PARTICIPATORY EVALUATION

Theories + Methods for Remote Work

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PART I

Introduction

INTRODUCTION

This guidebook identifies multiple resources for trends and innovations in participatory evaluation. It is unique in that it offers virtual adaptations of popular approaches to ideation, data collection and analysis, and action-taking for evaluators and human service organizations. This targeted research serves to support Evaluation + Learning Consulting's upcoming webinar series on participatory evaluation with a special lens on remote adaptations.

ABOUT EVALUATION + LEARNING CONSULTING

Evaluation + Learning Consulting (ELC) is a boutique management firm that helps to strengthen its clients' initiatives by cultivating a learning and data-driven culture. As a certified Minority and Women-Owned Business Enterprise (MWBE), we are committed to supporting initiatives in reaching maximum impact with a keen eye to diverse, equitable, and inclusive practices. We include stakeholders in every step along the way, growing internal capacity for evaluation and organizational development. Our expertise in evaluation, strategic planning, and adult learning poise us as the premier partner for creating lasting organizational change.

WHY PARTICIPATORY EVALUATION?

Participatory evaluation is not top-down or expert-led. It is a bottom-up framework that stimulates and utilizes the wealth of experiences and wisdom that participants have to create more meaningful, productive, and engaging discussions and debates. Participatory methods invite co-ownership of the process and use the know-how of the group to both address challenges and present opportunities for growth.

As a direct result of COVID-19, many facilitators, managers, evaluators, and other stakeholders involved in data collection and analysis have shifted to online and remote methods. This guide is meant to serve communities who want to create more productive meetings that meaningfully include stakeholders to identify and gather insight on challenges, issues, and patterns, and to build on that insight to generate collective action. These methods engage the whole group in learning about and getting to the root of their challenges and issues, while channeling their insight and analysis into productive action.

HOW TO USE THIS GUIDE

This document is intended for any evaluator, program leader, community member, or other human service stakeholder who is interested in creating opportunities for more involvement in decision-making. It is not meant to be read from beginning to end, but to serve as a reference for 1) learning participatory structures during every stage of the evaluation process and 2) translating popular participatory methods to a virtual setting.

The main sections of this guide include:

- **Getting into the Participatory Mindset** - a high-level explanation of participatory techniques and approaches
- **Virtual Tools** - platforms that are useful for facilitating participatory structures
- **Structures for Participatory Evaluation** - structures for engaging stakeholders in a participatory fashion, broken down by evaluation stages:
    - **Ideation + Design** - planning stages of the evaluation where challenges and evaluation questions are identified and where the evaluation plan is created.
    - **Data Collection** - Where the relevant data needed to answer the evaluation questions is collected
    - **Data Analysis** - Where the data that was collected is analyzed by stakeholders and meaning is made
    - **Action Planning** - Where the stakeholders decide next steps based on the information they learned from the evaluation process

GETTING INTO THE PARTICIPATORY MINDSET

This section is for those seeking resources and perspectives on the hows, whys, and whens of participatory work. It references three works:

1. Chicago Beyond's "Why Am I Always Being Researched" Guidebook
2. USAID's "Designing Participatory Meetings and Brownbags" Quick Guide
3. Liberating Structures

CHICAGO BEYOND'S GUIDEBOOK

The ***Chicago Beyond Model*** emphasizes community control over research and brings awareness to our own biases and assumptions, starting with a commitment to that awareness, and then finding new ways to relate to one another as evaluators and community-based stakeholders in the research process (p. 19). Some of their tips for participatory practices from their guidebook include:

- Design research to serve the community purpose.
- Refuse to participate in research that perpetuates the researcher as "brains" and the community as "brawn" stereotype.
- Insist that the discussions about the community happen with the community.
- Gain consent - Share information with the community organization about research options, methods, inputs, costs, benefits and risks. Without this information, the community organization cannot actually consent to the research. Ask for their consent.
- Have reciprocal exchanges about methods and inputs. Learn what the organization wants to learn, and why.
- Recognize how the research frameworks, processes and inputs reinforce power dynamics, and bring your creativity to making change.
- Build relationships with the community organization.

- Check partial truths.
- Invite co-ownership of research, in your processes and legal agreements.
- Communicate the full cost of the research—including intangible costs to participants, community organization, and community— and find ways to support the full cost.
- Shape research so producing value for the community is central, and invite the community to speak up on how the research can produce value for their community.

USAID'S QUICK GUIDE

USAID's Technical and Operational Performance Support (TOPS) Program offers a quick guide with recommendations on how to make any meeting more participatory.

- TOPS recommends thinking about what you would like to accomplish in a session first. The objective will relate to the specific format of the session that will help you and your participants accomplish what you set out to do.
  - In this guide, we have broken down the evaluation process into four stages: Ideation + Design, Data Collection, Data Analysis, and Action Planning. Considering the stage you are in will help to clarify your meeting objectives and the structures you will use to achieve them.
- If your group would like to strengthen capacity or address gaps in knowledge, the format should provide an opportunity to apply the new learning by internalizing and contextualizing new knowledge to make it real, specific, and actionable.
- Start on time, unless you have a really good reason not to. There is no need to wait until everyone joins the room to start, especially if the session is being recorded.
- Don't share your stress. Try not to reference to the wider group how the session is running related to timing. It is very common to hear facilitators say something like, "Since we're running behind, we will..." Modify the agenda or your actions as

needed to get the meeting back on schedule, but provide the participants with the illusion that everything is going as planned.

- Participants should be able to reflect, discuss and engage with the issue(s) at hand. Two TOPS-recommended methods to encourage participants' direct engagement, and to stimulate their thinking and dialogue, are:
    - **Moment of Silence** - Build moments of silence into your session by allowing the room to reflect in silence for one minute before each transition. Tell your group that you are building tangible pauses into the session. Moments of silence can be built in before Q&A or after explaining the topic of a small group discussion. Before moving on to the discussion, tell the group you would like them to reflect for a moment, thinking about what they have just learned and applying it to their own context.
    - **Agree/Disagree** - Use as an icebreaker in the beginning of a session, or to stimulate participants by challenging them to think and encouraging their direct participation. A moderator sends a poll to the group with a series of provocative but non-divisive questions phrased in an agree/disagree format. All those who agree with the question can be asked to click agree and those who disagree can click disagree. Explanation for the varying views can be solicited from members of each respective group. It is important that the moderators keep the tone light throughout this activity so that participants feel safe expressing their views.

LIBERATING STRUCTURES

Liberating Structures offer an alternative way to approach and design how people work together. They can be used by everyone at every level, from the executive suite to the grassroots. They are easy-to-learn microstructures that enhance relational coordination and trust. They quickly foster lively participation in groups of any size, making it possible to truly include and unleash everyone in shaping next steps. Liberating Structures are a disruptive innovation that can replace more controlling or constraining approaches.

Many of the structures contained in the guide come from Liberating Structures. Whether they are Liberating Structures or not, all structures within this guide embody the same ten principles:

1. Include and Unleash Everyone
2. Practice Deep Respect for People and Local Solutions
3. Build Trust As You Go
4. Learn by Failing Forward
5. Practice Self-Discovery Within a Group
6. Amplify Freedom AND Responsibility
7. Emphasize Possibilities: Believe Before You See
8. Invite Creative Destruction To Enable Innovation
9. Engage In Seriously-Playful Curiosity
10. Never Start Without Clear Purpose(s)

PART II

Virtual Tools

VIRTUAL TOOLS

Every structure in this guide is modified to work in a virtual environment.

