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Participatory Learning and Action Toolkit:
For Application in BSR's Global Programs

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TABLE OF CONTENTS

INTRODUCTION

About the Toolkit

A group of consultants worked collaboratively on BSR's HERproject for one year, resulting in the creation of this toolkit for BSR's global use. BSR tasked the consultants with developing and piloting participatory learning and action (PLA) tools during an extended baseline study of the HERproject farm pilot in Kenya. HERproject is a factory-based women's health education program that employs a peer health education model to promote women's health awareness and access to services. In Kenya, BSR is currently piloting HERproject on a vegetable and flower farm.

The consultants traveled to Kenya in March 2012 to pilot PLA tools with the aim of discovering how this methodology could enrich HERproject's monitoring and evaluation. Over the course of one week, the consultants conducted 20 semi-structured interviews and piloted six other PLA tools.

From this experience, the consultants concluded that PLA tools can enhance HERproject's monitoring and evaluation (M&E). As such, there is great potential that if incorporated more widely throughout BSR's global M&E system, PLA tools could further enhance all BSR programs worldwide. PLA tools provide detailed information about the context in which programs operate, as well as pinpoint opportunities for collaboration with local partners, identify resources available within communities, and provide insights into the benefits and challenges programs may face over the course of their duration. This approach can assist BSR staff and program participants in developing more appropriate and effective interventions across all of BSR's target sectors and communities. Client companies will also benefit from knowing that their interventions are directly responding to the voiced needs and desires, and active involvement, of the beneficiary population.

To provide a comprehensive, practitioner-oriented, and user-friendly guide for global BSR staff, this toolkit includes: 1) background on PLA methodology; 2) a guide for each activity successfully piloted in Kenya; and 3) case studies based on the consultants' experience piloting these tools in the Kenyan context. In the appendix, the reader will find examples of additional PLA activities and a list of print and online resources for further reference. BSR's global staff will be able to use the information in this toolkit to inform their own programming, adapting the PLA tools for the specific intervention and context in which they work.

Should any questions or comments about this toolkit arise, please feel free to contact Jennifer Schappert, Associate of Advisory Services at BSR, jschappert@bsr.org.

Participatory Learning and Action: An Overview

Definition: Participatory learning and action (PLA) can be defined as "a growing family of approaches, tools, attitudes and behaviors to enable and empower people to present, share, analyze and enhance their knowledge of life and condition and to plan, act, monitor, evaluate, reflect and scale up community action." PLA approaches have been applied across a range of sectors, including, but not limited to, programs for natural resource management and agriculture, equity, empowerment, health, human rights, and security. Several fundamental tenets form the foundation of PLA methodology, including the idea that the facilitator should "hand over the stick" to allow participants to describe their own experience and reality as they understand it. The facilitator also aligns his or her behavior to several key precepts inherent to this methodology, including the promotion of open sharing among participants, the use of visual aids and tangible objects, and collaboration through group work.[2]

Background: The PLA methodology evolved from less inclusive but related approaches to participation known as rapid rural appraisal (RRA) and participatory rural appraisal (PRA). RRA and PRA were developed in the 1970s to provide alternative methods of data collection beyond traditional anthropological ethnographies and large-scale surveys. This family of related approaches has evolved over time to emphasize local empowerment and to provide an alternative to extractive data gathering.

Global Use: By the 1990s, PRA and PLA approaches had reached a global audience. They have been used in over 100 countries around the world and piloted by a variety of institutions, including government ministries, international non-profits, and donor agencies. PLA tools continue to be invented or implemented in creative new ways, with some international organizations even using them internally to empower their employees. In other cases, PLA tools have been institutionalized as part of best practice for a specific type of project. For example, international non-profits routinely utilize wealth ranking to identify the poorest members of a given community in order to reach out to them for services. PLA methodology remains at the center of a well-known and effective type of water, sanitation, and hygiene project known as community-led total sanitation (CLTS).[3] As many successful case studies from a variety of sectors and regions are widely available on the Internet, practitioners can both learn from and contribute to the wide range of PLA activities currently implemented around the world.

[1] Yetter, Scott. "Introduction to Participatory Planning and Action." Workshop at the George Washington University, Washington DC, February 2012.

[2] Chambers, Robert. "From PRA to PLA and Pluralism: Practice and Theory." Institute for Development Studies. Working Paper 286. July 2007.

[3] Ibid

METHODOLOGY

Approach

The underlying principle behind the PLA methodology is to engage the full participation of people in the processes of learning about their needs and opportunities, and in the action required to address them. By empowering participants to creatively investigate issues of their concern, the approach challenges preexisting biases and conceptions about participants' knowledge. As such, it can also offer opportunities for local people to mobilize for joint action. While the particular methods used can vary, all the tools are defined by interactive learning, shared knowledge, and an adaptable, yet structured analysis. The PLA framework of joint analysis and interaction between stakeholders and participants promotes a focus on communal learning.

Below are the main PLA principles and guiding tenets for facilitation. The principles address best practices of the approach. The tenets help facilitators to implement these principles when conducting PLA tools in the field.

Principles[4]

1. Bias Explicit: Every individual maintains a unique worldview that is shaped by a confluence of factors including, but not limited to, culture, upbringing, religion, and perceived injustices. As such, every person maintains a distinct set of biases, which play a role in how an individual acts, thinks, and perceives the world around himself/herself. The best PLA facilitators make their biases explicit rather than trying to suppress them, ensuring that their biases have less influence on the outcomes of the PLA activity.

2. Triangulation: It is best to use as many tools as possible while diversifying team members and data sources to cross check information and neutralize biases. By triangulating information, facilitators are also able to capture a greater quantity of information.

3. Optimal Ignorance: Extensive rich, varied, and interesting data can be captured from PLA tools. However, collecting only the most necessary information saves time and resources.

4. Appropriate Imprecision: PLA methodology emphasizes the 'big picture' or trends across data. Facilitators should focus on identifying these trends rather than on precision in the design and application of the PLA tools.

5. Multiple Perspectives: Inherent to the PLA methodology is the practice of valuing all participant perspectives and exploring different worldviews. It is important to seek out diversity and analyze anomalies rather than to oversimplify complexity.

[4]Yetter, Scott. "Introduction to Participatory Planning and Action." Workshop at the George Washington University, Washington DC, February 2012.

6. Group Learning Process: A PLA approach to a project should involve a group learning process that mirrors the interactions and reflects the complexity seen in the community. As a result, group learning and instruction will be iterative, changing as people's perceptions evolve. It is important to remember that communities will not necessarily have homogeneous opinions.

7. Context Specific: All PLA approaches and tools should be flexible enough to adapt to a variety of contexts. Designing and adapting methods to the local situation cultivates buy-in among community members

8. Facilitating Empowerment: The ultimate aim of the PLA methodology is to facilitate local empowerment. The facilitator's role, then, is to foster this transformation among participants, rather than to dominate the activity.

9. Leading to Change: The PLA process should elicit learning and debate about the change that needs to happen among a given population. These discussions should change individual and group perceptions as well as the population's readiness for action.

Key Tenets of Facilitation[5]

1. Introduce yourself to the participants, if possible in the local language, in order to make them feel comfortable

2. Have confidence in the abilities and contributions of participants

3. Critically reflect on your own perspective and biases before, during, and after the activity

4. Ask participants for their own opinions, priorities, and desires throughout the activity

5. Be patient during the activity, allowing sufficient time for each participant to fully contribute

6. Allow participants to lead the discussion

7. Facilitate the activity in an informal manner without lecturing or dictating

8. Learn from what goes wrong or does not work in the activity

9. "Hand over the stick" and empower participants by allowing them to take charge of the writing, drawing, or other elements of the activity

10. Take responsibility for what you do as a facilitator, before, during, and after the activity

11. Welcome moments of silence as these may be necessary for participants to collect their thoughts

[5]Adapted from: Chambers, Robert. 2008. Revolutions in Development Inquiry, p. 98.

