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The
PACA
Field Guide
For Volunteers



Field Guide Owner

Peace Corps

The Participatory Analysis for Community Action (PACA) Field Guide for Volunteers

OFFICE OF OVERSEAS PROGRAMMING AND TRAINING SUPPORT (OPATS)

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KEY CONCEPTS

This Field Guide is built upon (and owes heavily to) the concepts detailed below. **These concepts are central to your work as a Peace Corps Volunteer, so read on!**

It's worth noting that you may find some contradictions among the following concepts. For example, some pinpoint problems or needs while others focus on developing assets and strengths. That's OK. The Field Guide acknowledges the value of all of these various concepts and approaches and aims to incorporate the best of each.

These key concepts are referenced throughout the Field Guide with this symbol: 

Remember to flip back to these pages to refresh your memory as needed.

Appreciative inquiry

Appreciative inquiry is an approach to community development that seeks to engage stakeholders in self-determined change. It is based on the belief that human systems are best made and imagined by those who live and work within them. When applied, appreciative inquiry is the cooperative search for the best in people, their organizations, and the world around them. Appreciative inquiry involves the art and practice of asking questions that strengthen a system's capacity to heighten positive potential.

 Learn more: *A Positive Revolution in Change: Appreciative Inquiry* by David L. Cooperrider

Asset-based community development (ABCD)

Asset-based community development is a strategy for sustainable community-driven development. ABCD is premised on the idea that communities can drive the development process themselves by identifying and mobilizing existing—but often unrecognized—assets, thereby responding to and creating local economic opportunity. ABCD intentionally starts with assets instead of problems or needs.

 Learn more: ABCD Institute

Community

“Community” in terms of your Peace Corps service can be defined in different ways depending on the situation. Sometimes it will be important to think of community as the administrative unit in which you live. Other times, you might be thinking about natural resource availability and thus think of community as the geographic watershed of land where water flows and drains. For some projects, you may need to focus on a specific subset of people, such as pregnant or lactating mothers, and consider them the community. Maintaining a flexible definition of community and exploring new perspectives will be an important part of your service.

Human-centered design (HCD)/design thinking

Human-centered design (also known as design thinking) is a creative approach to problem solving. It's a process that starts with the users you're designing for and ends with new solutions that are tailor-made to suit their needs, challenges, opportunities, and problems. HCD develops solutions by purposefully involving the end users' perspectives in all steps of the design process. Design-thinking strategies are highly hands-on, team-oriented, and typically characterized by overlapping, fluid phases rather than a linear set of steps

 Learn more: IDEO, *The Field Guide to Human-Centered Design*

Participatory rural appraisal (PRA)

Participatory rural appraisal is an approach to development that aims to incorporate the knowledge and opinions of rural people in the planning and management of development projects and programs.

i Learn more: Catholic Relief Services, Rapid Rural Appraisal (RRA) and Participatory Rural Appraisal Manual

Peace Corps' approach to development

The Peace Corps' approach to development is focused on capacity building. We see development as the opportunity to help people develop the capacity to improve their own lives. The focus of our work and development efforts is on people, not things.

i Learn more: Peace Corps, PACA Idea Book

Project design and management (PDM)

In the Peace Corps, PDM is the process of involving community members in moving from collective analysis to planning and implementing projects that meet their desires and needs—all while keeping sustainability as the end goal. PDM workshops are conducted at many posts with PCVs and their counterparts. The PDM process is the foundation of the Design and Deliver phases of the Field Guide, and several (but not all) of the PDM tools are included in these sections.

i Learn more: Peace Corps, Project Design and Management Workshop Training Manual

Prototyping

Prototyping is the process of test-driving a project for a short period of time in the real world before full implementation. What works? What needs to be changed or adjusted? Prototyping is an ongoing chance to get tons of feedback and try new approaches until you and the community find a solution that sticks.

i Learn more: IDEO, The Field Guide to Human-Centered Design

Roles of the Peace Corps Volunteer in Development

Your role in development is quite simple: help people help themselves! While this is easier said than done, as a Volunteer your role is defined around six capacity-building sub-roles: learner, change agent, co-trainer, co-facilitator, project co-planner, and mentor.

i Learn more: Peace Corps, Roles of the Volunteer in Development

Sustainability

Sustainability is the ultimate end goal of any project you support as a Volunteer. Think of sustainability as making it stick. The projects you carry out alongside community members should continue on and thrive long after you—and any subsequent PCVs—depart.

ACKNOWLEDGMENTS

The PACA Field Guide for Volunteers is both a revision of the 2007 edition of *The PACA: Participatory Analysis for Community Action Training Manual* [ICE No. M0053] originally published in 1996, and a consolidation of content included in *Gender and Development Training* [ICE No. M0054] as well as the *PACA Idea Book* [ICE No. M0083].

True to the principles and approaches embodied by PACA, this resource was developed over the course of three years by a **PACA working group** that utilized participatory approaches and tools, human-centered design thinking, and a formal piloting of a Field Guide prototype in order to collaboratively dream, design, and deliver this resource. The PACA working group consisted of PC/Washington staff members Adam Beebe, Courtney Clark, Hannah Gardi, Gabe Krieshok, Erin Lawless, Danielle Niedermaier, Amanda Rabinowitz, Stephanie Weber, and Amanda Young.

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INTRODUCTION



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How Volunteers Do Development

As a Peace Corps Volunteer, you have committed **“to help the people of interested countries in meeting their need for trained men and women.”**

Since the beginning, the Peace Corps has approached development in people-to-people terms. Peace Corps Volunteers serve to strengthen the capacity of men, women, girls, and boys to actively participate in their own development. In sum, we help people help themselves. Herein lies the heart of the Peace Corps’ approach to **development**: a distinct focus on capacity building. Volunteers strive to empower those they serve to be their own decision makers, to develop the skills needed to carry out those decisions, and to take the lead in improving their lives.

Your primary role as a Volunteer, then, is that of capacity builder and community partner. As you accompany the community in its learning process, you will also be a learner. Additionally, you will serve as a co-facilitator, mentor, and change agent, **among several other key roles**. As you assume each of these roles at various times throughout your service, your capacity-building efforts will become more sustainable when your work and the projects you are supporting are truly participatory in nature.

Participatory capacity building means developing relationships and uncovering meaningful information about who people are and how they interact. Likewise, it’s about facilitating opportunities for different groups of community members to develop relationships and uncover meaningful information about one another. It’s about bringing various community members together to help them analyze their situation and collectively identify promising ideas. And most importantly, it’s about empowering a wide variety of individuals and groups to assume ownership throughout the process of community-led action. Your commitment to working within a participatory capacity-building framework means that the skills, knowledge, and understanding of **available assets**, strengths, and resources stay within the community—ultimately making community-led development efforts more **sustainable**.

So how can you, as a Peace Corps Volunteer, engage in development that is meaningful, people-to-people, sustainable, and participatory? One magical word—well, an acronym, actually: PACA.

◀ Yep this is **Goal One**. Don’t forget Goal Two (to help promote a better understanding of Americans on the part of the peoples served) and Goal Three (to help promote a better understanding of other peoples on the part of Americans).

◀ **Development** in its broadest sense is any process that promotes the dignity of a people and their capacity to improve their own lives. Peace Corps Volunteers serve as catalysts for facilitating such change.

◀ There are six primary **roles of the Volunteer in development**: 1) Learner; 2) Change Agent; 3) Co-Trainer; 4) Co-Facilitator; 5) Project Co-Planner; 6) Mentor.

◀ To be an effective approach to development, **capacity building** needs to happen at a number of levels: individuals; professionals and service providers; organizations; and communities. Read more in the PACA Idea Book (Peace Corps Publication No. M0086)

◀ **Asset-based community development** is a strategy for sustainable community-driven development that focuses on building existing assets instead of concentrating on needs.

◀ The definition of **sustainability** is multifaceted and varies depending on the nature of your development activities. At a minimum, Volunteers should consider the cultural, political, economic, managerial, and environmental sustainability of their efforts.

A Brief History of PACA (and Why It Matters)

A focal point of the Peace Corps Volunteer experience has always been a commitment to partnering with local counterparts and communities, and empowering them to determine their own assets, needs, development priorities, and paths for community action—rather than dictating an agenda from the outside. Participatory Analysis for Community Action (or PACA, as it's known in the Peace Corps) is central to this approach.

Rapid rural appraisal (RRA) and **participatory rural appraisal (PRA)** are two of PACA's

Similar to  **earlier development methodologies from which it evolved**, PACA consists of various participatory methods to engage community members in the process of uncovering the information needed to lay the groundwork for sustainable community-led development efforts.

A significant challenge with participatory methodologies has been engaging all community members in participatory analysis and community action. Different from its predecessor methodologies, PACA relies on the active and full participation of diverse and representative community groups to share information and uncover insights, analyze implications for the community, plan for action together, and collectively implement projects. Recognizing women as an integral but often marginalized part of the development process, PACA deliberately incorporates gender analysis techniques that uncover existing gender considerations and factor them into the community action-planning process. PACA also seeks inclusion of different age groups (youth and the elderly), ethnic minorities, and other commonly marginalized groups.

PACA defined: PACA is a gender-sensitive participatory methodology designed to communicate information, identify needs, and lay the groundwork for community action to solve problems. It facilitates the development of an effective and open partnership between the Volunteer and representative segments of the local community to design, implement, and evaluate development programs.

In sum, PACA is how you “do  development” (Goal One) and build  capacity as a Peace Corps Volunteer. It is an approach for building partnership between Volunteers and community members—and especially among community members themselves—in order to advance sustainable capacity-building efforts. Through PACA, Volunteers and community members collaborate to ensure that the voices of women, girls, men, and boys are present throughout the entire process of deciding how to allocate their most precious resources—their time and energy—to work toward a common future.

How to Use the PACA Field Guide

PACA is your approach to participatory and sustainable development as a Peace Corps Volunteer. As such, you should use PACA to help brainstorm, design, iterate, implement, adjust, and improve **each and every community-led project you support throughout your entire service**. The PACA Field Guide will walk you and the community members you work with through the various **phases** of translating participatory analysis into community action, and provide specific **tools** for implementing and improving projects along the way. The **lenses** in the Field Guide introduce reflection and perspective into your capacity-building efforts by helping you uncover meaningful information about yourself and others.

The most important thing to remember about the Field Guide is that it intentionally does not prescribe how you use PACA. That means you should work through the Field Guide in ways that best suit you, your community, and the projects you work on together. Move through the five PACA phases as an iterative process instead of a rigid set of steps. Choose among the tools provided and adapt them to suit your skills and abilities, as well as the reality of your community. Purposefully and continuously apply the six lenses in order to help you both choose and adapt the PACA tools. And consult the **Sector-Specific PACA** section of the Field Guide and the separate **Sector-Specific PACA Booklets** for guidance on how to tailor PACA to the project activities for your sector (Agriculture, Community Economic Development, Education, Environment, Health, or Youth in Development).

Chances are, you'll find yourself continuously revisiting the Field Guide for each of the community-led projects you support throughout your Peace Corps service.

◀ See "About Phases" in **Section 2** of the Field Guide for a visualization of how PACA can benefit different kinds of

◀ You'll learn more about PACA phases, tools, and lenses (collectively referred to as the PACA Approach) in **Section 2** of the Field Guide.

◀ **Section 5** (Sector-Specific PACA) highlights Field Guide tools of particular relevance to each sector. Section 5 also introduces additional sector-specific tools that are available in separate Sector-Specific PACA Booklets.

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THE PACA APPROACH



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About Phases

PACA is neither a fixed nor a linear process. Rather, it is an iterative and gradual process of **appreciative inquiry**, participatory analysis, and community-led change. Each of the development efforts (projects) you support will have starts and stops, steps forward and backward, moments of doubt and clarity, and countless opportunities to regroup and change course.

No two Volunteers, communities, or projects are identical. Nevertheless, all projects will generally move through five PACA phases: **Develop Relationships, Discover, Dream, Design, and Deliver**. PACA phases lend structure and direction to projects. By working intentionally through each of the PACA phases, you will build trust with the community, gain key insights that will lead to project ideas (or improve upon existing projects), and work alongside the community to bring projects to life. Each phase in the Field Guide includes a set of tools to help you work through that specific PACA phase.

Each phase also includes **project monitoring tips** for checking the pulse of the project, as well as **sustainability tips** for planning ahead and empowering the community to own the project. By periodically monitoring project progress and considering sustainability in each PACA phase, you and the community will identify successes and challenges, adjust course as necessary, and—most importantly—help ensure that by the time you complete your service, community members will have assumed ownership over the projects you have dreamed, designed, and delivered together.



Develop Relationships

Build trust and relationships, integrate into the community, and bring different community members together

Discover

Gather information and gain key insights by observing, learning from, and engaging community members

Dream

Make sense of observations, insights, and discoveries to generate or improve project ideas

Design

Prototype, test, refine, and continue to improve project ideas

Deliver

Bring the project to life! Implement, continue to refine, and build lasting **sustainability**

Project Monitoring Tips

Check the pulse of the project by monitoring achievements, changes, and setbacks along the way.

Sustainability Tips

At every step of the process, plan ahead and empower the community to own the project.

At the end of each of the five phases (in Section 4) are reflection worksheets that will help you identify key insights generated from that phase to build upon in the subsequent phases.

How to Move Through Phases

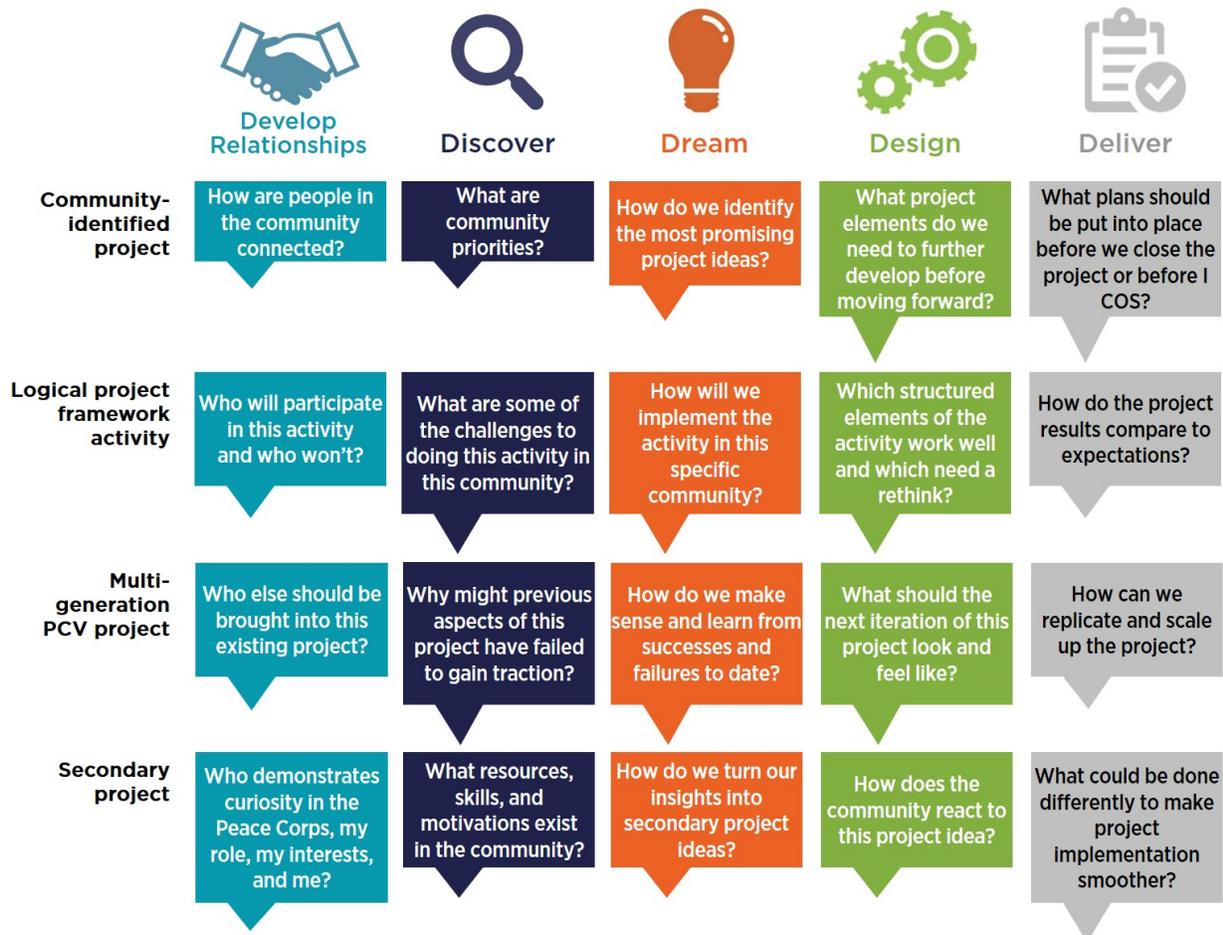
Regardless of the nature of your project—whether implementing a project activity included in your logical project framework, building upon identified community priorities, or continuing a project started by a previous Volunteer—it is essential to first work through the Develop Relationships and Discover phases before moving into the other phases. Being intentional about the first two phases is foundational to your effectiveness as a Volunteer and the long-term success of your Goal One development efforts—not to mention your safety at your site and the extent to which you are able to culturally integrate.

Once you move into the Dream phase and beyond, you can then embrace an iterative process instead of a rigid set of steps. Although you will generally continue to move through the phases in order, there will be countless moments during the Dream and Design phases when you and the community will want to go back and gain additional insights (Discover). Likewise, you may need to build trust (Develop Relationships) with new stakeholders who join the project at a later date.

Unsuccessful project ideas or  **prototypes** during the Design and Deliver phases are common. This may mean revisiting initial project ideas (Dream). Reverse steps through the PACA phases are not steps backward, but rather opportunities to refine, improve, and take more confident steps forward.

PACA for Every Volunteer Project

Working through the PACA phases helps you and the community ensure that the project in question is participatory, tailored to the realities of the community, led by the community, and owned by the community after you complete your service—regardless of the project’s starting point. Each and every community project supported by Volunteers can benefit from PACA. Here’s how:



Before getting started, remember: Do no harm! As a Peace Corps Volunteer, you are required to avoid and minimize adverse effects of your projects and your interactions with community members. This includes minimizing individuals' risk of danger, abuse of their rights, and environmental degradation. Before, during, and after your projects, ask yourself and your counterpart:

- Have project participants'—especially children's and vulnerable populations'—levels of risk of physical or emotional harm been considered?
- Does the project activity have any long-term consequences for the environment, including natural resource depletion, farming, wildlife areas, and land degradation?
- Does the project activity exacerbate existing divisions within or between communities (e.g., socioeconomic status, class, race, religion, health disparities)?

About Lenses

The Field Guide contains six lenses, each of which introduces a distinct perspective for helping ensure your use of PACA is truly inclusive, participatory, and sustainable. The lens topics are: behavior change; facilitation; gender; intercultural competence, diversity and inclusion (ICD&I); language; and power. Each lens explains the relevance of the topic to PACA, offers practical guidance for applying the lens when moving through the PACA Phases and/or using PACA tools, and states the insights you will likely uncover when applying the lens.

Think of lenses as a *mindset* (the philosophy behind your approach to using PACA), a *compass* (a guide for adapting your PACA approach based on the information you learn about yourself and others), and a *gut check* (validation of your PACA approach), all wrapped up into one. Using lenses will help you both focus inward—to uncover meaningful information about your own abilities, qualities, and lived experiences—as well as outward—to uncover meaningful information about the interpersonal and cultural dynamics at play among the community members with which you develop relationships and work.

How to Use Lenses

Lenses inform how you Develop Relationships, Discover, Dream, Design and Deliver with community members. Specifically, the information uncovered through applying a lens can help you decide which PACA tools to use as well as how you might want to modify a tool when using it. As you work through the PACA phases, consider which lenses will help you use PACA tools more effectively, challenge your assumptions, build trust with community members, and engage a wider cross section of the community. Periodically applying lenses to individual PACA tools will help you identify and overcome both internal and external barriers that might otherwise prevent you from obtaining authentic information and securing community buy-in for your projects.

In an ideal world, you'd use all six lenses continuously throughout every project. In reality, however, you will have to decide for yourself which lenses to use and when to apply them. Above all, keep in mind that applying lenses to PACA tools and your projects at various points throughout your service will enrich your development efforts, refresh your perspective, overcome obstacles, and validate next steps.

You'll learn more about the PACA lenses in Section 3, including practical guidance for applying lenses when moving through the PACA Phases and/or using PACA Tools.

About Tools

Each of the phases in the Field Guide includes a set of tools to help you work through that specific PACA phase. Note, however, that just because a tool is included in one phase does not mean it can't be used during another phase. The Field Guide tools consist of practical activities and techniques that will help uncover the information needed to carry out participatory, sustainable, community-led projects. Although no two projects are identical, all can benefit from the tools in the Field Guide.

There are hundreds of participatory tools out there; those selected for the Field Guide are by no means an exhaustive or definitive list. That said, the tools included here embody a wide range of development approaches (e.g.,  Appreciative inquiry,  ABCD, and  human-centered design); include various types of activities (e.g., verbal and hands-on, individual and group); and cater to the different local language levels of Volunteers. Section 5: Sector-Specific PACA introduces additional PACA tools of particular relevance to each Peace Corps sector.

How to Use Tools

When deciding which tool(s) to use, consider your objective: What insights, results, actions, direction, or clarification do you hope to gain? Make an effort to shift from a problem-focused approach to a strengths-based approach. For example:

Instead of a problem-based approach	Assume a participatory, strengths-based approach
Enter a community to lead new activities	▶ Become part of a community by learning (through observation and participation in existing activities)
Look for problems to solve or needs to address	▶ Help identify existing strengths, assets, and achievements to leverage and build upon
Lecture and instruct	▶ Facilitate spaces for increased community dialogue and participation
Dictate an agenda	▶ Facilitate group decision making
Rely on outside expertise	▶ Leverage and build upon local skills and knowledge

In **Section 4** you'll find a master list of all PACA tools, as well as the tools organized by phase. At the beginning of **Section 4** you'll also find a set of tool clusters—tools that have been grouped together based on a shared quality or suitability for a given context, and as such are well suited to be used in conjunction with one another.

3

LENSES



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BEHAVIOR CHANGE LENS

📌 Lens Insights

1. How does my knowledge of human behavior affect what I learn about people through PACA?
2. What do I need to know about behavior change when using PACA?
3. How can PACA help me uncover key information that will promote positive behavioral change?

Why does behavior change matter?

In many instances, simply improving an individual's knowledge about the importance or benefits of doing a certain behavior (e.g., saving regularly or eating more nutritiously), or increasing the availability of a service or program (e.g., free bed nets to prevent mosquito-borne diseases) is not enough to bring about the kind of developmental change being sought. Why not? Because of human behavior. People behave as they do for a variety of reasons; these factors are referred to as “determinants.” By putting people (and their behavior/actions) at the center of your projects, you can begin to understand the determinants of their behaviors and then develop strategies that foster positive behavioral change.

How to apply a behavior change lens when using PACA

Behavior change includes a broad range of activities and approaches that focus on uncovering the **determinants of people's behavior** and how to influence their behavior (learn about the most common behavioral determinants below). It's worth noting that a comprehensive Designing for Behavior Change framework exists, which warrants a significant amount of training, time, and attention (your post may have resources to support well-structured behavior change interventions). Regardless, this lens serves as a useful primer for beginning to think about behavior change in all five PACA Phases.

PACA phase

While **developing relationships**, you have the opportunity to identify the various behaviors you observe related to your sector or project activities.

When **discovering**, you can begin to uncover the determinants of people's behavior. What barriers exist to adopting the desired behavior(s) and what motivates people to act?

Once you begin **dreaming**, apply what you've learned about people's current behaviors and the determinants of those behaviors to brainstorm strategies to foster behavioral change.

Piloting a project during the **design** phase provides an opportunity to assess the efficacy of the project in changing behavior.

Once the effectiveness of a behavior change strategy has been demonstrated through a pilot, it's time to **deliver** the project more widely and continue to monitor participants' behavioral changes.

Key determinants of behavior change

Perceived Self-Efficacy/Skills – an individual's belief that he or she can do a particular behavior given his or her current knowledge and skills

Perceived Social norms – the perception that those who are important to an individual believe he or she should do the behavior

Perceived Positive Consequences – the advantages or positive consequences a person thinks will result from doing the behavior

Perceived Negative Consequences – the disadvantages or negative consequences a person thinks will result from doing the behavior

Other determinants include: perceived access; perceived cues for action; perceived risk; perceived severity; perceived action efficacy; perceived divine will; perceived policy; and perceived culture.

To learn more about the designing for behavior change approach, read *Designing for Behavior Change: A Practical Field Guide*, a USAID publication available online.

FACILITATION LENS

i Lens Insights

1. How do my facilitation skills affect my success using PACA?
2. What facilitation considerations are important for using PACA effectively?
3. What can I do in advance to prepare for facilitating a PACA Tool?

Why does facilitation matter?

The facilitation of participatory processes within any community is challenging; being an outsider in a community when using PACA Tools is even more so. The facilitation skills you employ can help make or break the success of any community project. How you facilitate PACA tools is critical to achieving meaningful, people-to-people, sustainable, participatory development.

How to apply a facilitation lens when using PACA

As a PACA facilitator, you have enormous influence on what happens each time you engage community members with PACA Tools. These choices range from who is present or not, where and when you hold a meeting, which Tools you use and how you adapt them, the questions you ask and how you ask them, how and much more. Use the following three-step checklist to prepare for successful facilitating a PACA Tool.

Step 1: Clarify	Step 2: Prepare	Step 3: Do
Ask yourself: <ul style="list-style-type: none">• What is the purpose of this meeting?• What are the expected outcomes?• Who should be involved?• What role should the facilitator have?• Where and when will this meeting be held (and what barriers does that present)?• What materials are needed and who has access to them?	Before you facilitate: <ul style="list-style-type: none">• Ensure the space and materials are appropriate for all participants• Plan how you will structure your activities and group your participants• Map out how participants will move and how materials will be used throughout the meeting• Determine the amount of time needed to meet the purpose of the meeting• Differentiate your instructions and materials for different groups (age, literacy levels, power status, etc.)• Create and maintain an environment that is safe, promotes equity and inclusion, participation, and collaboration	While you facilitate: <ul style="list-style-type: none">• Establish group norms and expectations with your participants• Follow your plan, but be flexible to needed changes• Be responsive to the needs of your participants• Respect all participants• Empower and support• Watch, Listen, Learn!

Learn more about facilitating participatory methods and tools by visiting the Robert Chambers Archive, an e-repository of development research, and reading Chambers' book entitled *Participatory Workshops: A Sourcebook of 21 Sets of Ideas and Activities*.

GENDER LENS

📌 Lens Insights

1. How do existing gender norms affect community members' participation in PACA and my projects?
2. What key gender considerations will help me use PACA more effectively?
3. How can I promote gender equity as part of each and every one of my projects?

Why does gender matter?

Societally defined gender norms—including expectations for how men, women, boys, and girls should behave—greatly influence access to and control over opportunities and resources, and participation in community life. Your gender experiences and assumptions will influence how you engage with community members as well as how they engage with you. Understanding existing gender roles will help you use PACA in a way that promotes gender equity—equal access to resources, opportunities, and decision-making for all your projects.

How to apply a gender lens when using PACA

As you work through each PACA Phase and the related Tools, explore the following key **gender considerations**.