ZOOM

Zoom is a popular video conferencing platform that has both free and paid versions. While there are many video conferencing platforms out there, we recommend the paid version of Zoom due to its ability to create breakout rooms.

Breakout rooms allow you to split your Zoom participants into up to 50 separate small groups. The meeting host can choose to create the groups either automatically or manually. The host can switch the rooms to which participants are assigned at any time. They are also free to visit with any breakout room. Being that so many participatory structures rely on small groups collaborating together, and being that no other video conferencing technology has the ability to host small group sessions at the time of publication, we highly recommend Zoom as your video conferencing platform.

GOOGLE SLIDES

Google Slides is an online presentation app that lets you create and format presentations and work with other people. It offers the ability to present information and take notes on what is being said in real time. Google Slides also offer the ability for a group of participants to work on the same document at the same time.

Google Slides is available accessible for free to anyone with a Gmail account. Best yet: when you share a link to your board, participants simply click and join. There's no need to sign up for or sign into a Gmail account. You can get started with Google Slides by going to www.slides.google.com.

GOOGLE JAMBOARD

Google Jamboard is a virtual whiteboard where you can upload images, notes and drawings. You and your participants can use virtual post-it notes and stickies to assist in making your session more collaborative and participatory. If you host sessions in person that require small group collaboration and utilize post-its and/or poster paper, Jamboard is an excellent solution with which to translate the structure to a virtual setting.

Click here to watch a brief tutorial on how to use Jamboard.

Google Jamboard is available accessible for free to anyone with a Gmail account. Best yet: when you share a link to your board, participants simply click and join. There's no need to sign up for or sign into a Gmail account. You can get started with Jamboard by going to www.jamboard.google.com.

STORMBOARD

Stormboard is a collaborative online whiteboard platform designed for remote teams and synchronous co-creation. It features one large whiteboard area that numerous people can edit at the same time. Tools for editing include post-its, icons, uploaded photos, and drawings. **Click here** to watch a brief video of Stormboard in action.

We recommend using Stormboard over Jamboard when:

1. You need more than 10 areas for collaboration.
2. You would like to move post-its between groups (this is possible but more difficult in Jamboard).
3. You want participants to vote on their favorite post-its and you want to limit the number of votes they get (while voting is possible with icons in Jamboard, there is no way to limit the number of votes).

We have experienced three challenges when using Stormboard:

1. It requires everyone to sign up for a (free) account.
2. They recently decreased the capacity of free users per board to five.
3. It's a technology whose user experience is unique from other platforms your participants might have used before (unlike the Google Suite which remains

consistent, even if no one has used Jamboard before).

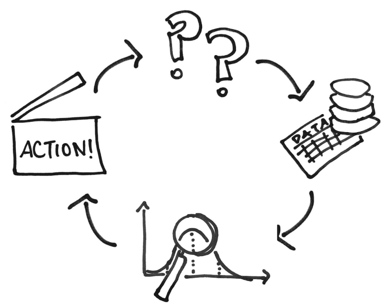
For both of these reasons, we recommend adding an extra 15 minutes to any agenda if you are using Stormboard for the first time.

PART III

Structures for Participatory Evaluation

STRUCTURES FOR PARTICIPATORY EVALUATION

The remainder of this guide will outline for you a variety of participatory structures that can be used during an evaluation engagement. For ease of use, the structures are divided into the four stages of an evaluation:



1. **Ideation + Design** - The period when stakeholders are identified, evaluation question(s) are clarified, and the evaluation is designed.
2. **Data Collection** - When qualitative and/or quantitative data is collected from the identified stakeholders.
3. **Data Analysis** - When the stakeholders are brought together to read, create meaning from, and draw conclusions about the data that was collected.
4. **Action Planning** - When stakeholders use the findings and conclusions to decide upon their data-informed next steps.

To follow is a table of contents with the name of each structure hyperlinked to its section of the guide.

IDEATION + DESIGN

Use virtual **participatory ideation + design methods** to understand how **your work directly and indirectly leads to change.** These structures will also aid in identifying the evaluation questions that are the most relevant and pressing for your group of stakeholders. They will also help users find clarity on how elements of a program ***impact, change, or are related to the wider issue or bigger picture.***

Journey Map

DATA COLLECTION

Use virtual **participatory data collection methods** as an alternative to traditional methods for collecting and exploring data.

Fishbowl

Card Sorting

Appreciative Interview

Conversation Cafe

PhotoVoice

Storytelling

DATA ANALYSIS

Use virtual **participatory data analysis methods** to identify salient findings with **multiple stakeholders.** Use these activities to talk to your audience about **results** in an engaging manner that leads to **making meaning** and contributes to **deeper understanding**.

Hierarchical Card Sorting

Easy As Pie

Gallery Walk

Data Walks

Data Placemats

Mind the Gap

T-shirt Slogan

ACTION PLANNING

Use virtual **participatory action planning methods** to reveal and sift through **actionable ideas** for **changes** that can be made right now within your capacity, and to create collective momentum for future **coordinated action**.

25/10

15% Solutions

Open Space Technology

What, So What, Now What? (W^3)

IDEATION + DESIGN

Use virtual participatory ideation methods to understand how your evaluation work will directly and indirectly lead to change. These structures will also aid in identifying the evaluation questions that are the most relevant and pressing for your group of stakeholders. These activities help users find clarity on how elements of a program *impact, change, or are related to the wider issue or bigger picture.*

SOCIAL NETWORK WEBBING

Use Social Network Webbing by *Liberating Structures* to uncover the existing network of relationships and resources among the core evaluation planning group, and to identify steps to take for tapping into those resources. This exercise will uncover the key individuals you need to incorporate in your evaluation process. Opportunities for building stronger connections become easier to identify as the network becomes visible to everybody in the group simultaneously.

Tech Materials Needed	Time Needed	Participant *n*
Zoom, Stormboard	60-90 mins	5-10

Planning Checklist

- ❏ Create a Stormboard with the name of every person in the core evaluation planning group clustered in the center

In-Meeting Steps

Step 1 Facilitate 1-2-4-All to generate the names of all the key groups of people needed to conduct a successful evaluation.

Step 2 Create a legend of all the key groups. Assign each group a Post-it color or shape. Place this legend in the corner of your board.

Step 3 Ask all core group members, “Who do you know that is actively involved in this program?” Tell them to create a Post-it with every person’s name, one name per Post-it. Ask them to arrange the Post-its based on each person’s relationship to the core evaluation planning group members (10 min).

Step 4 Ask the participants, “Who else is critical to a successful evaluation of this program?” Invite them to brainstorm and create Post-its for the new people. Individuals in this group may be their friends' friends. New legend categories and colors may be needed as the webbing expands (10 min).

Step 5 Ask the participants, “Who else would you like to include in this work?” Invite them to brainstorm and create Post-its for the other people they would like to include.

Step 6 Ask the participants, “Who knows whom?” Have them illustrate the answers with connecting lines (15 mins).

Step 7 Then, ask the group, “Who has influence and expertise? Who can block progress? Who can boost progress?” Have them mark these people with pre-identified symbols (15 mins). These people will become part of the evaluation’s group of stakeholders for the duration of the evaluation. The others on the map will be people from whom data is collected.

Step 8 Ask the group to devise strategies to: 1) invite, attract, and “weave” new people into the evaluation process; 2) work around blockages; and 3) boost progress (20 min).

