A photograph of three women in a meeting, looking at documents on a table. The image is overlaid with a teal color filter. The woman in the center is leaning over the table, pointing at a document. The woman on the left is smiling and looking at the document. The woman on the right is also smiling and looking at the document.

The Power of Reflection: An introduction to participatory evaluation techniques

By Gillian Kranias, Health Nexus

This resource was originally developed by Health Nexus for HC Link (2016).

Revised 2018

Contents

Why Evaluate?	03
Where to Start	04
Three Participatory Evaluation Techniques	05
- Lineups	06
- Head-Heart-Feet	07
- Paper Quilt	09
References	11

Introduction

Community groups and partnerships commonly talk about needing simpler tools to evaluate their efforts. With this resource, you can begin benefiting from your own reflection activities without needing an outside evaluator.

The following pages present a theoretical introduction to participatory evaluation and three simple evaluation techniques that can be used by any community group or partnership.

You can employ these practical and adaptable approaches to:

- inform the development phase of a partnership,
- reflect on group dynamics and processes, and/or
- identify results after a project or community event.

Using participatory techniques can also help re-energize your group members' relationships and commitment.

CHECK OUT - Health Nexus' [Participatory Evaluation Toolkit](#) to deepen your understanding of a participatory approach and access 7 additional techniques to use with your community group or partnership.

Why Evaluate?

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

Evaluation can help to:¹

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

Evaluation gives us information (also called “data”) that all types of people – including participants, organizers, facilitators, partners, politicians and funders – can learn from. Of particular value to voluntary groups and partnerships, evaluation can also (re)energize group relationships and commitment.

Participatory Evaluation is Unique

To take a participatory evaluation approach means to invite and facilitate more involvement and co-leadership from the people most directly involved with, and affected by, our efforts.²

Depending on where you are coming from, participatory evaluation may be a natural extension of how you already work (e.g. Indigenous traditions or community development approaches), or it may involve “...radically rethinking who initiates and undertakes the [evaluation] process, and who learns or benefits from the findings...”³

Why Choose a Participatory Approach?⁴

- Advance equity among group members.
- Emphasize the most relevant questions.
- Build collaboration skills.
- Spark creativity and innovation.
- Apply insights to action.
- Reflect your culture and values.
- Engage in a fun and energizing way.

Where to Start

Evaluation engages the power of reflection by taking a systematic approach, but it can still be quite simple. The basic pattern of an evaluative feedback system looks like this:

- A. Decide on one (or more) guiding question(s).
- B. Select a technique to gather information.
- C. Explore what? - Discuss and analyse the information (data) you collect.
- D. Discover so what? - Seek consensus about your findings (conclusions) and recommendations.
- E. Discuss now what? - Identify actions you can take based on what you learned.

“It’s about choosing, among several possibilities, the pair of glasses under which [your] project will be studied.”

– www.rechercheparticipative.org⁵

Powerful Evaluative Questions

Look for questions with the power to gather information and perspectives that take your group/partnership to a new level of understanding, strategy and synergy. Invite key stakeholders to select evaluative questions with you. Keep the questions simple and direct. Powerful questions are not complex questions.

Here are some question options that fellow consultants have found valuable for participatory evaluation discussions and results.

1. What happened?
(share observations and stories)
 - So what? (look for insights and learnings)
 - Now what? (plan for change)
2. What do we see that is different, since three years ago, that this partnership contributed to?
3. Tell a story that illustrates...how this experience has made a difference in your life, work or community?
4. Who is coming to our activities? Who is not coming? What might we change to reach out more?
5. Why do I participate in this group? How well are my personal goals being met? What could improve things?
6. What do we see that is different in our efforts since last year, in terms of:
 - Numbers?
 - Types of activities?
 - Types of partners?
 - Willingness to volunteer for tasks?
7. What helps? What gets in the way?