Gender insights	Key considerations
<p>Develop Relationships: A list of the key gender related norms, attitudes, behaviors, and expectations in the community.</p>	<ul style="list-style-type: none"> • Who has access to resources, benefits and opportunities? Who makes decisions about the use of resources and participation in community and economic life? • What do girls and boys, women and men in the community identify as their strengths (or assets), priorities and challenges? • What specific roles, responsibilities and behaviors are considered appropriate for girls and boys, women and men?
<p>Discover: Examples of success stories, what is working well within gender relations in the community, and what can be built on.</p>	<ul style="list-style-type: none"> • What resources, skills, and motivation exist in the community to promote gender equity? • What are the gender-related community priorities? • Are there examples of instances when gender was considered in the design of a community project?
<p>Dream: An action plan for involving men, women, boys, and girls in your project that outlines specific roles, responsibilities, and coordination of efforts.</p>	<p>Outline specific actions that can be taken to overcome the gender barriers you've identified. How can you encourage gender equitable participation; promote opportunities to assume leadership roles; and identify opportunities to reinforce gender equitable norms?</p>
<p>Design: Specific steps for incorporating gender equitable practices in your project.</p>	<ul style="list-style-type: none"> • What elements of the project design address gender-related issues in the community? What project elements need re-thinking so that they promote access, meaningful participation and gender equity? • How does the community react to the project idea, particularly as it relates to gender norms, attitudes, and behaviors?
<p>Deliver: A project that is gender-sensitive and results in gender equitable outcomes.</p>	<ul style="list-style-type: none"> • Is the project reaching the intended beneficiaries? Why or why not? • How can the project implementation be adjusted to benefit men, women, boys, and girls? • What are the signs of gender equity resulting from the project?

Learn more about gender by tapping into the gender point of contact on post staff, participating in a PCV Gender Committee (if applicable), and reading Peace Corps' *Gender Guidance* publication.

INTERCULTURAL COMPETENCE, DIVERSITY & INCLUSION (ICD&I) LENS

📌 Lens Insights

1. What elements of diversity are present within me and the community members with whom I work?
2. How might I be intentional about navigating intercultural differences to use PACA effectively?
3. How can I promote and practice inclusiveness while using PACA Tools?

Why does ICD&I matter?

Your cultural programming and elements of your individual identity influence how you perceive the world, as well as how your community perceives you. In order to effectively engage community members in PACA, you must continually unpack the unique combination of culture, experiences, values, and assumptions that you and they bring to a project. By using an ICD&I lens, you'll explore ways to bridge natural differences in identity and culture in order to promote a truly inclusive and participatory approach.

How to apply an ICD&I lens when using PACA

The **“Self-Other-Bridge” model** provides a three-step process for approaching and navigating intercultural situations. Revisit this model during each PACA phase to reflect on your use of PACA and PACA tools.

Self	Other	Bridge
Analyze my own reactions and worldview	Practice perspective-taking and consider others' reactions and worldviews	Explore options to bridge worldviews together in mutually respectful and beneficial ways
▼	▼	▼
Develop Relationships		
How do I build trust? What elements of my cultural programming, values, beliefs and worldview contribute to the reactions I have to others?	How do others build trust? How do their behaviors and reactions line up with or differ from what I expected? What factors contribute to their behaviors & reactions?	What are my most effective options for building trust? Am I developing relationships with a diverse group of community members?
Discover		
What assumptions do I have about the assets, skills, and motivations that exist in the community? Am I “discovering” in a reciprocal and respectful way?	What aspects of others’ identities, values and worldviews might shape how and what they choose to share? How might they perceive my desire to “discover”?	How do I seek the diverse perspectives of different community members? How can my “discovery” efforts be authentic, reciprocal & equitable?
Dream		
How does my cultural programming and identity impact the way I receive ideas? What are my own priorities and interests, and how do they align (or not) with community priorities?	What conditions enable others to feel safe and comfortable to share their ideas? How will they express approval, disapproval, excitement, apprehension and buy-in as we ideate together?	How do I appropriately validate and incorporate diverse perspectives? How can we practice suspending judgment and seek to understand each other’s values as we ideate?
Design		
How does my culture & identity impact the way I give and receive feedback? Do I engage in a way that allows others to fully express their concerns?	How does co-creation and feedback sharing happen in various contexts? How do I gauge others’ degree of buy-in to the project?	How will we engage when we have disagreements or concerns? How will we acknowledge and express appreciation?
Deliver		
What feelings arise for me at this stage of the project? What is my concept of “success”? Have my motivations changed?	How do others’ view “success” for this project? How do they view setbacks and challenges? Have their motivations or buy-in changed?	How can I empower others to own and continue the project after I leave? What ongoing support can I provide or arrange?

Learn more about ICD&I by reaching out your post staff contact for ICD&I, taking the Keys to Culture E-Learning Course on LearningSpace, and reading *Culture Matters: The Peace Corps Cross-Cultural Workbook*.

LANGUAGE LENS

📌 Lens Insights

1. How do my local language skills facilitate or inhibit my ability to effectively use PACA?
2. What communicative tasks are required for me to use PACA tools?
3. How can I prepare to effectively use a specific PACA tool given my local language limitations?

Why does language matter?

Language is at the heart of meaningful communication and the foundation for strong community integration. To a large extent, your language skills determine your effectiveness in both developing relationships and using PACA. There may be many PACA tool steps you can't easily communicate in the local language, but with advance preparation you can overcome some language limitations. Applying the language lens will enhance your effectiveness in using PACA tools, regardless of your local language level and limitations.

How to apply a language lens when using PACA

Before using a PACA tool, take time to review the tool's **key communicative language tasks** and assess your strengths and limitations for each task. For those communicative language tasks with which you need additional support, use following language support techniques to adapt your use or facilitation of the tool.

Communicative task	Language support techniques
Ask follow-up or clarifying questions	<ul style="list-style-type: none"> • Make a poster that lists specific prompts the group can use to seek clarity on someone else's response (group must agree to use prompts)
Ask questions (technical or tool content)	<ul style="list-style-type: none"> • Provide a handout with the written questions • Practice asking the questions with a language informant (native speaker) • Identify and practice key technical/tool vocabulary in advance
Brainstorm and elicit ideas	<ul style="list-style-type: none"> • Ask for a volunteer to record the group's ideas on flipchart paper • Instead of doing this as a whole group activity, break up into small groups and appoint a recorder and summarizer for each group
Facilitate a group discussion	<ul style="list-style-type: none"> • Co-facilitate with a language informant • Provide handouts in local language with discussion prompts • Break up into small groups; appoint a recorder and summarizer for each
Give detailed instructions	<ul style="list-style-type: none"> • Provide instructions through a handout or pre-recorded audio/video • Practice giving instructions ahead of time with a language informant
Solicit ideas/responses	<ul style="list-style-type: none"> • Make a poster that lists specific prompts the group can use to agree or disagree with someone else's response (group must agree to use prompts)
Summarize/analyze others' responses	<ul style="list-style-type: none"> • Co-facilitate with a language informant • Record responses and analyze recordings later with a language informant; present summary or analysis at following group meeting/workshop
Understand responses	<ul style="list-style-type: none"> • Record responses and analyze recordings later with a language informant • If possible, prepare a list of likely answers and write them as flashcards

For additional support with language, reach out to your LCC at post, practice using PACA tools with a tutor or language informant at site, or consider co-facilitating a PACA tool with another Volunteer.

POWER LENS

📌 Lens Insights

1. How do power dynamics shape community life and connect to root causes of situations?
2. What are the dimensions and manifestations of power I will likely encounter when using PACA?
3. How do power dynamics affect community participation in PACA, and how do they impact how (and which) people interact with one another?

Why does power matter?

Power is the ability to access resources and decision makers, influence others, set an agenda, and define reality for yourself (and potentially others)¹. Understanding power dynamics between individuals and groups is essential to practicing a participatory approach to development. Power affects and determines how change happens, who is involved, and what is viewed as possible. Applying a Power Lens when using PACA tools will deepen your understanding of visible, hidden, and invisible power dynamics (see below), and enhance your ability to promote equitable participation among project stakeholders.

How to apply a power lens when using PACA

Power typically operates in the following three ways, but identifying and understanding power dynamics can be tricky because power frequently does not manifest in tangible ways:

Visible power	Hidden power	Invisible power
Observable manifestations of power, including formal rules, structures, policies, institutions, and procedures for making decisions. <i>Examples: laws, elections, budgets, bylaws, regulations</i>	The influence individuals or groups have to set the proverbial agenda. It is exercised when those with power maintain their influence, control the agenda, and marginalize those with less power. <i>Examples: invite-only meetings, decisions limited to voting members, services provided in languages not spoken by everyone</i>	The belief systems and narratives created by those with power and accepted by those without power, which often results in a feeling of powerless and acceptance of the status quo. <i>Examples: negative stereotypes, gender norms, discrimination</i>

The concept of power distance is an intercultural framework that can help you understand your community's cultural attitudes toward power, hierarchy and status. Read Chapter 4 of Culture Matters: The Peace Corps Cross-Cultural Workbook to learn the difference between low and high power distance cultures in order to apply a power lens effectively within your specific community. Also refer to the **Self-Other-Bridge** in the ICD&I lens as follows:

Self	Other	Bridge
What values and ideas do I bring with me about how power should and should not be used, and what it should look like?	What values and ideas might various people in my community bring with them about how power should and should not be used, and what it should look like?	What are my options for bridging the differences in values and ideas about power? How might I consider suspending judgment, gathering diverse perspectives, and exploring multiple ways forward in order to navigate power dynamics effectively when using PACA tools?

To learn more about power, read *A Practical Guide for Facilitating Social Change*, a public online publication by Carnegie UK.

¹ Rothman, Joshua. May 12, 2014. "The Origins of Privilege," The New Yorker online.

4

TOOLS



Peace
Corps

MASTER LIST OF PACA TOOLS



Develop Relationships: Community Entry

28

Tool name	Insights discovered	
Community Walk	Important places and roles in your community	30
Community Mapping	Important resources in your community	31
Social Network Mapping	Relationships in your community	34
People Shadowing	Interaction of people in your technical sector; required resources; where and with whom people spend their time	36
Daily Activities Schedule	Community members' daily work; gender, age, and occupation disparities; the labor constraints of each group	38
Seasonal Calendars	Seasonal variations in labor activities, income flow, expenditure patterns, and household well-being	40



Discover: Gain Insights

46

Tool name	Insights discovered	
Asset and Deficit Mapping	Strengths and deficits in knowledge and skills	48
Collage	Visual expression of individuals' thoughts, beliefs and values	50
People and Connections Map	Relationship-focused visualization of how people can be reached	51
Personas	Key community member characteristics (interests, skills, motivations)	53
Conducting Interviews	Targeted information in community members' own words	55
Storytelling	In-depth information, feedback, and ideas from individuals	60
SWOT Analysis	Situational strengths, weaknesses, opportunities, and potential threats	61



Dream: Generate Ideas

67

Tool name	Insights discovered	
Download Your Learnings	Project themes that project stakeholders wish to pursue	69
Define Your Audience	Needs, contexts, and histories of project stakeholders	70
Needs Assessment and Priority Ranking	The ranked desires, needs, and problems of community members	71
Problem Tree	Definition of a problem, its cause, effects, and solution	73
How Might We...	Innovative opportunities and approaches for addressing challenges	75
Group Brainstorming	Diverse ideas for project ideation through group sharing	77
Co-Creation Sessions	Collaborative project design	79
Decision Dots	Converging and diverging viewpoints in decision making	81
Bisociation	Creation of new, innovative project ideas	83

= HCD = local language = low literacy = project monitoring = project sustainability



Design: Prototype and Iterate

87

Tool name	Insights discovered	
 Frame Your Design Challenge	Solutions to problems; more clarity on the project	89
 Business Model Canvas	New opportunities and ways to grow the project; ways to sustain your project by engaging key partners, identifying resources, and revenue opportunities	91
  Design for [X]	A long-term project vision; how to ensure the project is accessible, usable, and flexible	93
   Resource Assessment	Viability of your project design; where the project needs adjustments; gaps in project planning	94
   Roadmap	Time needed to execute the project; where responsibility should be assigned; stakeholder roles; project milestones	96
  Community Project Evaluation Plan	Approach for measuring the success and impact of the project; project goals, objectives, and implementation plan	97
   Feasibility Questionnaire	The feasibility of the project; what project goals, designs, and objectives need to be adjusted for successful implementation	99
 Improvement Triggers	Alternative perspectives and ideas for improving the project	101
  Budget Worksheets	Financial aspects of the project; where and how you access funds	103
 Network Contract for Partnership	Project participants' skills and assets; ways to offer and receive project support	106



Deliver: Project Implementation

112

Tool name	Insights discovered	
  Action Plan Worksheet	Action-oriented project implementation plan, including timeline, role of community members, project goal and objectives	114
 Project Monitoring Checklist	Progression/status of tasks based on project goals, objectives, and implementation plan	116
  Participatory Photography	Project outcomes and changes through photo documentation	118
  Stories of Change	Project outcomes and changes through interviews and personal stories	120
 Before-and-Now Diagram	The change in a community since the start of the project; reasons for change; the consequences and effectiveness of the project	122
  Ways to Grow Framework	The effectiveness of solutions, interventions, and project design; how to extend, adapt, or create a new offering	124
   Pilot	Ways to adapt and improve the project; beneficiaries' reaction to your project; how to best use resources; effectiveness of the evaluation plan	126
   Scaling Plan	How to expand the project to additional beneficiaries	128
 Sustainable Development Reflection	Key factors that will enable the project to endure after you COS	130

 = HCD
  = local language
  = low literacy
  = project monitoring
  = project sustainability

Choosing Which Tools to Use

When deciding which tool(s) to use, consider your objective: What insights, results, actions, direction, or clarification do you hope to gain? Each tool in the Field Guide includes a difficulty level, the communicative language tasks required to effectively use the tool, materials needed, and other key considerations to help you determine which tool(s) are best suited for your purposes. Use perspective and reflective lenses to help you choose among and adapt tools to suit your abilities, the realities of the community, and the nature of your project. You will find yourself using some of the tools in the Field Guide numerous times, in various PACA phases, and throughout your service. Others you may not use at all.

Tool Clusters

Below are clusters of PACA tools that have been grouped together based on a shared quality or suitability for a given context, and as such are well-suited to be used together. Using various tools in the same cluster may lead to additional insights, ensure inclusivity in your participatory approach, and help validate the next steps of the project.

Look for the following icons in the Master List of PACA Tools to identify tools belonging to one of these clusters:



Human-centered Design (HCD)

These tools were borrowed from sources that specifically support the human-centered design methodology.



Local Language

These tools involve the fewest number of communicative tasks and are well-suited for PCVs with limited local language ability.



Low Literacy

These tools do not require participants to read or write and are well-suited for community members with limited literacy.



Project Monitoring

These tools are well-suited for reinforcing good project-monitoring practices.



Project Sustainability

These tools are well-suited for building community ownership of the project.

Remember, just because a tool lives in one cluster does not mean it should only be used under the conditions or context that identifies that particular cluster. Any tool in the Field Guide may be modified or repurposed to fit your needs.

TOOLS BY PHASE



Develop Relationships: Community Entry

Build trust and relationships, integrate into the community, and bring different community members together.

The relationships you build in the community are the foundation of your entire Volunteer experience, as well as each and every community-led project you support during your service. People-to-people relationships are the backbone of  **Peace Corps' approach to development**; they are integral to your effectiveness and wellbeing as a Volunteer. Relationship building is your initial and most important work in the community! You will achieve this by meeting people where they are, observing, and listening to them as a learner.

In the Develop Relationships phase, you'll participate in local activities, observe the environment and your surroundings, demonstrate curiosity for local ideas and practices, and, through these efforts, integrate into the community. Most importantly, you'll also bring different members of the community together to build relationships with one another. The Develop Relationships tools will help you build the trust and credibility needed for the community to begin sharing their needs, strengths, assets, desires, hopes, and dreams with you.

Safety and Security Tip

Developing relationships is also the single most effective strategy for increasing your personal safety. By building relationships, community members will look out for you, protect you, and warn you of possible threats that you may not be aware of.

This phase will help you answer:

- What does “community” mean and look like to different community members?
- In which activities do different community members engage?
- What does a “day in the life” of various community members look like?
- What are the local activity settings?
- What are the observable assets, resources, and institutions in the community?
- How are people connected to one another?
- What do community members deem important in their surroundings?
- Who demonstrates curiosity and interest in learning about the Peace Corps, my role, and me?
- **Safety and security:** Who are my safety and security resources?

CIRCLING BACK: When might you revisit the Develop Relationship phase?

- To build upon or solidify the trust you've created with project stakeholders
- To bring new community members and stakeholders into an existing project
- To clarify or validate project insights
- To expand or scale a successfully implemented project into new parts of the community

	Tool name	Insights discovered	
	Community Walk	Important places and roles in your community	30
	Community Mapping	Important resources in your community	31
	Social Network Mapping	Relationships in your community	34
	People Shadowing	Interaction of people in your technical sector; required resources; where and with whom people spend their time	36
	Daily Activities Schedule	Community members' daily work; gender, age, and occupation disparities; the labor constraints of each group	38
	Seasonal Calendars	Seasonal variations in labor activities, income flow, expenditure patterns, and household well-being	40

[View the Master List of PACA tools at the beginning of the Tools section.](#)

Project Monitoring Tips

- Keep track of the individuals you meet and speak to, where, when, and how. Note any initial reactions or first impressions from your meetings with these individuals. Use the worksheet at the end of this phase to help you. Make sure you develop a strategy for staying in touch with the individuals and groups with whom you initiate a relationship during this phase.
- Note the power dynamics between the individuals you have met; what relationship do they have with each other? Make sure you engage with stakeholders from underrepresented or vulnerable groups in order to build inclusiveness and trust. The lenses can help you with this!
- Keep track of any documents or maps that were produced in this phase. If possible, keep them in a place where several community members can access them. Schedule times for sharing out results from the exercises with community members.

Sustainability Tips

- As you prepare and implement the tools, make sure you're inviting community members into the process so they can assist you and so they become familiar with the tools in order to use them in the future.
- Ensure there is a known location where the resulting documents from the tools that were used can live and be easily accessed.
- Take the time to share back the insights and findings from any of the tools you used with both those individuals who participated in the tool activities as well as community leaders and key stakeholders.



Community Walk

Community walks provide an opportunity to be introduced to the community you are living and working in. As you walk around, people become familiarized with you. As different individuals lead you on walks, they will show you what they each deem important.

Time: varies (30 minutes to 2 hours)

Difficulty: easy

Materials: paper; writing utensil

Communicative language tasks: ask follow-up or clarifying questions; ask questions; solicit ideas and responses; understand responses

Steps:

1. In conjunction with your PST trainers, counterpart, or other initial contacts in the community, assemble a small group of community members to lead you on guided tours of the community. Explain that you would like to learn more about the community. Some potential destinations for your walk include markets, stores, water sources, community forests, agricultural areas, health centers, cemeteries, garbage dumps, ports, bus or train stations, municipal parks, churches, and so on.
2. Identify and prioritize any lenses you think are important and/or applicable for this tool and how you will incorporate them into your tool explicitly or implicitly.
3. Think of some questions (perhaps in advance) that are associated with your sector. For example, an Agriculture or Environment Volunteer might want to focus on how natural resources are being used. Here are sample questions for such an inquiry: What is that? How is it used? Who uses it? Who built it? How many types of soils are on your land? What are they called? As you walk, let your questions flow based on what you see, taste, feel, hear, and smell, and pursue a line of questioning that follows what is pointed out to you. Mentally note what generates discussion, even if you don't understand what is being said. Pick out words you hear often and jot them down on your paper.
4. Be aware that what you see may vary according to the time of day, season, or if your walk coincides with a holiday or festival. Repeat walks to the same places and note the differences.
5. Be sensitive to the time constraints and workloads of your guides, and remember to thank them for accompanying you.

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Helpful Tips

Be aware that you will get different information from different people depending on their roles, personalities, and positions in the community. You may consider setting up walks with a few different groups of various ages, genders, or ethnic makeup. If appropriate, ask your counterpart, trainer, or host family to help you set up these walks.



Community Mapping

Community mapping can be used in various geographic settings to locate current resources, activity centers, institutions, and other areas frequented by the groups developing the map. It helps to identify how different categories of people (e.g., men and women, various ethnic groups) differ in their perception, needs, and access to resources, centers, and institutions. The process allows community members to identify issues to be addressed and potential projects to undertake, while providing a visual record of the community that you can refer back to as you monitor the progress of a project.

Time: varies (2-3 hours)

Difficulty: moderate

Materials: Flip chart paper; large markers (several colors); 3 sizes of the same color circles for each participant; 50 small pieces of three different-colored papers; 20 pieces of two additional colored papers; 2 small pads of sticky notes; glue stick or tape; tacks or pins

Communicative language tasks: ask follow-up or clarifying questions; ask questions; give detailed instructions; summarize/analyze responses; understand responses

Steps:

1. Welcome participants and explain that they will be participating in a community-mapping activity designed to share everyone's perspectives of what the area looks like.
2. Divide participants into subgroups (e.g., men and women, boys and girls, different ethnic groups) and give each subgroup a separate workspace.

Step 2 is crucial to the success of this activity! The purpose of asking participants to work in subgroups is to create safe spaces in which community members with shared characteristics and identities will feel most comfortable participating. Working in subgroups can help reduce gender, power, and other dynamics at play that would otherwise hinder participation and bias the large group conversation.

3. Ask each subgroup to use the supplied materials to do the following:
 - Draw the designated area starting with a central feature (e.g., road, river, or boundary) that you have predetermined.
 - Add features to the map that they believe are important; you can give them prompts (e.g., sources of water, transportation options, markets, institutions) if preferred.
4. After the drawing is complete, ask each subgroup to do the following:
 - Using the sets of different sized circles, each person should identify the most important, second most, and third most important institutions or resources. Tape or paste them down after they are arranged.
 - Using the small pieces of colored paper, identify frequency of where they spend their time. One color represents daily use, one represents weekly use, and one represents monthly. Tape or paste them down after they are arranged.
 - Using the pieces of two additional colored papers, identify places where they like to be and don't like to be. They can use as many pieces as they would like. Tape or paste them down after they are arranged.
 - Using sticky notes, draw or write things they need or want in the community. Tape or paste them down after they are arranged.

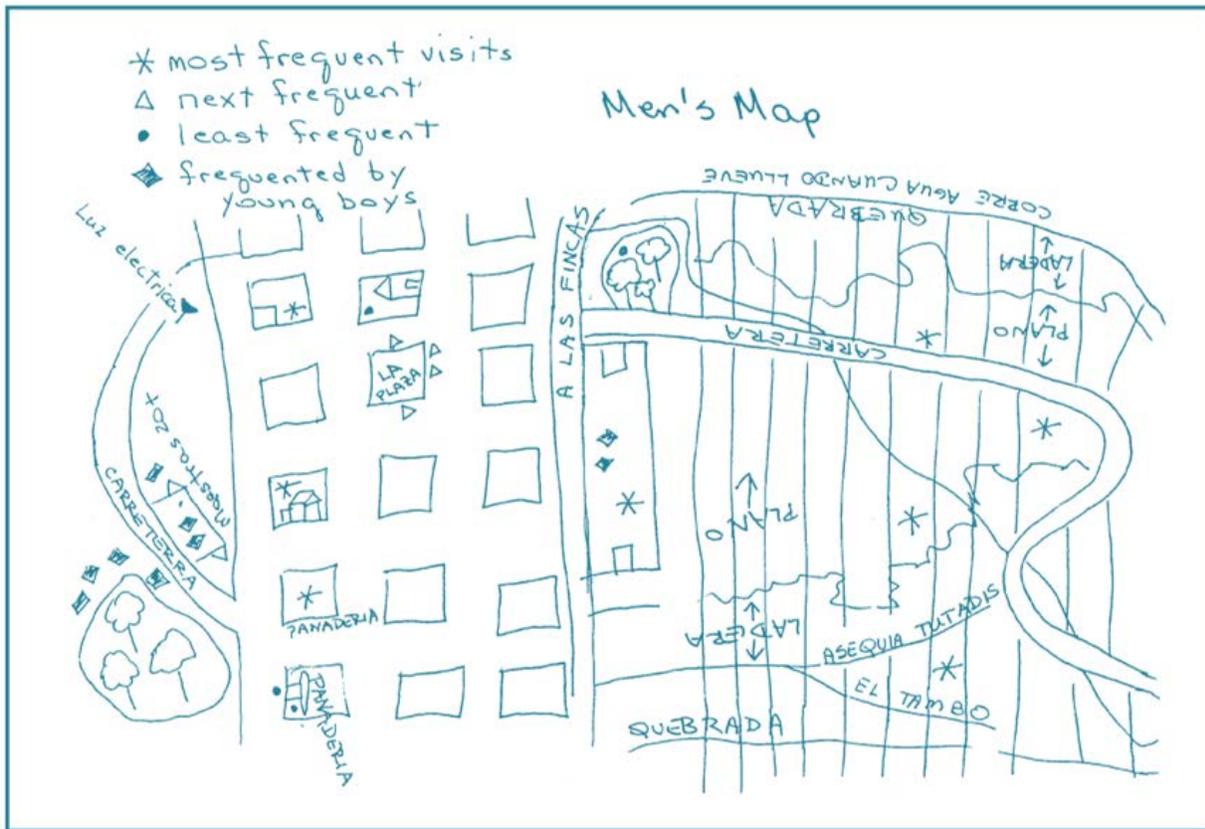
5. Ask each subgroup to look at their own map and the patterns of importance, frequency, likes and dislikes, and needs and wants that they have identified. Some questions for discussion are:
 - Why have you identified these places?
 - What do you think would make the community better? Why?
6. Bring everyone back together in one large group. Post the maps where everyone can see them, and have a reporter for each group describe the map. Encourage groups to ask each other questions and look for similarities in the maps. Some questions for discussion include:
 - What differences do you see in the way the maps are drawn or the features included? Why might there be these differences?
 - What do the maps reveal about opportunities, such as available natural resources, human resources and institutions, infrastructures, and so on?
 - Do the maps reveal any constraints (e.g., places not frequented, unused resources, and distance to needed services)?
 - Are there any patterns to places liked and disliked? Were these similar on everyone's maps? Why or why not?
 - What did you identify as things you would add to the community? Did everyone identify the same things? Why or why not?
7. To wrap up, reflect as a whole group.
 - As a community, what did we learn from this exercise? How might we use this information?
What are some possible next steps?

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.

Helpful Tips

Consider your context. Depending on what group of people you are working with, you can make variations to the subgroups, features of the map, or discussion. For example, if you're working with a school you may prompt them to draw resource centers, bathrooms, etc., and discussions may lead to adding facilities or changing policies. If you're working with farmers, you may prompt them to focus on sources of credit, seeds or other inputs, and field locations. Follow-up discussion with the farmers may include organizing co-ops or jointly purchasing transportation improvement.

Sample Community Map



Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.



Social Network Mapping

Developing a simple drawing helps community members explain existing social networks and the relationships they have with different members of their community. This activity explores issues of trust and will be helpful in informing your knowledge of the circles of relationships—as well as gaps in networks—within the community.

