

Workshop Agenda

PARTICIPATORY ACTION RESEARCH, PLANNING AND EVALUATION: Tools and Foundations

Originating with the pioneering work of Kurt Lewin and the Tavistock Institute, participatory action research (PAR) is a well-documented tradition of collective reasoning and evidence-based learning for social change. Taken together, the various formulations of PAR (critical, pragmatic, and psycho-analytic) constitute a robust alternative to positivism's denial of human agency and justice in the global era.

The three-day agenda is organized into four modules: Planning systems that learn, Exploring problems, Knowing the actors and Assessing options. Participants will learn and apply practical tools that can be adapted to many contexts for up-stream needs analysis, mid-stream monitoring and course correction and down-stream assessment of social change. Some tools are practiced in depth while others are introduced as a 'window' for self-study.

The following is a list of tools used during the workshop. You can download the full set of tools at: <http://www.participatoryactionresearch.net/skillful-means>

Planning systems that learn

Ground participatory action research, planning and evaluation in specific contexts and institutional settings, and support discussion of planning where uncertainty prevails.

Your P.I.E. Profile: helps you assess the balance and integration of three components in a learning system: 1) Planning, to create logical schemes for doing things to achieve goals with appropriate inputs; 2) Inquiry (research), consisting of data collection and diagnostic analysis, using the appropriate tools; and 3) evaluation, to assess results or outcomes against goals, using well-defined criteria and indicators. You can use the tool to decide what adjustments to a learning system are needed in a particular context, and why.

Process Manager: helps you plan research, planning activities and evaluation at the right time and at the right level of detail, in light of new information and unforeseen events.

Order and Chaos: helps you decide on the planning approach needed by answering two questions: what are the chances of achieving project or program goals, and how certain or

confident are people that the information and knowledge they have is complete and reliable?

What's the problem?

Timeline: helps you tell a story of changes over time, significant events of the past or the chronology of steps in a current or planned activity. Use this story to find ways to overcome barriers of the past and apply lessons learned.

Force Field: helps you understand the factors that contribute to a problem, a situation or a project, and those that counteract it. Discuss ways of achieving key objectives by strengthening or reducing the factors at play.

Gaps and Conflicts: helps you identify issues underlying the core problem and find out if these issues are mostly about gaps or conflicts in power, interests (gains and losses), moral values, or information and communication.

Causal Dynamics: helps you identify strategic entry points in complex systems, by assessing the causes of a key problem and the way each cause interacts with other causes in a system. It helps you decide where to start based on the causal weight of different factors, how they interact with each other, and where control can be exercised.

How good is your analysis?

Validation: helps you validate the results of an inquiry and decide whether more evidence and/or consensus is needed before action can be taken based on the results.

Who are the Stakeholders?

Stakeholder Rainbow: helps you identify stakeholders, visualize differences and plan who to engage and in what order.

Social Analysis CLIP: helps you create a grounded stakeholder analysis and build a base for advocacy and strategic action, especially in complex settings involving conflicts of interests or histories of conflict.

Negotiation Fair: helps you assess and negotiate what stakeholders can expect of each other, by assessing current and desired levels of interaction and making offers and requests.

Network Dynamics: helps you assess relations of trust, information flow or influence among stakeholders, and how to overcome problems related to the silo effect in organizations.

V.I.P (values, interests and positions): Helps you compare the positions that stakeholders take on a situation or action with their actual interests and the moral values they hold.

What are the Options?

Ranking, Rating and Weighting: Helps you prioritize by developing an order within a hierarchy (ranking), grading elements using one or several criteria (rating), and comparing elements using scores weighted according to the importance people assign to criteria (weighting).

Disagreements and Misunderstandings: Helps you rank stakeholders' goals in order of importance, and review disagreements and misunderstandings people may have about these goals.

Contribution and Feasibility: Helps you choose between several options using two criteria: the contribution associated with each option, and how feasible each option is in light of favorable conditions (strengths and opportunities) and unfavorable conditions (weaknesses, threats).

The Socratic Wheel: Helps you evaluate and rate one or several elements or alternatives (current project goals, options to choose from, individual skills, leadership styles, products, events, etc.) on multiple criteria.

Attribution and Contribution: Helps you assess the contribution of an intervention to observable changes in a situation, by exploring and developing a narrative around the nature of the intervention, what would have happened without it, and the reliability of the evidence used to do the evaluation.

The Instructor

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