IMPROMPTU NETWORKING

Use Impromptu Networking by *Liberating Structures* at the beginning of a new evaluation engagement to help participants make loose yet powerful connections.

Facilitating this activity will help to establish a pattern of engagement throughout the evaluation.

Tech Materials Needed	Time Needed	Participant *n*
Breakout groups in pairs (Zoom)	60-90 mins	Unlimited

Planning Checklist

- ❏ Facilitators should choose pairs so that strangers or colleagues in different groups/functions can be paired together.
- ❏ Develop your questions. Ex: "What do you hope to get from and give to this evaluation project?"

In-Meeting Steps

Step 1 Ask the questions and let the group know you will be pairing them off to share their answers to the questions with their partner.

Step 2 Pair the group off. In each round, give 2-5 minutes per person to tell their partner their answers to the questions. Allow time for discussion before bringing the large group back together.

Step 3 Rotate partners for up to three more rounds.

Step 4 As a large group, discuss themes, commonalities, new ideas that came up, etc.

JOURNEY MAP

Use a Journey Map by *Service Design Tools* to design a representation that describes step-by-step how a user interacts with a service. The process is mapped from the user perspective, describing what happens at each stage of the interaction, what touchpoints are involved, and what obstacles and barriers they may encounter. The journey map is often integrated as an additional layer representing the level of positive/negative emotions experienced throughout the interaction.

Tech Materials Needed	Time Needed	Participant *n*
Zoom + Stormboard	60 - 90 mins	Unlimited

Planning Checklist

- ❏ Create a Stormboard using the Customer Journey Map template (the simple version, not the alternative) and send an invite to your participants via link or email invite through the Share feature.
- ❏ In the last (fifth) row, in the lower left of the template, type in "Barriers and Obstacles" below "Opportunities."
- ❏ Create a legend for the 5 categories on the left: Doing, Thinking, Feeling, Opportunities, Barriers/Obstacles. Assign each group a Post-it color or shape. Place this legend in the corner of your board.

In-Meeting Steps

Step 1 Ask each participant to map out their interactions with an organization or service provider by generating answers to the column for the first stage in sequence, starting with "Doing" for 2 minutes, moving to Thinking after 2 minutes, and so on. When you get to feeling, be sure to ask participants to label their positive **and** negative emotions. Give each part of the stages 2 minutes each, so you spend a maximum 10 minutes per stage. Repeat for each stage.

Step 2 Ask participants to use line connectors to help to establish a flow or relationship between different touchpoints. Click once on a note and click and drag one of the arrows around the sticky note to the one that you want to connect it to. Participants can customize the labels of the connector lines to display what they represent to them, as well as the color and direction of the arrow, by clicking the circle on the line.

Step 3 Bring everyone back to the large group. Ask people to share what they learned from the map of interactions they co-created. What are some themes that emerged?

What surprised you? What made you wonder? What did you learn from others that stuck with you? What insights have you gained into the topic being discussed? What do you want to know more about?

1-2-4-ALL

Use 1-2-4-All by *Liberating Structures* to engage everyone simultaneously, no matter how large the group, in generating questions, ideas, and suggestions that are rapidly sifted by the whole group. This can be helpful with high-level decisions such as identifying the most impactful evaluation question or low-level decisions such as creating the evaluation plan.

Tech Materials Needed	Time Needed	Participant Count
Jamboard (Zoom breakout rooms work, too)	20 - 30 min	Unlimited

Planning Checklist

- ❏ Make sure you have Virtual break out rooms for participants to work face-to-face in pairs and foursomes
- ❏ Use Jamboard or Miro (in breakout rooms on Zoom will work, too) for participants to record observations and insights
- ❏ Develop a question you want answered by the diverse perspectives of the multiple stakeholders invited to the meeting. Examples: What evaluation questions do you have? What does success look like for your participants?

In-Meeting Steps

Step 1 Ask the whole group to join in a silent self-reflection on the question posed by the facilitator (5 min).

Step 2 Generate ideas in pairs, building on ideas from self-reflection (5 min).

Step 3 Share and develop ideas from your pair in foursomes (notice similarities and differences) (8 min).

Step 4 Bring the whole group back. Ask, “What is one idea that stood out in your conversation?” Each group will share one important idea with all (10 min). Repeat the cycle as needed.

NINE WHYS

Use **Nine Whys** by *Liberating Structures* to clarify the purpose of the evaluative work at hand and its importance.

Tech Materials Needed	Time Needed	Participant Count
Jamboard + Zoom	30 - 40 min	Unlimited

Planning Checklist

- ❏ Develop the question you will be diving into. Ex: “What (evaluation) questions do you have about the work you do? Why is the answer to this important to you? Why?”

In-Meeting Steps

Step 1 Using 1-2-4-All, each person in a pair is interviewed by his or her partner for 5 minutes. Starting with, “What (evaluation) questions do you have about the work you do?” the interviewer gently seeks a deeper answer by repeating the query: “Why is the answer important to you?” Encourage them to continue probing, asking “Why?” until their partner can go no deeper because they have reached the fundamental answer to the question. Switch roles after 5 minutes. (10 min)

Step 2 Each pair shares the experience and insights from the last step with another pair in a group of four (10 min).

<u>Step 3</u> Invite the whole group to reflect by asking, “How does the information we learned here today influence the next steps we take?” (10 min).

DATA COLLECTION

Use virtual participatory data collection methods as an alternative to traditional methods to collecting and exploring data.

FISHBOWL

Use **Fishbowl** from KStoolkit *(et al.)* to create a space virtually for a small group of people (5-6) to discuss among a larger group.

Tech Materials Needed	Time Needed	Participant Count
Zoom	20 - 30 min	Unlimited

Planning Checklist

- ❑ Make sure you invite a diverse enough group of stakeholders to create the intended discussion dynamic. You will want to invite those who have direct experience with the program, outcome or challenge you will be exploring, as well as enough people who do not have direct experience.

In-Meeting Steps

Step 1 Invite a small group of people that have direct experience with the program, outcome, or challenge to be explored into the “center” by asking them to turn their video and audio on while asking the other group, the “outer circle,” to turn theirs off.

Step 2 Ask the "center" group to talk about the challenge together, sharing stories of their direct experience and insights as they might do if they were sitting in a coffee shop or at dinner together. They talk to each other, NOT the audience.

Step 3 Next, invite the audience to ask questions and share their insights about the conversation while those in the "center circle" just listen. Gather all the questions. You might want to use file cards or have someone capture all the questions on chart paper.

Step 4 Invite the group to dialogue with each other between the two circles. Some good questions for the debrief: "What did you hear that surprised you? How has your perspective on the issue changed? What questions are still open for you?"

CARD SORTING

Use **Card Sorting**, a design method originating in cognitive psychology, to gather and organize ideas that draw on the knowledge of the whole group. This structure creates a method for capturing the information from the Ideation + Design structure 1-2-4-All (although below we will abbreviate the structure to be 1-4-All). It then provides a lead into the Data Analysis structure Easy as Pie.

Tech Materials Needed	Time Needed	Participant Count
Zoom + Stormboard	20 - 30 min	5 - 10

Planning Checklist

☐ Create a new **Stormboard.**

☐ Create a **shareable link** to the Stormboard so you can share with participants.

☐ Divide the expected number of participants by 4 in order to calculate the number of breakout groups you will be hosting. Create a place for each breakout group around the borders of the Stormboard.

☐ Set the number of votes allowed per person to 10.