TOOLS AND CASE STUDIES

Facilitator's Field Guide

The field guide below describes the process of how a facilitator should conduct a PLA activity.

Before

1. Include participants with a diversity of experiences and backgrounds so as to capture differences among the population.

2. Have multiple facilitators. This allows for questions of greater variety and depth. Facilitators can also divide the responsibilities of taking notes and interviewing the findings.

3. Bring a discreet notebook so as to seem less intimidating.

4. Prioritize your questions in case time runs out; ask the most pertinent questions initially.

During

1. Obtain consent from all participants before beginning an activity and communicate whether or not the information will remain confidential.

2. Manage participant expectations; make it clear that the end result of the activity may be for research and not necessarily future programming.

3. Audio record and take photos of PLA activities to ensure the retention of as much detail as possible, when relevant. Ask consent before recording or taking photos.

4. Give everyone a chance to participate, if desired. Dominating participants should not detract from the participation of others.

5. Encourage the translator to repeat everything said in both languages, so that all participants are guaranteed an equal opportunity to fully understand and engage in the activity.

6. Position yourself at the eye level of the participants when giving instructions or asking questions, which may necessitate sitting, squatting, or kneeling with the participants.

7. Aim questions at the image itself instead of one specific person when asking follow-up questions and interviewing the map/diagram. This will encourage all participants to feel equally able to answer the question.

8. Be sensitive to the participants' level of comfort in answering certain questions within earshot of other people.

9. Be flexible! Even if the exercise is not working out as planned, you are still likely to garner valuable information.

10. Be aware of the dynamics of the participants. It is natural for some people to be more quiet or expressive than others; you need not worry about changing this dynamic. Be aware, however, of how the activity is influenced by the contributions of the group members.

11. Encourage participants to write in the language they prefer, which can then be translated by the translator. They can also draw instead of write.

12. Ask open-ended questions to elicit more of a detailed response beyond "yes" or "no."

13. Record the detail of what is said and, whenever possible, what is not said but can be sensed (e.g. hesitation or tension). Body language can be equally important and is referred to as the "hidden transcript" or "subtext."

After

1. Thank the participants for their generosity of time and contributions during the activity, explaining to them how the research will be used in the future.

2. Triangulate the data from PLA tools with other methods for capturing information.

3. Discuss findings with the research team and with participants, if appropriate. This allows the participants to challenge any potentially incorrect perceptions of the research team and makes the process more participatory.

4. Record notes and/or transcribe audio after the activity is complete. Elaborate on notes by memory and/or by reviewing the audio recording. Ideally, this will be done the same day as the activity to ensure accuracy. Code notes according to the relevant themes/topics discussed.

DAILY SCHEDULE

About the Tool: The daily schedule is used to identify work patterns among a given population or community. It draws out nuanced differences between sub-populations and allows facilitators to identify ideal times for meetings to be held with community members and for project activities to be carried out.

Use: The daily schedule activity should be administered at the beginning of a project cycle to assure that projects do not disturb the important daily activities of a given population. This tool can also be conducted in midline and endline evaluations to understand how daily activities have changed due to project implementation.

Logistics:

- ***Time:*** 1 hour
- ***Materials:*** Varies depending on the context but often includes pens, pencils, markers, standard size paper or large sheets of paper, rocks, sticks, etc.
- ***Personnel:*** 1 facilitator, number of participants can vary depending on the information the facilitator wants to capture
- ***Space:*** Any indoor or outdoor space shielded from the elements where participants can draw on a table or the ground using markers or found materials

Preparation:

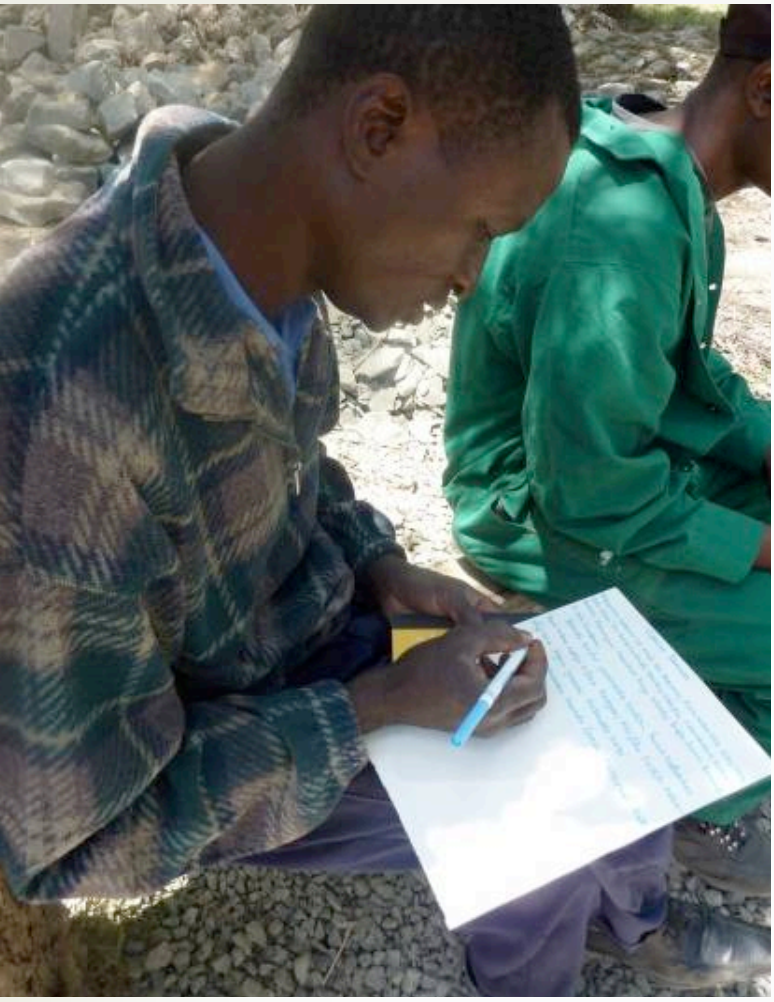
- Prepare a list of objectives for the daily schedule exercise, assuring they are realistic for any potential time, material, or personnel restraints.
- Write a checklist indicating all the important information to gather from the activity.
- Decide how to organize the activity. Participants can construct one generic daily schedule as a group (separated by gender, profession, age, etc.) or each individual can construct his/her own schedule.
- Brief the facilitator or translator on the objectives of this activity as well as how to carry it out.

Directions:

1. ***Introduce the daily schedule (approximately 5 minutes):*** Review the objective(s) of the exercise with the participant(s). Explain the facilitator's role in the exercise: to ask questions and listen. Explain the participant's role in the exercise: to draw or write her/his/the group's daily schedule. Participant(s) should include activities from the time they wake up until the time they go to bed. Participant(s) can depict multiple activities at the same time.

2. ***Daily schedule (approximately 20 minutes):*** The participant(s) should draw a timeline. They can divide this timeline in multiple ways: by hour, by time period (morning, afternoon, evening), or by changes in activity. The participant(s) will then place activities along the timeline, representing them either with words, symbols, blocks of time, or graphs.

