

Remote Participatory Evaluation & Research Methods

This edition of Co-Praxis reflects on methods, techniques, and tools that can be used for the facilitation of participatory evaluation or action research processes at a distance, during the global pandemic or other times when in-person events are not possible. The participatory evaluation and research methodologies used to frame the specific techniques and tools in this edition of Co-Praxis include feminist evaluation, developmental evaluation, participatory action research and popular education. This bulletin sets out methods and techniques that can be used asynchronously or synchronously to respond to the common approaches to participatory evaluation and research.

JGG Experience

JGG consultants were accustomed to facilitating participatory evaluation or action research processes through a blend of in-person and on-line techniques; however, this changed with the global pandemic that restricted international travel.

JGG looked to asynchronous and synchronous distance education good practices when the global pandemic first hit. JGG had examined these practices in previous multi-country evaluations for the Organization of American States and other clients that involved professional development courses offered through online platforms and hemispheric networks. After this internal review, JGG staff and a University of Ottawa intern researched important participatory evaluation and action research methodologies. Once the common key elements of these methodologies were distilled, JGG was then able to review methods and tools for each phase of the evaluation or research that would address the participatory principles and approaches. This bulletin documents the results of our internal learning and reflection.

PARTICIPATORY METHODOLOGIES

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Chicago Beyond. 2018. "[Why Am I Always Being Researched?](#)" Chicago Beyond.

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Haylock, Laura, and Carol Miller. 2015. "[Merging Developmental and Feminist Evaluation to Monitor and Evaluate Transformative Social Change.](#)" *American Journal of Evaluation*, April.

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Methods and Techniques for Participatory Remote Research or Evaluation

ROLE OF THE EVALUATOR OR RESEARCHER

The participatory methods reviewed situated the evaluator or researcher as a facilitator, co-learner, "translator," or "explainer of methods" to recognize the agency and knowledge (from lived experience) possessed by community members or project participants involved in the process. Methodologies reviewed for this Co-Praxis note the importance of shifting

power to participants and defining roles and responsibilities and ethical issues among participants and facilitators at the outset. To shift power the researcher should acknowledge their own position of privilege, clarify roles and facilitate intersectional analysis of experiences based on gender, education, ethnic origin, nationality and other characteristics.

Methods and tools to facilitate analysis of power:

[Community Power Map](#) or [Other power analysis tools](#).

METHODS IN THE DESIGN PHASE

Co-creating the research or evaluation design with the participants will help shift some power from the evaluator/researcher to the stakeholders/participants. To be fully aligned with participatory methodologies that seek social change and learning, active participation of stakeholders or a community should be planned for all stages of research or evaluation. A variety of approaches can be adapted to remote participation. For example, popular education, based on Paulo Freire's pedagogy of the oppressed, involves critical reflection based on participants' life experiences and encourages horizontal relations between facilitators and community participants. Initial participatory analysis of the context or issue can be conducted using a variety of methods.

Methods and tools to support participatory design:

Synchronous or asynchronous visual mapping of the evaluation or research process on [Miro](#), or [VUE](#) (visual understanding environment), an application developed by Tufts University.

[World Cafe Method](#) could be used in small breakout groups (e.g., on Zoom) to generate options for research or evaluation objectives or key lines of inquiry.

[Pre-texts](#) is a protocol developed by a Harvard professor that seeks to generate critical reflection, collaboration and citizenship among a group based participatory artistic interpretation of a selected text.

The [Delphi technique](#), easily applied through email, could be used to generate consensus on project goals and results among diverse opinions (it was originally designed for forecasting based on 'experts' opinions).

Create a research or evaluation timeline in a PPT in a shared folder or [with Google Docs and Lucidchart](#).

[Participatory Rural Appraisal](#).

Pre-texts

A JGG colleague, Carmen Colazo, applied Pre-texts online with a university law class during the pandemic. Carmen requested students leave their cameras on during the two-hour session (the minimum suggested time). Carmen describes the process in the following manner. Step 1: each session begins with a group exercise (icebreaker) prepared by the facilitator (first day) and subsequently by one of the participants. Step 2: A text is selected and shared by the facilitator (and subsequently the participants). Carmen used the Argentinean Civil Code, but it could be a poem, essay, judicial decision or any other text. Participants then respond to, or question, the text. For subsequent classes the law students researched, and shared major topics found in Civil Codes from other countries and uploaded their research to a cloud-based folder. Step 3: The group reflects on the previous step (what did we do?) and participants are encouraged to expand the inquiry. Step 4: An artistic activity to interpret the text is selected by the facilitator for the first session and subsequently by a participant (e.g., a poem, skit, song, recipe, or drawing). This activity is developed in small groups or by individuals and shared with the full group. For example, in one of the sessions the students prepared recipes with "ingredients" from the Civil Code. Step 5: The session ends with another reflection (what did we do?).

METHODS FOR DATA COLLECTION

After specific inquiry or evaluation questions have been determined by the stakeholders with the help of a researcher/evaluator data collection methods need to be identified. In development evaluation, feminist evaluation and participatory research community members or project participants are engaged in collecting data and can also be sources of information. The evaluator or researcher may need to prepare capacity building activities with partners and participants on the application of certain methods or tools.