In-Meeting Steps

Step 1 When the meeting begins, share the link to your Stormboard and give everyone time to sign up and sign in.

Step 2 Have folks minimize the board for now. Ask a question or pose a prompt for which the group's feedback is needed.

Step 3 In silence, each participant reflects on the question and writes as many ideas as possible down on a piece of paper or text document on their computer (5 mins).

Step 4 Tell the participants that you are about to break them into random groups of four via breakout rooms, and that they should remember their breakout room number. Once in their breakout room, they should "meet" their other room members in their designated place on the Stormboard. Instruct them to create post-its that represent the ideas that each person came up with. Similar ideas can share one post-it (10 mins).

Step 5 Bring the breakout rooms back together. Go room by room and have them share 1-2 post-its that the group seemed to agree upon the most. Move those post-its to the center of the board and begin grouping them into similar ideas. After all the ideas have been shared, ask all to look at the center of the board and make any changes they see fit to the current groupings.

Step 6 Show participants how to vote on post-its. Tell them they have 10 votes to use on the post-its that resonate the most with them. This will allow you to easily see the ideas with which the group most agrees.

APPRECIATIVE INTERVIEW

Use **Appreciative Interview (AI) by** *Liberating Structures* to spark positive movement by exploring what works and uncovering the root causes that make success possible. Stakeholders are energized while sharing their success stories, offering social proof of local solutions, promising prototypes, and exciting innovations while providing data for recognizing success patterns.

Tech Materials Needed	Time Needed	Participant Count
Zoom	20 - 30 min	Unlimited

Planning Checklist

- ❑ Create the question(s) that your participants will be answering. The theme or question(s) should be based on your evaluation question(s) and focus on a time the person or program was successful.

In-Meeting Steps

Step 1 If pairs can self select, ask "Pair up preferably with someone you don't know well." --- If pairs must be selected by the facilitator, say "I will be pairing you up with someone I think you don't know well."

Step 2 Describe the sequence of steps and specify a theme or question(s) to which participants are expected to respond. The theme or question(s) should be based upon your evaluation question and should focus on a time the person or program was successful. Ex: Tell a story about a time you know your program had a positive impact on a participant (3 min).

Step 3 In pairs, participants take turns conducting an interview and telling a success story, paying attention to what made the success possible (7-10 min. each; 15-20 min. total).

Step 4 In groups of four, each person retells his or her partner's story. Ask participants to listen for patterns in conditions that supported success. Have a recordkeeper for the group record the patterns on post-its on their Jamboard page (or your preferred virtual platform) (15 min).

Step 5 Have groups share out their insights and patterns. Share your screen and record their responses on a fresh page in Jamboard (or your preferred virtual platform). Summarize if needed.

CONVERSATION CAFE

Use **Conversation Café** by *Liberating Structures* (and stewarded by the National Coalition on Dialogue and Deliberation) to collect data about a confusing or shocking event while providing stakeholders the space to process and for new strategies to emerge. The format helps people have calm and profound conversations with a simple set of agreements and rounds of dialogue, with little or no unproductive conflict.

Tech Materials Needed	Time Needed	Participant Count
Zoom breakout rooms + Jamboard **or** Google Slides	60 - 90 min	At least 3 - 7 to form a group + unlimited

Planning Checklist

- ❏ Create the question(s) that your participants will be answering. The theme or question(s) should be based on your evaluation question(s) and focus on a time the person or program was successful.

In-Meeting Steps

Step 1 Invite all the participants to prepare to gather in small mixed and diverse groups to listen to one another's thoughts and reflect on a shared challenge.

Step 2 State the theme of the conversation, usually in the form of a question.

Step 3 Explain that there will be four rounds of conversation at every table. The first two rounds will use a virtual talking object and will take place in breakout rooms, the third round will be an open conversation with the larger group, and the final round will once again use a virtual talking object but this time within the larger group. Give the duration of each round.

Step 4 Read the six Conversation Cafe agreements: (1) Suspend judgment as best as you can; (2) Respect one another; (3) Seek to understand rather than persuade; (4) Invite and honor diverse opinions; (5) Speak to what has personal meaning; (6) Go for honesty & depth without going on & on & on.

Step 5 Ask for someone in each group to volunteer as the host. The host is a full participant whose role is to gently intervene only when a participant visibly fails to observe one of the six agreements, most frequently talking on and on.

Step 6 Explain how the virtual talking objects will work: the host will call on each participant in the room one by one. That person will hold up an object around them (pen, piece of paper, cell phone, etc.) so that it can be seen in their video feed while they speak. Once they are finished, they will put their object back down on their desk. Everyone will get an opportunity to speak. If someone prefers not to, they can pass.

Step 7 Create breakout rooms of 3-7 people per group. Instruct the larger group that the first round will be with a talking object and that each person will have only 1 minute to speak. Tell them the prompt (each person shares what he or she is thinking, feeling, or doing about the theme or topic) and send them into their breakout rooms.

Step 8 When the larger group is back together, tell them that the second round will also be with a talking object. Each person will once again have only 1 minute to speak. Tell them the prompt (each person shares thoughts and feelings after having listened to everybody in their small group) and send them back into their same breakout rooms.

Step 9 Third round: open conversation with the large group. You as the facilitator can either ask folks to raise their hands if they'd like to speak and call on individuals, or you can use a talking object and systematically call on every participant (20-40 mins). Have a co-facilitator or a volunteer take notes.

Step 10 Fourth round: structured conversation with a talking object within the large group. Each member shares their "takeaway" from the conversation. Be sure to call on every participant, allowing for the ability to pass (5-10 min). Have a co-facilitator or volunteer take notes.

PHOTOVOICE

Use **Photovoice,** developed by Caroline C. Wang and Mary Ann Burris in 1992, to help identify the experiences, strengths, challenges, and/or successes of participants. This method can help people access hidden knowledge such as feelings, attitudes, and patterns that are difficult to express with word

Tech Materials Needed	Time Needed	Participant Count
Zoom + Google Slides	30 - 40 min	5 - 10 people

Planning Checklist

- ❏ Ask the participants from whom you want to collect data to take or find photos that represent their response to a prompt or series of prompts you present to them. This prompt is designed to help you gain more clarity about your evaluation question.
- ❏ Have participants share their photos with you via email. Place all the photos into a Google Slide document with one slide for each participant.
- ❏ Create a link to share the document. Be sure the link allows for edit access.

In-Meeting Steps

Step 1 Share the link to the Google Slides.

Step 2 Have each participant find their slide and identify 1-3 of the photos they think best responds to the prompt. Have them record what the photos are of and how they relate to the prompt (10 mins).

Step 3 Put the participants into breakout groups of 3-4. Have them take turns sharing their photos and how they relate to the prompt. Ask them to take note of similarities and themes. Ex. Questions: "What do you *see* here? What is really *happening* here? How does this relate to our prompt? *Why* does this concern, situation, or strength exist? How can we become *empowered* through our new understanding? And, what can we *do*?"

Step 4 Bring the whole group back together. Have a representative share out the themes and similarities for their breakout group. Record their responses on a blank slide in the deck. Share your screen so that everyone can see you taking notes.

STORYTELLING

Use Storytelling, a technique profiled by USAID's TOPS program (PDF here), to gather knowledge that incorporates context, nuance, and tacit knowledge. Storytelling is invaluable in providing context through key background information.