3. ***Presentation of the daily schedule (approximately 10 minutes per participant or group):*** Ask participant(s) to share their daily schedule. This is the participants' opportunity to present what they have created. Pay attention to what they describe as well as what they omit.



4. ***Interview the daily schedule (approximately 10 minutes per participant or group):*** Ask questions about the daily schedule. Some suggested clarifying questions are listed below:

- What is the difference between your daily schedule and that of a family member, co-worker, etc.?
- How does your schedule affect your health and well-being?
- Are there any opportunities that you are unable to pursue due to your schedule (e.g. participate in a women's group)?
- What is the most important activity to you?
- What is the most difficult activity for you?
- How/when does your schedule change?

Tips:

- When facilitating this exercise, divide participants into groups in which they will be comfortable talking about their daily routine.
- Allow participants to construct their schedule in a way that makes sense to them. This could mean by drawing or writing prose.

Case Study: Daily Schedule

Background:

The facilitator conducted the daily schedule activity with two female and two male flower farm workers in Naivasha. In this case, the women and men participated separately. The objectives of the activity were to compare gender differences

between schedules, to discover the best time to conduct project activities, and to gain a better understanding of daily work plans and other activities among the population.

Benefits and Associated Findings:

- Facilitators learned about the gendered division of labor among farm workers (male farm workers perform more physically demanding jobs on the farm).
- Facilitators identified gendered differences in how individuals spend their time in the home as well as expectations surrounding men's and women's work (women hold responsibility over the majority of household labor while men enjoy significantly more free time).
- Facilitators gained a better understanding of the cyclical patterns of farm work (during the holiday season workers put in excess hours).

Challenges:

- Male participants seemed uncomfortable sharing details about their home life with a female facilitator.
- If the facilitator and translator do not set up the exercise well and explain the objectives clearly, participants may view this activity as intrusive.

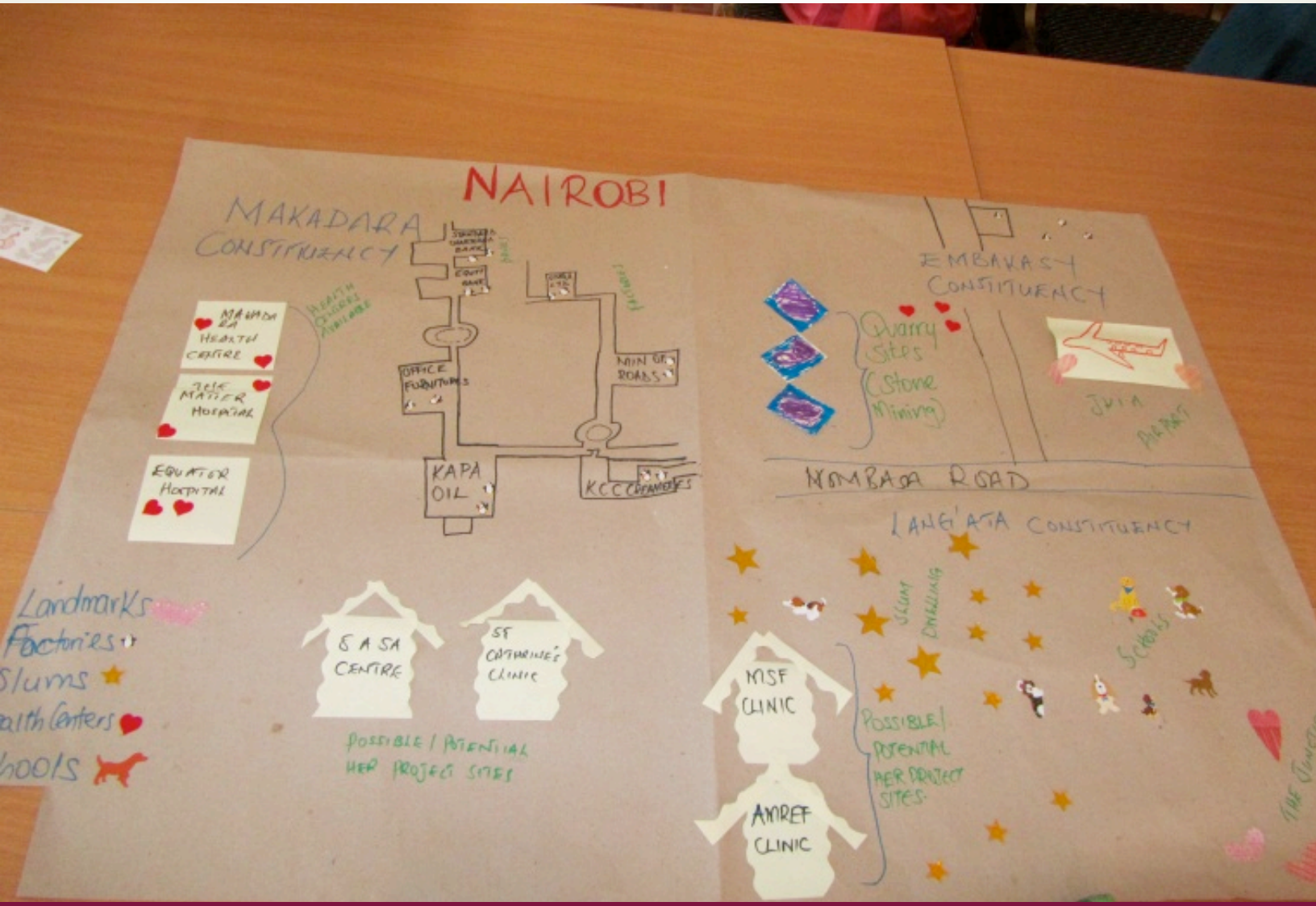
Recommendation:

- Conduct the exercise with both individuals and groups. For example, ask one group to make a generic daily schedule and several individuals to craft their own personal schedule.

PARTICIPATORY MAPPING

About the Tool: Participatory mapping is an exercise that allows outside facilitators to gather key information about a community or space by capturing a pictorial representation of it. This tool allows both mapping participants and facilitators to think about a location in a non-traditional manner. Facilitators may identify important landmarks based on a particular theme in which they are interested (e.g. maternal health) or utilize the exercise to capture a snapshot of the community or particular environment. It is an excellent tool to gain understanding on the local perspective and reality.

Use: Participatory mapping is often used as part of a baseline assessment of a community. It enables community members or relevant stakeholders to share the experience of their space in an informal manner while also exploring existing community assets and needs, helping to inform project design.



Logistics:

- ***Time:*** 1.5 hours
- ***Materials:*** Varies depending on the context, but often includes markers, large sheets of paper, post-its, stickers, construction paper, tape, scissors, rocks, sticks, etc.
- ***Personnel:*** 1-3 facilitator(s) and 2-5 participants per map
- ***Space:*** Any indoor or outdoor space shielded from the elements where participants can draw on a table or the ground using markers or found materials

Preparation:

- Prepare a list of objectives for the participatory mapping exercise, assuring they are realistic for any potential time, material, or personnel restraints.
- Write a checklist indicating all the important landmarks or spaces to uncover in the mapping exercise.
- Brief the facilitator(s) or translators on the objectives of this activity as well as how to carry it out.

Directions:

1. ***Introduce the mapping exercise to participants (approximately 5 minutes):*** Review the objectives of the exercise with the participants. Explain the facilitator's role in the exercise: to watch, ask questions, and listen.