Time: 90 minutes

Difficulty: easy

Materials: paper; writing utensil

Communicative language tasks: ask follow-up or clarifying questions; ask questions; give detailed instructions; solicit ideas and responses; summarize/analyze responses; understand responses

Steps:

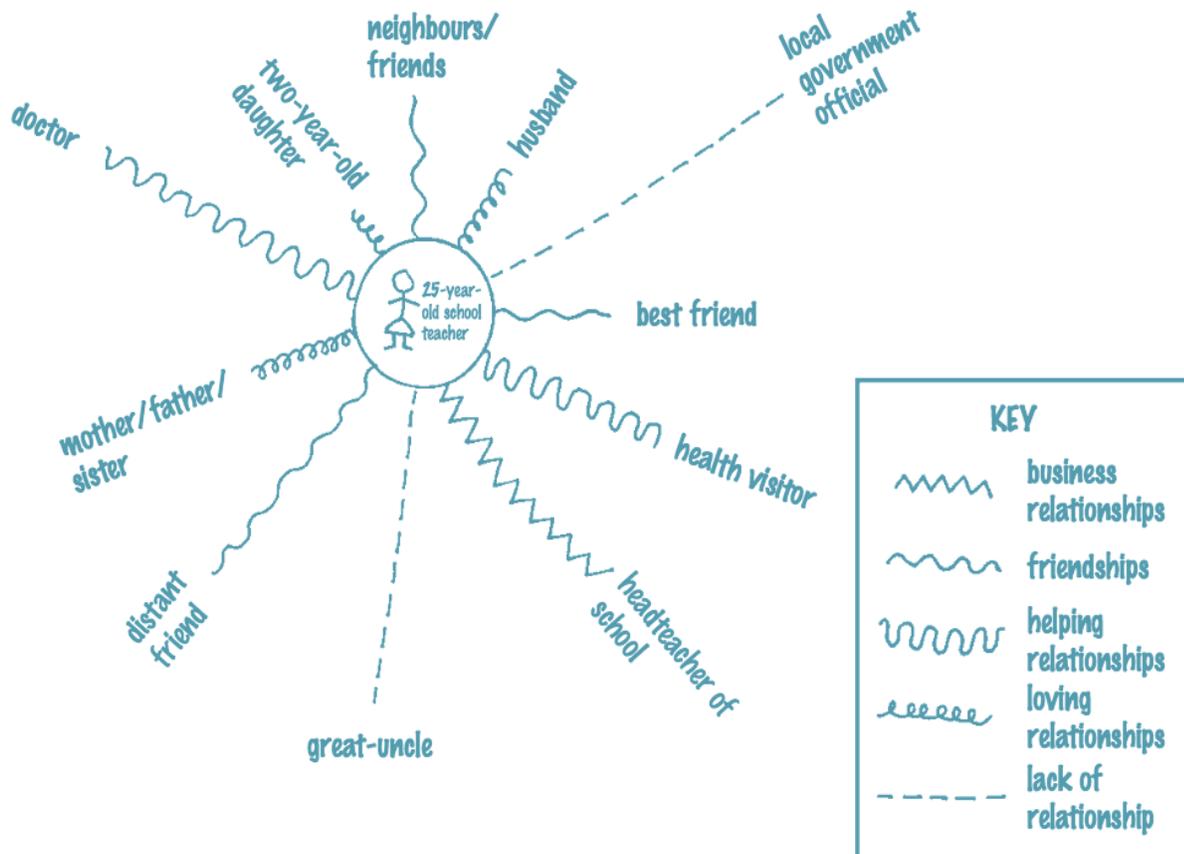
1. Gather and welcome a group of community members together for this activity.
2. Divide larger groups up to make social network maps for different people.
3. Agree whose relationships to map - for example, the relationships of a 'typical' person found in the community, such as a schoolboy, or the social relationships of an actual person or group affected by HIV/AIDS. Show this person at the center of the map
4. Show other people (or households, groups and so on) with whom they have important relationships on the map. Use lines and arrows to indicate relationships. Use different colored lines, or lines made from different objects, to show different kinds of relationships - for example, 'helping' relationships, friendships, business relationships and so on.
5. Use distance between people and the person cared for on the map to show the importance of the relationship - the closer to the person, the more important.
6. Discuss what is shown on the map. Who would you engage in community projects to help solve community problems?

Adapted from: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.

Helpful Tips

Ensure that you are in a safe space when carrying out this exercise. At first, don't suggest people for participants to include in their drawing—just see who they draw. If they begin to struggle with the exercise, suggest friends, parents, relatives, health workers, or others.

Example Social Networking Map



Source: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.



People Shadowing

This tool can help increase your understanding of how people interact in relation to your technical sector environment and what resources they need.

Time: 1 day with each coach

Difficulty: moderate

Materials: notebook and writing utensil; list of questions to ask each coach

Communicative language tasks: ask follow-up or clarifying questions; ask questions; understand responses

Steps:

1. Ask your trainer or counterpart to help you identify “coaches,” or people in your community you can accompany or shadow, who work in a relevant field and/or use local resources relating to your technical sector. Some possible examples of coaches are listed in the chart at the end of this tool.
2. Ask your counterpart or trainer to introduce you to these people and request permission to shadow them for a day. If possible, spend one day each with four or five different people in your community.
3. Observe which resources they use and make mental notes. As opportunities present themselves, turn your observation into action and perform the same activity as your coach.
4. Try to get a sense of where your coaches spend their time, who they interact with, the rhythm of their day, and places of importance. Be prepared with several questions that will promote good conversation.
5. Write about your experiences at the end of the day. Think about how many hours a day different people spend on activities like collecting water, cleaning, farming, collecting firewood, or relaxing.
6. As you begin to understand different schedules and tasks, compare and contrast them.
7. Make observations regarding the different roles and responsibilities in the community with respect to your technical context and how these roles may be complementary or conflicting.
8. Draft any tentative conclusions about who has access to or control over resources. Additionally, note how knowledge varies among gender, social class, or ethnic group regarding the technical areas of focus (the surrounding natural resource base, the provision of family health care, small business management, and so on).

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Helpful Tips

If you are in PST while conducting this exercise, discuss your observations and reflections with your trainers and colleagues. In language class, use gestures, pictures, and demonstrations to extend your oral language skills and share as much information and perspective as possible.

Coach Ideas by Sector

Peace Corps Sector	Possible Community Coaches
Agriculture/Environment	Farmers, herders, honey collectors, dairy producers, blacksmiths, park service workers, basket weavers, hunters
Community Economic Development	Market sellers, local store owners, bank/credit lenders, cooperative directive members, chamber of commerce representatives, journalists, social service representatives, women's organization members, local politicians, NGO leaders
Education	Teachers of different levels/subjects, directors, local religious teachers, mothers
Health	Traditional healers, midwives, community health workers, social workers, nurses, doctors, farmers, mothers, family garden keepers
Youth in Development	Primary and secondary students, technical school students, youth who work in the market or in other informal jobs, religious leaders, sports coaches/leaders

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.



Daily Activities Schedule

A daily activities schedule shows exactly what work individuals and groups do throughout the day and often reveal differences by age, gender, and occupation. In addition to charting the routine labor demands of daily life, this tool can provide insights into the labor constraints of each subgroup and areas in which labor-saving technologies might be readily adapted. The technique raises awareness of the contribution that different groups make to overall household welfare.

Time: 2 hours

Difficulty: moderate

Materials: large pieces of paper; writing utensils

Communicative language tasks: ask follow-up or clarifying questions; ask questions; give detailed instructions; solicit ideas and responses; understand responses;

Steps:

1. Welcome participants and explain that everyone will be exploring and sharing their daily schedules to get a better understanding of who does the various tasks within the community.
2. Divide participants into subgroups (men and women, boys and girls, different ethnic groups, etc.). Ask each subgroup to consider their routine day during the year. Note: If there are great differences by season or work period, repeat Steps 2-3 for each period.

Step 2 is crucial to the success of this activity! The purpose of asking participants to work in subgroups is to create safe spaces in which community members with shared characteristics and identities will feel most comfortable participating. Working in subgroups can help reduce gender, power, and other dynamics at play that would otherwise hinder participation and bias the large group conversation.

3. Beginning with the time that the day begins, have each subgroup reconstruct a normal day noting the activities that they do as well as a rough estimate of the time block necessary. Remind participants (particularly women) to consider time periods when multiple tasks are performed. Optional: If time allows, have groups make a schedule for the other group right after they have completed their own (going through Steps 2-3).
4. Bring everyone back together in one large group. Post the schedules where everyone can see them and have each group report out their results. Questions to consider:
 - What are the similarities and differences in labor demands? What are your perceptions of workload?
 - What would reduce some of the workload? (a closer source of water, machinery, childcare, etc.)
 - When would be the best times of day for things like meetings or training? Is it the same for men and women? For all groups within the community?
5. To wrap up, reflect as a group: "As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?"

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.

Helpful Tips

This technique demonstrates the gender-based perceptions of the workload of each group. Some activities that groups perform might be perceived within their culture as only a “role” rather than “work.” You will want to encourage participants to map all kinds of work, including:

- Productive work (income-generating work, food production for income, or paid or wage labor)
- Reproductive work (food production for family consumption, housework, childcare)
- Social or integrative work (birth, marriage, funeral observances, other religious observances, caring for the ill or disabled, celebrations)

Sample Daily Activities Schedule

LaCosta Typical Day for a Woman		LaCosta Typical Day for a Man	
AM	4:00 Get up Sweep kitchen and rooms Start fire Wash and dress	AM	5:00 Get up and dress Collect tools/fishing equipment
	4:30 Collect water for day Put water on for coffee		5:30 Eat breakfast
	5:00 Prepare breakfast and lunch		6:00 Check nets, prepare/repair boats
	5:30 Serve breakfast Start drying fish		Check/mend sails Take lunch Go fishing
	6:00 Get children up Wash, dress, and feed children (Children collect eggs)	PM	3:00 Return from fishing Sell excess fish Clean-up boats, nets Put away equipment
Noon	12:00 Return home		5:00 Shower and dress Meet with other men
PM	Have lunch and nap		6:00 Return home for dinner Clean-up dinner Listen to or watch news
	2:00 Collect firewood		9:30 Go to bed
	3:00 Meet fishing boats Carry fish home		
	4:00 Start preparing dinner Clean fish Salt or start drying fish		
	6:00 Serve dinner Clean-up dinner Do handwork, mend clothes, while listening to news		
	9:00 Shower		
	9:30 Go to bed		

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.



Seasonal Calendars

Seasonal calendars trace seasonal variations in labor activities, income flow, and expenditure patterns. Household well-being (in terms of food security, income availability, and the demand on household resources) often fluctuates seasonally during the year. Many households experience a “hungry season,” or periods of economic stress, and these variations may differently affect people based on sex, age, and other characteristics. Creating a seasonal calendar is designed to identify these seasonal variations in household well-being from the perspectives of women, men, girls, and boys. An understanding of these seasonal variations is important to the development and implementation of a community action plan and individual projects.

Time: 2 hours

Difficulty: moderate

Materials: flip chart paper; large pens (several colors); small pens (several colors); scissors; glue stick; tape; tacks or pins; 40 small rectangles of paper

Communicative language tasks: ask follow-up or clarifying questions; ask questions; facilitate a group discussion; give detailed instructions; solicit ideas and responses; understand responses

Steps:

1. Explain to participants that you will be asking a number of questions to create a seasonal calendar in order to identify the variations among seasons and examine how changes in seasons affect community members' lives.
2. Ask participants what they consider to be the “beginning of the year,” which groups will use to start the calendar. If participants have trouble, ask them to identify spheres of activity that are common to all households (e.g., school year, agricultural production).
3. Divide participants into pre-planned subgroups (e.g., men and women, subgroups of occupations, ethnic or racial groups), giving them separate space to prepare a calendar.

Step 3 is crucial to the success of this activity! The purpose of asking participants to work in subgroups is to create “safe spaces” in which community members with shared characteristics and identities will feel most comfortable participating. Working in subgroups can help reduce gender, power, and other dynamics at play that would otherwise hinder participation and bias the large group conversation.

4. Ask subgroup participants to identify some of their daily and seasonal tasks that are devoted to earning money and maintaining the home and family.
5. Ask subgroup participants to identify factors that affect these activities. Some examples include weather patterns, crops and animal production, animal and plant diseases, cyclical resource availability, human health patterns, and social obligations and events.

To begin your seasonal calendar, identify several spheres of activity (e.g., agricultural production). Either write this sphere somewhere on the calendar or use the colored marking pens to draw a representative symbol of the sphere on a small square of paper and tape it to the calendar. Then enter all related tasks and activities (e.g., land preparation, weeding, harvesting) as community members describe them in a line across the calendar months. Then begin another sphere of activity and enter a second line of relevant tasks throughout the year. Seasonal variations in overall labor demand will then be visible.

6. On the calendar, ask subgroups to:
 - Identify which member of the household does each task
 - Identify when during the year income flows into the household by identifying the sources of income (income source, not quantity, is important)
 - Indicate variations in household expenses by identifying periods of special expense
 - Indicate patterns of household health and welfare
 - Indicate cultural patterns (holidays and religious festivals)

Note: Subgroups should analyze their own calendar looking vertically at patterns of labor and expenses. This reveals major periods of difficulty, ease, labor bottlenecks, etc.

7. Bring everyone back together in one large group. Post the calendars where everyone can see them and have each group report out their results. Ask groups to interpret the information in terms of :
 - Opportunities, such as free time for other activities
 - Constraints, such as periods of high expenditure, intense labor, illness, or cultural practices
 - Other specific purposes determined by the facilitator or the needs and desires of the community

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.

Helpful Tips

In areas where tasks vary seasonally, it may help to use coding to show the interrelation of tasks. Create a symbol or color to represent each category to be coded. Examples of categories for coding are: adult male; male child; adult female; female child; continuous activity; sporadic activity; more intense activity

Example Seasonal Calendar



Two Peace Corps Volunteers share their group's work on completing a seasonal calendar

Image credit: USAID



DEVELOP RELATIONSHIPS WORKSHEET

Who are the key community members or groups with whom you and your counterpart used PACA tools?

List 1 or 2 key insights from each of the tools you used in this phase:

Develop Relationships tool used	1-2 insights from using the tool
▶	
▶	
▶	
▶	
▶	

Based on your answer to the previous question, what are the key insights from this phase?

Looking ahead, how will you and the community use or build upon these key insights?

What new or unanswered questions do you want to explore with community members in the next phase?

List 1 or 2 key insights from each of the lenses you used in this phase. Think about why you and your counterpart chose these lenses based on cultural context:

Lenses used and why	1-2 insights from using the lens

Based on the answer to the previous question, which lenses will you continue to use in the next phase and why? Are there new lenses that have not been mentioned in PACA that you and your counterpart would use?

What community interests were raised while you carried out PACA tools in this phase?

List the community interests that fit within your role as a PCV and/or the scope of your project framework.	List the community interests that fall outside your role as a PCV and/or the scope of your project framework.

Based on your initial interactions in this phase, what expectations are you setting with the community at this point? Are they realistic and achievable?

What suggestions do you have for the community members who have interests outside of your scope? What are the assets in the community they could rely on? How can you communicate this information to the appropriate community members?

Project monitoring considerations

- How will you continue to check in with the people with whom you formed relationships?
- How have you and your counterpart shared back the insights gained through use of the tools in this phase with the individuals and/or groups who participated?
- How will you know that the community members have acquired the knowledge and skills necessary to continue on with the project?

Sustainability considerations

- Who are emerging as the leaders and key stakeholders in the community?
- How will you and your counterpart continue to encourage ownership of projects over time by these key stakeholders?



Discover: Gain Insights

Gather information and gain key insights by observing, learning from, and engaging community members.

The Discover phase enables you and the community to think ahead to your Design challenge, including what you know—and what you'll need to know—before successfully designing and delivering a project. A well-designed project rests on a solid foundation of research into various aspects of the community. You may think that you or your counterpart have become experts on what the community prioritizes and who counts as a stakeholder since you have taken the time to understand this in the Develop Relationships phase. However, there are likely many challenges, resources, and skilled individuals in the community to still learn about. Discover tools will help you uncover evidence-based learnings and insights that will inform your Dream, Design, and Delivery efforts.

This phase will help you answer:

- What resources, assets, skills, and motivations exist in the community beneath the surface of simple observation?
- How do different community members view themselves and one another?
- What do community members value?
- What are some challenges the community faces?
- Who participates and who does not participate in different community activities and settings?
- What are the right questions to ask in order to find out more about a specific topic of interest?
- What question and interview techniques will help uncover deeper insights?

CIRCLING BACK: When might you revisit the Discover phase?

- To gather feedback about project ideas generated during the Design phase
- To implement improvements to project ideas after the Design phase and before bringing a project to life during the Deliver phase
- To overcome challenges or resistance experienced during the Deliver phase

	Tool name	Insights discovered	
	Asset and Deficit Mapping	Strengths and deficits in knowledge and skills	48
	Collage	Visual expression of individuals' thoughts, beliefs and values	50
	People and Connections Map	Relationship-focused visualization of how people can be reached	51
	Personas	Key community member characteristics, interests, skills, motivations	53
	Conducting Interviews	Targeted information in community members' own words	55
	Storytelling	In-depth information, feedback, and ideas from individuals	60
	SWOT Analysis	Situational strengths, weaknesses, opportunities, and potential threats	61

View the Master List of PACA tools at the beginning of the Tools section.

Project Monitoring Tips

- Using your journal and the worksheet at the end of this phase, draw connections between the various people you met in the Develop Relationships phase to the insights you are uncovering during the Discover phase.
- As you work through this phase, keep track of the things community members note are assets, deficits, and opportunities. Do different demographics view these assets, deficits, and opportunities differently? If so, begin brainstorming how you can reconcile those differences and find common ground between the groups to promote a positive project that all stakeholders feel good about.
- Use this phase to triangulate the various pieces of information that you are hearing from community members and your own observations. Remember the danger of a single story; no single person has a complete understanding of everything in your community, so you need to ensure you hear from a variety of people, noting the biases that they may each have.

Sustainability Tips

- As you prepare and then implement the tools, be sure to invite community members into the process so that they can assist you and become familiar with the tools for the future.
- Share insights with community members and create a process for constructive conversation about the insights discovered. Create and save a record of insights and the tools used in this phase for future reference.
- As you work through this phase, identify factors that would contribute to or obstruct the sustainability of the project. How committed do individuals or groups appear to be?



Asset and Deficit Mapping

Rather than viewing  **assets-based** and problem-based approaches as a dichotomy, it may be more helpful to think of them in terms of a continuum. As a Peace Corps Volunteer, your role along the continuum is clear: Start with what people have and can do.

Time: 90 minutes

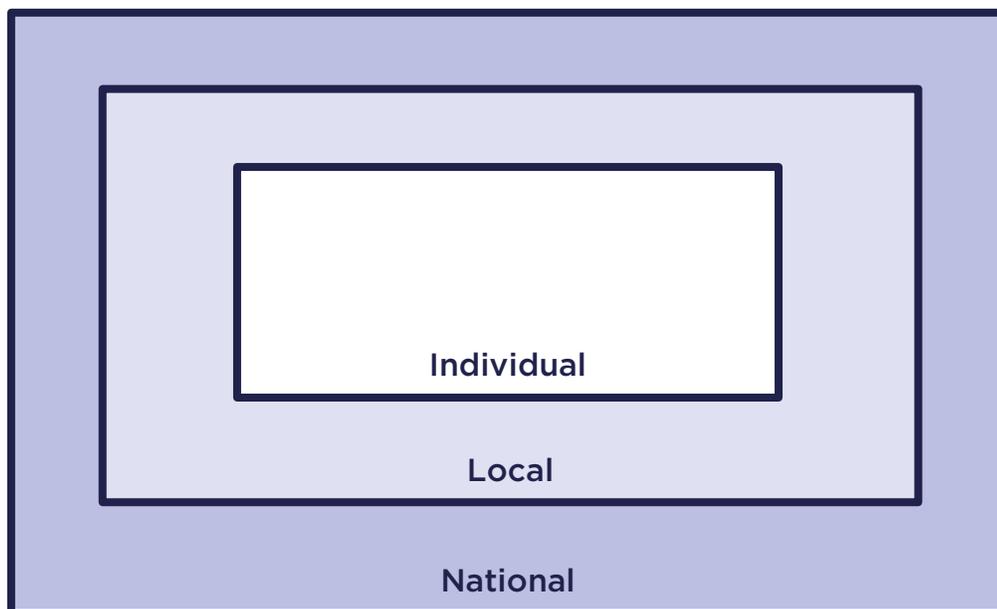
Difficulty: moderate

Materials: Flip chart sheets; markers

Communicative language tasks: ask follow-up or clarifying questions; brainstorm and elicit ideas give detailed instructions; facilitate group discussion; solicit ideas and responses; understand responses;

Steps:

1. Have community members form small groups.
2. Give small groups the following task (written on a flip chart), and about 15 minutes to work:
“Make a list of all the personal skills and knowledge you bring to this workshop. Each individual in your group contributes certain things, such as skills in different languages, knowledge of how to motivate people, marketing expertise, etc. Create a list that represents all of the capacities you have represented in your group.”
3. When time is up, stop them and ask them to listen for further instructions. On a blank flip chart, draw the following scheme, building it from the inside out, as you describe what to put in each space:
 - In the inside square, write all the individual skills your group has. Use the list you have just created.
 - In the middle square, add all of the local associations or groups that you collectively represent—for example, women’s groups, religious groups, schools, nongovernmental organizations (NGOs), etc.
 - In the last space around the edges, list all of the national institutions you all represent or with which you have links—ministries, foundations, the Peace Corps, etc.



4. Distribute blank flip charts and markers to each group. Give groups 20 minutes or so to work. Ask them to list the names of the people in the group on the chart somewhere and to post their flip charts along one wall, next to each other.
5. Have each group report out their asset maps:
 - Ask each group to report a few items from the center—their individual skills and capacities.
 - Then ask for some examples from the second layer—local associations.
 - Finally, ask for some examples from the outer layer—national institutions.

Raise the following questions or comments to encourage discussion:

- As you look at all the individual and group skills, connections to organizations and associations, how does that make you feel about this group?
 - We can call these flip charts of assets “strength maps.”
6. Ask participants to do a second map with their groups. This time, they should focus on deficits, issues, or problems that might affect a potential project.
 - In the inside square, list skills or knowledge needed for designing and carrying out the project that individuals in your groups lack. Add other potential issues for your small groups, such as different skill levels in the language of the workshop; ethnic, religious, or gender differences; roles distinction (supervisors, employees, Volunteers), and so on.
 - In the middle square, list issues or problems in the local community that might hinder completion of a project, such as different educational and interest levels; ethnic, age, and other differences; lack of local associations or organizations; limited finances for the community as a whole; uncooperative leaders, and so on.
 - In the outer block, list national-level issues or problems that might hinder completion of a project, such as bureaucracy involved in getting approval or funding; cost of getting expert help; lack of compatible goals of ministries or NGOs; and so on.
 7. When they have finished, have them post these new maps next to their others. Ask them the following questions:
 - Did it feel different to do the two maps? If so, how?
 - How do you feel about the two different visions of your group?
 - What was the point of making these maps?
 - Do you think these items might apply to your group in some way?
 - Does it feel different to have discussed and written down your own needs rather than have someone from outside of your group do it? If so, how does it make you feel about yourselves?

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps

Helpful Tips

If you do not have access to enough printed materials in the community for the participants to use, invite them to draw their collage. Or get creative and use local materials.



Collage

Collages can help you understand how the people you are designing for think and what they value, possibly surfacing unexpected needs and themes. Collages are an easy way to push people to make something tangible and then to explain what it means to them.

Time: 30 minutes-1 hour

Difficulty: easy

Materials: writing utensils, paper, glue or tape, magazines and newspapers

Communicative language tasks: ask follow-up or clarifying questions; ask questions; brainstorm and elicit ideas; give detailed instructions; solicit ideas and responses; understand responses

Steps:

1. Welcome the community members and give them a prompt for making their collage. Perhaps you could ask them to make a collage that represents taking control of their lives, their dream jobs, or how they think about their families.
2. Depending on the setting you may have each community member make their own collage or split them into subgroups (e.g., by gender or age group) and have them make group collages.
3. When they've finished, ask them to describe the collage, what the various elements represent, and how it speaks to the prompt.
4. Collect the collages to refer to later. They will provide a visual record of your research and can be used to springboard further conversations.

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.

Helpful Tips

If you do not have access to enough printed materials in the community for the participants to use, invite them to draw their collage. Or get creative and use local materials.



People and Connections Map

The people and connections map is a quick and simple way to visualize exactly who a project or initiative is trying to reach and how. It provides a visual overview of the different stakeholders (individuals and organizations) of a project—both those directly and indirectly affected—and helps spark conversations about the role of each project stakeholder.

Time: 2 hours

Difficulty: moderate

Materials: template; writing utensils

Communicative language tasks: brainstorm and elicit ideas; give detailed instructions; understand responses

Steps:

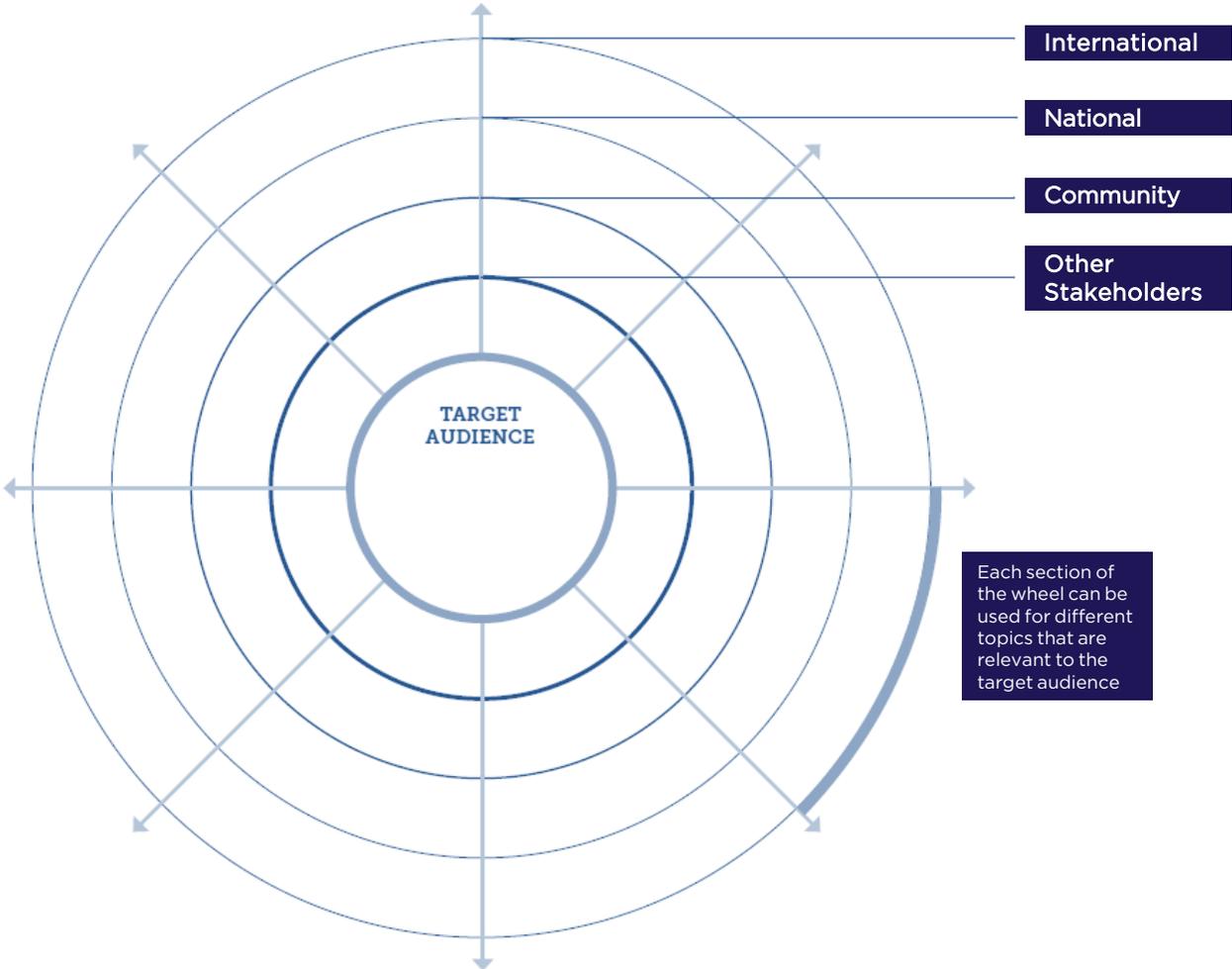
1. Using the template at the end of this tool, start by writing down your target audience (the beneficiaries, users, or consumers) who would benefit from the project you're supporting in the central circle.
2. Work your way from the center toward the outer layers, mapping other people and organizations that are related to the work you do. This may include your counterparts or other people who are responsible alongside you for implementing the work.
3. It may help to further organize the people and organizations on the map by clustering them into sections that express specific networks, sectors, or interest areas. For example, you may have a section related to health, safety, environment, or education.
4. Once the template has been filled out, go through each person and organization on the map with your counterpart, and if necessary, reposition them into the segment that everyone agrees fits most.
5. Reviewing the map with your counterparts will give you a useful starting point to discuss which relationships or connections are key, which may need some extra attention or development. By clearly marking these fields in the map, you can highlight and communicate the main focus of your work.