Tech Materials Needed	Time Needed	Participant Count
Zoom + Google Docs	25 - 30 min	5 - 10 people

Planning Checklist

☐ Identify the theme, event, activity, etc. you want to learn more about about

☐ Create a Google Doc for taking notes

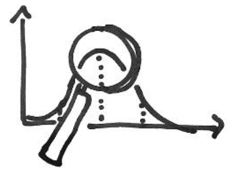
In-Meeting Steps

Step 1 Share with the group the prompt to which they will be responding. Create enough breakout rooms for people to gather in groups of two. Tell them that they will each have two minutes to tell a story centered on the prompt. After two minutes, the next person will begin their story. Let them know that you will post an announcement when it's time to switch storytellers (5 mins).

Step 2 Bring the group back together. Randomly create new breakout rooms with different pairs. Give them the same instructions - 2 minutes per story - before sending them into their new rooms. Make an announcement so that they switch storytellers after two minutes.

Step 3 Repeat this process one or two more times.

Step 4 Bring everyone back to the large group. Ask people to share what they learned from the stories they heard. What are some themes that emerged? What surprised you? What made you wonder? What did you learn from telling your own story? What insights have you gained into the topic being discussed? What do they want to know more about?

DATA ANALYSIS 

Use virtual participatory data analysis methods to identify salient findings with multiple stakeholders. Use these activities to talk to your audience about results in an engaging manner that leads to making meaning and contributes to deeper understanding.

HIERARCHICAL CARD SORTING

Use **Hierarchical Card Sorting (HCS)** as a participatory method to engage stakeholders in taking a set of concepts or topics and sorting them into groups or categories to generate insights. HCS was developed by Rick Davies and influenced by Gregory Bateson, and found through the BetterEvaluation website. It is also used in program evaluation to determine if engagement issues are due to cross-cultural problems of understanding the *emic* viewpoints of groupings or group labels.

Tech Materials Needed	Time Needed	Participant Count
Zoom + Stormboard	30 - 40 min	2 - 8 people

Planning Checklist

☐ Create a blank **Stormboard**.

☐ Obtain a **shareable link** so you can share with participants

Identify a list of themes that came up during qualitative data collection. Try to avoid using too many (say 25), otherwise the task will become time consuming and too difficult. Write down each theme on a separate Post-It card on the Stormboard and number each card.

In-Meeting Steps

Step 1 Invite all meeting members into the Stormboard.

Step 2 Ask the respondent to tell you about some of the differences between all these themes. This is a warm up exercise that generates a shared awareness of the large number of differences that exist.

Step 3 Ask the participants to sort all the cards into two piles of any size according to what they think is the most important difference between all the themes represented on the cards. If there is a particular issue that you want to explore, clarify the question by asking, "In your perspective, what do you think is the most significant difference between…?" or "Considering the objectives of this program, what do you think is the most significant difference between…?" Emphasise that a distinction is important if it makes a difference. Check the significance by asking "What difference does this difference make ?" If one can't be identified then suggest to the participants that they consider if there are other differences which might be more important.

Step 4 Record which cards are in which pile, the reported difference between the two piles, and what difference that difference makes. You can do this with a screenshot and notes in a separate text document.

Step 5 Take one of the two piles at time and repeat Steps 3 and 4 above. Then repeat this process with the second pile.

Step 6 Repeat the same process until there is only one card left in each pile. If you have many cards to start off with you may decide to end when each group has 2 or less cards, or some other lower limit.

The results of the card sorting exercise is called a **treemap**, which can be summarized in Excel (rows = cases, columns = successive sorts, cell contents = differences).

Consequences of the differences can be inserted as Comments in the relevant cell, or as different coloured text in the same cell as the difference.

For evaluation-based discussions, some additional steps are needed:

Step 7 Call the participants' attention to the results of the first sort and ask evaluative questions such as "which of these two groups indicates the highest level of success?" Then move to the second level of sorting and ask the same question about the results of each of the two sorts at this level, then move to the next level and so on. The answers will enable all the groups of themes to be sorted in rank order, from most to least successful. This process is extremely adaptable to whichever evaluative factors the investigator is interested in exploring. PS: In addition to asking about relative success, the answers can be followed up with a "Why do you think so?" question.

EASY AS PIE

Use **Easy as Pie** by *Public Profit* to explore how a set of activities are contributing to a major goal or outcome by visualizing all the possible influences that impact an outcome. Then, each influence is given a weight and assigned a slice within a pie chart. The Data Collection structure Card Sorting provides a good lead into this structure.

Tech Materials Needed	Time Needed	Participant Count
Zoom + Google Slides	30 - 40 min	Unlimited

Planning Checklist

☐ Hold a Card Sorting session, or obtain a list of influential factors/themes by some other means

☐ Create a table with influential factors/themes in one column and the number of votes it received in another. Create a pie chart from that table with each influential factor/theme and its percentage of the whole labeled.

☐ Transfer the chart to Google Slides. On the same slide, type out the reflection questions you want the group to consider.

☐ Create a shareable, view-only link to the slide.

In-Meeting Steps

Step 1 When you're ready to begin this activity, share your screen with the pie chart. Talk participants through each slice of the chart.

Step 2 Tell participants that you are going to put them into breakout rooms to discuss their reactions to the chart. Share the list of questions you want them to discuss. Sample questions include: what resonates with you? What is surprising? What changes would you make to this chart?

Step 3 Create random breakout groups and allow them to discuss for 5 minutes.

Step 4 Bring the group back together, shuffle the groups randomly, and break them out into rooms again (5 minutes).

Step 4 Bring the group back together. Have a representative share out their room's reflections. Take notes on a fresh slide.

GALLERY WALK

Use **Gallery Walk,** a technique profiled by USAID's TOPS program (PDF here), to take any set of aggregate data from your Data Collection phase and invite participants to create their own conclusions and interpretations of it.

Tech Materials Needed	Time Needed	Participant Count
Zoom + Google Slides **or** Stormboard	30 - 40 min	Unlimited

Planning Checklist

☐ Create a shared Google Slides or Stormboard for your group and drop in your aggregate data or findings, preferably one item in each slide so that participants can view each of them.

☐ Number your slides/items so your participants can take note.

☐ Prepare questions that can generate a discussion on the things that stand out the most with the whole group. You can find example questions in Step 2 below.

In-Meeting Steps

Step 1 Ask participants to quietly view each of the 10 (or however number of) findings in the slidedeck and make notes in a separate personal document.

Step 2 Invite participants to prepare to break out into pairs and then groups of four to discuss their gallery walk. Ask questions that generate a discussion on the things that stand out the most with the whole group. Ex. Questions: (1) What confuses you the most? (2) What do you feel strongest about? (3) What is most insightful for you?

Step 3 Use 1-2-4-All to generate responses to the discussion questions by creating break out groups of two, then four, then bringing everyone together for the last part of 1-2-4-All in Step 4.

Step 4 Ask, "What is one idea that stood out in your conversation?" Each group will share one important idea with all (10 min). A facilitator or volunteer should take notes.

DATA WALKS

Use **Data Walks,** a traditional teaching technique profiled by the Urban Institute (PDF here), to empower community stakeholders with useful information and stories about their community. Data walks are convenings geared toward stakeholders, meant to review community data and research findings in an accessible and meaningful way. Stakeholders can share, analyze and make meaning from data jointly. The goal is to empower stakeholders to be involved in key decisions.

Tech Materials Needed	Time Needed	Participant n
Zoom + Google Slides **or** Stormboard	25 - 30 min	10 - 30 people

Planning Checklist

☐ Create a presentation using **Google Slides** (or recommended technology platform of your choice). In your presentation, you should include the data in graph, chart, and text form with an easy explanation of where that data comes from.