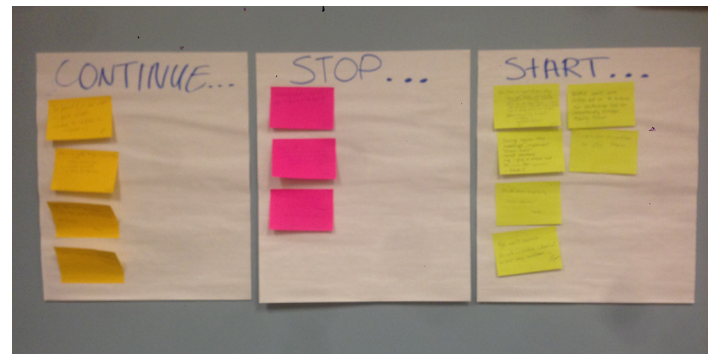
8. What are the big rewards? What are the big challenges?
9. What should we:
 - Keep doing?
 - Stop doing?
 - Start doing?

Tip

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



Use *Fishes & Weeds* cut-outs for a fun way to explore the questions "What are the big rewards?" and "What are the big challenges?" For more ideas on creatively using cut-outs to explore powerful questions, read Andrea Bodkin's Blogpost [Facilitation Technique: Fishes and Weeds](#) (and more)



Three Participatory Evaluation Techniques

On the following pages are descriptions of three participatory evaluation techniques that are simple and fun. Don't forget, you can also ask your powerful questions using standard data collection

techniques (like surveys, focus groups and/or key informant interviews) and still emphasize participation during your evaluation design, as well as when you analyse the results of your research.

For more examples (7 more complex techniques), check out our [Participatory Evaluation Toolkit](#). You can also try adapting participatory facilitation techniques you already use to an evaluative discussion.

Lineups (also known as human continuum)⁶

Lineups are a very physical way of looking at where people's experiences, feelings or preferences fit along a spectrum or scale. They generate some immediate quantitative insights, which are then explored further to highlight qualitative stories or explanations. Lineups can help your group respectfully explore and better understand what's behind differences of experience or opinion. Here are some sample questions that lineups can reflect on:

- How well do you think we have met our objectives for this project – from “not at all” to “completely”?
- How are you feeling at the end of this session – from “tired” to “highly energized”?
- To what extent are other leaders in your sector/ community aware of the activities and impacts of this partnership – from “completely” to “not at all”?

Logistics

SPACE	TIME	MATERIALS
<ul style="list-style-type: none"> • Enough space to line up (see picture). If your space is tight in length, invite people to line across an arc. 	<ul style="list-style-type: none"> • 8-20 minutes. This depends on how much time you spend exploring the reasons behind peoples' choice of position, and whether you ask more than one question (try 1-3). 	<ul style="list-style-type: none"> • Optional: note taker or flipchart to document the debrief dialogue.



Instructions

1. Explain the technique, define the extreme ends of the lineup, and clarify your respect for individual choice (i.e. clarify that participation is optional and people may choose to just watch).
2. Pose a question.
3. Invite people to place themselves along an imaginary line on the floor, according to their personal response to the question you have posed. Invite them to chat with other people along the line in order to best determine what spot matches their experience/perspective, and allow time for them to do this.
4. While still standing in the line, take a look at the quantitative results of your lineup survey. Next, explore the (qualitative) meaning behind what you see by inviting people to explain their place in the line-up. For example: “why did you end up at this location?” and/or “what keeps you at this location?” Explore whether this new information leads the group to any important lessons or other insights.

Tips

- In advance, check that the question you are asking is one that people will feel comfortable to explore together. Lineups are similar to a Likert scale survey but everybody can see each other’s response, so confidentiality may be an issue.
- It is often helpful to curve the line a bit during the probing discussion, so that people can better see each other.

