. Prepare the data for analysis by carefully reviewing your results. Remove any errors and improve data clarity.
   c. Present your data in simple and creative ways. You can draw by hand or use graphics and tables in Word. You can also use spreadsheet software (e.g. Excel for graphs), free online infographic software or word clouds (e.g. to show qualitative data themes).
   d. Prepare one or more distinct data placemats. Each placemat can share a selection of 2 to 6 charts or other visuals related to one evaluative question or one group of respondents (e.g. one for information about and from parents, and then another for information about and from teachers who were involved in the same project or event).
   e. Make enough placemat copies for everyone at the session.

2. Review the purpose and process of the evaluative activities you conducted.
3. Remind people why you have invited a variety of people to explore evaluation results together. Invite people to introduce themselves if they do not know each other already.
4. Explain the data visualizations on the placemats.
5. Initially, invite people to work in groups of 2 to 3 people to look at the data and discuss a few (no more than three) guiding questions. Here are some options from Pankaj et. al. (2011)[31]:
    a. What surprises you about the data?
    b. What factors may explain some of the trends you are seeing?
    c. Does this lead you to new questions?
    d. What doesn't fit? How?
    e. Where would you add context to clarify or explain the findings?
6. In a large group, gather perspectives and explore different viewpoints. Identify where the group agrees and where there is dissent (differing opinions can be fine – just note them).
7. You can finalize recommendations or a plan for action, or save this for a later date.

Tip

Develop your infographics at an advanced session with a team. As one community evaluator noted "it creates another opportunity for discussion of the evaluation results and invites people to make collective decisions about what is most important to share from the findings."[32]

See *Important Resources along the Road* for other approaches to participatory data analysis.

Important Resources Along the Road

Health Nexus Resources:

The Power of Reflection: An introduction to participatory evaluation techniques,
Health Nexus, 2018
Includes three simple participatory evaluation techniques.

Participatory evaluation toolkits:

Community-based Participatory, and Developmental Evaluation Approaches: An Introductory Toolkit,
Ecology Action Centre, 2015
An accessible toolkit based on evaluation methods adapted for a community food project. Includes a clear explanation of developmental evaluation (a recently coined academic term based on traditional practices within the community sector).

Useful tools for engaging young people in participatory evaluation,
UNICEF, CEE/CIS Regional Office, 2005
Describes conventional data collection methods and 10 participatory techniques.

Art-Based Evaluation 101,
Margo Charlton of Resonance Creative Consulting, 2013
Describes different arts-based evaluation activities for use at the start, middle and end of a project.

Petit guide d'évaluation à l'intention des initiatives de développement des communautés. Centre collaborateur de l'OMS pour le développement des Villes et Villages en santé, 2009
Guides partners in a community development committee or coalition through the steps of conducting a process evaluation of "how to work together". (available in French only)

More options for participatory data analysis:

Dabbling in the Data: A Hands-On Guide to Participatory Data Analysis,
Public Profit, 2017
Offers 15 team-based activities to promote meaningful conversations about data.

DEPICT model,
Sarah Flicker and Stephanie A. Nixon, 2014
Presents six steps for participatory data analysis, with details on roles and guiding questions.

Inclusion Research Handbook,
Ontario Women's Health Network, 2009
Describes in detail a two-day process agenda for the collective analysis of results from focus groups.

Participatory facilitation techniques that can be adapted for evaluation contexts:

Facilitation for Healthy Communities Toolkit,
HC Link, 2017.
A quick and easy reference guide to using seven different facilitation techniques.

Creating the Change We Want,
Community Development Framework, 2016.
Includes 27 participatory exercises and workshop outlines to build neighbourhood capacity. Written with an equity and inclusion lens.

Les outils d'animation,
Communagir, 2017
Searchable database with different facilitation techniques. Includes 13 evaluative techniques. *(available in French only)*

L'AVEC, pour faire ensemble: Un guide de pratiques, de réflexions et d'outils,
Collectif VAATAVEC, 2014
Includes 17 participatory techniques for collaborative dialogue and decision-making. Written with an equity and inclusion lens. *(available in French only)*

Related guides and tools:

Guide to Focus Groups,
Ontario Women's Health Network, 2009
A comprehensive and clear-language guide to focus groups that can serve as a reference point or training manual. Written with an equity and inclusion lens.

Community-Based Research Toolkit: Resources and Tools for Doing Research with Community for Social Change,
Access Alliance Multicultural Health and Community Services, 2011
A detailed description of all the steps involved in developing, conducting and evaluating a community-based research project. Packed with tools and templates. Written with an equity and inclusion lens.

Self-Evaluation Tool for Action in Partnership,
Health Nexus, 2017

Designed for members of a partnership who voluntarily participate in self-evaluation. Includes important process equity indicators. This is a translation-adaptation of the evidence-based tool Outil diagnostique de l'action en partenariat.

Different angles on steps in evaluation planning and implementation:

Participatory Evaluation,
Community-based Public Health Policy and Practice, 2002

Includes a graphic and an explanation of the key steps for developing and implementing a participatory evaluation plan.

At a Glance: The ten steps for conducting an evaluation,
Public Health Ontario, 2015

The steps described in this compact resource may be useful to reference. For a participatory approach, don't forget to insert Gather the right people as your first step (see p.# above).

Participatory Evaluation,
Community Tool Box, KU Work Group for Community Health and Development

These webpages outline participatory evaluation, its benefits and drawbacks, who should be involved, and how to conduct a participatory evaluation. At the end are several links to other online resources on the topic.

Working Together: The Paloma-Wellesley Guide to Participatory Program Evaluation,
Paloma Foundation and Wellesley Institute, 2010

Written for program evaluations which prioritize a participatory approach, this guide offers knowledge, steps and tools for planning and implementation.

Pour mettre vos actions en valeur : La boîte à outils qui vous guide jusqu'au rapport d'activités,
Centre St-Pierre, 2012

Pages 52-65 focus on evaluation, including: an introduction to and steps for participatory evaluation, a table with key challenges and solution pathways, and a table describing self-assessment tools. *(available in French only)*

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Health Nexus adapted and republished this resource to support organizations working on Political Action and Community Action projects with funding from Status of Women Canada (SWC). We hope this will be a practical resource as you create systemic change supporting women's empowerment and leadership. SWC-funded projects are invited to contact Health Nexus with any questions, or for partnership support coaching/facilitation on related themes at collaboration@healthnexus.ca.

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Download this resource at:
https://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/participatoryevaltoolkit.pdf

Cette ressource est également disponible en français.

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