2. ***Mapping (approximately 30 minutes):*** Participants should draw a map of their community or another geographical space of which they have first-hand knowledge. It is up to the participants to decide the boundaries of the community or space they are mapping, but the boundaries should remain within a border that most people can access by walking or a short drive. Participants should identify all the major landmarks that are important for the community members. If they would like, participants may come up with their own coding system for delineating landmarks (such as color coding, lines, tangible objects, pictures, stickers, etc.).

3. ***Presentation of the map (approximately 10 minutes):*** Ask participants to share their map. This is the participants' opportunity to present what they have created

to the facilitator(s) and other groups. Pay attention to what they describe as well as what they omit.

4. ***Interview the map (approximately 30 minutes):*** Ask questions about the map. Some suggested clarifying questions are listed below:

- Why did you choose these landmarks?
- How did you decide to define the boundaries of the community?
- What three places are you most likely to frequent?
- With what three places are you least likely to be familiar?
- What spaces are safe?
- What spaces are dangerous?
- Where are the transportation points?

5. ***Identify important landmarks (approximately 15 minutes):*** If you have not done so already, identify all the landmarks listed in your checklist. Ask about the landmarks that were unknown or unexpected. Identify points of interest to your particular topic (e.g. maternal health, agriculture, water and sanitation, etc.) and ask clarifying questions.

Tips:

- Create the map in a large, open area.
- Do not begin to ask about elements that interest you until all the participants' own landmarks have been identified; then orient your questions according to the issues on your checklist.
- Copy the map into a field notebook as it is being drawn; transfer later onto flipchart paper for future use. This helps create a record of the activity so you can refer back to it later.
- Do not worry too much about scale.

Case Study: Participatory Mapping

Background:

The facilitators utilized the mapping tools with the staff of a local non-profit organization in Kenya to identify the health services available to farm and factory workers in the Naivasha and Nairobi areas. One team mapped the Naivasha community and the other team mapped a neighborhood of Nairobi. Participants identified the health institutions and services together with the residential areas, dangerous places for women, and resources at factory and farm workers' disposal.

Benefits and Associated Findings:

- Facilitators learned about the general layout and context of the communities before they visited in-person (due to high rates of prostitution at truck stops in Naivasha, rates of HIV/AIDS are high).
- Facilitators identified barriers and benefits to specific health resources available in the communities (farm workers in Naivasha travel a great distance to access health resources).
- Facilitators identified potential partners and opportunities for the potential expansion of the project (women in the informal sector who prepare meals for men working in the factories in Nairobi could be potential beneficiaries).
- Participants utilized creative energy to think about a space they are familiar with in a new way (participants recognized the resources they should be cultivating to make their work more effective).

Challenges:

- The activity was limited by the availability of personnel.
- Participants did not live in the communities they mapped. Thus, the maps likely lacked some relevant data.

Recommendation:

- Extensive and interesting information will arise through the course of this exercise. Make sure to stay on track and capture data that is not only interesting, but also pertinent to your objectives.

FACILITY ASSESSMENT

About the Tool: Facility assessments are used to gain a better understanding of the infrastructure and dynamics of a project area, including the physical space, different tasks, and overall facility conditions. By walking around the physical area with a key informant(s), the tool allows for greater knowledge and awareness of how both the physical infrastructure and the interpersonal dynamics occurring in the community will affect project implementation.

Use: This tool is most effective when carried out before project implementation begins. It can inform key project elements, as well as indicate what aspects of the project design should be altered to be appropriate for the facility infrastructure and dynamics.

Logistics:

- ***Time:*** 1 hour
- ***Materials:*** Multiple copies of the facility assessment matrix below (ideally one per room to be visited), pens/pencils, notebook, and camera (optional)
- ***Personnel:*** 1-2 facilitator(s) and 1-2 participant(s)
- ***Space:*** At a minimum, include the areas that will be affected by the project, and ideally all unique areas of the space (contingent upon appropriate approval and assuming the space can be walked in a reasonable amount of time)

Preparation:

- Prepare a list of objectives for the facility assessment exercise, assuring they are realistic for any potential time, material, or personnel restraints.
- Write a list of key questions to keep in mind during the activity, indicating all the important information to gather from the assessment.
- Brief the facilitator(s) or translator(s) on the objectives of this activity as well as how to carry it out.

Directions:

1. ***Facility assessment planning (approximately 10 minutes):*** Before starting out on the facility assessment walk, discuss the objective(s) of the exercise with the

participants. Share the checklist of topics that will be assessed in each location (see sample facility assessment matrix below) and review the key questions to keep in mind. Explain the facilitator's role in the exercise: to ask questions, observe, and listen. After answering any questions they may have, review the list of places of interest that will be visited during the walk. Ask the participant(s) to suggest any other places that should be included, or ones that should not be visited (explain why). Visit the entire facility, not just those spaces directly affected by the project, including restrooms, eating spaces, and outdoor areas.

2. ***Facility assessment walk (approximately 45 minutes):*** Walk slowly through the agreed-upon places, while discussing what you see with the participant(s) along the way. Observe, ask questions, and listen. Take copious notes. Throughout the walk, use the sample matrix document to help with note taking (see below). For each topic, make note of related positive or negative elements, either observed or discussed. Draw sketches and maps and/or take photos, if possible. Take additional notes in a notebook or on the reverse side of the facility assessment matrix sheets.

3. ***Interview the Participants (approximately 15 minutes):*** Conclude the exercise by asking the participant(s) some follow-up questions to gauge their overall takeaways and observations. Pay attention to what is described as well as what is omitted.

Potential topic-based questions:

- What spaces are dangerous? Why?
- What spaces are unhealthy? Why?
- What spaces are unclean? Why?
- What spaces elicit tension or anger? Why?
- Are there spaces that are difficult for women/men? Why?
- Are there spaces that are difficult for older/younger people? Why?
- Where can people go to find support or help?

Potential comprehensive questions:

- How would you like the project to address the community's needs?
- What spaces do people like? Why?
- What spaces do people dislike? Why?

- What tasks in this space are the most dangerous? The most physically difficult? The most boring? The worst? Why?
- In what spaces can people access information or resources?
- Where can individuals find information on the project?
- Do any of the spaces change during different times of the year? How so?

Tips:

- Do not linger in any one space if your presence appears to be distracting other people. Note any comments or questions you may have about that space and ask the informant afterward, during the follow-up interview.
- Only go where you have explicit permission.
- Only take pictures if you have explicit permission.
- Do not ask every single question in every single space. Determine the relevant questions per space and ask overarching questions at the end.
- Focus your questions on what you observe during the walk.
- Avoid spatial bias; walk to the limits of the territory if possible.

Sample Facility Assessment Matrix for Note Taking

Name of Area/Space:

Sketches:

TOPIC	NOTES
Gender-sensitivity a. How does this space affect women differently than men? b. Do women/men have special needs in this space? c. Do women/men feel comfortable in this space?	
Safety a. Are there risks to physical safety in this space (e.g. equipment, repairs needed)? b. Is this space prepared for an emergency (e.g. fire, theft, harassment, natural disaster)?	
Health a. Are there any good or bad effects on health from this space (e.g. food, water, air, physical duress)? b. Is this a stressful space? c. How does this space affect peoples' mental and emotional health?	
Hygiene a. Are germs easily spread in this space? b. Can people remain clean in this space?	
Use a. What is this space used for? b. How often is this space used? c. What tasks occur in this space? d. Are there any good or bad effects on people's well-being from these tasks? e. How does being in this space make people feel (e.g. happy, tense, calm, worried)?	