Methods and tools for or to adapt to remote data collection:

[Most Significant Change](#) and [MSC](#) using [participatory video](#) or [PhotoVoice](#).

[Outcome Harvesting](#).

[Socratic method of conversation](#) Socratic Method to stimulate conversation.

Rapid polling using online tools such as [Mentimeter](#) or [Kahoot](#).

Create a retrospective timeline of major milestones on [Miro](#), in a PPT in a shared folder.

[Digital storytelling](#).

[Focus group discussions](#).

Interviews and surveys led by community members or project participants.

Video or camera diaries prepared by participants.

Cause and effect mapping to explain why a change occurred (e.g. [StorySurvey](#)).

Participatory evolutionary process ([ParEvo](#)), a method allowing multiple people to produce a set of storylines about what could and/or did happen.

[Project benefit-impact matrix](#) – a visual method exercise to scrutinize how a project affects, the community, different groups and individuals.

SENSE-MAKING/DATA ANALYSIS

Once the data is systematized the analysis or “sense-making” activities with participants is important. The literature review revealed that facilitating participation in this phase can be challenging, especially if a large amount of data has been collected. It may require a certain amount of initial analysis on the part of the researcher; for example, she may first categorize information before a workshop with participants. Alternatively, data analysis may be done at the end of a data collection activity, among the participants involved. Regardless, collaborative analysis with participants, or a reduced group of participants, to identify the evaluation or research “results” by making sense of the data is key to a participatory process. It ensures data is reviewed based on lived experience. It allows for issues (findings) identified to be re-framed, prioritized, and the underlying conditions that supported social change to be identified.

Methods and tools for participatory data analysis:

Completing the reflection on the methods used in data collection such as [MSC](#) with [PhotoVoice](#).

Reflection workshops or various reflection activities using [Miro](#) or other mapping tools such as [StickyStudio](#).

Participatory prioritization of research results/findings in the community.

[Sensemaker](#) software would support data collection and sense-making. It allows participants to enter their stories in real time and then analyzes the data to identify patterns.

[Causal Map](#) is a new online social research application to organize and visualize qualitative research.

CONCLUSIONS AND ACTION PLANNING

While the methodologies reviewed distinguish sense-making and conclusions (or interpretation of findings), in reality it would seem that participatory data analysis and sense-making would naturally lead to some broader conclusions, especially if the sense-making phase involved data analysis across sources and methods. Once research or evaluation findings are identified and validated by participants, the conclusions (interpretation of findings) should be developed together with project participants or community members. This ensures the conclusions and action plans to address the evaluation or research results are relevant to the participants in their local context.

Methods and tools to assess results and draw conclusions:

[Citizen Jury](#) is a method that could be adapted to support data analysis and this final phase. The individuals responsible for certain data collection and compilation could present the results (the “evidence”) to the jury (the larger group of participants or community members) prior to an assessment of the evidence and conclusions.

JGG Reflections

JGG network consultants and colleagues from Bolivia, Canada, Colombia, Guatemala, Paraguay, Serbia, Turkey, Uganda, the United Kingdom and Vietnam shared their experience of facilitating online participatory research and evaluation in two online meetings.

Offline participatory methods easily adapted to online evaluation or research. Certain key principles remain the same for in person or distance evaluation and research. JGG consultants note that the selection of tools is less important than understanding why and when to use specific methods and tools to respond to particular issues or research questions. Most methods can be adjusted for distance participation with a little creativity and online platforms or tools.

New opportunities to experiment during the pandemic. JGG consultants note a new interest in experimentation with innovative approaches to data collection among colleagues and clients. For example, development agencies are now willing to consider participatory approaches at a distance even though this possibility, through various tools, has been available for years. JGG, along with others, is learning to manage the risks related to remote evaluation and research during international and national travel restrictions. However, in general, adapting and testing methods has been effective, if not more time consuming than initially envisioned.

Connectivity. JGG has addressed problems with internet access and digital literacy in rural areas of various countries by using WhatsApp or telephone or arranging access through an organization with facilities and internet connection for participants to use. Admittedly, some of the methods and tools

above will not work well without strong internet connectivity and computer equipment.

Online contact with victims of violence. Data collection in relation to a program's response to violence or sensitive personal experiences has been addressed as it would in face-to-face meetings: a local resource person accompanies the participant or introduces the evaluator and ensures initial trust is built.

Participatory methods are often more time consuming and resource intense. This needs to be taken into consideration during the planning stages of an evaluation or research project and should be clearly communicated by or to donors. Consideration could be given, for example in a feminist evaluation at a distance, to adopt methods that provide for both data collection and sense-making. JGG consultants note that certain types of evaluative initiatives, such as systematizing experiences and lessons learned, can be highly participatory without requiring additional time and funding.

Other resources

[Participatory Action Research](#), The Institute of Development Studies.

[Participatory Approaches. Methodological Briefs. Impact Evaluation No. 5](#), UNICEF.

[Overview of several participatory methods and tools](#), The Institute of Development Studies.

[Toolbox on participatory planning projects with a focus on cities and urban planning](#), Active Neighbourhoods Canada.

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