☐ Create a **shareable link** to the Google Slide so you can share with participants (make sure to select the option that ***anyone with the link can view [not edit]***).

☐ Create a comprehensive list of people to invite to your virtual Data Walk.

☐ Plan to have translation if multiple languages are spoken in the community.

In-Meeting Steps

Step 1 Present an overview of the data to attendees. Tell them that you will be giving them time to look through the data individually before we discuss their reactions to the data.

Step 2 Provide a link to the slide deck. Invite the participants to quietly flip through the slides and study the material.

Step 3 After 5-10 minutes, give them the following prompts: (1) What confuses you the most? (2) What do you feel strongest about? (3) What is most insightful for you?

Step 4 Ask the participants to answer these questions in small breakout groups.

<u>Step 5</u> Bring the group back together. Ask them to share the things that stood out the most within their breakout groups. Record their responses on a blank slide, sharing your screen so that everyone can see.

DATA PLACEMATS

Use **Data Placemats** as a participatory analysis technique and facilitative process, thoroughly discussed by Veena Pankaj and Ann K. Emery in *New Directions for Evaluation*. After data collection (surveys, etc.), a data placemat can be created for **each impact area**. The data placemat is a visual document the size of a placemat that **displays themes from the collected data, in the form of charts and graphs.** It is used as a facilitation technique to engage stakeholders in data interpretation and analysis to make meaning of the data and eventually use significant and invaluable insights to draw conclusions and help tell a story. The process of data placemats allows the stakeholders to "co-create new knowledge with each other and with the evaluator.

Tech Materials Needed	Time Needed	Participant n
Zoom + Google Slides **or** Stormboard	25 - 30 min	5 - 10 people

Planning Checklist

☐ Create one or a series of data placemats for each impact area using **Google Slides** (or other technology platform of your choice). In your presentation, you should include the data in graph, chart, and text form with an easy explanation of where that data comes from.

☐ Create a **shareable link** to the Google Slide so you can share with participants (make sure to select the option that ***anyone with the link can <u>view</u> [not edit]***).

☐ Create a comprehensive list of people to invite to your virtual Data Placemats event.

In-Meeting Steps

Step 1 Present an overview of the data to attendees. Tell them that you will be giving them time to look through the placemat(s) individually before we discuss their reactions.

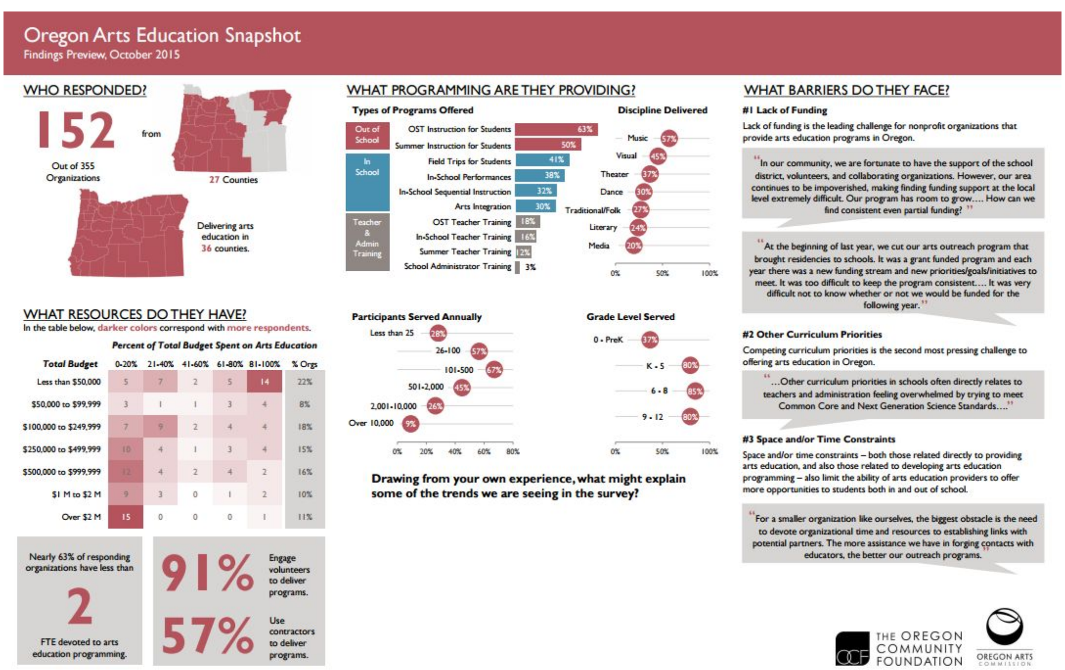
Step 2 Provide a link to the slide deck. Invite the participants to quietly flip through the slides and study the material.

Step 3 After 5-10 minutes, give them the following prompts:

1. What confuses you the most?
2. What do you feel strongest about?
3. What is most insightful for you?

Step 4 If there is only one placemat, have the group respond to the questions all together. If you have more than one placemat, divide the larger group into that number of breakout rooms. Ask the participants to answer the above questions in their smaller groups.

Step 5 Bring the group back together. Ask them to share the things that stood out the most within their breakout groups. Record their responses on a blank slide, sharing your screen so that everyone can see.



MIND THE GAP

Use **Mind the Gap** by *Public Profit* to explore meaningful differences among data by generating discussion around **what might contribute** to those differences.

Tech Materials Needed	Time Needed	Participant n
Zoom + Google Sheets + Stormboard	45 - 90 min	5 - 10 people

Planning Checklist

- ☐ Create a shared Google Sheets document with the participants.
- ☐ Create a Stormboard for voting.

In-Meeting Steps

Step 1 Ask your group to take a minute and look at the data you would like to analyze and then walk through the data set with the group. Ex. Guiding Questions: "What figure are you interested in learning more about? What groups are the most meaningful for us to compare?" In the example data set below, the group may decide that it is interested in seeing pretest and post-test changes for boys versus girls. You can take a poll on Zoom or vote on Stormboard with post-it notes to find out what your group is most interested in seeing.

Example Data Set

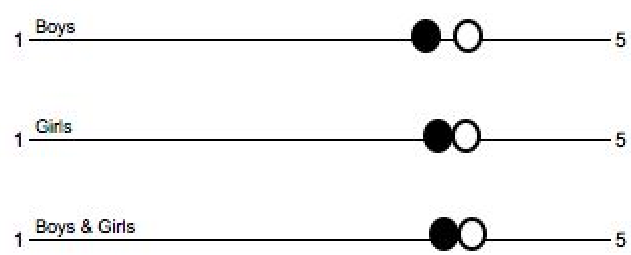
STUDENT	GENDER	PRE-TEST	POST-TEST
Student 1	Male	4.1	4.3
Student 2	Female	3.5	3.1
Student 3	Female	2.47	2.6
Student 4	F	3.7	4.1
Student 5	Male	4.5	4.5
Student 6	Female	4.6	4.6
Student 7	Male	3.2	3.3
Student 8	Male	2.1	2.5
Test scores on a scale of 1-5			

Step 2 Ask your group to calculate averages (sum of the all the values divided by the number of values) Ex. Values to Calculate: "What is the total average for the entire data set? What are the averages for each of the groups we are interested in comparing?"