People a. How many people use this space? At the same time? b. Who are they? c. What social interactions take place in this space? d. Is there cause for conflict in this space?	
Equipment/Supplies a. What equipment and supplies do people use in this space? b. Is the equipment sustainable? c. Is technology used?	
Clothing/Protection a. What clothing and protective gear do people wear in this space?	

Case Study: Facility Assessment

Background:

Two facilitators conducted the facility assessment with two female farm workers in Naivasha. In this case, one woman worked in the flower section and the other woman worked in the vegetable section. Several objectives were outlined for this activity: to identify potential health risks and safety hazards to workers on the farm; to gain a better understanding of the production process; and to identify infrastructure elements that promote worker support and satisfaction.

Benefits and Associated Findings:

- Facilitators saw the different spaces on the farm and discovered how the space was conducive to HERproject (close proximity of female work stations to training space).
- Facilitators identified how some spaces were different for men and women, and how certain spaces were only used by men or women (women in charge of flower processing; men in charge of pesticide spray).
- Facilitators gained a better understanding of the potential health and safety risks workers face on the farm (ergonomics at work stations).

Challenges:

- The assessment was only conducted in the flower section; the key informant from the vegetable section could not contribute much useful input.
- If the facilitator and translator do not set up the exercise well and explain the objectives clearly, participants may view this activity as intrusive.
- Participants appeared uncomfortable saying anything negative about either worker or infrastructure conditions.
- Facilitator presence in some rooms appeared to distract other workers.
- Working through a translator slowed the process.

Recommendations:

- When conducting this activity, try to include participants with knowledge of multiple areas in the facility to gain deeper insight.
- Conduct the exercise twice, ideally with two people that hold different positions in the community. Seeing the same space through different perspectives will elicit more nuanced information and allow for the triangulation of data.

RANKING

About the Tool: The ranking tool can be utilized to capture the opinions, beliefs, concerns, or priorities of a community. Participants are asked to identify a certain number of key issues pertaining to the research objective. The activity can span a wide range of sectors, including health, education, and economic security, simply by adjusting the guiding research question. By ranking the categories for their relative importance, impact, satisfaction, etc., participants identify the group consensus, while also unveiling the nuanced individual sentiments within the group. The tool may be able to elicit sensitive information among group members. As the act of ranking requires reflection and analysis, the exercise provokes group discussion.

Use: The activity provides a relatively simple approach to conducting a rapid-fire assessment about a community's perceptions on a certain topic. The follow-up discussion allows for information to be shared and analyzed on a deeper level than a traditional survey. The tool produces both quantitative and qualitative data and can be implemented at any time during the project cycle, though most beneficial if used at baseline, midline, and endline, at a minimum. By conducting the activity throughout the project cycle, the impact of the intervention on the population can be monitored.

Logistics:

- ***Time:*** 45 minutes
- ***Materials:*** Varies depending on the context but often includes large flip chart paper, beans, stones, marbles, or other similar material, markers, and large index cards
- ***Personnel:*** 1-2 facilitator(s) and 4-8 participants
- ***Space:*** Any indoor or outdoor space shielded from the elements where participants can draw on a table or the ground using markers or found materials

Preparation:

- Prepare a list of objectives for the ranking exercise, assuring they are realistic for any potential time, material, or personnel restraints.
- Brief the facilitator(s) or translator(s) on the objectives of this activity as well as how to carry it out.

Directions:

1. ***Explain the purpose of the exercise to the participants (approximately 5 minutes):*** To gauge some of the main opinions, beliefs, concerns, or priorities of the community, and to learn which are the most important and why.

2. ***Identify the issues (approximately 20 minutes):*** Hand each participant a marker and some index cards. Ask them to discuss and call out the most important opinions, beliefs, concerns, or priorities on the topic in question for themselves and members of the community. If the group agrees that an issue is legitimate, a participant should write or draw it on an index card or directly onto the flip chart paper. Multiple sheets of flip chart paper may be necessary. Once the list of issues is compiled (it can be as short or long as necessary, though should only entail the "most important" categories), the cards (or flip chart paper) should be placed on the ground.

3. ***Rank the issues (approximately 15 minutes):*** Give each participant an equal amount of beans (for a useful estimate, multiply the number of categories by 2). Then ask the participants to place the beans next to each issue (either physically on the flip chart paper next to the associated topic or on the ground next to the index cards), giving more beans to those categories deemed more important, and less beans to those deemed less important. The participants can do this one at a time, or all simultaneously to avoid the influence of others.

4. ***Count the beans (approximately 5 minutes):*** Have a member of the group count each pile, or assess by sight if short on time. The group should identify the largest and smallest piles.

5. ***Interview the rankings (approximately 10 minutes):*** Ask questions about the rankings. Talk about the piles in the interview, rather than an individual's decisions, in order to desensitize certain issues. Some suggested interview questions are listed below:

- How do you define each category?
- Why are some issues ranked higher than others? Most common? Most extreme?
- Why are some issues ranked lower than others? Least common? Least extreme?
- How many participants agree with the results at the two extremes? The majority?
- Are any of the results related to gender? Any other demographic factor?

- Are certain people less likely to agree with the results (e.g. youth)?
- Are there any categories not listed that fewer people experience?
- Where can someone access services and information about these categories?
- Which of these sources are most used? Why?

Tips:

- Participants can write the category names in the language they prefer, which can then be translated. They can also draw instead of write.
- Encourage participants to rank individually, not necessarily as their peers rank.
- Have the group define each category so that all participants and facilitator(s) have a common understanding of the term. Avoid imposing categories; let participants define their own relevant categories.
- If the beans are counted, this quantitative data should be cataloged for future use as a comparison point.

Case Study: Ranking

Background:

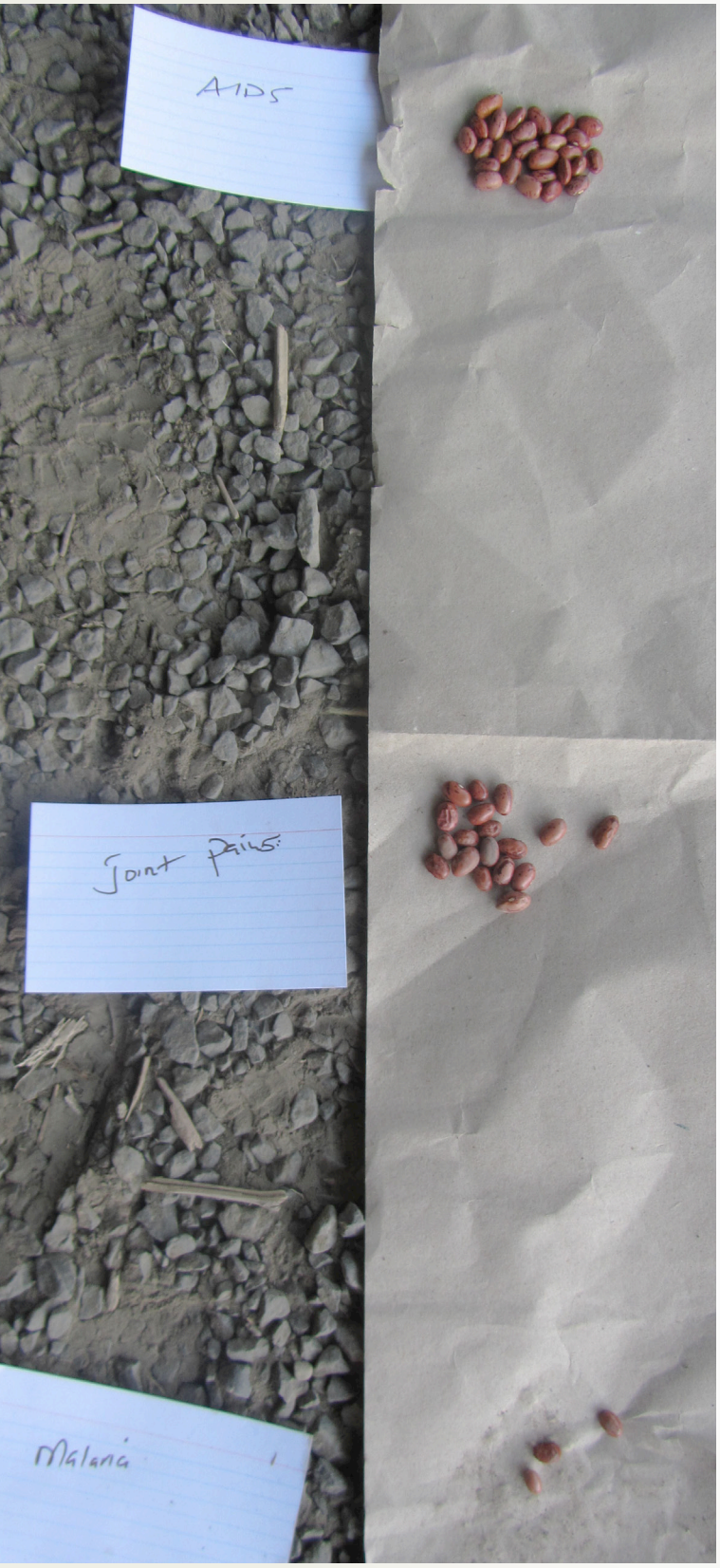
The ranking tool was used with six male farm workers in Naivasha to collect baseline data on their health needs. As HERproject focuses on the health needs and concerns of the women on the farm, the ranking tool provided new and comparative baseline data. The ranking took less time than expected, so more time was then spent on the follow-up questions and discussion.

Benefits and Associated Findings:

- The male participants revealed new health concerns that had not been expected or identified by the facilitators before (such as stress). For other concerns, the extent to which they impacted the participants had not been captured before (such as joint pain).
- The activity exposed knowledge gaps and misinformation among the participants (men thought tuberculosis came from cold weather or smoking).
- The activity identified how current resources and services on the farm and in the community do not match needs (while most available programming focuses on worker safety or HIV/AIDS, men want more information on stress and joint pain, and options for treatment).
- Participants openly shared sensitive information with each other and the facilitators (such as sexually transmitted infections).

Challenges:

- Only one facilitator was available during this activity, making it difficult to both ask sufficient questions and to take notes.
- Compared to other farm workers, this group was very quiet and reserved. It was hard to get anything but one-word explanations from them.
- The activity progressed exceptionally fast. Before the facilitator had finished distributing the beans to all the participants, most of the other men had finished allocating the beans. It would have been beneficial to encourage



the men to take time in making their decisions, and also to have had a facilitator more closely observing the distribution.

- The project does not aim to directly benefit the health of men. By participating in this activity, they may have false expectations about how future programming will impact them.

Recommendations:

- Spend sufficient time explaining how the beans should be allocated. This should primarily be an individual decision, not based upon the rankings of other participants.
- Spend sufficient time gathering information from participants on the definitions of the categories they supply.
- Spend sufficient time gathering information from participants on the reasons for a category's ranking, regarding both the group ranking and individual decision-making and bean distribution.

VENN DIAGRAM

About the Tool: The Venn diagram can be used to capture the ways in which information travels throughout a community. Participants discuss knowledge sources from both within and outside of the community and their relative trustworthiness. Key individuals and institutions are identified, along with the types of information they convey. The tool can be applied to any type of knowledge, such as health, education, job opportunities, food sources, etc. From there, the tool offers a comparison of the amount of material available from the various informants. The activity should be conducted in a group setting in order to get a representative sample of the available information outlets. Various groups within the community (based on gender, age, occupation, income level, etc.) may have access to different sources.

Optional: Alternatively, the Venn diagram can also be used to rank the spheres of influence within and outside of a community. For example, a community could use the tool to rank the importance of water sources or to identify community members the project should engage.

Use: The tool can be implemented at any time throughout the project cycle, though most beneficial if used for the baseline to understand this important contextual element. Rich in qualitative findings, the Venn diagram enables facilitators to extrapolate additional details on how much each source is used and trusted, and how the sources interrelate with one another. The results from this activity could directly inform how an intervention could most effectively provide information to its beneficiaries.

Logistics:

- ***Time:*** 1 hour
- ***Materials:*** Varies depending on the context but often includes large flip chart paper, different colored construction paper, tape, scissors, and markers
- ***Personnel:*** 1-2 facilitator(s) and 4-8 participants
- ***Space:*** Any indoor or outdoor space shielded from the elements where participants can draw on a table or the ground using markers or found materials

Preparation:

- Prepare a list of objectives for the Venn diagram exercise, assuring they are realistic for any potential time, material, or personnel restraints.
- Brief the facilitator(s) or translator(s) on the objectives of this activity as well as how to carry it out.

Directions:

1. ***Introduction to the Venn diagram (approximately 5 minutes):*** Review the objective(s) of the exercise with the participants: to identify sources of information on the topic of interest that are available to participants; to identify how information travels through the community; and/or to identify which entities and individuals have the most influence within the community. Explain the facilitator's role in the exercise: to ask questions and listen. Explain the participants' role in the exercise: to create a diagram that shows where participants get their information.

2. ***Conduct the exercise (approximately 25 minutes):*** The facilitator(s) should place flip chart paper on the ground and draw a circle on the paper to represent the community (as defined for this activity). Everything inside the circle is an internal institution or person; everything outside is an external institution or person. The facilitator(s) asks participants to cut out circles to represent sources of information. These can be individuals, institutions, or media outlets, within or outside of the community. Participants should cut the circles in various sizes to represent how much information they get from that source. For example, "parents" may be written on a large circle because they greatly influence the information participants receive, whereas "television" may be written on a smaller circle because not all community members have access to one. They should write or draw a label on the circle to mark what each represents.

Optional (if desired and time permitting): The facilitator(s) then gives participants a marker and asks them to draw arrows indicating how information transfers from one source to another, if at all (e.g. an arrow is drawn from "doctor" to "parents" to indicate that parents get health information from the doctor at the clinic, which is then transferred to participants).

3. ***Interview the results (approximately 30 minutes):*** Ask questions about the Venn diagram. Some suggested interview questions are listed below:

- What types of information are participants getting from each source?
- If a source is outside of the community, where is it located?

- What kinds of behaviors have changed from the information received?
- How often do participants access information from these sources?
- How often do participants seek out information from each source?
- Do the sources of information relate to each other in any way?
- What sources are most trustworthy or informative? Why?
- What sources would participants want more information from/interaction with?
- What are the current barriers? How can this be improved?
- What institutions/individuals have control over services and information?
- How is information communicated between the various sources identified?

Tips:

- To avoid potential conflict when reviewing the sources of information, be careful not to ask about direct comparisons of influence if the source is an individual (e.g. if the teacher is a larger circle than the parents, especially if either party is observing the exercise).
- Note institutions and/or people that are not indicated. The absence of these groups is also a finding.