Adapted from: DIY. 2014, *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta

Helpful Tips

By organizing the people related to your work in concentric circles, you can indicate which of them are closer or farther away from the target beneficiaries. This will show you which individuals or organizations you may need to draw input or resources from when implementing a project.

People and Connections Map template



Adapted from: DIY. 2014, Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta



Personas

Personas are portraits of fictional but realistic individuals that are used to represent particular groups in your intended audience—in this case, the community members who will benefit from the project you’re working on. Personas are created by drawing together the characteristics of similar people—their behaviors, motivations and the like—into one “archetype” through which the group can be understood. By creating a fictional character to embody these characteristics, personas help ensure that your work stays focused on people rather than an abstract description of the group.

Time: 2 hours

Difficulty: moderate

Materials: Worksheet provided below

Communicative language tasks: Ask questions; brainstorm and elicit ideas

Steps:

1. Personas represent different target subgroups that can benefit from the project. Being aware of the different preferences, routines, and motivations these different personas have can help you customize your efforts to these specific subgroups.
2. Use the worksheet below to compile a portrait of a typical person who represents one of the subgroups that could benefit from your project.
3. Try to make the persona as close to a typical person as possible by adding a name, a picture, and descriptions of interests, skills, and motivations.
4. Feel free to add any other details that are relevant to your situation and in relation to this persona.
5. It is often handy to create a number of personas so that you and community members can focus on the key characteristics of each subgroup of your intended audience.

Adapted from: DIY. 2014, *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta

Helpful Tips

Developing successful personas is all about knowing what to put in, and what to leave out. The trick is to recognize the common characteristics that could form the basis of a persona, and what selection of personal details to include in order to bring this to life. Doing this right can be hugely beneficial as it lets you brainstorm ideas and test potential solutions from various target subgroups’ perspective.

Persona Worksheet

ADD PICTURE OR DRAWING	Who am I?	3 reasons for me to engage with you:		3 reasons for me not to engage with you:		
	Persona name:	1)	1)		1)	
	Audience segment:	2)	2)		2)	
3)	3)	3)		3)		
My interests	My personality	My skills	My dreams	My social environment		
(Empty space for notes)	(Empty space for notes)	(Empty space for notes)	(Empty space for notes)	(Empty space for notes)		

Adapted from: DIY. 2014, Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta



Conducting Interviews

Conducting interviews, either formally or informally, is an important way to connect with people and hear them describe experiences in their own words. However, gaining the insights you want from an interview can be harder than you think. By following these steps and using the worksheets provided, you'll unlock all kinds of insights and understanding that you'd never get sitting in your home.

Time: 1-2 hours

Difficulty: moderate

Materials: Writing utensil; paper; worksheets provided below; camera

Communicative language tasks: ask follow-up or clarifying questions; ask questions; summarize/analyze responses; understand responses

Steps:

1. Determine the type of information to gather. Then identify individuals, experts, and/or groups who could provide you with the information you're looking for. Refer to the [Interviewee Types](#) table at the end of this tool to help you think through who you should interview.
2. Consult a language and cultural informant. Ask her/him to explain and/or demonstrate culturally appropriate ways to approach someone in the community and initiate a conversation or informal interview.
 - How would you establish rapport with the other person?
 - Within the cultural context, what might be some nonthreatening questions to use at the beginning of the interview?
 - How would you read the nonverbal language of the other person?
3. Draft a series of questions. Think back to the type of information you're interested in gathering and how you plan to use this information; this will help guide your questions to elicit useful dialogue and information. The templates at the end of this tool can help you with this process:
 - a) [The Question Ladder](#): How do you know the right question to ask in an interview? Sometimes reaching the right answer means thinking through the kinds of questions you're asking. It might sound simple, but focusing on what you're asking someone is essential for reaching a deeper understanding. The Question Ladder worksheet can help you to hone in on a certain topic by asking a series of questions about different aspects related to that topic. Use the worksheet to generate a series of possible questions from which a final set can be chosen. You can use the Question Ladder technique to practice approaching or exploring an issue through various directions. Once you have gained some experience with the technique, you may find yourself automatically using it in conversations or interviews you conduct with people.
 - b) [Question Structure](#): It is often helpful in an interview to begin the conversation with a few easy, closed questions, and then proceed to the open-ended questions to explore ideas, knowledge, and opinions. Sometimes an open-ended question may be vague and difficult to answer, in which case you may want to move back to a more closed question.
 - c) [Interview Digging](#): To help the interviewee(s) feel comfortable, it can be helpful to follow the Interview Digging three-step framework. Depending on the situation, you can sometimes transition directly from an open general question to a deeper question or set of questions, as is shown in the table.
 - d) [Interview Framing](#): There are various ways to elicit and document information during an interview, and the Interview Framing template below provides a few options. You may ask

people to simply tell you about something, but you could also invite them to show things or maybe make a drawing of particular practices or things they do.

- e) [Interview Guide Worksheet](#): This worksheet will help you structure your more open, general questions before probing with deeper questions.
4. Conduct a practice interview with a trusted source prior to conducting the actual interview. This helps you to get a sense of how to frame the questions for better responses and will help you be more comfortable during the actual interview. If possible, bring along another colleague to sit with you during the practice interview to give you feedback afterward on your style and language skills.
 5. Conduct the interview(s)! Make sure the interviewee(s) are specific when describing their thoughts, preferences, motivations, etc. Record as much information during the interview as possible. It's important to record what the interviewee is saying as well as their body language, since that can also give you clues about how they feel about certain topics. It may be helpful to use an audio recording device to capture the interview, especially if you are not confident in your language skills. If you do wish to record the interview, make sure to get permission to do so from the interviewee before recording the interview.
 6. Analyze what you learned during the interview(s). There are many tools in the next phase that can help you make sense of the data you conducted during your interview(s) and determine what your next steps should be!

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Helpful Tips

The word “why” is often interpreted as blame, rather than curiosity, so use it with a careful tone or use “how come” instead.

Be aware of asking questions on sensitive topics (HIV status, child deaths, etc.) that could cause discomfort or trauma to the interviewee.

Whenever possible, conduct your interviews in the interviewee’s own space (e.g., home, work place). You can learn so much about a person’s mindset, behavior, and lifestyle by talking with them where they live or work.

Interviewee Types

Guidelines for conducting interviews with:

An individual

- No more than three research team members should attend any single interview so as to not overwhelm the participant or crowd the location. Each team member should have a clear role (e.g., interviewer, note-taker, photographer).
- Come prepared with a set of questions. Start by asking broad questions about the person's life, values, and habits before asking more specific questions that relate directly to the projects you're working on.
- Make sure to write down exactly what the person says, not what you *think* they might mean. This process is premised on hearing exactly what people are saying. If you're relying on a translator, make sure he or she understands that you want direct quotes (to the extent possible).
- What you hear is only one data point. Be sure to observe the individual's body language and surroundings; see what you can learn from context and non-verbal cues. Take pictures, provided you get permission first.

An expert

- Though the crux of this phase is talking with the people you're designing with and for, you can gain valuable perspective by talking to experts. Experts often provide a systems-level view of a topic, tell you about recent innovations—successes and failures—and offer the perspectives of organizations like banks, governments, or NGOs. You might also look to experts for specific technical advice.
- Determine what kind of expert you need. If you're working in agriculture, perhaps you should interview an agronomist. In reproductive health? A doctor or policymaker may be a good bet.
- When recruiting your experts, give them a preview of the kinds of questions you'll be asking and let them know how much of their time you'll need.
- Choose experts with varying points of view. You don't want the same opinions over and over.
- Ask smart, researched questions. Though you should come prepared with an idea of what you'd like to learn, make sure your game plan is flexible enough to allow you to pursue unexpected lines of inquiry.
- Record your expert interview with whatever tools you have. A pen and paper work fine.

A group

- Though a group interview may not offer the depth of an individual interview, it can provide a compelling look at how a larger set of the people you're designing for operates. The best group interviews seek to hear everyone's voice, get diverse opinions, and are strategic about group makeup.
- Identify the sort of group you want to talk with. If you're trying to learn something specific, organize the group so that they're likely to have good answers to the questions that you've got.
- Try to make sure everyone in the group will feel comfortable sharing their thoughts, opinions, and experiences in front of everyone else in the group; differences in gender, age, social class, etc. can cause some people to hold back from sharing.
- Convene the group interview on neutral ground, perhaps a shared community space that people of all ages, races, and genders can access.
- In a group interview, be certain to have one person asking the questions and other team members taking notes and capturing what the group is saying.
- Come prepared with a strategy to engage quieter members of the group. This can mean asking them questions directly or finding ways to make the more vocal members of the group recede for a moment.
- Group interviews are a great setting to identify who you might want to go deeper with in a co-creation session (see the tool by the same name in the Dream Phase).

Question Ladder

Simple questions ←————→ Complex questions

	Is	Did	Can	Will	Would	Might
Who	Who is	Who did	Who can	Who will	Who would	Who might
What	What is	What did	What can	What will	What would	What might
Where	Where is	Where did	Where can	Where will	Where would	Where might
When	When is	When did	When can	When will	When would	When might
Why	Why is	Why did	Why can	Why will	Why would	Why might
How	How is	How did	How can	How will	How would	How might

Adapted from: DIY. 2014, Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta

Question Structures

Question type	Examples
Closed Questions (yes or no):	Do you like to eat goat? Do you use the health clinic?
Either/or Questions:	Do most children eat ___ or ___ in the morning before school? Is the clinic free or is there a fee?
Open Questions (what, how, when, where, and sometimes why?):	What are some foods you like to eat? When might you take your child to the health clinic?
Personal Question Forms:	Do you throw your trash in the river? How many children do you have?
Generalized Question Forms:	Do people throw trash in the river? How many children do most families have?

Adapted from: DIY. 2014, Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta

Interview Digging

1. **Open Up:** Make the participant feel at ease with “warm-up” questions they are comfortable with.
Example for household demographics: Who does what in the household?
2. **Go Broad:** Prompt bigger, wider thinking on related issues that they may not normally address on a daily basis.
Example for aspirations for the future: How are things connected?
3. **Probe Deep:** Dig deeper on the specific topic or challenge you are trying to learn more about and prompt with more challenging “what if” scenarios.

Adapted from: DIY. 2014, *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta

Interview Framing

<p>SHOW ME If you are in the interviewee’s environment, ask him or her to show you the things they interact with (objects, spaces, tools, etc.). Capture pictures and notes to jog your memory later. Or, have them walk you through the process.</p>	<p>DRAW IT Ask participants to map out their activities and experiences through sketches and diagrams. This is a good way to debunk assumptions and reveal how people perceive and order their activities.</p>
<p>THINK ALOUD As they perform a process or task, ask participants to describe aloud what they are thinking. This helps uncover their motivations, concerns, perceptions, and reasoning.</p>	<p>BE SPECIFIC People often generalize about what’s typical and leave out rich important details. Instead, ask people to talk about a specific period of time. Instead of what’s your typical day like, ask them what happened yesterday.</p>

Adapted from: DIY. 2014, *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta

Interview Guide Worksheet

Open General	Then Go Deep
<p>What are some broad questions you can ask to open the conversation and warm people up?</p>	<p>What are some questions that can help you start to understand this person’s hopes, fears, and ambitions?</p>
<p>What kind of job do you have?</p>	<p>How do you allocate your money now?</p>
<p>How are you paid?</p>	<p>Where do you actually keep the money you want to put aside?</p>
<p>How do you save for the future?</p>	<p>What helps you save money?</p>
<p>Have you ever saved your money at a bank?</p>	<p>If you’ve visited a bank, tell us about your experience.</p>
<p>-----</p>	<p>-----</p>

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.



Storytelling

This tool is particularly effective in exploring difficult subjects, creating a bond within a group, and revealing details about everyday life. It uses storytelling to recount an actual event that happened in participants' pasts or an event that happened to a friend. This tool can be particularly effective, as stories are an integral part of most cultures and communities where the Peace Corps works. When people get into storytelling mode, they often reveal many details that may seem incidental, but which can shape your understanding of issues and relationships in your community in new ways.

Time: 1 hour

Difficulty: moderate

Materials: a comfortable and private space to hold a group meeting

Communicative language tasks: ask follow-up or clarifying questions; ask questions; facilitate a group discussion; give detailed instructions; solicit ideas and responses; summarize/analyze responses

Steps:

1. Welcome your group and explain that today you will be using stories to learn more about a particular topic.
2. Before the activity, prepare a 'typical' story about a major issue or concern that is being dealt with in the community. For example, if working with adolescent girls, perhaps the topic is around menstrual hygiene and the difficulties girls in school face if they have no access to sanitation or hygiene. Make sure that the story includes lots of detail (about the people, places and situations involved), but leave it without an ending.
3. Share the story with the participants. Encourage them to listen carefully.
4. Ask the participants what they think about the story. For example, is it realistic? How does it make them feel? What issues does it highlight?
5. Divide larger groups of participants into groups of eight or less. Ask each group of participants to come up with an ending to the story. Encourage them to use speaking, singing, drawing and/or acting to communicate it.
6. Ask the groups to share their endings.
7. When the activity is complete, encourage the participants to discuss what the story showed. For example, what did the story show about relations between people in the community? What did it show about people's attitudes? What did it show about the biggest challenges?

Adapted from: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance

Helpful Tips

The storyteller can dress up and use props or different voices to make the story more lively. There are many different versions of this tool. For example, you can ask participants to make up their own 'typical' story about the issue at hand in their community. Encourage participants to include lots of detail about the situation, people, places and attitudes involved. Share the first two to three sentences of a 'typical' story about an issue in the community, then ask a volunteer to suggest the next two to three lines, and so on. Keep going until the story reaches an end or has covered several important points. Divide a 'typical' story into three parts. Share the first part with the participants, then stop and ask: 'How is the character feeling?' 'What do you think about what is happening?' Repeat the process for the next two parts.



SWOT Analysis

A SWOT analysis is a useful technique for understanding your community's Strengths, Weaknesses, Opportunities, and Threats. It can be used in two ways: as a simple icebreaker to help community members get together to "kick off" strategy formulation, or as a more robust strategy tool.

Time: 2-3 hours

Difficulty: moderate

Materials: template; writing materials; flip chart; markers

Communicative language tasks: ask follow-up or clarifying questions; ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions

Steps:

1. Welcome participants and thank them for joining the group to focus on discovering insights about the community which will help inform projects moving forward.
2. Explain that a SWOT analysis is a useful technique for understanding the community's strengths and weaknesses, and for identifying both the opportunities available and potential threats. By asking key questions it can help us see the community from a different perspective.
3. Also note that strengths and weaknesses are often internal to the community, and opportunities and threats are usually related to external factors.
4. If it is a larger group, split participants into two or four smaller groups of no more than 10 each. If the total group is less than 10, keep the whole group together.
5. The activity will focus on answering questions related to strengths, weaknesses, opportunities, and threats using the matrix below. If there is more than one group, each group can focus on one or two sections rather than all four.

Strengths Questions

- What does your community do well?
- What unique or lowest-cost resources can your community draw on? What advantages does your community have?
- What do people outside of your community see as your strengths?
- What unique characteristics does your community have that others don't?

Strengths Tips: If the group is having any difficulty identifying strengths, try writing down a list of your community's characteristics, many of which will be strengths. Additionally, it is helpful to think about the community's strengths in relation to other communities the group is familiar with.

Weaknesses Questions

- What could the community improve?
- Where do you have fewer resources than other communities?
- What are others likely to see as your community's weaknesses?

Weakness Tips: Consider this from an internal and external basis: Do other people seem to perceive weaknesses that you don't see? Are other communities doing certain things better than you? It's best to be realistic now, and face any unpleasant realities or limitations as soon as possible.

Opportunities Questions:

- What opportunities are open to you?
- What trends could you take advantage of?
- How can you turn your strengths into opportunities?

Opportunities Tips: When looking at opportunities, take a look at the identified strengths and ask whether these open up any opportunities. On the other hand, if you were to eliminate some of the identified weaknesses, would new opportunities arise?

Threats Questions:

- What threats could harm the community?
- What are other communities doing?
- What threats do your weaknesses expose you to?
- What obstacles does your community face?

Threats Tips: Once you have identified threats, it is important to evaluate the community's ability to mitigate or control those threats. A simple evaluation exercise (scale of 1-5, where 1 means completely within our control and 5 means completely out of our control) can help the community focus on the threats they can realistically mitigate.

6. Once all four sections have been completed, come back together if you were in groups.
7. Read the findings together and have a discussion about what themes arise:
 - What have you discovered about your community that you didn't know before?
 - What surprised you?
 - How can we use these findings?
 - What project ideas could be addressed based on these findings?
8. Thank everyone for coming and express your interest in keeping this conversation moving forward.

Helpful Tips

Note that SWOT and the individual letters may be named differently depending on how these concepts are translated into the local language. For example, in Spanish SWOT is called FODA.

If you're using SWOT as a serious tool (rather than as a casual "warm-up" for strategy formulation), make sure you're rigorous in the way you apply it:

- Only accept precise, verifiable statements
- Prioritize long lists so that you spend your time thinking about the most significant factors
- Make sure that options generated are carried through to later stages in the strategy formation process
- Apply it at the right level: Do you want to evaluate the whole community? Health aspects in the community? A certain project idea?

SWOT Analysis Matrix

Strengths	Weaknesses
Opportunities	Threats



DISCOVER WORKSHEET

List 1 or 2 key insights from each of the tools you used in this phase:

Discover tool used	1-2 insights from using the tool
.....	▶

Based on your answer to the previous question, what are the key insights from this phase?

Looking ahead, how will you and the community use or build upon these key insights?

What new or unanswered questions do you want to explore with community members in the next phase?

List 1 or 2 key insights from each of the lenses you used in this phase. Think about why you and your counterpart chose these lenses based on cultural context:

Lenses used and why	1-2 insights from using the lens
.....
.....
.....
.....

Based on the answer to the previous question, which lenses will you continue to use in the next phase and why? Are there new lenses that have not been mentioned in PACA that you and your counterpart would use?

What community interests were raised while you carried out PACA tools in this phase?

List the community interests that fit within your role as a PCV and/or the scope of your project framework.	List the community interests that fall outside your role as a PCV and/or the scope of your project framework.
.....
.....
.....
.....
.....
.....

What expectations are you setting with the community at this point? Are they realistic and achievable?

What are the community's highest priorities and what are the implications for supporting this scope of work as a Peace Corps Volunteer?

What suggestions do you have for the community members who have interests outside of your scope? What are the assets in the community they could rely on? How can you communicate this information to the appropriate community members?

Project monitoring considerations

- How will you share the insights you discovered with community members?
- How will you encourage community members to share their own realizations with you and each other?

Sustainability considerations

- How will you and your counterpart ensure that the insights you discovered in this phase remain the foundation for the project(s) that you and the community develop?
- Which "discoveries" from this phase present potential challenges to project ideas or the ability and willingness of community members to take ownership of future projects?



Dream: Generate Ideas

Make sense of observations, insights, and discoveries to generate or improve project ideas.

You and the community have used various tools together, tabulated results and insights, recorded testimonies, generated countless flip chart papers and sticky notes, and it's all right in front of you. So now what?

In the Dream phase you and select community members will come together to make sense of learnings and observations from previous phases. The analysis-focused tools in this phase will enable you all to turn insights into project ideas. Together, you will generate tons of ideas, narrow them down, and identify the most promising design opportunities. The key to this phase is in its name: Dream! Your objective is to dream big and generate as many ideas as possible. Some will lead to tried and true project ideas, while others might seem like crazy new ways of making change—and that's good! Think big, have booming brainstorming sessions, and prioritize project ideas that can be  **prototyped** and tested.

This phase will help you answer:

- How do we make sense of insights gathered and turn them into project ideas?
- What are the community's priorities?
- Who will the project benefit?
- What obstacles or challenges might hold us back from moving forward?
- How do we move from opportunity identification to project design?

CIRCLING BACK: When might you revisit the Dream phase?

- To gather more insights for project design elements that are unclear
- To analyze learnings gathered when prototyping, delivering, and monitoring a project

	Tool name	Insights discovered	
	Download Your Learnings	Project themes that project stakeholders wish to pursue	69
	Define Your Audience	Needs, contexts, and histories of project stakeholders	70
	Needs Assessment and Priority Ranking	The ranked desires, needs, and problems of community members	71
	Problem Tree	Definition of a problem, its cause, effects, and solution	73
	How Might We...	Innovative opportunities and approaches for addressing challenges	75
	Group Brainstorming	Diverse ideas for project ideation through group sharing	77
	Co-Creation Sessions	Collaborative project design	79
	Decision Dots	Converging and diverging viewpoints in decision making	81
	Bisociation	Creation of new, innovative project ideas	83

[View the Master List of PACA tools at the beginning of the Tools section.](#)

Project Monitoring Tips

- Using your journal and the worksheet at the end of this phase, keep a record of ideas that community members come up with for solving community problems or building off of assets.
- Refer back to your observations from the Develop Relationships phase. Make sure you are not getting Dream phase ideas from only one select/limited cohort but from across the entire community.
- Refer back to your observations from the Discover phase. What assets or opportunities relate to the ideas being generated during this phase?
- To the best of your ability, assist community members in identifying available support and resources for project ideas that you aren't able to help them with.

Sustainability Tips

- As you prepare and then implement the tools, make sure you're inviting community members into the process so they can assist you and so they become familiar with the tools in order to use them in the future.
- Make sure you do not let your own dreams get in the way of the community members' dreams. Ask yourself: If you were gone tomorrow, would the community members continue to have the same dreams?



Download Your Learnings

It's time to start making sense of all the ideas you and the community have come up with for how to address your problem or focus on an opportunity. This is a rich and powerful way to share what you've heard, and part of the goal is to turn your individual learnings into group knowledge.

Time: 30 minutes-1 hour

Difficulty: easy

Materials: large pieces of paper; writing utensils; sticky notes or small pieces of paper; tape

Communicative language tasks: ask follow-up or clarifying questions; ask questions; facilitate a group discussion; solicit ideas and responses; summarize/analyze responses; understand responses

Steps:

1. Welcome participants and applaud them for all the work they have done to get to this point in the process. Explain today they will be sharing their individual learnings to create greater group knowledge.
2. Start by ensuring there are limited distractions and sit in a circle.
3. One by one, go around the circle and have each participant write their project ideas and stories on sticky notes (or small pieces of paper), and put them on big sheets of paper. Participants should put all of the key information they want to share on the sticky notes and use them to describe who they met with, what they saw, the facts they gathered, and their impressions of the experience. After each participant goes, open it up for clarifying and follow-up questions from the group.
4. Once everyone in the group has gone, spend some time clustering the sticky notes together based on similar themes as you put them on the wall.
5. To wrap up, reflect as a group. It's critical to pay close attention to the community members' stories, learnings, and hunches.
6. As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.

Helpful Tips

This process is best done the day after interviews or after a day in the field while your experiences and perceptions are fresh.

Learn more about this activity in the IDEO Field Guide to Human-Centered Design, p. 77, "Download Your Learning."



Define Your Audience

Before you get too far along dreaming and move into the Design phase of a project, first consider the broad spectrum of community members who will be touched by the project idea. It's critical to begin with who you're designing for. You're bound to learn more about the project beneficiaries once you start designing and **prototyping** a project, but having an idea of the intended project beneficiaries' needs, contexts, and history will help ensure that you and the community are asking smart questions. Don't limit your thinking to just the people you're designing for—you may need to consider governments, NGOs, businesses, or other community groups who are leading their own projects.

Time: 60-90 minutes

Difficulty: moderate

Materials: writing utensils; post-it notes (or cut up squares of paper and tape)

Communicative language tasks: ask questions; brainstorm and elicit ideas

Steps:

1. With your team, write down the people or groups who will be directly involved in or reached by the project. Are you designing for youth? For farmers? Write all the groups down on sticky notes and put them on a wall so you can visualize the beneficiaries.
2. Now add people or groups who are peripherally relevant or are associated with the direct beneficiaries of the project.
3. Think about the connections these people have with your sector/project/idea. Who are the fans? Who are the skeptics? Who do you most need on your side? Add them to the wall.
4. Now arrange the sticky notes into a map of the people involved in the project. Save, refer to, and update this map of people as you move through the Dream, Design, and Deliver phases.

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.



Needs Assessment and Priority Ranking

Completing a needs assessment, or an analysis of their situation, helps community members identify their desires, needs, or problems and rank them in order of priority. A list of issues may be developed from a discussion or from analyzing the results of using other tools, such as community mapping or seasonal calendars. Priority ranking forms the bridge from the Discover phase to Dream and Design.

Time: 2 hours

Difficulty: difficult

Materials: paper; writing utensils

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; summarize/analyze responses

Steps:

1. Divide participants into subgroups (e.g., men and women, boys and girls, different ethnic groups, etc.).

Step 1 is crucial to the success of this activity! The purpose of asking participants to work in subgroups is to create safe spaces in which community members with shared characteristics and identities will feel most comfortable participating. Working in subgroups can help reduce gender, power, and other dynamics at play that would otherwise hinder participation and bias the large group conversation.