Head-Heart-Feet⁷

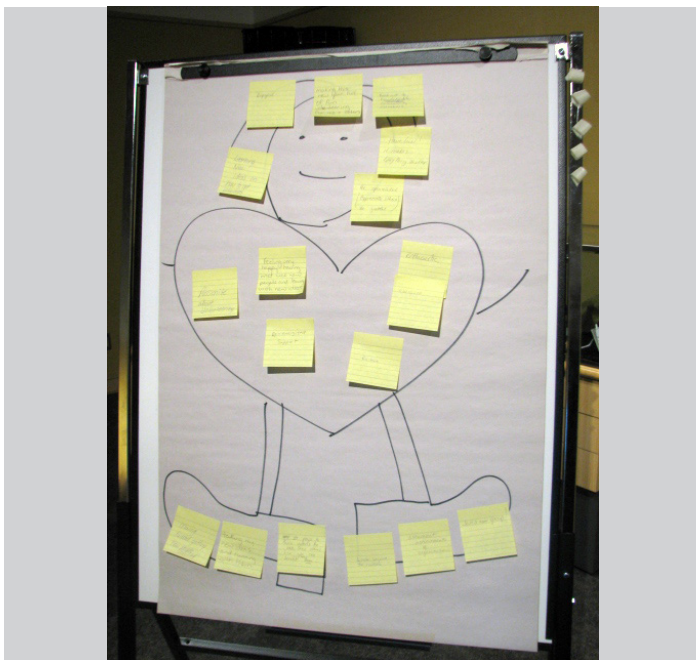
The head-heart-feet evaluation offers a simple complement of questions, drawing on the analogy of a “whole person”. Here are some examples of how it can be used in different ways, at different times:

- At the beginning... of a new partnership: use it to survey everyone in the room about their hopes for the collaboration.
- In the middle... of a day long workshop (e.g. before lunch): use it to assess the morning’s activities and consider if afternoon plans should be adjusted.
- At the end... of a collaborative planning session: use it to reveal diverse impacts of the session on participating individuals and partners.

Logistics

SPACE	TIME	MATERIALS
<ul style="list-style-type: none"> Wall space (or a flipchart stand) in a location that will facilitate people's comfort to post and read the notes. 	<ul style="list-style-type: none"> 5 minutes for people to write and post their responses. Add another 5-15 minutes immediately after, or at the beginning of your next gathering, to read/summarize and reflect on the results. 	<ul style="list-style-type: none"> Flipchart paper Post-it notes Thin markers for people to write their comments.

Instructions



1. On large flipchart paper, draw a stick figure with a large head, heart and feet.

2. Write on the flipchart and/or explain the symbolism of each body part:
 - Head = what did I learn?
 - Heart = how am I feeling?
 - Feet = what will be my next steps?
3. Distribute three small sticky notes to each person, and invite them to comment and post their responses according to each symbol and related question. Invite people to read the responses of others when posting their own.
4. Take time immediately - or at the beginning of your next gathering - to review the results together:
 - What patterns do we see?
 - Does anything surprise us? Or concern us?
 - What can we learn from this feedback?
 - What, if any, action should we take based on this feedback?

Tips

- Be flexible. People may interpret the questions in slightly different ways and that is okay. The main purpose of this technique is to create an opening for people to reflect and share very personal qualitative insights. These can later be used to initiate a larger group reflection and response.
- In a group that includes individuals or representatives from different subgroups (for example, parents and teachers) you can give different coloured post-it notes to each group to help identify if there are any patterns based on those differences.

Paper Quilt

Paper quilts are a relatively quick arts-based evaluation technique. They allow time for individual and/or small group reflection, then use images and story to express ideas.

Here are two examples of groups using paper quilts in different situations:

Powerful question:

Why do I care?

What do I value most about this initiative?

This paper quilt activity took one hour: twenty minutes was allocated to individual, pair and small group reflections before the squares were drawn (because of this the images are more complex and the content has more depth).



Powerful question:

Recognizing that many of us passionate folks have very busy work, volunteer and social lives, what can we do to maximize our team energy and effectiveness?

This paper quilt reflection took 20 minutes: ten minutes to reflect in pairs and complete squares, then ten minutes to collectively analyse and identify a "small wins" action plan.