Case Study: Venn Diagram

Background:

While on the farm, the facilitators conducted two Venn diagrams with workers, one with all men and the other with all women. The aim was to draw a comparison of the most trusted sources of information between the two worker populations. The facilitators conducted the men's Venn diagram first, with a larger group of eight men, followed after by a smaller group of four women. A large circle drawn on the flip chart paper represented the farm. The participants identified the sources of health information within the farm and in the greater community by placing circles of relative size (according to importance) in the appropriate location on the flip chart paper. In interviewing the findings, the facilitators prioritized the follow-up questions instead of adding the optional steps (see below) in order to ascertain information on levels of trust given to the various sources provided.

The results of the Venn diagrams found that the men rely most heavily on sources of health information outside of the farm, such as their parents and media sources. Women, on the other hand, obtain most of their health information from their peers within the farm. This high level of trust ascribed to female peers as sources of health information provides a compelling argument for the viability of HERproject in this farm setting.

Benefits and Associated Findings:

- Facilitators learned about the types of information from each health source (the health information on the farm focuses mainly on work safety).
- Participants revealed new sources of health information that had not been expected or identified by the facilitators before (such as mobile clinics), and for other sources, the extent to which they impacted the men had not before been captured (such as men's reliance on advice from parents even in adulthood).

- The activity identified information wanted and/or needed by participants, both within and outside of the farm (men want to meet with someone who is HIV positive).
- The activity garnered workers' opinions on current support and services available on the farm (men want greater farm support of existing health and safety committee; women want access to family planning methods on the farm).
- Facilitators gained information on community behavior change as a result of health information (increased use of family planning, increased rates of circumcision, and decreased rates of smoking).
- The activity identified service providers to engage in future or continued programming (private non-profit that offers rapid cervical cancer screenings).
- The activity provided an overview of worker activism and involvement in health programming on the farm (participation in Health & Safety Committee), which can be capitalized on to a greater extent with future programs.

Challenges:

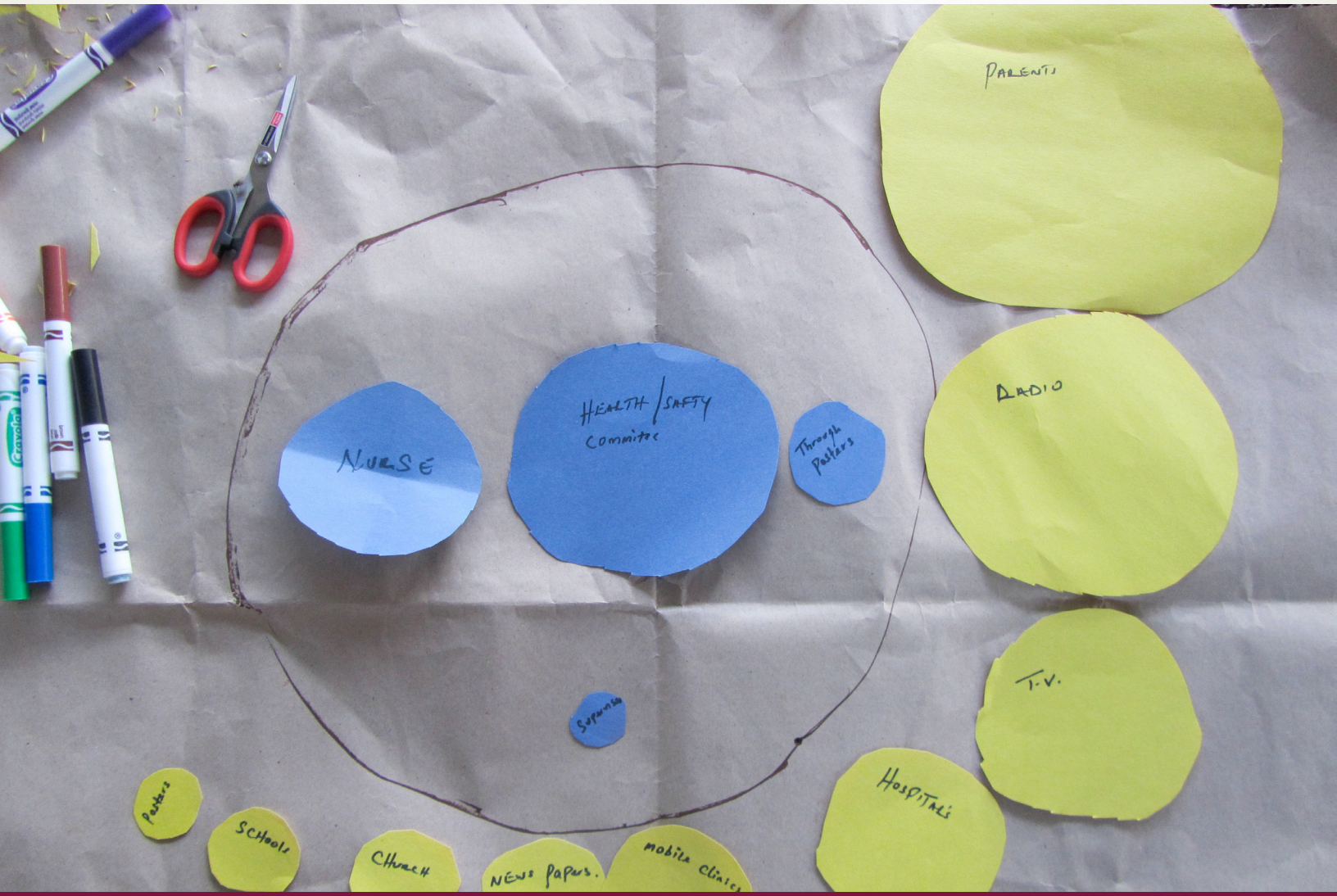
- The men's group had a dominating participant that spoke up more than anyone else. While it may have been helpful to have a group leader, the facilitator should ensure that one or several participants are not inhibiting others' participation.
- English speakers wanted to communicate with the facilitator directly in English, circumnavigating the translator and thereby excluding some participants from the conversation.
- While both groups provided valuable information, the men's group seemed more lively and engaged in the activity, while the women were more reserved

and hesitant. This dynamic may have been due to the size of the groups, the individual personalities of group members, or the confidence levels and participation experience of the different groups as the result of societal gender norms. Gender norms can present a challenge to accessing comprehensive and accurate information from participants.

- The project does not aim to directly benefit the health of men. By participating in this activity, they may have false expectations about how future programming will impact them.

Recommendation:

- Take full advantage of this activity to get as much information out of it as possible. There are many layers to this exercise: sources, relationships, types of information, frequency, trust, location, etc. The discussion section should be prioritized. Leave ample time and try to interview each source individually to fully capture its various dimensions.



SEMI-STRUCTURED INTERVIEW

About the Tool: Semi-structured interviews are guided conversations with either an individual or a group in which only the topic(s) are predetermined and questions and insights arise as a result of the discussion. More flexible than structured interviews, semi-structured interviews allow for new questions to emerge during the interview as a result of the information the participant provides. The facilitator in a semi-structured interview should have a guiding framework – an interview guide – of themes to be explored, but should not feel constrained by a formal set of preset questions. This permits the facilitator to ask questions in various ways for different participants, and to probe for details or discuss issues specific to each interview. Interview guides help facilitators focus an interview on relevant topic(s) without limiting them to a predetermined format. This freedom and flexibility enables facilitators to tailor their questions to the specific context and situation, and to the people they are interviewing.