2. Ask each subgroup to develop a list of items using a common question (e.g., what would make our community better?). All groups must use the same question.
3. Prompt subgroups to thoroughly discuss the items to prepare to rank them. For example, several items may be related and need to be either combined or further differentiated. You may discuss the lists based on one of the following factors: urgency, level of interest or need, resources, cause-and-effect analysis, scope/complexity, or risk.
4. Use a priority-ranking method to identify the top items. All subgroups must use the same method. Methods include:
 - Traditional methods of decision making (culturally known and appropriate): For example, each person states an opinion aloud before an elder makes a decision.
 - Consensus discussions: Everyone must be convinced of the top priority, and those supporting a priority must make their case.
 - Voting: Physically placing objects next to items, raising one's hand, or secret ballot.
 - Pairwise ranking: Each item is compared to every other item to see which is more important.
5. Bring the subgroups together and ask each to present its original list and five priority items.
6. Discuss the similarities and differences found on all lists. Look for and discuss related items, and look for items that will meet the needs or desires of most people. Consider:
 - What can we do within a year? (complex vs. simple, short term vs. long term)
 - What can we do with our own resources?
 - What will benefit the most people?
 - Which might make the biggest impact?

- What do we need to do first to prepare for the others?
 - Which most closely link to our mission?
7. If possible, and if the group is ready, agree on one or two items for long-term priorities and determine next steps. These may include creating a committee to begin planning or determining who will gather additional needed information. Schedule the next meeting to discuss progress.

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.

Helpful Tips

Always consider the composition of the group when choosing a voting method. For example, if there are three nurses at the meeting and each person present has one vote, the health clinic might get the highest vote. Consider using a consensus discussion for a group with this composition. Or, if the group members do not read, represent items with objects or drawings.



Problem Tree

Doing this exercise allows the group to construct a visual diagram of the problem, showing its causes and effects. The “trunk” of the tree is the main problem, the “roots” are the causes, and the “branches” are its effects. The visualization of the cause-effect relationship helps to prevent the common error of solving only a symptom of the problem.

Time: 1 hour

Difficulty: moderate

Materials: flip chart; writing utensils

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; solicit ideas and responses; summarize/analyze responses; understand responses

Steps:

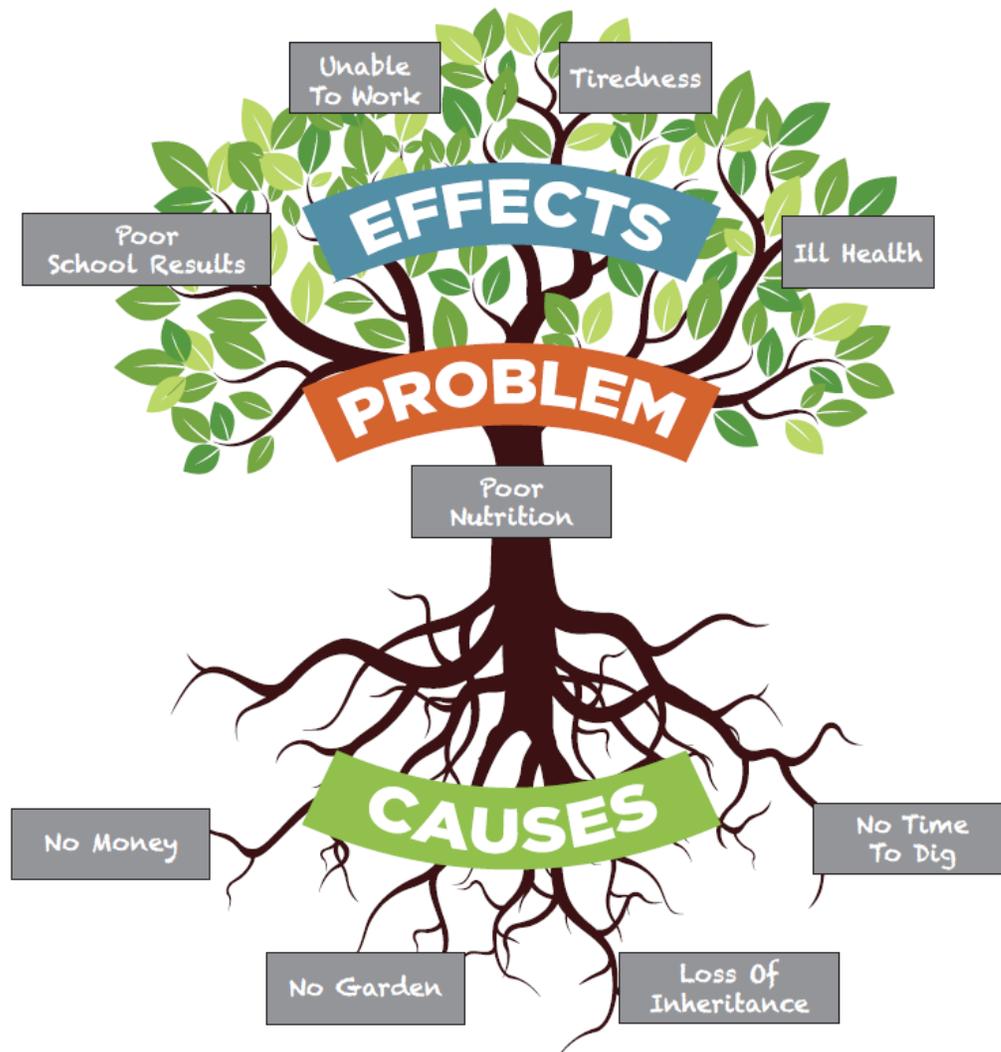
1. Welcome participants and explain the purpose of the day: to think through the causes and effects of the challenge in your community that you are trying to address. The exercise you will be using is called a Problem Tree.
2. On a flip chart, draw a rough sketch of a tree. Include some roots and some branches, but leave plenty of room for participants to write. In the trunk of the tree, write the problem or challenge in the community. Be as specific as possible.
3. Ask participants to brainstorm different causes of this problem. Write each cause separately on the roots of the tree.
4. Take one cause at a time, explaining that people can also look at the secondary causes of a problem by asking the question, “Why?” For example, if the problem on the tree trunk is that mothers are not aware of danger signs, ask “Why?” again. Continue in this way until community members feel that all the causes have been discussed.
5. Ask for a volunteer to summarize the work so far, from the trunk to the smallest root, so that community members can be sure that nothing has been forgotten and that everything is in the right place.
6. Ask participants to brainstorm different consequences or effects of the problem. Write those near the branches of the tree. Make sure that participants consider the consequences or effects for individuals in their community (women, men, children, vulnerable populations, etc.) as well as for the community at large.
7. Be sure to take one effect at a time, explaining that people can also look at the secondary effects by asking the question, “What, in turn, is the effect of this?” Continue in this way until community members feel that all the effects have been discussed.
8. Ask for a second volunteer to give an overall description of the tree with all its roots and branches. This allows community members to have an overall view of the problem in the community. It also makes sure that there is no confusion between causes and effects.
9. Now ask the group to reflect on the causes and effects of the problem and challenge them to think broadly about what some solutions might be. These solutions can be very practical or they can be quite lofty. For example if one of the causes of a problem is “lack of knowledge,” a proposed solution could be “promoting increased knowledge through educational workshops.”

10. From here, the group can think about what intervention they want to address given the scope of your work as a volunteer. Doing a problem tree can allow groups to figure out what aspects of a big problem they can tackle given their resources, time, and community engagement.
11. To wrap up, reflect as a group, asking, “As a community, what did we learn from this exercise? How might we use this information? What might be some next steps?”

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Example Problem Tree

Example of a problem tree (not completed) for an HIV/AIDS orphans and vulnerable children program.



Adapted from: Building Blocks in Practice: Participatory Tools to Improve the Development of Care and Support for Orphans and Vulnerable Children, International HIV/AIDS Alliance, 2004.



How Might We ...

You've identified problem areas that pose challenges to the people you're designing for. Now, try reframing your problem statements as "How Might We" questions to turn those challenges into opportunities for design. The "How Might We" approach suggests that a solution is possible and can be answered in a variety of creative ways. A properly framed "How Might We" question doesn't suggest a particular solution, but rather gives you a framework for innovative thinking.

Time: 1 hour

Difficulty: moderate

Materials: writing utensils; create "How Might We" question worksheets

Communicative language tasks: ask follow-up or clarifying questions; ask questions; brainstorm and elicit ideas; give detailed instruction; summarize/analyze responses

Steps:

1. Welcome the participants and explain the goal of the day—to reframe a problem statement as an opportunity that promotes innovative thinking.
2. Start by looking at the problem statement your group has created. Share the "How Might We" worksheet and ask pairs to try rephrasing the original statement in this frame.
3. The goal is to find opportunities for designing the community's project or activity. So if your insights suggest several "how might we" questions, that's great.
4. Now ask the pairs to take a look at their "how might we" question and think about whether it allows for a variety of solutions. If it doesn't, broaden it. "How might we" questions should generate a number of possible answers and should lead to brainstorming.
5. Then ask the pairs to ensure the questions aren't too broad. It's a tricky process, but a good "How Might We" should give you both a narrow enough frame to let you know where to start your brainstorm, but also broad enough to give you room to explore wild ideas.
6. If there is time, bring two pairs together to share ideas and then share two key thoughts with the larger group.
7. To wrap up, reflect as a group. As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.

Helpful Tips

For more information about How Might We statements, refer to the IDEO *Field Guide to Human-Centered Design*.

Example: Create “How Might We” Questions

Turn Your Insights Into “How Might We” Questions

Insight: *Women want a private space in which to enter and exit the toilet.*

How might we ...

Create a private zone for women before they fully exit the toilet?

Insight: *Without proper maintenance, toilets will become dirty very quickly.*

How might we ...

Design toilets to be easily serviced and maintained?

Insight: *The people who live and work near a public toilet play a crucial role in directing users toward or away from it.*

How might we ...

Create an experience that will drive the surrounding community to encourage more use?

Adapted from: IDEO.org, 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.



Group Brainstorming

Once you've completed the Discover phase and gained insights into the areas the community would like to address, it's time to generate new ideas and next steps, and dig deeper into your project together. Brainstorming provides an opportunity for everyone's ideas to be shared and compared. Before you start, be sure that you agree on the problem or opportunity and state it clearly.

Time: 1 hour

Difficulty: moderate

Materials: : flip chart or large pieces of paper; writing utensils; sticky notes or small pieces of paper; tape

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; solicit ideas and responses

Steps:

1. Welcome community members and explain that today they will be brainstorming around the stated community problem or opportunity.
2. Each person should have sticky notes to write on and a pen or pencil. Also, identify one or two people to be recorders so you don't lose any good ideas.
3. Read the problem or opportunity statement that you prepared out loud, and ask the participants to write down all of the ideas they have regarding that statement. Write one idea per piece of paper (or sticky note) and add the paper to the work surface (wall, table, floor, etc.).
4. Then give each participant the opportunity to share an idea from his or her individual list.
5. As a group, build off each idea as it is presented with follow-up questions and see where it goes. A lot of new ideas will emerge so don't pass judgement at this point. Encourage all ideas. Remember to take notes.
6. At the end of your session, group the project ideas together into similar approaches and write up a brief summary of each approach.
7. Make sure that you develop each approach fully before comparing them.
8. To wrap up, reflect as a group. As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

*Note: Some members of your team might prefer an alternative to brainstorming called **brainwriting**, which is similar but relies on written rather than verbal communication. This can be useful if some members of the team are shy or have a language barrier. In brainwriting, each member of the team draws their idea, using a sketch with a few notes, and then hands it to the next member of the team, who writes their ideas to improve the idea on the page, and then passes it to the next person until it gets back to the originator. As a team, you should choose the method you prefer or you could try both.*

Adapted from: Amy Smith and Ben Linder. 2014. IDDS Design Workbook. Arusha, Tanzania: IDDS.

Helpful Tips

To ensure a productive brainstorming session, keep it under one hour, and follow the below rules of brainstorming:

- Defer judgment: don't dismiss or criticize any ideas
- Build on the ideas of others: no "buts," only "ands"
- Encourage wild ideas: think naively, keeping all engineering knowledge of what is feasible to the side; embrace the most out-of-the-box notions because they can be key to innovative solutions
- Go for quantity: aim for as many ideas as possible; in a good session, up to 100 ideas are generated in 1 hour
- Be visual: use sketches or models to convey the project ideas
- Stay focused on the topic
- One conversation at a time: no interrupting, no dismissing, no disrespect, no rudeness
- Be optimistic

You may also want to have another idea-generating session to see if you have more ideas after some time has passed. As a team, choose between four and six approaches that you think are worth following up on.

Find more information about group brainstorming in the *IDDS Design Workbook*.



Co-Creation Sessions

The purpose of a co-creation session is to bring together a group of people from the community you are working with and then get them to design the project alongside you. Instead of just hearing their voices, co-creating empowers them to join the team. You can co-create services, investigate how communities work, or understand how to implement the project or activity.

Time: 1-3 hours

Difficulty: moderate

Materials: large pieces of paper; writing utensils; sticky notes or small pieces of paper and tape

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; solicit ideas and responses; summarize/analyze responses

Steps:

1. Before you set the day and time of your co-creation session, it's important to think critically about who you want in attendance. Perhaps it's a certain demographic like adolescent girls or male farmers, or maybe its influential actors in local government or unemployed community members.
2. Once you've identified your audience make personal invitations (in person, by a phone call, or through email, etc.).
3. The point of this session is to build rapport. Make sure you capture their feedback and treat them as co-creators instead of interview subjects. You want them to become more invested in the project and eager to see it come to fruition.
4. The content of the session can focus on conversation starters or group brainstorming. For this exercise, we will focus on conversation starters.
5. Before the session, decide what you want the attendees you're designing with to react to. For example, if you are designing a sanitation system you could come up with conversation starters around toilets and privacy. Come up with as many ideas that could get conversations going such as: What is the toilet of the future? The toilet of the past? A presidential toilet?
6. Once the group has settled in, start by telling them that you're interested in their reactions to these conversation starters. Acknowledge some may be silly, some may be strange, and some may be serious. Regardless, you are eager to hear their thoughts and opinions.
7. As the participants share their take on your questions or statements, be open to however they interpret the concepts. When one of the ideas strikes a participant, ask more questions. You can learn a lot about how your participants think and what they might want out of a project or activity.
8. After the conversations, you can use these questions to propel the group into forward thinking:
 - What new ideas excite you?
 - What surprised you about some of the ideas generated?
 - How can we apply these new ideas to our project?
9. To wrap up, reflect as a group.
 - As a community, what did we learn from this exercise?
 - How might we use this information?
 - What are some possible next steps?

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.

Helpful Tips

Depending on the number of participants, you may want to split into small groups to facilitate better conversation and diversity in voices.

Conversation Starter Case Study and Sample Card

These tools were used in Uganda to better understand local financial habits.





Decision Dots

Dots are a helpful tool for facilitating decision making in groups. People use the dots to visually express their opinions or vote on a particular issue or alternative. The dots allow everyone to have a say in the outcome, and the visualization of the group's viewpoint can have a powerful, even galvanizing effect on the process. Three of the most common ways in which decision dots are used are to (a) summarize quickly the convergence or divergence of opinion or viewpoint about a specific issue, (b) select the most important issues felt by participants, and (c) make a choice between different alternatives.

Time: 1-2 hours

Difficulty: moderate

Materials: large pieces of paper; writing utensils; sticky notes or small pieces of paper

Communicative language tasks: ask follow-up or clarifying questions; ask questions; facilitate a group discussion; give detailed instructions; solicit ideas and responses; summarize/analyze responses; understand responses

Steps:

1. First, make the dots. Cut them out of paper and have tape or glue handy for attaching them to flip chart paper (as illustrated in the example below). If you are working in a rural environment, you may want to experiment with beans, seeds, or other small objects that can be stuck to or laid onto another surface. You can also have people simply draw dots directly on the flip chart paper where you have the issues or alternatives listed.
2. Welcome participants and explain that today they will be giving their opinions about an aspect of the project or activity you are working on together and/or prioritizing certain issues. Share the topic at hand today.
3. Make sure to indicate if you are using the single-dot or multi-dot method. Here is the explanation of both:

Single-dot questions:

- Single-dot questions allow group members to express their viewpoint immediately by putting a colored dot on a scale, range, or matrix that allows different options.
- This is used to decide on the next step of a group process, to get over an impasse in discussion, to discuss the feeling of the session or the day, or to evaluate group process.
- Each person gets one dot to place, either openly or in private (depending on the issue and the group composition).
- The facilitator makes no initial judgment but leads the group in an interpretation of the results of the voting.

Multi-dot questions:

- In this version, everyone has a chance to put several dots to indicate his or her priorities on a number of issues or alternatives.
- The number of dots for each participant depends on the number of participants and the number of issues or alternatives. For example, if there are 15 alternatives to choose from and 20 participants, only two or three dots per person should be distributed.
- Once the dots are placed, count them, and then put the alternatives in numerical sequence to prioritize. Don't be too rigid—even after counting the dots, let the group discuss and evaluate the priorities.

4. Prompt the group to complete the exercise by placing their dots using the selected method.
5. To wrap up, reflect as a group.
 - As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Helpful Tips

You can use decision dots in almost any setting where you have a group of people who need to discuss and come to agreement on something. For example, you can discuss condom use with a Girls Leading Our World (GLOW) club and use the dots to help you see where people stand on the issue or what solutions they would propose for increasing condom usage. In a planning workshop, you can use decision dots to decide which discussion topics are of highest priority for the agenda.

Sample Decision Dot activity on flipchart paper

ONE DOT QUESTIONS

With your first dot, indicate how motivated you feel to support the proposed organizational development plan:

Unmotivated
Extremely motivated

Place your remaining two dots on the two organizational development topics you think we should prioritize over the next 6 months:

<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Partnerships</p> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Leadership development</p> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Social marketing</p> </div>
<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Project management</p> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Advocacy</p> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p style="text-align: center; font-weight: bold;">Financial management</p> </div>

Adapted from: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.



Bisociation

Bisociation is a technique to generate new concepts when you feel you've exhausted all the project ideas. In this approach, you choose a topic that may seem unrelated to your topic and then think of all the ways that bring these two ideas together. For example, if you are generating ideas for improving a health center, you might choose a cell phone to focus on in this exercise. How are cell phones related to health centers? Do they improve communication between health providers and patients? Could they help remind a client to take their medication or show up to an appointment? What would a health center app look like?

Time: 1 hour

Difficulty: moderate

Materials: flip chart; writing utensils

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; solicit ideas and responses; summarize/analyze responses; understand responses

Steps:

1. Welcome participants and explain they will be generating new, creative ideas that might be outside their typical thinking from previous gatherings.
2. Divide participants into subgroups (this could be done by counting off, as having different viewpoints in this activity could generate creativity).
3. Ask the group to reflect on the ideas they have generated for their project so far. Take notes on a flip chart to visualize all the great brainstorming they've already done.
4. Now introduce Bisociation by explaining that sometimes, when a group has been thinking about ideas for a long time, it's helpful to change the perspective and think differently to generate new ideas.
5. Ask the group to shout out a few item or elements of everyday life, irrespective of the project. Record those on a flip chart.
6. Now choose one. Each group will have 20 minutes to brainstorm and record with words or drawings how their project idea relates to this topic.
7. Optional, if time allows: If this topic doesn't generate a lot of ideas, choose another one and repeat.
8. Post each group's flip chart sheet and do a gallery walk.
9. Once everyone is seated, ask the following questions:
 - What surprised you about the connections you saw between the topics?
 - What new ideas excite you?
 - How can we apply these new ideas to our project?
10. To wrap up, reflect as a group: As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Adapted from: Amy Smith and Ben Linder. 2014. *IDDs Design Workbook*. Arusha, Tanzania: IDDS.

Helpful Tips

You may choose to do Bisociation with additional topics if you don't get fruitful results the first time around, or you could have each group choose a different topic.



DREAM WORKSHEET

List 1 or 2 key insights from each of the tools you used in this phase:

Dream tool used	1-2 insights from using the tool
.....	▶
.....	▶
.....	▶
.....	▶
.....	▶

Based on the answer to the above question, what are the most promising project ideas that resulted from the tools you and your counterpart used with community members during this phase?

For each of the most promising project ideas identified, what doubts or unanswered questions might you want to explore further? Which tools from the previous phases could you use for this purpose?

List 1 or 2 key insights from each of the lenses you used in this phase. Think about why you and your counterpart chose these lenses based on cultural context:

Lenses used and why	1-2 insights from using the lens

Based on the answer to the previous question, which lenses will you continue to use in the next phase and why? Are there new lenses that have not been mentioned in PACA that you and your counterpart would use?

List the community interests that fit within your role as a PCV and/or the scope of your project framework.

List the community interests that fall outside your role as a PCV and/or the scope of your project framework.

What are the greatest challenges you foresee as you move to start designing a project?

Project monitoring considerations

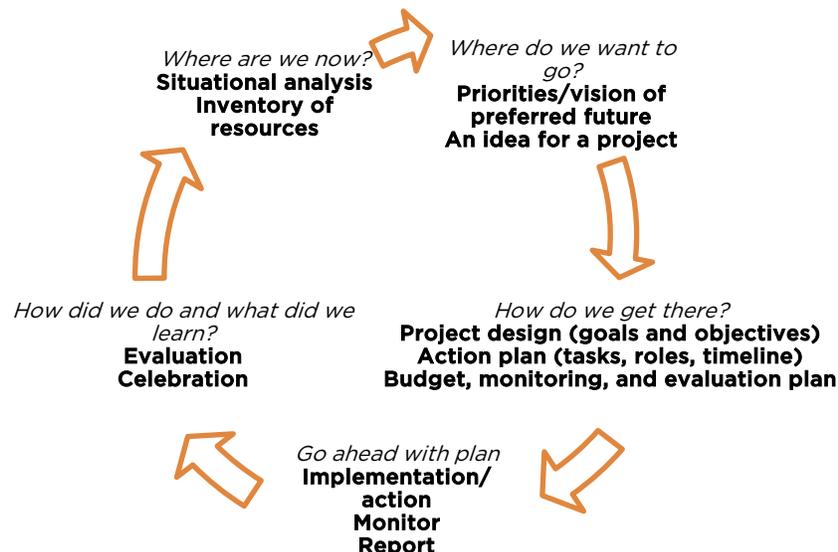
- How do you plan to revisit the ideas that came out of the Dream phase with community members in the future?
- How have you and community members “connected the dots” between the insights generated in the previous two phases in order to validate the project ideas generated in this phase?
- How might you modify any of the project ideas based on insights from previous phases?

Sustainability considerations

- For each of the project ideas generated in this phase, what were the initial discussions about community members’ role(s) in bringing the project to life?
- How will you and your counterpart ensure that the project ideas that will move to the Design phase are truly implemented and owned by the community?

Some posts carry out Project Design and Management Workshops (PDM) and some do not. Even if your post does not carry out this workshop, there is a very helpful resource available online for you to review as you start to move from the Dream phase into the Design phase with your community.

Through PDM, Volunteers and their counterparts learn how to involve community members in moving projects that meet their desires and needs from analysis to planning and implementation. Think about where you have been in the **community development cycle** and where you are going:





Design: Prototype and Iterate

Prototype, test, refine, and continue to improve project ideas.

The Design phase is about testing project ideas as much as possible with as many potential people as possible. Use the Frame Your Design Challenge tool to decide which ideas to pursue, and then select from the tools that follow to design the project, including timeline, budget, feasibility, stakeholders, and partnerships.  **Prototyping** is a great way to iterate project ideas (continuously refining and improving) before investing significant time and resources to scale a project and bring it to life (Deliver phase).

Be ready and excited to fail! This seems counterintuitive, but few design ideas are perfect the first, second, or even third time around. Prototyping pieces of the project idea with actual users or beneficiaries from the community will generate valuable feedback to rapidly integrate into the project idea, thereby improving the likelihood of the project's success and sustainability.

This phase will help you answer:

- What are our main design challenges and opportunities?
- For whom and for what are we designing this project?
- What resources do we have (and need) to successfully bring the project to life?
- How feasible is our project idea?
- Which project aspects do we need to think through in greater detail?
- What do we need to consider before implementing the project?
- How can we improve the project design to maximize the likelihood of success?
- What are the roles of our stakeholders and partners?

CIRCLING BACK: When might you revisit the Design phase?

- To iterate—i.e., refine and make improvements to—the project idea after receiving feedback on the prototype
- When the implementation of one or more aspects of the project doesn't go as planned or encounters a roadblock
- When project partners realize they may have to make changes to the project idea before scaling to reach a wider cross-section of the community

Tool name	Insights discovered	
 Frame Your Design Challenge	Solutions to problems; more clarity on the project	89
 Business Model Canvas	New opportunities and ways to grow the project; ways to sustain your project by engaging key partners, identifying resources, and revenue opportunities	91
  Design for [X]	A long-term project vision; how to ensure the project is accessible, usable, and flexible	93
   Resource Assessment	Viability of your project design; where the project needs adjustments; gaps in project planning	94
   Roadmap	Time needed to execute the project; where responsibility should be assigned; stakeholder roles; project milestones	96
  Community Project Evaluation Plan	Approach for measuring the success and impact of the project; project goals, objectives, and implementation plan	97
   Feasibility Questionnaire	The feasibility of the project; what project goals, designs, and objectives need to be adjusted for successful implementation	99
 Improvement Triggers	Alternative perspectives and ideas for improving the project	101
  Budget Worksheets	Financial aspects of the project; where and how you access funds	103
 Network Contract for Partnership	Project participants' skills and assets; ways to offer and receive project support	106

[View the Master List of PACA tools at the beginning of the Tools section.](#)

Project Monitoring Tips

- Monitoring the progress of projects is important throughout all the phases, but it's especially important as you go through the Design and Deliver phases.
- Developing a list of the important steps to monitor during the Design phase and what success looks like at each step will make project monitoring a lot easier.
- Keep a detailed record of the processes, tools, and insights used to design, prototype, or iterate throughout this phase so you and community members can continue to learn and improve the project.

Sustainability Tips

- As you prepare to use Design phase tools, invite community members into the process to assist so they become familiar with the tools and are able to use them to design future projects.
- Take special note of any financial consideration needed to get the project off the ground. Make sure you and your project partners have a realistic plan for how to access or manage funds, especially if the project will require ongoing investment and financial management to be sustainable.
- Feasibility is perhaps one of the most important considerations in the Design phase. If you and your project partners conclude that the project idea is not feasible, chances are it will not be sustainable either. Be prepared to adjust or abandon unfeasible project ideas.



Frame Your Design Challenge

Getting the right frame on your potential project will help you to get started, organize how you think about potential solutions, and at moments of ambiguity, help clarify where you should push your design.

Time: 1-2 hours

Difficulty: moderate

Materials: blank Frame Your Design Challenge worksheets; writing utensils; paper

Communicative language tasks: ask questions; brainstorm and elicit ideas

Steps:

1. Create a blank version of the Frame Your Design Challenge worksheet that accompanies this tool (one copy per participant or one copy on large flip chart paper).
2. Ask participants to briefly summarize the problem they're trying to solve or the issue they are trying to address. Capture all ideas in writing, and use that list to come up with one succinct answer to the first worksheet prompt: "What is the problem you're trying to solve?"
3. Make a first attempt at writing a design challenge (worksheet prompt #1). The written design challenge should be in the form of a question and related directly to the participants' succinct answer to the previous question.
4. Properly framed design challenges drive toward ultimate impact, allow for a variety of solutions, and take into account constraints and context. Name the project's ultimate impact (worksheet prompt #2), and then try articulating the design challenge again with the ultimate impact in mind.
5. A quick test to run on your design challenge is to see if you and community members can come up with five possible solutions to your design challenge in just a few minutes (worksheet prompt #3). If so, you're likely on the right track.
6. Another common pitfall when scoping a design challenge is being either too narrow or too broad. A narrowly scoped challenge won't offer enough room to explore creative solutions. And a broadly scoped challenge won't give you any idea of where to start. Write down some of the context and constraints faced by the project (worksheet prompt #4). Adjust your design challenge again, as appropriate.
7. Now that you and community members have run your challenge through these filters, go through all the worksheet prompts again (worksheet prompt #5). It may seem repetitive, but the right question is key to arriving at a good solution.