Logistics

SPACE	TIME	MATERIALS
<ul style="list-style-type: none"> • Enough wall space (or a flipchart stand) to house the quilt squares all together. If the wall is not directly in front of where people will sit, you will want room to stand together in front of the quilt. • Tables are useful, but not completely necessary, for when people are drawing their squares. 	<ul style="list-style-type: none"> • Variable. Usually 30-60 minutes. This depends on your group size and the complexity of the question being explored. The individual sharing and the large group analysis take up the most time. 	<ul style="list-style-type: none"> • Squares of paper or card stock, ideally in different pale colours • Markers or crayons • Masking tape or blue sticky tack • Flipchart for notes on the evaluative discussion.

Instructions

1. Prepare the paper quilt squares. 8 ½ x 8 ½ squares are a nice size, but smaller squares or post-it notes can work with smaller groups.
2. Invite people to reflect on an evaluative question (the reflection can be done alone, in pairs, or in small groups).
3. Pass around colourful markers and invite everyone to draw a picture, a symbol, or 1-2 words (in any language) on their square.
4. Have people take turns sharing their square, adding an explanation (if they want), and then posting it to the wall to create a colourful "paper quilt"
5. Together, discuss common themes, surprises, learnings and/or action opportunities. Note these evaluation results on your flipchart.

Tips

- A longer variation: invite people to reflect individually, then in pairs or small groups using a reflection sheet. Later, invite them to draw paper quilt squares based on their discussion.
- You can also use a paper quilt to explore the impacts of a project or event. Ask people to reflect on what has changed for them or a key learning, and then draw a picture, symbol or word which reflects the change or learning.
- Be sure to take a picture of the paper quilt - for tweeting to the world or inserting into a report.

References

¹ Anita M. Baker, Beth Bruner. *Participatory Evaluation Essentials: An Updated Guide for Nonprofit Organizations and Their Evaluation Partners*. (The Bruner Foundation, 2010).

² Institute of Development Studies. *Participatory Monitoring and Evaluation: Learning from Change*, IDS Policy Briefing, issue 12 (1998).

³ Institute of Development Studies. p2.

⁴ KU Work Group for Community Health and Development. "Participatory Evaluation", Community Tool Box Chapter 36, Section 6, (University of Kansas, 2015).

⁵ Centre collaborateur de l'OMS pour le développement des Villes et Villages en santé. *Sait-on bien travailler ensemble? Petit guide d'évaluation à l'intention des initiatives de développement des communautés*. (Québec : Centre collaborateur de l'OMS pour le développement des Villes et Villages en santé, 2009). P.47 <http://www.rechercheparticipative.org/PDF/PetitGuideEval18nov09pourImpression.pdf>

⁶ R. Arnold, B. Burke, C. James, D. A. Martin, and B. Thomas. *Educating for a Change: A Handbook for Community Educators*. (Toronto: Between The Lines, 1991).

⁷ Arnold et al. *Educating for a Change*.

Tip

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

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

The publication of this resource has been funded through Status of Women Canada's Women's Program.



Acknowledgements

Here is a recognition to all the equity-seeking individuals and communities who have said “this system doesn’t work for us”, “nothing about us without us”, “honour the principle of reciprocity”...and who developed and shared ways of evaluating that pay respect to these insights and values. The teachings and techniques in this resource are grounded in their wisdom and generosity.

Thanks also to the many individuals who provided valuable feedback on different versions of this resource.

Download this resource at: <https://en.healthnexus.ca/sites/en.healthnexus.ca/files/resources/powerofreflection.pdf>

Cette ressource est également disponible [en français](#).



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

For more than 30 years Health Nexus has been working with diverse partners to help create healthy, equitable and vibrant communities where people of all ages can thrive. Health Nexus is a bilingual organization that offers services and programs in English and in French.

To learn more, contact us at:

www.healthnexus.ca
416-408-2249 or 1-800-397-9567
info@healthnexus.ca
[@healthnexus](https://twitter.com/healthnexus)