Use: Semi-structured interviews can be used during any phase of the project cycle. They allow project beneficiaries, implementing staff, community members, and/or relevant stakeholders to share their expectations and/or experiences with the project in a less formal manner than a survey or formal interview. They can be used for a range of reasons: to obtain specific information from a population; to obtain general information relevant to targeted issues; and/or to gain insights on such issues. As semi-structured interviews have an open format – enabling focused, conversational, two-way communication – they can be used both to give and receive information.

Logistics:

- ***Time:*** 30 – 90 minutes, depending on the topic(s) and participant(s)
- ***Materials:*** Pens, pencils, notebook, interview guide, and audio recorder
- ***Personnel:*** 1-2 facilitator(s) and 1-4 participant(s)
- ***Space:*** Any indoor or outdoor space shielded from the elements where the participant(s) can feel free to talk openly and where the facilitator(s) can take notes and/or audio record

Preparation:

- Prepare an interview guide – an informal grouping of topics and questions that are guided by an overarching objective(s). Be sure that it is relevant and realistic

for the time and personnel available.

- Brief the facilitator(s) or translator on the objective(s) of this activity as well as how to carry it out.
- Choose the person/people to be interviewed.

Directions:

1. ***Introduce the semi-structured interview to the participant(s) (approximately 5 minutes):*** Review the objective(s) of the exercise with the participant(s). Explain the facilitator's role in the exercise: to ask questions, listen, and take notes. Assure that the participant(s) being interviewed understands and trusts that the responses will be confidential. Make sure the participant(s) is comfortable. Answer any questions they may have before the start of the activity.

2. ***Conduct the semi-structured interview (approximately 30-90 minutes):*** Sit down with the participant(s), turn on the recording device, and begin the interview based on the interview guide. Let the discussion flow organically, guided by participant(s) responses. Try to cover the issues of interest in the interview guide. Begin with less sensitive issues. Keep the interview interactive. Probe further by asking who, what, where, when, how, and why. Take notes. Maintain eye contact.

Tips:

- Do not take too many hand-written notes. Participants may feel intimidated if you write down every word they say. Make the interview more of a casual conversation, writing down only key phrases to trigger your memory later of the issue discussed.
- Do not ask leading questions.
- Do not ask vague questions.
- Do not make implicit assumptions.
- Conduct practice interviews to become familiar with the interview guide.
- Keep the interview focused. If a response is beginning to go off topic, gently steer the conversation back on track.
- Record in detail what is observed and how the interview develops.

- Record personal impressions of the interview.
- Build rapport with the participant(s).

Case Study: Semi-Structured Interview

Background:

Semi-structured interviews were utilized with four main populations, for a total of 20 occurrences. First, in the offices of a local non-profit organization to identify currently known context-specific factors affecting the implementation of HERproject in Kenya and in the agricultural-based setting, and to understand the challenges and successes of the first peer health educator training.

Second, at the HERproject site on a farm in Naivasha to learn the perceived value and satisfaction with HERproject by upper management, middle management, the nurse, and the human resource officer; and to gauge the peer health educators' interest in the training and capture their impressions.

Third, with local health care providers in Naivasha to learn what services they currently provide to the community; to discover what interactions they currently have with female farm workers; and to uncover what they see as the greatest health needs for female farm workers.

Fourth, with stakeholders in Nairobi to identify what organizations offer services to farm workers and in what capacity; to learn if any other organizations are serving the same population; and to identify if there is a way to facilitate collaboration and knowledge sharing between HERproject and other organizations implementing health projects in Kenya.

Benefits and Associated Findings:

- The interviews uncovered a lot of unexpected, valuable information that the facilitators would not have known to address (the need for postabortion care treatment).
- Facilitators identified potential challenges to project implementation (nurse untrained in comprehensive family planning methods).

- Facilitators learned about previously unidentified worker health issues (such as UTIs).
- Facilitators triangulated information by speaking to different populations on the same topics (such as farm workers, farm management, and local service providers).
- Facilitators identified linkages between HERproject and local health care services (such as a HIV positive community health worker who offers on-site training and awareness sessions on HIV/AIDS).

Challenges:

- Facilitators struggled to take copious notes while maintaining flow of conversation.
- Facilitators found it difficult to schedule time with certain participants.
- Some participants seemed hesitant to believe the interview would remain confidential as it was audio recorded.
- Sorting through excess information to determine what bits are most useful and relevant after the exercise became a tedious and challenging process for the facilitators.

Recommendations:

- As a lot of interesting information will come out through the course of an interview, stay on track and capture data that is not only interesting but also relevant to the objective(s).
- Triangulate the data from this tool with other methods for capturing information.
- Begin with a few warm up questions to make the participants feel comfortable. These can be simple questions like "how old are you," "where are you from," or "how long have you been working here."

APPENDIX

Beyond the Toolkit

While the tools and case studies presented in this toolkit can be adapted to fit the needs of other interventions, it does not provide a comprehensive list of PLA tools. Below is a sampling of a few additional tools that could be beneficial in gathering information on the general context or specific research questions of a given project. Beyond those, many other PLA tools exist and new ones are continuously created. A list of additional PLA resources, both in print and online, can also be found below. Please reference these additional resources for greater detail on the activities below, in addition to other PLA tools.

Additional PLA Options & Potential Objectives

Tools for General Context

These tools can be utilized to gather information on the general context of the target community. These would be most beneficial during a preliminary assessment before the intervention begins to help inform the project activities, ensuring that the intervention is appropriate and effective.

1. Seasonal Calendar: Captures data on the cyclical patterns in a given community that affect the lives and well-being of the population. Possible patterns to be identified include:

- Disease prevalence
- Climate (rain fall and temperatures)
- Crop sequences (pests and diseases)
- Work schedules
- Social events
- Variations in food supply
- Migration
- Income and expenditures
- Workload of men, women, and children
- Weather and disease outbreaks
- School year

2. Pie Chart: Produces a visual diagram of the dynamics within a community that affect the lives and well-being of a population, in relation to one another. Possible dynamics to be identified include:

- Ethnic or religious composition
- Age
- Occupations
- Educational levels
- Reasons for poor health
- Barriers for accessing social services
- Main social or health problems
- Use of health care or educational facilities

3. Historical Profile: Provides information on the pre-existing context of a community by eliciting a snapshot of the relevant historical events that have impacted and may continue to influence community members. Possible historical elements to be identified include:

- Health and social services
- Health epidemics or common problems
- Development interventions
- Political history
- Construction
- Cultural events
- Industries and trade
- Land acquisition

Targeted Tools

These tools can be utilized to gather information on a specific research question for the target community. These tools would be most beneficial if implemented periodically throughout the project cycle, including during the baseline, midline, and endline assessments at a minimum. By conducting these activities throughout the project cycle, the impact of the intervention on the population can be monitored.

1. Spider Web Diagram: Produces a visual comparison of the priorities, opinions, and trends present within a community. Possible trends to be identified include:

- Skills or knowledge learned
- Difficulties/barriers to social services
- Effectiveness of program components
- Severity of health issues

2. H Form: Assists with asking a targeted question and learning the positive and negative aspects of a specific factor in a community. Possible factors to be identified and assessed include:

- Health conditions
- Access to social services
- Program components
- Community member's opinions and priorities

3. Flow Diagram: Gathers information on processes in a community or the decision-making of groups or individuals. Possible processes to be identified include:

- Support services sought during illness
- Causes and effects of diseases
- Program interventions
- Reasons for non-use of social services
- Effects of unhealthy or damaging behaviors
- Functioning of work systems
- Differences in life cycles of girls and boys
- Transfer of information

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