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.

Helpful Tips

It can be very difficult to get community members to synthesize their thoughts and feelings to try to succinctly name a design challenge. Be patient as you facilitate this process. Invite everyone's participation and help facilitate group consensus.

Example Frame Your Design Challenge Worksheet

Frame Your Design Challenge

What is the problem you're trying to solve?

Improving the lives of children.

1. Take a stab at framing it as a design challenge.

How might we improve the lives of children?

2. Now, state the ultimate impact you're trying to have.

We want very young children in low-income communities to thrive.

3. What are some possible solutions to your problem?

Think broadly. It's fine to start a project with a hunch or two, but make sure you allow for surprising outcomes.

Better nutrition, parents engaging with young kids to spur brain development, better education around parenting, early childhood education centers, better access to neonatal care and vaccines.

4. Finally, write down some of the context and constraints that you're facing.

They could be geographic, technological, time-based, or have to do with the population you're trying to reach.

Because children aren't in control of their circumstances, we wanted to address our solution to their parents. We want a solution that could work across different regions.

5. Does your original question need a tweak? Try it again.

How might parents in low-income communities ensure children thrive in their first five years?

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.



Business Model Canvas

The Business Model Canvas tool provides a highly visual format for groups to manage strategy discussions around new and existing projects. Existing projects can use this tool to grow, identify new opportunities, and increase efficiency. New projects can use this tool to develop a strategic plan for making their idea **sustainable**. Think of the Business Model Canvas as a lean, succinct, and visual business plan.

Time: 2 hours

Difficulty: moderate

Materials: several blank Business Model Canvas sheets; suggested: sticky notes, colored pens, flip chart or large pieces of paper

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; summarize/analyze responses

Steps:

1. Guide community members to start in the middle of the canvas, by answering the “What do you do?” question. Be sure to answer this question in specific, concrete terms that describe the value the project adds to the community. This question lays the foundation for the rest of the canvas.
2. Begin filling in the rest of the blanks. Treat your first (or second or third) passes at the canvas as brainstorming and idea generation sessions. If you’re using one large version of the Business Model Canvas with a group, consider starting by writing key words for each category on sticky notes that you can easily move and remove from the canvas.
3. Think of the Business Model Canvas as an iterative, living document. Your team’s answers to these questions could change drastically over time, but this tool will help ensure that your team members are all on the same page. In terms of **sustainability**, this will help ensure that you are consistently engaging with key partners, identifying and taking advantage of resources, and bringing in revenue.
4. Keep your Business Model Canvas posted in a highly visible location to remind the team of your strategy, and allow for edits and additions as needed.

Adapted from: DIY. 2014. Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta.

Business Model Canvas Sheet



Adapted from: the Business Model Canvas was originally designed by Osterwalder and Pigneur (2010), Business Model Generation; Strategyzer AG made it available under Creative Commons



Design for [X]

By this stage, you've gained a lot of insights from the community about what you'd like the project or activity to look like. You've asked for feedback. You've gotten buy-in from the community and stakeholders. Now it's time to plan ahead for eventual implementation. Using the concepts of accessibility, usability, and flexibility to guide your discussion will allow the group to gain a long-term vision for the project with different perspectives.

Time: 1-2 hours

Difficulty: difficult

Materials: flip chart or large pieces of paper; writing utensils

Communicative language tasks: ask follow-up or clarifying questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instruction; solicit ideas and responses; summarize/analyze responses

Steps:

1. Welcome community members and applaud them for all the work they have done to get to this point in the project design process. Explain that they will be looking at the project through a few different dimensions to ensure it is the best it can be before they move into the Design phase.
2. Go through each aspect they will be considering:
 - **Design for Accessibility:** How far would people travel to participate? What form of transportation would they use? How often would they need to participate for it to be useful or for there to be a noticeable change?
 - **Design for Usability:** How can we ensure community members engage in the project more than one time? How can we make sure the design considers participants' needs and addresses their desired outcomes? Is it easy to use? Easy to understand? Is it something participants want?
 - **Design for Flexibility:** How can we be open to changes to the project? How do we remain open to community feedback once we start implementing but remain committed to our goals and objectives?
3. Divide participants into three subgroups (this could be done by counting off or dividing by demographics such as men and women). Assign each group one of the above dimensions.
4. Ask each group to brainstorm and record their ideas with text or drawings on flip chart paper.
5. Post each group's poster and do a gallery walk (give participants a few minutes to tour the room and then, once seated, ask them to share impressions about what they saw on the flip chart papers).
6. Once everyone is seated, ask if anyone has anything to add to the flip chart papers of the other groups.
7. To wrap up, reflect as a group: As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Adapted from: DIY. 2014. *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta.

Helpful Tips

Additional ideas for Design for [X] are available in the *IDDs Design Workbook*.



Resource Assessment

Devising an innovative solution and putting it into practice are two different things. This individual exercise will help you understand the feasibility of the project design and which aspects of the project will need to be adjusted.

Time: 1 hour

Difficulty: easy

Materials: writing utensils; sticky notes or other small pieces of note paper; tape; Resource Assessment worksheet

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; solicit ideas and responses; summarize/analyze responses

Steps:

1. The main elements of project implementation you'll examine through this activity are the distribution of the solution, the partners you will need, and the capabilities necessary to execute.
2. Start to fill out the Resource Assessment worksheet (you may choose to use sticky notes or small pieces of paper with tape so that you can remove them later and reuse the worksheet in the future). List what you've already got and what you'll need. You may want to have a group brainstorming session about what needs to happen for each of the main categories: Distribution, Activities, Capabilities, and Responsibilities. For example, under Distribution, perhaps you are comparing the option of visiting various communities one by one over time to inviting representatives from each community to come to one single location. Build out a Resource Assessment worksheet for each model to compare.
3. As you look at all the project ideas after the brainstorm, start to identify group needs based on community members in the room. Then, include a category for needs that are currently out of reach or that the group is not currently capable of securing. You can list these under the Still Needed category.
4. Look at how you plan to identify people to help run the project. Do you need more or less help after assessing your resources?

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.

Helpful Tips

This exercise can be extremely helpful in not just mapping out what program implementation means in terms of the distribution, activities, capabilities, and responsibilities required, but also for identifying gaps in your thinking. It's a way of viewing the project with considerations for implementing responsibility, capacity, and staffing.

Sample Resource Assessment Worksheet

Resource Assessment Worksheet							
Distribution	Activities	Capabilities	Responsibilities				Still Needed
How are you getting your concept out in the world? Are there multiple ways?	What activities will be required to make your idea work?	What are we already capable of?	Who is responsible for doing it?				
			Community Members	Project Leadership Team	Funder	External	
Example Project: Community Music Drama and Dance Club	Village outreaches	Transportation		X			Vehicle
	Meeting Space	Cleaning and Maintenance	X				Permission from local authorities

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.



Roadmap

You'll need a timeline and a plan of action before you deliver the project and bring it to life. A roadmap can help keep you on time and on target. It helps you gather the key stakeholders in the project and collectively figure out a timeline, assign responsibility for each element of the project, and establish milestones.

Time: 1-2 hours

Difficulty: moderate

Materials: writing utensils; sticky notes or other small pieces of note paper; paper; wall calendar

Communicative language tasks: ask questions; facilitate a group discussion; give detailed instructions; summarize/analyze responses

Steps:

1. Assemble community members, critical stakeholders, and partners that will be responsible for implementing the project idea.
2. Create a big calendar for the next year or 18 months. Use it to map out what needs to happen when. Start putting sticky notes on the calendar that show the project's key dates.
3. It's easy to get lost in all that needs to happen, so think about your calendar in chunks. Figure out what needs to occur in the next month, in three months, in a year. Themes will emerge around the various tracks of work that will need to take place.
4. Think about the major milestones in the project timeline—when the project will officially begin, when you need to hold meetings, when you will pause to evaluate successes and challenges—and get them on the calendar. Use a different colored sticky note for milestones or flip them so they look like diamonds instead of squares to stand out.
5. As you add sticky notes to the calendar, assign a team member or partner to each track of work. Find someone to own or champion each element of the project and be prepared to hold them accountable to the tasks.

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.

Helpful Tips

This exercise requires a lot of paper. Feel free to improvise if necessary. The main point is that it is a participatory process for all stakeholders to see what needs to be done to bring the project to life. This roadmap should be able to be referenced at any time throughout the project. Ideally, it will stay on a wall where it can remain for the duration of the project.



Community Project Evaluation Plan

The Community Project Evaluation Plan will help you plan how to measure the success and impact of a project. It is important to develop this plan as you design the project—it will help you become clearer on the project goals, objectives, and implementation plan.

Time: 1-2 hours to develop plan; additional time to collect data

Difficulty: moderate

Materials: paper; writing utensils; Community Project Evaluation Plan worksheets (or copied onto a flip chart)

Communicative language tasks: brainstorm and elicit ideas; facilitate a group discussion; summarize/analyze responses

Steps:

1. Assemble the community members involved in the project planning and implementation.
2. Review the goals and objectives of the project. The key questions for your evaluation will typically come directly from the project goals and objectives.
3. Identify three to five key questions that will guide and focus your evaluation efforts. It may be possible to simply rephrase your goals and objectives from statements into questions.
4. As a group, fill out the Community Project Evaluation Plan worksheet.
5. As a group, review the plan you've developed and make any changes.
6. Collect the information according to this plan at the appropriate times during or at the end of the project.
7. As you make changes or adjustments to the project, make sure to update your evaluation plan as appropriate.

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps.

Helpful Tips

While you may want to measure everything possible about the project, make sure to stick to just the key indicators that will help you determine the extent to which the project was successful.

It may not be possible to measure the success of your entire project based on the timing of the project and your COS date. If this is the case, make sure you identify at least a few critical questions that you can answer before you COS. Through the process of answering those initial questions, you can build the capacity of the project leaders to continue evaluation after you leave.

Community Project Evaluation Plan worksheet

This worksheet will help you plan how to measure the success and impact of the project (excerpted from The New Project Design and Management Workshop Training Manual).

Key Questions	Quantitative & Qualitative Information	Sources of Information	Methods to Collect Information	Who Participates/ When
What do you want to know?	What type of information do you need?	Where can you find the information?	How will you collect the information?	Who will collect and analyze the information? When?



Feasibility Questionnaire

This questionnaire helps you test the feasibility of the project design. The insights you gain from this analysis will help you determine if you need to adjust the project goals and objectives.

Time: 1 hour

Difficulty: easy

Materials: writing utensils; paper

Communicative language tasks: ask questions; facilitate a group discussion; summarize/analyze responses; understanding responses

Steps:

1. Review the Feasibility Test Questions listed at the end of this tool. Add or modify questions that pertain to the specific project you're working on, as appropriate.
2. Gather the community members together to discuss the feasibility of the project design.
 - If the group is small, you may choose to sit together and talk through each question. Record your answers on paper so that they can be revisited again in the future.
 - If the group is large, you may want to divide into smaller working groups to work through the questions. Bring the larger team together to report out their small group discussions, coming to full team consensus. Ensure responses are recorded on paper.
3. Make sure that there is a clear plan for next steps after the feasibility questions have been answered. This may mean moving forward with the project as designed, deciding there is still more that needs to be done before moving forward with implementation or possibly abandoning the project altogether.

Source: Office of Overseas Programming and Training Support (OPATS). 2002. Roles of the Volunteer in Development: Toolkits for Building Capacity. No. T0005. Washington D.C.: Peace Corps.

Helpful Tips

Remember that this exercise is a gut check that ultimately could change the design of the project. Remain open to that possibility and prepare your counterparts and community for this possibility. If plans need to be adjusted, present adjustments as opportunities to refine and improve the project for greater impact.

Feasibility Test Questions:

1. What, beyond your direct control, could cause this project to fail?
2. How can you (the community) improve the likelihood that the project will succeed?
3. All things considered, do the project benefits justify the costs?
4. Does the community have the capacity to handle and sustain a project of this type and scope? If not, how can we narrow the focus to make it more manageable and sustainable?



Improvement Triggers

This exercise provides a collection of questions that can be used to help you and the community look at your work differently. Inspired by the SCAMPER tool (developed by educator Bob Eberle in the 1990s), these questions are designed to provoke new ways of thinking and to approach the project from different directions.

The questions in this tool assume anything new is a modification of something that already exists. This might not always be true, but approaching your work from this perspective can be useful when trying to articulate how the project is unique or how it builds on what's been done previously.

Time: 1 hour

Difficulty: moderate

Materials: SCAMPER worksheet; writing utensils

Communicative language tasks: ask questions; facilitate a group discussion; give detailed instructions; understand responses

Steps:

1. Welcome community members and explain that they will be challenging themselves to look at the project from different perspectives with the hope of gaining new ideas and improving it.
2. Pass out the SCAMPER worksheet. Divide participants into even groups. Each group will work on one improvement trigger. If the group is small, give each group two improvement triggers. Ideally, there should be three people per group.
3. Explain that asking these questions about the project will help us reflect on new perspectives and generate different ideas to modify our work.
4. Give each group 20 minutes to work on their assigned improvement trigger. Next, ask each group to pass their worksheet on to their neighboring group to review and add to it. This will allow two groups to provide insights on each improvement trigger.
5. After completing the SCAMPER worksheet, ask each group to share their top three improvement trigger ideas with the larger group.
6. In the large group, ask participants to reflect on the exercise and discuss: What major thoughts did this provoke? What potential improvements arose?
7. To wrap up, reflect as a group: As a community, what did we learn from this exercise? How might we use this information? What are some possible next steps?

Adapted from: DIY. 2014. *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta.

Helpful Tips

More information on improvement triggers is available in the *DIY Toolkit*.

SCAMPER Worksheet (Excerpted from DIY Toolkit)

Substitute

What materials or resources can you substitute or swap to improve your work? What other process materials could you use? What rules could you substitute?

Combine

What would happen if you combined different aspects of your work to create something new? What if you combined purposes or objectives? What could you combine to maximize the uptake of your work? How could you combine talent and resources to create a new approach?

Adapt

How could you adapt or readjust your work to serve another purpose or use? Who or what could you emulate to adapt your work? What other context could you put your work into? What other products or ideas could you use for inspiration?

Modify

What could you add to modify your work? What could you emphasize or highlight to create more value? What element of your work could you strengthen to create something new?

Put to another use

Can you use your work somewhere else? Who else could benefit from your work? How else could you do your work—perhaps in another setting? Could you reuse ideas or anything else from a previous project?

Eliminate

How could you streamline or simplify your work? What elements of your work could you make more fun? What elements of your work or even rules could you eliminate? What could you have in its place?

Reverse

What would happen if you reversed your process or sequenced them differently? What if you did the exact opposite of what you're trying to do now? How can you reorganize your work?



Budget Worksheets

Budget worksheets serve as both a reality check and a planning guide for spending. They help provide timely information about the requirements for outside expertise or the training of local people, and loans, grants, or other funding needed to obtain equipment and materials.

Time: 1 hour

Difficulty: difficult

Materials: flip chart; writing utensils; tape; handouts (budget worksheets)

Communicative language tasks: ask questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; understand responses

Steps:

1. Prepare three flip chart sheets: Human Resources and Labor; Materials and Supplies; and Travel/Other Costs.
2. Get community members together and explain that as a group you will be creating a budget for the project so that you know how much money you will need or if it will be necessary to scale back the project. Explain what each of the three categories means.
3. Ask community members to brainstorm all of the different resources needed for the project and under which category each resource belongs. Write responses down on the appropriate flip chart paper. If the group is getting stumped or not mentioning important resources, ask probing questions to elicit more ideas.
4. Go back to each item and discuss how much you will need and associated costs. Make a note next to the item on the flip chart paper. Make sure you consider what is available locally and what you will need outside help with. Does anyone have connections with people outside of the community that you could ask for help?
5. Go through as a group and write down your budget onto the three budget worksheets. Complete the budget worksheets and discuss if there are areas or items that need to be adjusted.

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps.

Helpful Tips

If your required budget is higher than the resources the group currently has, have a discussion around ways that you could find resources within the community. This can range from fundraising ideas to in-kind donations and discounted labor or transportation. Be creative and resourceful!

More information about budget worksheets is available in Peace Corps' *The New Project Design and Management Workshop Training Manual*.

Budget Worksheets

BUDGET WORKSHEET 1

Project Name: _____

Tasks (from Action Plan)	Human Resources/Labor Needed (Trainers, teachers, technicians, drivers, construction workers, etc.)	Cost			
		Number of people	Number of days	Wage/day or job	Subtotal

BUDGET WORKSHEET 2

Project Name: _____

Tasks (from Action Plan)	Materials/Supplies/Equipment	Transportation/Other Cost Items	Cost	
			Unit Cost	X No. Needed = Subtotal

BUDGET SUMMARY WORKSHEET

Project Name: _____

Budget category	Total Cost by Category	Amount Provided by Community or Project Group	Amount Provided by Project Partner(s)	Amount Needed from Outside Community

SAMPLE BUDGET WORKSHEET 1

Project Name: _____

Tasks (from Action Plan)	Human Resources/Labor Needed (Trainers, teachers, technicians, drivers, construction workers, etc.)	Cost			Wage/day X or job = Subtotal
		Number of people	Number X of days		
1. Conducts Environmental Awareness (EA) Camp - 40 youth total	Park EA Leaders (staff time donated by park)*	2	3 (prep day + 2-day camp)	20.00	(120.00)*
	Local participating teachers (teachers' time donated by school)	3	3 (prep day + 2-day camp)	20.00	(180.00)*
	Park Administrative Assistant (staff time donated by park)	1	2 days (equivalent)	15.00	(30.00)
	Local traditional forest users	3	1 day (equivalent)	10.00	30.00
2. Plan and implement conservation project at school	Participating teachers (teachers' time donated by school)	<i>Subtotal for Task 1</i>			<i>30.00/ (330.00)</i>
		2	2 days (equivalent)	20.00	(80.00)
		1	1.5 days (equivalent)	20.00	(30.00)
Plant live tree border to prevent erosion at edge of play field Etc.	(staff time donated by park)	<i>Subtotal for Task 2</i>			<i>(110.00)</i>
Subtotal this Page					30.00
Person-time donated					(440.00)

* () = donated item

Source: Office of Overseas Programming and Training Support (OPATS). 2003. The New Project Design and Management Workshop Training Manual. No. T0107. Washington D.C.: Peace Corps.



Network Contract for Partnership

This template “contract” encourages project stakeholders to look at the skills and assets available among all project participants, and to begin thinking of ways to offer and receive support from one another.

Time: 1 hour

Difficulty: easy

Materials: writing utensils; Network Contract worksheet provided below

Communicative language tasks: ask questions; facilitate a group discussion; give detailed instructions; summarize/analyze responses

Steps:

1. Gather project partners, project stakeholders, and community members together for a meeting about creating a network of partners for the project.
2. Explain to the group what a “network partner” is:
 - Emphasize the wealth of assets represented in the group and the diverse ways in which participants may support one another’s efforts to move the project forward.
 - Ask the group to offer some examples of support they would like to receive from or offer to this project.
3. Give the group five minutes for quiet time to individually reflect on what they are ready to commit to for the duration of the project as a network partner.
4. Come back together as a full group and give each participant a copy of the Network Contract worksheet.
5. Ask for a few participants to speak to the group about the ways they can contribute to the project.
6. Once participants feel comfortable with the idea, ask them to write their individual ideas down as an informal contract on the worksheet provided.
7. Keep the agreements in a place where they can be accessed and viewed at a later time.

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps.

Helpful Tips

Examples of partner support might include providing contacts, sharing resource materials, collaborating on a community exchange or field trip, offering monitoring and evaluation or budgeting expertise, or reviewing project plans.

Network Contract worksheet

NETWORK CONTRACT

FOR _____ (you)

WITH YOUR NETWORK PARTNERS:

Name	Best way to contact
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

COMMITMENTS TO PROVIDE SUPPORT:

Who	Issue/Type of Support	When
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Signatures: _____

Date: _____

Source: Office of Overseas Programming and Training Support (OPATS). 2003. The New Project Design and Management Workshop Training Manual. No. T0107. Washington D.C.: Peace Corps.



DESIGN WORKSHEET

List 1 or 2 key insights from each of the tools you used in this phase:

Design tool used	1-2 insights from using the tool
▶

Based on the answer to the above question, what are the most important design principles and considerations for the project as you move forward?

List 1 or 2 key insights from each of the lenses you used in this phase. Think about why you and your counterpart chose these lenses based on cultural context:

Lenses used and why	1-2 insights from using the lens
▶

Based on the answer to the previous question, which lenses will you continue to use in the next phase and why? Are there new lenses that have not been mentioned in PACA that you and your counterpart would use?

Are there any project design considerations you might want to explore further? Which tools from the previous phases could you use for this purpose?

Looking ahead, how do you and your counterpart plan to prototype or pilot your project before launching it? What will that look like?

What are the primary budget considerations for the project?

Think about the desired result(s) you want to get out of this project. These major results are the goals for your project. The number of goals will depend on the scope of your community project. Most small projects have only one or two goals.

Project goals ...

- restate the vision and approach in terms of what is to be accomplished;
- define the long-term results or changes that the project will bring about;
- are realistic and include an overall time frame

List your goal(s) here:

Objectives are similar to goals but much more specific and focused on the short-term results you need to meet the longer-term goal(s) of the project.

Objectives ...

- are the short-term results you need to meet the longer-term goal(s) of the project;
- are SMART: Specific, Measurable, Attainable, Realistic, and Time-Bound; and
- answer the questions: Who is/are the target group or individuals expected to change? What action or change is expected? When might the desired action or change be accomplished? How much change is expected?

List the objectives for each goal listed above:

Project monitoring considerations

- What steps will you take to monitor the project over time?
- What will success look like at each step?
- How have you built in the ability to adjust your project over time based on the results of your monitoring activities?

Sustainability considerations

- If your support as a PCV of the project were to end right now, which aspects of the project would suffer most? What can you and your counterpart do to enhance community ownership over each of these project aspects?
- How will you ensure that the project is self-sustaining/community sustaining and will not need continued financial and managerial support over time?

Some posts carry out Project Design and Management Workshops (PDM) and some do not. Even if your post does not carry out this workshop, there is a very helpful resource available online for you to review as you start to move from the Dream phase into the Design phase with your community.

Through PDM, Volunteers and their counterparts learn how to involve community members in moving projects that meet their desires and needs from analysis to planning and implementation. Think about where you have been in the **community development cycle** and where you are going:





Deliver: Project Implementation

Bring the project to life! Implement, continue to refine, and build lasting sustainability.

The Deliver phase is about rolling up your sleeves! This is when all the work you and the community have done during the Dream and Design phases becomes a reality. While at times the implementation of the project might not go according to plan or schedule, and you may need to make adjustments or deviations from your work plan, remember to have fun and celebrate the incremental progress made toward achieving the overall project goal.

In this phase, you will juggle a number of tasks, including: coordinating various activities at once; mentoring and motivating the implementation team; potentially managing a budget; communicating progress to project stakeholders; refining the scope of work and approach based on new insights; and documenting the achievements and setbacks of project implementation. There is a lot going on during this phase, but at this point in your service you and the community members you are working with will most likely be ready and eager to welcome the change of pace.

This phase will help you answer:

- What are the critical project tasks, roles, and timeline for project implementation?
- How can we test out aspects of the project before full-scale implementation (pilot)?
- How is the project progressing? What changes or adjustments need to be made?
- How does project implementation compare to expectations?
- How might we record or document the project's impact?
- How can we grow (scale) the project impact?
- Is the project truly owned by community members? Is it sustainable?

CIRCLING BACK: When might you revisit the Deliver phase?

- Before repeating the project or scaling it up to include other communities or community members

	Tool name	Insights discovered	
	Action Plan Worksheet	Action-oriented project implementation plan, including timeline, role of community members, project goal and objectives	114
	Project Monitoring Checklist	Progression/status of tasks based on project goals, objectives, and implementation plan	116
	Participatory Photography	Project outcomes and changes through photo documentation	118
	Stories of Change	Project outcomes and changes through personal stories	120
	Before-and-Now Diagram	The change in a community since the start of the project; reasons for change; the consequences and effectiveness of the project	122
	Ways to Grow Framework	The effectiveness of solutions, interventions, and project design; how to extend, adapt, or create a new offering	124
	Pilot	Ways to adapt or improve the project; beneficiaries' reaction to the project; how to best use resources; evaluation plan effectiveness	126
	Scaling Plan	How to expand the project to additional beneficiaries	128
	Sustainable Development Reflection	Key factors that will enable the project to endure after you COS	130

View the Master List of PACA tools at the beginning of the Tools section.

Project Monitoring Tips

- Monitoring the progress of projects is important throughout all the phases, but it's especially important as you go through the Design and Deliver phases.
- Record the progress of the project, regularly checking back on your notes throughout to remind yourself of past insights that may impact the project as it's implemented.
- Do you need to revisit any phases in order to develop more relationships or gain additional insights before implementation?
- Draft intermediary stages on your road to "success" and make sure you're monitoring to see when you reach each stage, adjusting as necessary and documenting adjustments.
- Make sure to follow up with beneficiaries of the project throughout implementation to solicit their perceptions of the project's progress and success; this will also allow you to adjust the project as needed and gauge effectiveness.

Sustainability Tips

- As you prepare to use Deliver phase tools, invite community members into the process to assist so they become familiar with the tools and are able to design future projects.
- Make sure you're sharing project roles with leaders throughout implementation so they are able to carry on the project after you have left the community.
- Once your project is complete, discuss results of the project with community members to document change that has taken place and plan for future projects, as needed.
- Feasibility is perhaps one of the most important considerations in the Design phase. If you and your project partners conclude that the project idea is not feasible, chances are it will not be sustainable either. Be prepared to adjust or abandon unfeasible project ideas.



Action Plan Worksheet

After community members have fully thought through the project's design, they are ready to plan for action. The Action Plan Worksheet helps think through the tasks for project objectives, the roles and responsibilities of community members and other project stakeholders, and the timeline for getting the project done.

Time: 1 hour

Difficulty: moderate

Materials: flip chart; markers; Action Plan Worksheets; writing utensils; pieces of paper; tape

Communicative language tasks: ask questions; facilitate a group discussion; give detailed instructions; summarize/analyze responses

Steps:

1. Prepare flip chart sheets similar to the Action Plan Worksheet and list out the different objectives of the project.
2. Give everyone a copy of the Action Plan Worksheet and briefly describe the overall process.
3. Define the key terms "task" and "objective" for the group, explaining their relationship, and give examples that can help illustrate how to sequence tasks that are dependent on prior tasks.
4. Explain that as a group you are going to write an action plan for the project starting with tasks.
5. Go through each objective and collectively write out the tasks associated with each. Then go through to put the tasks in sequential order. *Note: This can be done on pieces of paper and taped to the flip chart so you can move the sequence of tasks, if needed.*
6. Once the tasks have been identified and put in the correct order, go through as a group and decide roles and responsibilities. Who will do each task? Make sure to record answers on the flip chart and/or worksheet.
7. After each task has a person assigned to it, as a group, decide on the timeline for getting each task done. Keep in mind your goal of the overall timeline for the project, as some tasks may need to get done more quickly than others. Make sure that everything gets recorded so you can stay on track.