Example Calculations:
Based on the example data set in Step 1, you would calculate:
Pre-test avg. for boys: 4.1+ 4.5 + 3.2 + 2.1 = (13.9) / 4 boys = 3.48
Post-test avg. for boys: 4.3 + 4.5 + 3.3 + 2.5 = (14.4)/4 boys = 3.65
Pre-test avg. for girls: 3.5 + 2.47 + 3.7 + 4.6 = (14.27) divided by 4 girls = 3.57
Post-test avg. for girls: 3.1 + 2.6 + 4.1 + 4.6 = (14.4) divided by 4 girls = 3.6
Pre-test avg. for boys and girls: 4.1 + 3.5 + 2.47 + 3.7 + 4.5 + 4.6 + 3.2 + 2.1 = (28.17) divided by 8 boys and girls = 3.52
Post-test avg. for boys and girls: 4.3 + 3.1 + 2.6 + 4.1 + 4.5 + 4.6 + 3.3 + 2.5= (29) divided by 8 boys and girls = 3.62

Step 3 Ask participants to set up their individual sheets with the following: (1) Draw a line across their sheets of paper; one line for every group we calculated averages for. (2) Label the length of the line.

Step 4 Guide participants in plotting the figures by asking them to draw a bubble along the line that approximately corresponds to the values for each group.



The dots correspond to the group averages you calculated in step 2. TIP! In this figure, a filled-in bubble represents the pretest scores and an open bubble represents a post-test score to make it easier to tell them apart. You can also use different colors.

Step 5 When participants are done plotting their scores, have them determine where the greatest differences or gaps in the data occur.

Step 6 Ask participants to share out their responses to the following questions:

- ★ Where are the greatest differences?
- ★ Why might these differences occur?
- ★ What additional information might you need in order to better understand these differences?

T-SHIRT SLOGAN

Use **T-Shirt Slogan** by *Public Profit* to guide participants through the process of synthesizing what a set of data reveals into summary statements and turning the summary statements into memorable and to-the-point t-shirt slogans that are then shared and discussed by the group.

Tech Materials Needed	Time Needed	Participant *n*
Zoom + Jamboard (or similar solution); T-shirt handout (see below)	20 - 25 min	Any size

Planning Checklist

☐ Create a **shareable link** to the Jamboard so you can share with participants (make sure to select the option that ***anyone with the link can edit***).

☐ Divide the expected number of attendees into groups of 3-4. Make one page for each group.

☐ Visualize the data you would like the group to interpret.

☐ Place an outline of a t-shirt and a copy of the visualization on each page in the Jamboard.

In-Meeting Steps

Step 1 Ask participants to remember their breakout room number when it is assigned. Have each team navigate to their group number's page. Ask them to think about what the data means and how they can convey that message through a t-shirt slogan.

Step 2 Ask teams to work together on a design for their t-shirts, including the slogan in the middle (15 mins)

Step 3 Come back together and have groups share their t-shirt slogans.

Step 4 Debrief the activity by asking questions such as: (a) What are some common themes you recognize across the different t-shirts? (b) What challenges did you have in coming up with a slogan? (c) What did you learn about converting numbers and data into a meaningful message?

ACTION PLANNING 

Use virtual **participatory action planning methods** to reveal and sift through **actionable ideas** for **changes** that can be made right now within your capacity, and to create collective momentum for future **coordinated action**.

25/10

Use **25/10** by *Liberating Structures* to help a large crowd rapidly generate and sift through the whole group's most powerful actionable ideas.

Tech Materials Needed	Time Needed	Participant *n*
Zoom + Google Slides	20 - 30 min	10 - 30

Planning Checklist

☐ Create a **Google Slide deck** that has a **numbered** slide for each participant with their name on it and with a Post-It note in each slide.

☐ Create a **shareable link** to the Google Slide so you can share with participants (make sure to select the option that ***anyone with the link can edit***).

☐ Be prepared to randomize your participant *n* in order to randomly assign a numbered slide to each participant. You can do this by going to Research Randomizer (you can use this formula to help you: set of numbers = 1; number per set = participant *n;* numbers range = 1 to participant *n;* each number to remain unique = yes; sorting numbers that are generated = no; and your options of how to view and whether to use placemarkers is up to you).

In-Meeting Steps

Step 1 Once in your virtual session, when participants are on both the virtual platform and the Google Slides (and you are sharing your screen with the Google Slides open), invite your participants to think boldly and discover the most attractive of all the ideas in the room by asking, ***"If you were ten times bolder, what big idea would you recommend? What first step would you take to get started?"***

Step 2 Explain the process to the group: (1) Each participant types on their virtual Post-It note, on their specific **numbered slide** in the whole slide deck, their bold idea **and** first step.

Step 3 Then randomly assign a **numbered slide** to each participant using Research Randomizer (see Planning Checklist above) or another random number **assigner (not generator).** Tip: Ask each participant to note their number somewhere as you call it out. It will be hard to find someone's randomly assigned number in one cycle if they lose it, unless you use both Research Randomizer's placemarkers and an already existing spreadsheet of participant names to keep track of people's placemarkers (e.g. p1 = Molly, p2 = Joey). After you assign all the slides, and then ring the bell to indicate the "Read and Score" scoring cycle, the participants can read their virtual Post-It. Ask participants to patiently wait for this cycle to begin before beginning they read their virtual Post-It.

Step 4 Tell the participants to read the virtual Post-It note in the numbered slide they were assigned without talking. You can also have them share in pairs in a breakout room to exchange thoughts on their own cards (based on the # they got from the randomizer).

Step 5 Ask the participants to then individually rate the idea on the Post-It note with a score of 1 to 5 (1 for low and 5 for high) and write their score on the Post-It note. This is called "Read and Score."

<u>Step 6</u> Cards are reassigned a second time ("Mill and Pass") (again, **no reading until the bell rings - only random assignment for all participants**). Ring the bell and the "Read and Score" scoring cycle repeats. This is done for a total of five (5) three-minute scoring rounds.

<u>Step 10</u> Ask participants to add the 5 scores on the post-it in their slide.

<u>Step 11</u> Find the best-scoring ideas with the whole group by conducting a countdown. Ask, "Who has a 25?" Invite each participant, if any, holding a Post-It scored 25 to read out the idea and action step. Continue with "Who has a 24?," "Who has a 23"…. Stop when the top ten ideas have been identified and shared.

<u>Step 12</u> End by asking, "What caught your attention about 25/10?"

15% SOLUTIONS

Use **15% Solutions** by *Liberating Structures* to reveal actions that can be done immediately with the freedom and resources each person has and to show that there is no reason to wait around, feel powerless or fearful. These activities will create momentum, and may make a BIG difference. Get your group to focus on what is within their discretion instead of what they cannot change.

Tech Materials Needed	Time Needed	Participant *n*
Zoom	60 - 90 min	4 - 8 per breakout + Unlimited

Planning Checklist

☐ Create a **Stormboard,** with the list of questions in Step 1 visible to all participants. You can paste the questions below in a Stormboard text box, or send the list out to participants beforehand.

In-Meeting Steps

Step 1 In connection with their personal challenge or their group's challenge, ask "What is your 15 percent? Where do you have discretion and freedom to act? What can you do without more resources or authority?"

Step 2 First alone, each person generates their own list of 15% Solutions. 5 min.

Step 3 Individuals share their ideas with a small breakout group (2 to 4 members). 3 min. per person and one person at a time. 15-20 min.

Step 4 Group members provide a consultation to one another (asking clarifying questions and offering advice). 5 to 7 min. per person and one person at a time. 20-35 min.