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps.

Helpful Tips

Depending on the degree of the project's complexity, it may be helpful to write out the objectives ahead of time so that as a group you can brainstorm the tasks associated with each objective.

Depending on your group, you may choose to use flip chart paper to record the tasks or simply write onto the Action Plan Worksheets.

More information about Action Plan worksheets is available in Peace Corps' *The New Project Design and Management Workshop Training Manual*.



Project Monitoring Checklist

Using a basic checklist helps you monitor the routine progress of the project. It is important to develop this checklist as you design the project—it will help you become clearer on the project goals, objectives, and implementation plan.

Time: 30 minutes–1 hour to develop checklist;

additional time to collect data

Difficulty: easy

Materials: paper; writing utensils; Project Monitoring Checklist worksheets (or copied onto a flip chart)

Communicative language tasks: ask questions; brainstorm and elicit ideas; summarize/analyze responses; understand responses;

Steps:

1. Assemble the members of the project planning and implementation team.
2. Discuss the various stages of your implementation plan in order to think about what project aspects you might want to monitor and how you will monitor them.
3. As a group, fill out the Project Monitoring Checklist (see next page).
4. Review the checklist you've developed and make any changes.
5. Collect the information according to this checklist throughout the implementation of the project.
6. As you make changes or adjustments to the project, make sure to update your monitoring checklist as appropriate.

Source: Office of Overseas Programming and Training Support (OPATS). 2003. *The New Project Design and Management Workshop Training Manual*. No. T0107. Washington D.C.: Peace Corps.

Helpful Tips

Think as broadly as you can about all the different aspects of the project that you could monitor—this will help you be better prepared to stay on track with the project.

If you end up coming up with a lot of things to monitor and become overwhelmed by the list, consider grouping them into buckets. For example, if three different things on your list lead to the same result of having a well-planned training event, you could consider grouping them into one.

Project Monitoring Checklist

Develop a checklist that will help you monitor the routine progress of your project.

What to Monitor?	Things and Places to Check	How?	Who Does It?	When?

Sample Project Monitoring Checklist

What to Monitor?	Things and Places to Check	How?	Who Does It?	When?
Materials and equipment	Inventory, estimates, bills of lading, condition of equipment, supply of replacement parts, etc.	Visits Meetings	Project participants	Daily
Budget	Ledgers, financial/bank accounts, comparing planned expenses to actual expenses	Books/ledgers Budget analysis	Accountant Project team	Weekly
Interest and motivation	Attendance, participation, new members join, committee doing work, etc.	Attendance sheets Reports	Project team	Weekly
Training and education	Attendance at sessions, material learned, new skills developed, number of materials developed, quality, etc.	Attendance sheets Testing (e.g., pre- and post-tests) Observation	Project team	Weekly
Roles and responsibilities	Work schedules, work quality, performance, promptness, contracts, job reviews, etc.	Reports Job review	Project team	Monthly
Administrative needs	Permits and licenses acquired, proper documents available, etc.	Reports	Project team	Monthly

Source: Office of Overseas Programming and Training Support (OPATS). 2003. The New Project Design and Management Workshop Training Manual. No. T0107. Washington D.C.: Peace Corps.



Participatory Photography

Participatory photography is a tool developed to document social change for marginalized groups. For the purposes of PACA, it is being adapted to document the stages of project implementation. With this tool, participants document project progress and outcomes via a series of before-and-after photos.

Time: Several hours each for: initial planning; training project participants; supporting and providing feedback to program participants; and reviewing photos

Difficulty: difficult

Materials: paper; writing utensil; camera(s); way to view photos digitally and print photos

Communicative language tasks: ask questions; give detailed instructions

Steps:

1. People are trained in how cameras work and how to compose a picture. They can start by looking at photographs from newspapers and magazines, and discussing what makes a good or bad photograph. Good photographs usually tell a story all by themselves.
2. Deciding what to photograph. Here photographers plan who or what they will photograph, where and how they will photograph and who they will present them to.
3. Photographers go out into the community and photograph according to their plan.
4. Sharing and reflecting on the photographs taken Photographers develop their photographs and allow each other to show what they have photographed and why. Photographers share what their photographs mean to them as individuals, identify the common themes emerging, and lessons they have learned about how various issues affect their community.
5. Present the photographs to others. This can be done in different ways. For instance, an exhibition can be given in a public place like a school, hospital or workplace, or a book can be made of the photographs and sold to raise funds for the cameras or service projects.

Adapted from: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.

Helpful Tips

Photographs should be credited in the following manner: © Photographer/Partner Organization [if applicable]/Peace Corps

Photography can be quite an art, although children and adults can use them quite easily. For the best results, asking a local professional photographer to train participants is a good idea. Always ask permission before taking someone's photograph and ensure that the person knows what that photograph will be used for. Cameras can be expensive, but cheaper cardboard cameras are now available in most big cities. Alternatively, people can share cameras.

Sample Peace Corps photo waiver form

Authorization to Use Personal Information

I, _____, hereby grant to the Peace Corps a perpetual, worldwide, royalty-free, non-exclusive license to use, reproduce, or publish, for purposes authorized by the Peace Corps Act: my name; my photograph; the negatives and prints of photographs, videotapes, and/or other audio or visual recordings of myself; my articles and stories; and any other documents, writings, statements, recordings, representations, or information I may provide pursuant to and in accordance with the terms of this authorization. (Attach or describe licensed item if applicable.)

In particular, I hereby authorize the Peace Corps to use, reproduce, or publish any or all of the above-listed items and to make reference to me in connection with these items to promote the Peace Corps using various media and publicity means, including, but not limited to: websites; books; public service advertising on television and radio stations; television and radio broadcasts; direct mail pieces; print advertisements; brochures; flyers; posters; articles; editorials; speeches; roundtable discussions; radio interviews; and television programs.

I acknowledge that I will receive no compensation from the Peace Corps in consideration of this authorization or the use of the above-listed items pursuant to this authorization.

Signature and date



Stories of Change

The Stories of Change (SoC) approach is a participatory project monitoring technique. It involves collecting stories of change from program participants and systematically identifying common themes that emerge. These themes can be used to guide project adjustments or describe project outcomes.

This approach will allow you to record stories that highlight significant improvements in project participants' lives since taking part in a Peace Corps-sponsored training, activity, or project. This approach gives community members a voice to assess the direct outcomes of the project. SoC is particularly effective when used with a larger project. Following the collection of these stories, it is recommended that you facilitate a community activity to share the results of the recording process, as culturally appropriate.

Time: Several hours

Difficulty: moderate

Materials: paper; writing utensil; optional: audio and/or video recorder to capture program participants telling their story

Communicative language tasks: ask follow-up or clarifying questions; brainstorm and elicit ideas; facilitate a group discussion; give detailed instructions; summarize/analyze responses;

Steps:

1. Assemble the project planning and implementation team. Share with them what Stories of Change (SoC) is and that you'd like to discuss the possibility of using this tool with your project. If the team decides it's a good idea to proceed with using SoC, proceed to the next step.
2. Discuss the following:
 - Identify key times or aspects of the project that would be beneficial to capture using SoC.
 - Determine who will be the interviewers (who will be responsible for collecting the stories).
 - If necessary, develop a brief training for those interviewers.
 - Determine what your key question(s) will be. It may be helpful to review the interviewing tools in the Field Guide for ideas.

Using the following phrases in your SoC questions may help elicit more specific responses:

"Looking back over the past month ..." focuses respondents' thinking on a specific time period.

"What do you think was ..." asks respondents to use their own judgment.

"... the most significant ..." asks respondents to be selective and prioritize.

"... change ..." asks respondents to name and describe specific impact(s).

"... in your quality of life ..." asks respondents to name and describe specific impacts that they personally experienced as a result of the project.

"... for your household?" like the previous phrase, establishes boundaries for respondents' answers.

3. If necessary, implement a brief training for the interviewers.
4. Get a signed consent form from each respondent. When a storyteller tells a story, the person collecting the story needs to first explain how the story will be used and check that the storyteller is OK with the intended use. Storytellers should also be asked whether or not they want their name to accompany the story. If not, names need to be deleted from the story from then on. If a person or group is mentioned or identifiable within a story not told by them, ask the storyteller to consult with the third party to

check whether they are OK with their name being mentioned in the story. If a storyteller wants to tell a story about a third party without naming that person, the identity of that person should be protected.

5. Capture the stories using one of these three media:
 - Through interview and note-taking (and/or audio or video recording)
 - During group discussion and note-taking (and/or audio or video recording)
 - Program participants write down the story directly themselves

Note: For each story, make sure to record who collected the story and when, so you can verify its accuracy and follow up as necessary.

6. With your project team, review the stories of change you've collected. Discuss the various themes you see emerging from the stories. Are they themes you were hoping to see? Are there any unexpected themes? Are there any negative themes or lessons learned? Based on the themes that emerged, discuss if there are changes to the project you could make in order to see more significant changes in the future around the outcomes you're hoping to achieve through the project.
7. Share the results of this process with program participants.
8. Repeat this process as appropriate throughout the life of your project.

Adapted from: Morten Skovdal & Flora Cornish. 2015. *Qualitative research for development: a guide for practitioners*. Rugby, UK: Practical Action.

Helpful Tips

Try to categorize the stories into three to five themes. This will help you focus your analysis and not only identify outcomes but also generate ways to improve your project.

As with everything you do, use this process of collecting and analyzing stories of change as a capacity-building process with the project team.

Make sure the storyteller(s) share as much as they can about the who, what, where, when, how, and why of their story so you can have as complete a picture of what happened (and continues to happen) as possible.

Question Guide example: Permagardening Stories of Change

You should already know the household, but if needed, introduce yourself and explain that you are there to get their feedback on the permagarden and see how you can assist them going forward.

- When and how did you first learn about permagardening? How soon after the training did you begin your own permagarden?
- What do you remember most from your experience with permagardening?
- What is something that you would have liked to have known before starting your own permagarden (that you were not trained in)?
- What changes have you and your household seen in your lives since you started your own permagarden?
- Of those changes, what would you say is the most significant that you and your household experienced in this time period?



Before-and-Now Diagram

This diagram shows change in a community since the start of your project or community initiative. Remember, your definition of community for the purposes of this tool will vary from project to project. A before-and-now diagram can be used to explore change over time in a particular situation, explore the consequences of a particular event, assess the effectiveness or impact of a community initiative or project, and understand how significant events have affected people differently.

Time: Several hours each for: initial planning; having participants develop their own before-and-now diagrams; discussion and, if desired, development of a group before-and-now diagram

Difficulty: moderate

Materials: paper; writing utensils; flip chart paper and markers if making a group diagram

Communicative language tasks: ask questions; give detailed instructions; summarize/analyze responses

Steps:

1. Gather participants from the community.
2. Explain to participants the purpose of a before-and-now diagram.
3. Agree what time period is meant by “before.” This might be the time before an important event or development—for example, before an important change in the law, before the start of a community initiative, or before HIV emerged in the community.
4. Ask participants to (individually) draw or write about the situation as it was before the event or development. Examples of what participants might want to think about are changes in individuals’ attitudes and behaviors, the community, services, policies and laws, the economy, or the environment.
5. Then ask participants to draw or write about the situation as it is now.
6. As a whole group, ask participants to compare and present their two drawings or descriptions. Discuss what has changed, what has not changed, and the reasons for this.
7. Optional: Develop a group before-and-now diagram based on participants’ individual diagrams.

Adapted from: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.

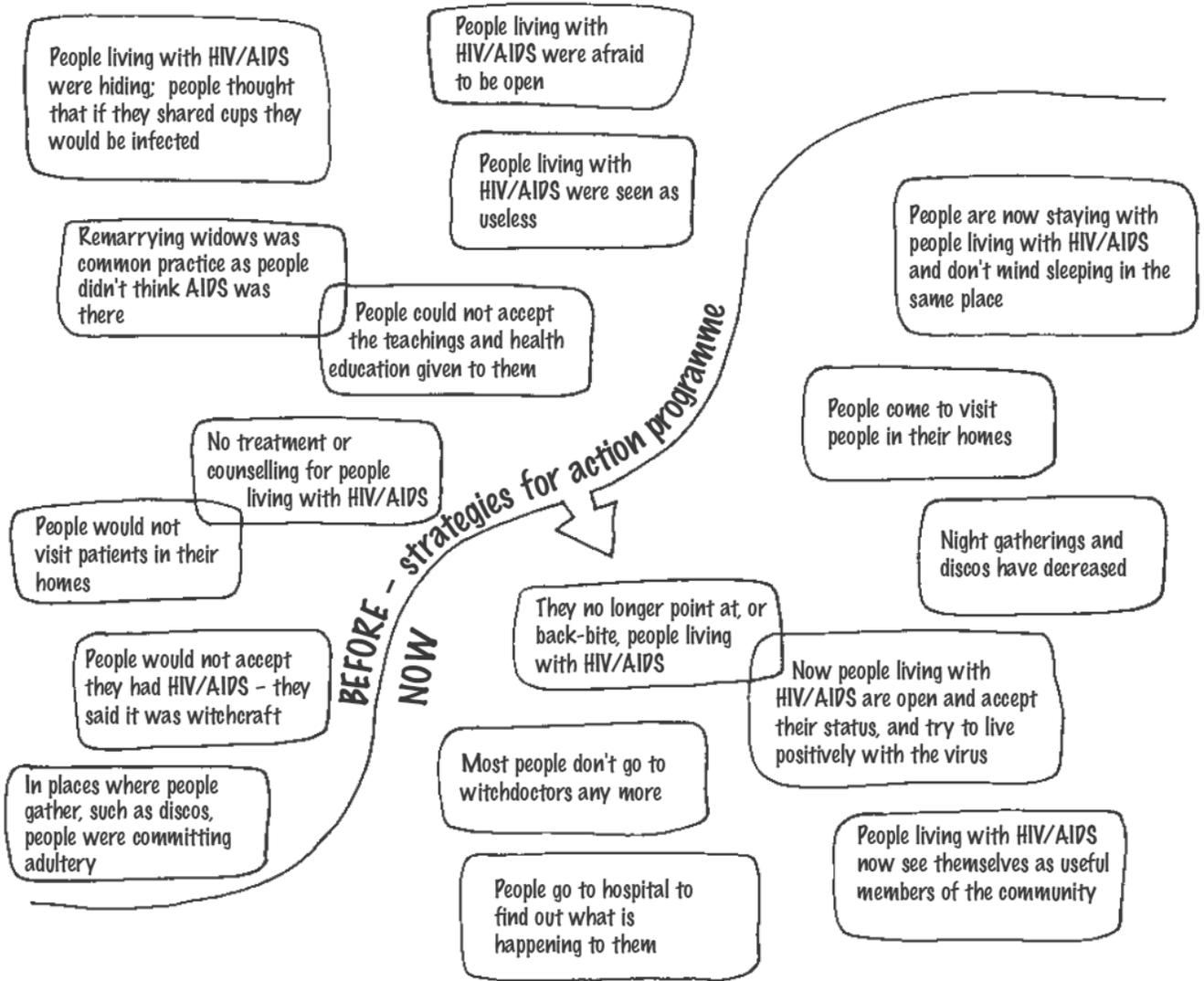
Helpful Tips

When discussing change at the community level, it is important to make sure that different views are well represented, as people will have experienced change differently.

The before and now diagram is a useful tool for monitoring or assessing change—for example, what has changed as a result of community action?

Encourage a balanced assessment by discussing what has not changed, as well as what has changed.

Sample Before-and-Now Diagram



Adapted from: International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.



Ways to Grow Framework

This Tool is a visual way to identify potential difficulties in implementing a project. It will help you determine whether the solutions and interventions you've come up with to address the community-identified problems are incremental, evolutionary, or revolutionary, as well as whether they extend, adapt, or create a totally new offering. The tool will help you to assess whether you and the community have the means to effectively implement the project design you've developed.

Time: 30 minutes-1 hour

Difficulty: easy

Materials: writing utensils, sticky notes, Ways to Grow Framework worksheets (or copied onto a flip chart)

Communicative language tasks: ask follow-up or clarifying questions; ask questions; give detailed instructions; summarize/analyze responses;

Steps:

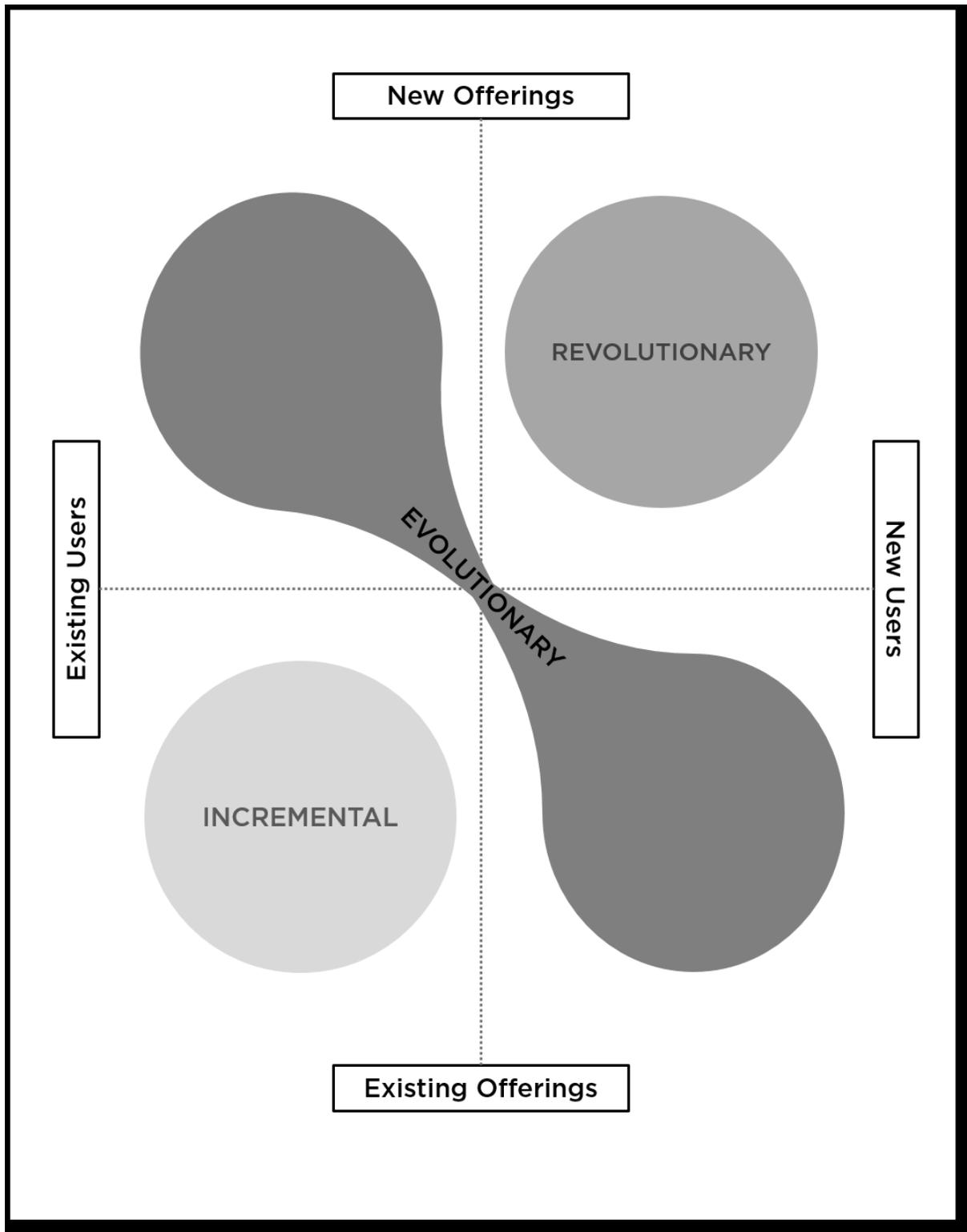
1. Bring together the core group of community members focused on project design and any other relevant stakeholders. Print copies of the Ways to Grow Framework worksheet below or draw one on a large sheet of paper. The vertical axis represents the novelty of what the project is offering, and the horizontal axis represents the users, beneficiaries, and/or project participants.
2. Next, plot your solutions, design ideas, or interventions on the worksheet. Explain that new offerings land above the horizontal axis and ones that build incrementally on existing offerings land below. An idea or intervention aimed at new users falls to the right of the vertical axis and one that affects existing users falls to the left.
3. Look at the distribution from incremental to revolutionary. Are there gaps? Are parts of the matrix blank and others full? If so, do you want to create solutions that fill all four quadrants?

Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.

Helpful Tips

Remember to think hard about what the community group can realistically achieve and what will benefit the target population most. Although you might be most excited by the prospect of doing revolutionary thinking, incremental and evolutionary change often has the greatest potential for impact.

Ways to Grow Framework worksheet



Adapted from: IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco



Pilot

Recognized as a best practice in the international **development** arena, a pilot is a longer-term way of testing out the project idea and plan on a smaller scale. Piloting a project can help you:

- Recognize potential problems with your approach early on before they escalate into larger issues.
- Revise and adapt the project before full-scale implementation.
- Identify unforeseen challenges that might arise during implementation (logistics, training, etc.).
- Gauge your target population's reaction to the project.
- Determine if you need to spend more time or resources on certain aspects of the project.
- Test and revise your evaluation plan to ensure you are measuring your desired outcomes in the best way possible.

Time: months

Difficulty: difficult

Materials: Everything necessary to run the project on a small scale

Communicative language tasks: Ask questions; brainstorm and elicit ideas

Steps:

1. Ensure that all the planning pieces are in place for the start of your pilot. This includes having:
 - Established a community task force that is invested in the project and committed to meet regularly to discuss and provide feedback on progress.
 - Developed the project in a participatory manner, based on the identified needs and assets voiced by the target group and community stakeholders.
 - Created a clear implementation plan that outlines the core components and activities of the project, with timelines.
 - Established an implementation team that understands its roles and responsibilities.
 - Developed a pilot-specific monitoring and evaluation plan to capture the outcomes of your pilot.
2. Identify the target population who will be your test audience for the pilot. They should be as similar to the full-scale project target population as possible.
3. Train up implementation team members prior to the start of the pilot. This is important to ensure that everyone on the team is on the same page and working toward the same vision.
4. Solidify your logistics for the pilot. Do you have all of the materials you need? Do you have a clear location identified to conduct the pilot? Do you have transportation needs figured out? Is the training venue booked?
5. Regularly collect information—both qualitative and quantitative data—about how your pilot is working. This includes gathering feedback on the pilot process from your implementation team members.
6. Regularly share progress with community stakeholders. Consider organizing regular update meetings. Being transparent about how your pilot is going will go a long way to help you gain the trust and buy-in of the community. This will be essential for getting the go-ahead to take the project to scale.
7. Don't forget to have fun and enjoy the experience of bringing the project ideas and vision to life! Celebrate your successes—no matter how small they might seem.

Adapted from: IDEO.org. 2015. *The Field Guide to Human-Centered Design*. San Francisco: IDEO.org.

Adapted from: HHS, Office of Adolescent Health. 2011. Tips and Recommendations for Successfully Pilot Testing Your Program. Rockville, MD: HHS.

Helpful Tips

Develop a clear plan for monitoring how well your pilot is working. Since your pilot is the best opportunity to learn what goes well and what doesn't before full-scale implementation, it's important to have a plan for soliciting feedback (both from your implementation team and your pilot participants), tracking the activities and outcomes, and recording any adjustments you make—or need to make—to your approach and your plan to get the desired results of the project.

Try to stay true to your implementation plan, despite the temptation to overhaul it if things don't go exactly as planned. You should make moderate adjustments as necessary, but resist the urge to make sweeping predictions or assumptions about the full-scale implementation based on these early findings.

Share the progress and results of your pilot with the community. Seize this as an opportunity to begin building community awareness and strengthening key partnerships. This will be important and helpful for successful implementation as well as with the  **sustainability** of the project. Consider inviting members of the community to a gathering to celebrate the kickoff of the full-scale project once you have compiled the pilot results. This is a great way to promote the positive effects your pilot has had on participants as well as reinforce your value to the community.



Scaling Plan

What do you do once you've completed the pilot phase of the project? Develop a scaling plan! A scaling plan builds upon the success of the pilot by extending the reach of your work to a bigger population. This could mean replicating the project across different geographic locations, engaging and collaborating with different organizations, or expanding the breadth and depth of the problem the project addresses. Before you decide on how and when to scale, it will be important to build a shared vision for scaling with community partners. The scaling plan aims to do just this by stimulating serious dialogue with both internal and external stakeholders.

Time: several days

Difficulty: difficult

Materials: venue for workshop; Scaling Plan worksheets (or copied onto a flip chart); writing utensils; paper

Communicative language tasks: ask questions; brainstorm and elicit ideas; summarize/analyze responses

Steps:

1. Organize a workshop to bring together community members, partners/organizations, project beneficiaries, and other important stakeholders (village elders, community leaders, service providers, etc.) to implement the project.
2. Work together with participants to go through the five key areas outlined in the following worksheet. Reviewing the questions in the worksheet will help spark critical in-depth conversation to help you determine whether you are ready to go to scale with the project.
3. Once you complete the worksheet, you may need additional days to conduct further consultations and potentially revise the scaling plan.

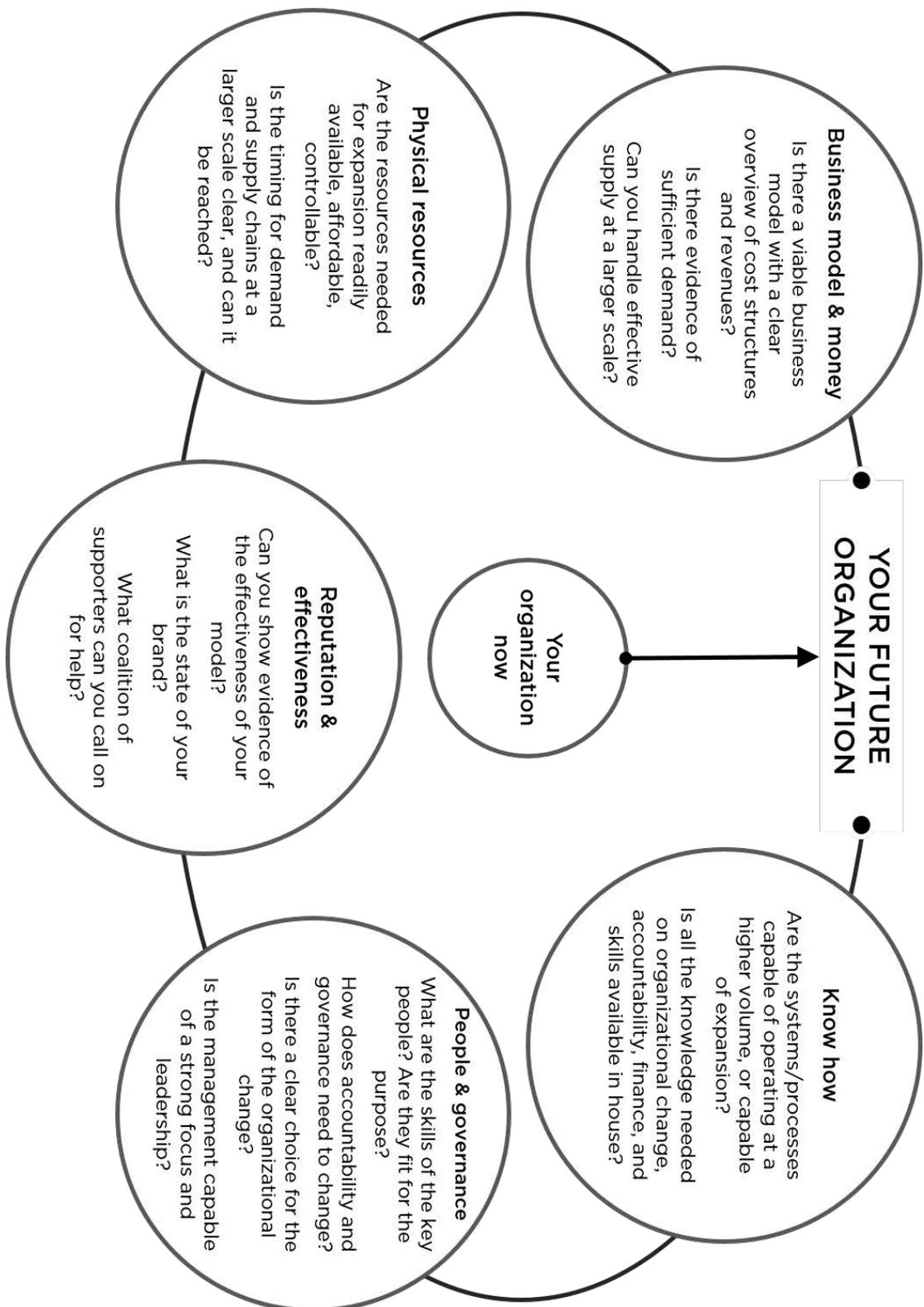
Adapted from: DIY. 2014. *Development Impact & You: Practical Tools to Trigger and Support Social Innovation*. London: Nesta.