OPEN SPACE TECHNOLOGY

Use **Open Space Technology** by *Liberating Structures* to release and liberate inherent creativity, action, leadership and capacity to self-organize in groups of any size.

Tech Materials Needed	Time Needed	Participant *n*
Zoom + Google Slides + Google Sheets	60 - 90 min	Unlimited

Planning Checklist

☐ Create a shared Google Slides deck with a numbered list of your evaluation findings on a slide.

☐ Create a shared Google Sheets spreadsheet with a sign-up sheet format with "Participant name" in one column, "Evaluation finding 1" in another column and "Evaluation finding 2" in a third column. Leave everything else empty. Participants will use this sign-up sheet to sign up for the findings they want to talk more about by inputting their name under the “Participant name” column and the numbers of the findings they want to sign up for in “Evaluation finding 1” and “Evaluation finding 2”

In-Meeting Steps

Step 1 Invite participants to prepare to co-construct the agenda by taking a look at the Google Slide with the list of evaluation findings and signing up directly in the Google Sheets spreadsheet for the findings they want to talk about in their two rounds.

Step 2 To organize the first round of breakout rooms, start by looking at the first findings column and grouping break out members together who have the same numbers in this column. (TIP! Sort the numbers in each of the two findings columns, and expand the selection, so Google Sheets can automatically group those who signed up for each finding together.) Create breakout rooms according to the sign-up list. Make sure each finding has at least two people signed up before creating a breakout room.

Step 3 Ask the participants to self-organize one person - preferably the one most passionate for the finding - to be the host of the discussion (the host will lose their sign-up to talk about the second finding, but have the privilege of facilitating two sessions). Tell the group the host will be facilitating the 30-minute session about the finding, while the other people in the breakout group develop recommendations and action plans from the finding. Notes should be taken by the group and can be posted in a Sticky note on the shared findings slide in Google Slides. The host should label the Sticky notes by the group they facilitate so that everyone can keep track of whose recommendations and action plans are on which Sticky note (e.g. label the first Sticky, “Group 1” and the second Sticky, “Group 2”). Create the breakout groups. (30 mins)

Step 4 Repeat. Organize the second cycle of breakout rooms as in Step 2, but look at the second findings column instead of the first one. Group the participants together who have the same numbers in this column by sorting. (30 mins)

Step 5 Debrief. Ask the participants to take a look at all the proceedings that were distributed in the Google Slides next to each of the findings. (5 mins)

Step 6 For each finding that had a breakout group, ask participants in both breakouts to take a look at each other’s recommendations and action plans. Ask the participants if they notice any similarities or big differences in the way they perceived the finding, or if anything in particular stood out in their recommendations and action plans. Then ask the whole group whether they had any questions for either breakout group. (20 mins)

WHAT, SO WHAT, NOW WHAT?

Use **What, So What, Now What? W³** by *Liberating Structures* to look back on progress to date and decide what adjustments are needed, together. Shared progression through the stages makes possible reflecting on a shared experience that builds understanding and motivates coordinated action, while avoiding conflict about what to do.

Tech Materials Needed	Time Needed	Participant *n*
Zoom + Google Docs or Jamboard	30 - 40 min	5 - 7 per breakout + Unlimited

Planning Checklist

☐ Create a Google Doc or Jamboard with your findings, data sets or salient facts about the findings that the group discovered in any earlier participatory method.

In-Meeting Steps

Step 1 If needed, describe the sequence of steps and show the Ladder of Inference (see below). If the group is 10–12 people or smaller, conduct the debrief with the whole group. Otherwise, create small break out groups of 5-7 people each.

Step 2 Facilitator shares findings with the group so participants can look at the data and see what happened (i.e. the “WHAT?”, or the salient observations that have been collected). Salient **facts** about the findings that the group discovered earlier using participatory methods can be shared with the whole group.

Step 2 Ask the group, “SO WHAT? Why is that important? What patterns or conclusions are emerging? What hypotheses can you make?" Then, after the sense making is over, ask, "NOW WHAT? What actions make sense?" If needed, remind participants about what is included in the "SO WHAT?"

Step 3 Ask people to work 1 min alone on "Why is that important? What patterns or conclusions are emerging? What hypotheses can I/we make?" 1-2 min. alone.

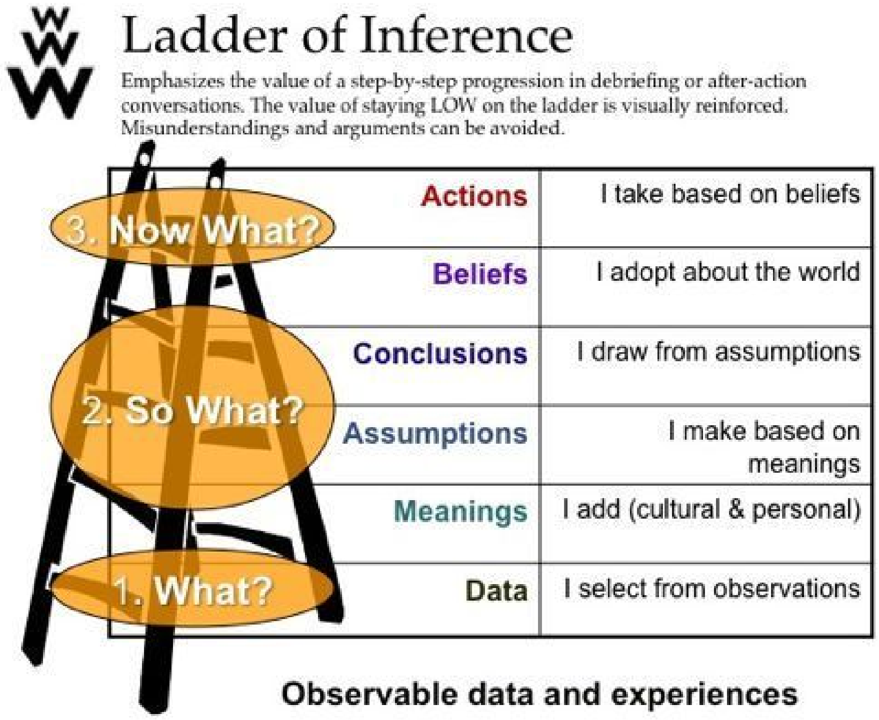
Step 4 Break out groups of 5-7 people, facilitated by one person in each group to keep the "SO WHAT?" discussion going and ensure each person that wants to discuss their answer can in the time allowed. 2–7 min. in small group.

Step 4 Salient **patterns**, **hypotheses**, and **conclusions** from small groups are shared with the whole group and collected. 2–5 min.

Step 5 NOW WHAT? Participants work 1 min. alone on "Now what? What actions make sense?" 1-2 min.

Step 6 Break out groups of 5-7 people, facilitated by one person in each group to keep the "NOW WHAT?" discussion going and ensure each person that wants to discuss their answer can in the time allowed. 2–7 minutes in small groups.

Step 6 Actions are shared with the whole group, discussed, and collected. Additional insights are invited. 2–10 minutes.


Ladder of Inference
Emphasizes the value of a step-by-step progression in debriefing or after-action conversations. The value of staying LOW on the ladder is visually reinforced. Misunderstandings and arguments can be avoided.
3. Now What?
Actions
I take based on beliefs
Beliefs
I adopt about the world
2. So What?
Conclusions
I draw from assumptions
Assumptions
I make based on meanings
Meanings
I add (cultural & personal)
1. What?
Data
I select from observations
Observable data and experiences