Helpful Tips

Remember to give as much factual data as possible when filling out the worksheet, rather than only anecdotal evidence. You may need to collect and prepare this data in advance of the meeting.

Encourage participants to be as open, honest, thorough, and self-critical as possible. The more detail, the better, as this will give you a deeper understanding of the situation.

Scaling Plan worksheet



Adapted from: DIY. 2014. Development Impact & You: Practical Tools to Trigger and Support Social Innovation. London: Nesta.



Sustainable Development Reflection

This tool provides an opportunity to discover issues at play as you work alongside community members to create long-term projects that will continue to thrive after you close your service.

Time: 2–3 hours

Difficulty: moderate

Materials: flip chart paper for taking notes; notebook to copy flip chart notes; markers; writing utensils

Communicative language tasks: ask questions; facilitate a group discussion; summarize/analyze responses

Steps:

1. As you develop and implement the project idea, find time to lead a guided discussion with the community project planning group based on the following questions: *Is our project ...*
 - Culturally **sustainable**? Does the basic approach or concept fit within and build on local beliefs and traditions, or will it be seen as not acceptable when you, the Volunteer, leave?
 - Politically **sustainable**? When there is no longer a foreign **development** worker in the project, will it be sustainable within the sociopolitical context?
 - Economically **sustainable**? Will there be sufficient local resources, or the capacity to generate them when supportive outsiders, such as you, the Volunteer, leave?
 - Managerially **sustainable**? Will there be local management capacity to carry on the work when you, the Volunteer, leave?
 - Environmentally **sustainable**? As the project grows, will the environment be able to sustain the use of resources?
2. Continue to consider these issues and come back to these reflection questions throughout the life cycle of the project.

Source: Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.



DELIVER WORKSHEET

List 1 or 2 key insights from each of the tools you used in this phase:

Deliver tool used	1-2 insights from using the tool
▶

Based on your answer to the above question, what are the next steps you and community members are planning to carry out?

Looking back, did you and your counterpart choose to develop a prototype or to pilot the project before launch? What did you and the community learn from this process?

List 1 or 2 key insights from each of the lenses you used in this phase. Think about why you and your counterpart chose these lenses based on cultural context:

Lenses used and why	1-2 insights from using the lens
▶

Based on the answer to the previous question, which lenses will you continue to use in the next phase and why? Are there new lenses that have not been mentioned in PACA that you and your counterpart would use?

Take this opportunity to revisit and adjust the project goals. Remember that project goals:

- restate the vision and approach in terms of what is to be accomplished;
- define the long-term results or changes that the project will bring about; and
- are realistic and include an overall time frame.

Revisit your goal(s) here:

Take this opportunity to revisit and adjust the project objectives. Remember, objectives:

- are the short-term results you need to meet the longer-term goal(s) of the project;
- are SMART: Specific, Measurable, Attainable, Realistic, and Time-Bound; and
- answer these questions: Who is the target group or individuals expected to change? What action or change is expected? When might the desired action or change be accomplished? How much change is expected?

Revisit your objectives here:

Project monitoring considerations

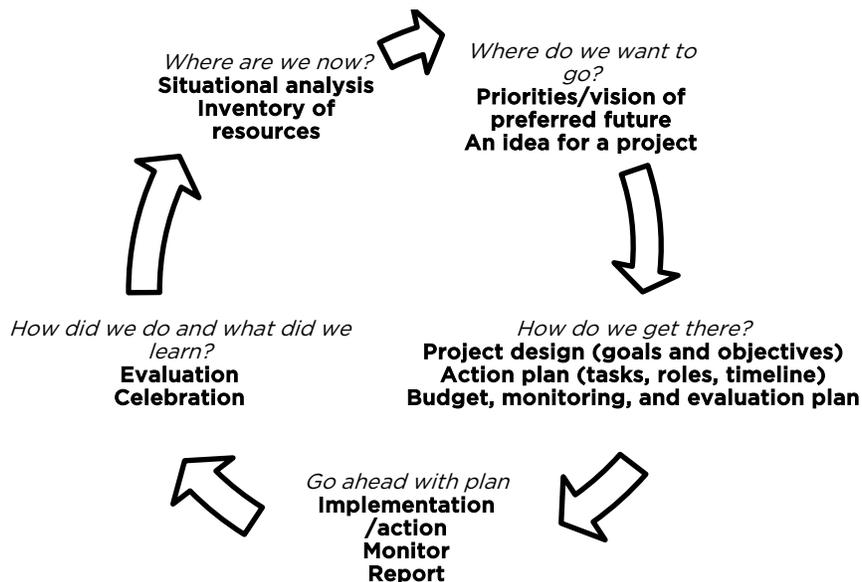
- How will you and your counterpart engage the community in monitoring the project?
- How will you adjust your project over time based on the results of your monitoring activities?

Sustainability considerations

- Are there any initial concerns you and your counterpart have about community ownership of the project? If so, how will you address them?
- Are there additional community members with whom you engaged in previous phases that could be brought into the project?

Some posts carry out Project Design and Management Workshops (PDM) and some do not. Even if your post does not carry out this workshop, there is a very helpful resource available online for you to review as you start to move from the Dream phase into the Design phase with your community:

Through PDM, Volunteers and their counterparts learn how to involve community members in moving projects that meet their desires and needs from analysis to planning and implementation. Think about where you have been in the **community development cycle** and where you are going:



5

SECTOR-SPECIFIC PACA

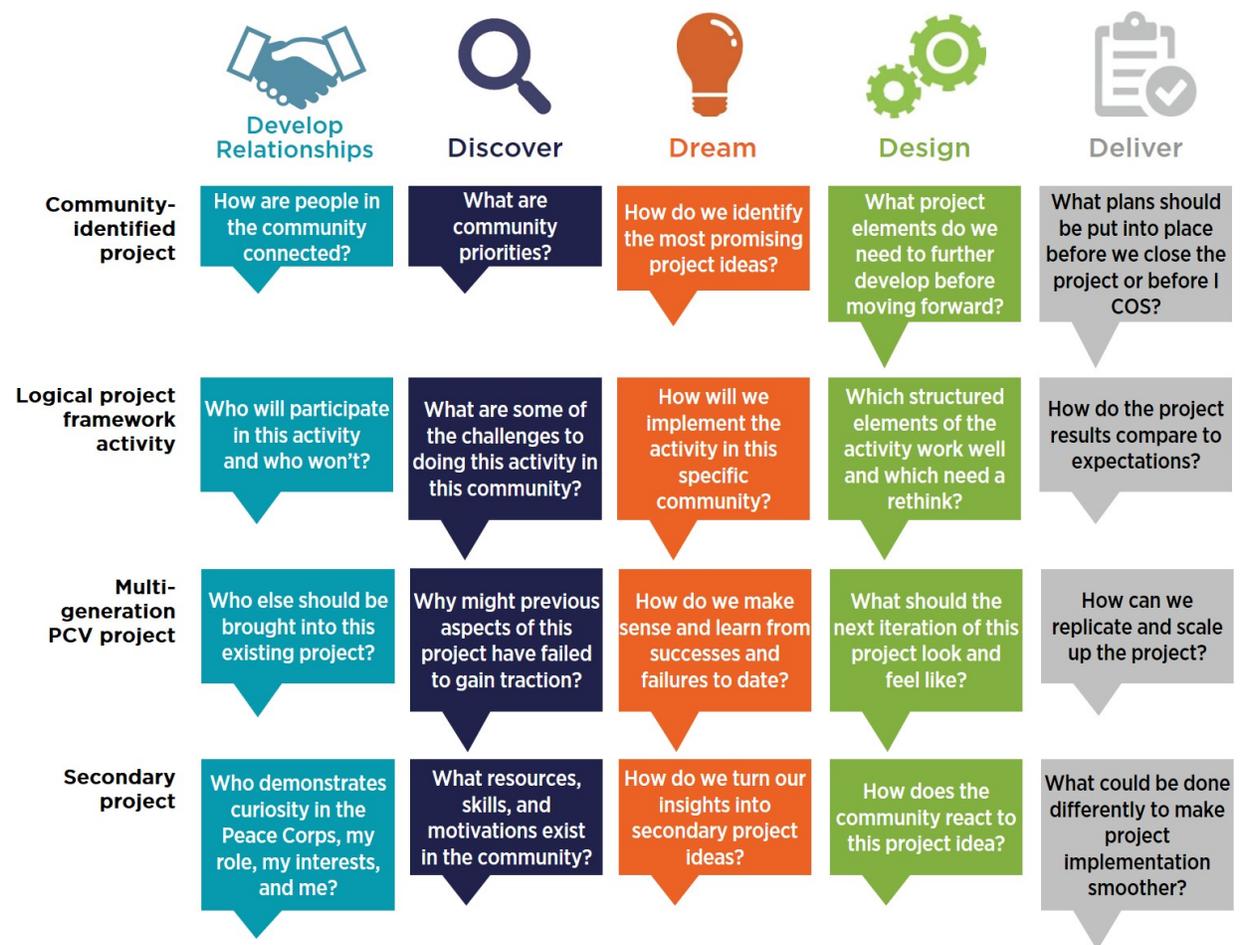


Peace
Corps

WHAT PACA MEANS FOR PROJECTS IN YOUR SECTOR

You became a Peace Corps Volunteer to serve in a specific sector and contribute to the overall Goal One development efforts of that sector set by the Peace Corps at a global level. You also chose your country of service and have since committed to advancing its specific goals, objectives, and project activities outlined in the logical project framework for your sector.

Regardless of the nature of your individual assignment and the expectations set during PST about what sector-specific project activities you will implement in your host community, each and every Peace Corps Volunteer project can benefit from PACA. The PACA process (lenses, phases, and tools) helps you and the community ensure that the project in question is participatory, tailored to the realities of the community, led by the community, and owned by the community after you complete your service—regardless of the project’s starting point:



The following pages provide an overview of the most useful Field Guide tools for each sector. This section also introduces additional PACA tools for each sector, which can be found in separate Sector-Specific PACA Booklets.

PACA FOR AGRICULTURE

What PACA Means for Agriculture

Agriculture (AG) Volunteers can utilize PACA participatory tools to empower local people to make desired, realistic, and sustainable changes in their lives and situations. Using simple visualization tools, Agriculture Volunteers assist local farmers and their families or farming-related groups to take an active role in identifying and analyzing their own conditions, resources, problems, and assets. With this information, Volunteers help participants design, implement, and evaluate evidence-based activities that are most likely to have the desired results and outcomes.

Community Member Profiles

The community members most often involved in AG projects include:

Smallholder farmers: Individuals who, along with their household members, provide most of the labor on their personal farm to produce the bulk of the staple foods mainly for their own consumption

Farmer groups: Groups form for many reasons, including to share experiences and receive training or information to improve farm productivity; to pool resources and improve access to farming inputs, such as seeds, fertilizer, or credit; and to pool production to improve market access, sales, and profits.

Key PACA Considerations for AG Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring AG projects to life, keep in mind the following key considerations:

- What types of agriculture activities are practiced in your community?
- What agriculture-related technical services and service providers are available in your community?
- Are there already services or linkages in the community between farmers or between farmers and public or private agriculture extension or advisory services?
- Who has access to opportunities, resources, and services?
- Who controls or makes decisions about those opportunities, resources, and services?
- How do gender and age considerations play a role in these activities or services? For example, what are the gender norms or roles that contribute to (or may constrain) local agricultural practices? Are women and/or youth able to access services?
- What are the cultural expectations that affect males and females in agriculture?
- What are the cultural expectations that affect youth involvement in agriculture?
- Are there any professional or trained individuals in the community that you can work with?
- Are there individual farmers that appear highly motivated and well respected that you can work with?
- Are there any informal or formal farmer groups that exist in the community that you can work with?

PACA FOR AGRICULTURE

How might I use the tools in the Field Guide as an AG Volunteer?

Seasonal Calendars

Develop Relationships

Illustrate seasonal variations in rainfall and temperature, crop and animal production, labor availability and demand, pests and diseases, and the timing of important social events.

Daily Activities Schedule

Develop Relationships

This tool can lead to mutual learning and appreciation among men and women regarding their roles and contributions to the family, farming, or other farming-related activities.

Community Walk

Develop Relationships

Walking field or garden paths provides an opportunity to observe daily and seasonal activities and practices as well as to build relationships with farmers.

Problem Tree

Dream

Help a farmer or farmer group better understand issues and distinguish between causes and effects.

Action Plan Worksheet

Deliver

Using input from the farm household or farmer group, develop an action plan that identifies goals and objectives, actions, roles, and a corresponding timeframe.

Pilot

Deliver

Implement a small-scale intervention to test new practices and analyze results. For example, a farmer or farmer group can start fish farming with one small fish pond with the intention of expanding if the trial goes well.

Before-and-Now Diagram

Deliver

This tool is a simple yet effective method for visualizing change. For example, community members can draw maps of a farm system both before and after trees and fish ponds are added.

PACA FOR AGRICULTURE

In addition, here are a few sector-specific tools central to sound AG PACA:

Farm Map/Gender-Based Farm Mapping

Discover

This tool can help you to illustrate the use of physical space on a farm and to map farming-related activities described by farmers and household members.

Source: [80 Tools for Participatory Development](#)

Transect Walk and Plot Diagramming

Discover

Illustrate the various aspects of farm plot management: crops and varieties, cultural practices, problems, and potential. This can be a starting point for discussing alternatives.

Source: [80 Tools for Participatory Development](#)

Farm Problem Census

Discover

Use the farm map and models developed with farmers and household members to inventory problems involving the use of resources, catalogue the production system, and identify “bottlenecks.”

Source: [80 Tools for Participatory Development](#)

Solution Evaluation Matrix

Dream

Participants first identify specific problems, then develop their own criteria and assess the feasibility and sustainability of possible solutions.

Source: [80 Tools for Participatory Development](#)

Farm Plan

Design

Drawing from the farm map and other tools, explore options for developing the farm and the steps necessary to accomplish this.

Source: [80 Tools for Participatory Development](#)

Participatory Follow-Up (Task Completion)

Deliver

These simple forms enable farmers or farmer groups to monitor progress on tasks assigned in the work plan and provide feedback.

Source: [80 Tools for Participatory Development](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for AG Booklet.

PACA FOR AGRICULTURE

PACA for Agriculture in Action

A new Agriculture Volunteer takes a “garden walk” every morning to visit the gardens around her village. When she returns home, she adds the path and garden locations to her community map. She makes a sketch of each garden visited, including the water source and other gardening resources, and then notes the names of the farmers.

The Volunteer also spends time every day observing farmers’ gardens, noting what crops are growing and what practices are used. She asks farmers a variety of questions in order to get a better understanding of the local gardening practices—where they acquired seeds or other inputs, what is done with harvested produce—and, importantly, in order to develop a trusting relationship.

After investing this time in Community Walks and Community Mapping, the Volunteer identifies several interested and motivated farmers and schedules times to meet each at their home with their family members or in the gardens to talk about improving productivity. **Community Walk** with the students to understand the economic landscape through their eyes.

The following tools are used:

1. **Farm Map:** Using butcher paper, the men, boys, women, and girls who make up the farming household draw the different activities and assets (resources) that provide their household with both food and livelihoods.
2. **Farm Systems Map:** Family members draw connections between each of the activities on the farm map.
3. **Daily Activities Schedule:** On a 24-hour timeline, each family member notes the timing of and total time spent on the different activities they are responsible for during a day.
4. **Seasonal Calendar:** On a 12-month timeline, each family member notes major activities and when they occur during a year, particularly the seasons and the different agricultural activities.
5. **Problem Tree:** Family members identify specific problems in the garden (e.g., too much shade, animals eating crops, pests/diseases) to discuss causes and effects and to identify solutions.
6. **Action Plan Worksheet:** A plan is drawn up to implement solutions that address priority problems, needs, or desires.
7. **Pilot:** Family members develop a plan to test a new practice on a small scale and assess results.
8. **Participatory Follow-Up (Task Completion):** Family members use a the Solution Evaluation Matrix to keep track of what is achieved as actions are implemented.

PACA FOR COMMUNITY ECONOMIC DEVELOPMENT

What PACA Means for Community Economic Development

The Peace Corps' Community Economic Development (CED) sector is premised on the belief that community members and community-based organizations are best positioned to drive the local development process themselves. Volunteers' CED projects build upon a community's existing assets by strengthening the capacity of community members to identify and create local opportunities for both economic and community development some language limitations. Applying the Language Lens will enhance your effectiveness in using PACA Tools, regardless of your local language level and limitations.

Community Member Profiles

The community members most often involved in CED projects include:

Households: Men, women, boys, and girls; youth and adults; community leaders; family units; smallholder farmers

Enterprises: Aspiring and existing small business owners; agribusinesses; artisan groups; farmers associations; women's income-generating activity (IGA) groups; entrepreneurs

Organizations: Associations; cooperatives; institutions; nonprofits; government bodies; schools; civil society organizations; chambers of commerce; community savings groups

Key PACA Considerations for CED Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring CED projects to life, keep in mind the following key considerations:

- What are the main community-facing institutions, organizations, nonprofits, associations and other groups? What does each contribute to community and/or local economic development?
- Are there already services or linkages in the community between these various individual and group actors?
- What are the primary economic activities, opportunities, and resources in your community? Who has access to them? Who does not?
- How do gender and age considerations play a role in these activities, opportunities, and resources? For example, what are the gender norms or roles that contribute to who starts or owns a business? Are youth able to access savings and credit services?
- What are the cultural expectations that affect males and females when it comes to income-generating activities, household finances (money matters), and leadership roles in community development efforts?
- What are the economic and cultural variables that affect the livelihood options and paths for youth?
- Who are the professional or trained individuals in the community with whom you can partner on CED projects?

PACA FOR COMMUNITY ECONOMIC DEVELOPMENT

How might I use the tools in the Field Guide as a CED Volunteer?

Community Mapping

Develop Relationships

When drawing a community map, adopt an asset-based approach: visually emphasize places, people, and geographic features that community members most value. When discussing the final map, explore featured resources and assets. Discuss key interconnections and relations among assets and ask how community members can leverage assets in new ways.

Personas

Discover

Whether you're assisting a small business owner in improving his/her business, an association in attracting new members, or a community-based organization in developing new services for beneficiaries, developing a set of personas can help generate insights about how to strengthen connections and interactions with specific community members and other key stakeholders

Bisociation

Dream

Because CED projects can sometimes seem abstract or intangible (as compared to a gardening AG project or a malaria prevention HE project), this idea-generating technique can provide useful comparisons that ground a CED project in terms that are more familiar to community members.

Needs Assessment & Priority Ranking

Dream

Communities often generate a lot of ideas for CED-related projects; it can be difficult to know where to begin! Identifying common needs and prioritizing them can help to inspire action on items of importance for everyone in the community.

Business Model Canvas

Design

This succinct, one-page visual chart helps articulate the value proposition and other key aspects of a proposed product, service, initiative, program or enterprise. Adapt the canvas questions/considerations as necessary to the type of proposal being considered.

Resource Assessment

Design

This one's a no-brainer! Sustainable CED projects build on existing community assets and figure out how to leverage those assets toward local development goals.

Scaling Plan

Deliver

CED projects are most impactful and sustainable when scaled to reach a larger proportion of the community. Use the Scaling Plan to help community organizations scale their programs, social entrepreneurs scale their impact, or associations build stronger networks in their operating environment.

PACA FOR COMMUNITY ECONOMIC DEVELOPMENT

In addition, here are a few sector-specific tools central to sound CED PACA:

Market Survey

Discover

This tool profiles the economic activity of your community and in particular the economic significance of its natural resource base.

Source: [A Volunteer's Guide to Community Entry](#)

NGO Capacity Profile

Discover

This is one of many similar tools that can be used for assessing an organization's existing capacity and formulating ongoing capacity-building strategies.

Source: [An NGO Training Guide for PCVs](#)

Value Chains

Dream

This tool helps you think through each step that a proposed process, project, or product takes from the beginning (creation) to the end (use) and determine if each actor has enough incentive or interest to make all the pieces connect together.

Source: [IDDS Design Workbook](#)

Decision-Making Tools (various)

Dream

A variety of excellent participatory tools exist to promote structured decision making when it comes to sorting and exploring local CED priorities, including decision-matrix analysis; nominal-grouping technique; pairwise ranking; and pare to analysis.

Source: [MindTools](#)

Force Field Analysis

Design

This tool can help you think through the pros and cons of a design change to your project by listing, discussing, and evaluating all of the forces for and against the proposed change before the change is fully implemented.

Source: [MindTools](#)

Innovation Flowchart

Deliver

Innovation is a driver of economic growth and community development. This tool provides a structured overview of the various stages in an innovation process and walks you through the people, resources, skills, and activities needed to bring your project idea to life.

Source: [DIY Toolkit](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for CED Booklet.

PACA FOR COMMUNITY ECONOMIC DEVELOPMENT

PACA for Community Economic Development in Action

A CED Volunteer is eager to inspire local youth to become more entrepreneurial. It would be great, too, if some youth ended up launching profitable enterprises, and better still if they launched social enterprises that had a positive impact on the community! The local youth unemployment rate is high, and the CED Volunteer believes that youth can develop the capacity to create their own economic opportunities in the community and beyond.

The school headmaster—who the Volunteer befriended in the beginning of service during the Develop Relationships and Discover phases—recently asked the Volunteer to support a group of high school students who have expressed interest in starting an after-school business club.

The Volunteer has a group of interested students with whom to start the club but wants to ensure that all students have the opportunity to participate. But what are the students' interests? What are the most viable local economic activities? How can the Volunteer convince the students of the importance of an entrepreneurial mindset (in addition to traditional business skills)—regardless of their individual livelihood paths? And how might the Volunteer foster social entrepreneurship among the students?

The PCV uses the following tools to engage the students in a participatory process that gives the entrepreneurship club focus and brings it to life:

1. **Community Walk** with the students to understand the economic landscape through their eyes.
2. Create a **Seasonal Calendar** with students and teachers to better understand the community's economic cycles and seasons.
3. The PCV supports students in using the **Conducting Interviews** tool to learn from successful business owners and entrepreneurs in town who share lessons learned from their experience.
4. After the PCV delivers training sessions to the students about the entrepreneurial mindset and social entrepreneurship, the **People and Connections Map** helps students explore and discuss potential opportunities in the community for enterprises (traditional and social), as well as identify other students who might have valuable skills and perspectives to contribute to the club.
5. **Download Your Learnings** supports a club discussion about what the students have learned thus far about the most viable and promising opportunities for a group-led enterprise in their community.
6. The various **Decision-Making Tools** in the CED Sector PACA Booklet help the club brainstorm, prioritize, and ultimately select an idea for a club-led social enterprise.
7. **Business Model Canvas** provides a focused framework for group discussion about planning the launch and operations of the club's social enterprise.
8. The **Innovation Flowchart** in the CED Sector PACA Booklet walks the club through the people, resources, skills, and activities needed to bring their social enterprise idea to life!

PACA FOR EDUCATION

What PACA Means for Education

The PACA approach helps Volunteers engage more intentionally with colleagues and learners at school, and explore and identify strategic linkages with community partners in and beyond the classroom. In addition to their teaching assignments, Education (ED) Volunteers often identify secondary projects at their school—enrichment activities, such as developing a library, facilitating reading clubs, championing science fairs, or identifying a health or services gap. The latter can include teaching life skills classes or connecting with a district special needs office to make materials accessible to visually impaired learners.

Community Member Profiles

The community members most often involved in ED projects include:

Students: Pupils enrolled in schools are at the heart of the Education sector work carried out around the world.

Teachers: Working with teachers to identify assets and opportunities in and out of the classroom is critical to the success of Education projects.

Parents and families: A student's immediate network plays a very important role in supporting Education initiatives in schools and across the community at large.

Key PACA Considerations for ED Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring ED projects to life, keep in mind the following key considerations:

- In addition to the school, what education facilities, services, and service providers are available in your community? At the district level?
- Are there linkages in the community between schools, community organizations, family services, and health services?
- Who has access to educational opportunities, resources, and services? How are learners with special needs accommodated and included? Are special materials available?
- Who controls or makes decisions about those opportunities, resources, and services?
- How do gender and age considerations play a role in educational services?
- What are the cultural expectations that affect males and females in schools and educational settings?
- What are the cultural expectations that affect the learning of youth? Of teachers?
- Are there other individuals in the community you can work with to support broader educational opportunities or needs? After-school learning opportunities? English practice?

PACA FOR EDUCATION

How might I use the tools in the Field Guide as an ED Volunteer?

People and Connections Map

Discover

Visualize how a new school program or intervention will be influenced by input and participation from the broader community (parents, family members, etc.).

Conducting Interviews

Discover

Learn about the past, current, and future successes and challenges at the school. At many Volunteer sites, the school is a point of entry into the community. Interviews are an excellent way to introduce yourself, get to know colleagues, and gain insight into how things work.

Define Your Audience

Dream

Learn more about the specific needs of your school, the history of teachers and students, and—if working outside of the school—the educational needs and contributions of parents and community members.

Problem Tree

Dream

Determine issues affecting student performance or challenges impacting teacher training. Do some “If...then...” discussion with collaborators about the various outcomes (positive, negative, and neutral) that might occur because of a proposed change or intervention.

Decision Dots

Dream

Ensure that everyone’s opinion is heard! This tool helps provide a low-risk way for all members of the school staff to express their opinions. Supplies like stickers or dot labels can be used; however, locally available alternatives like stones or bottle caps work too.

Action Plan Worksheet

Deliver

Identify tasks and set a reasonable pace (timeline) for a school-led project to be completed. Input from counterparts and others in the school community will help to develop a realistic task list.

PACA FOR EDUCATION

In addition, here are a few sector-specific tools central to sound ED PACA:

Organizational Chart

Discover

Chart the role of each member of the school community to ensure that the chain of command is understood, build trust with colleagues, and get things done in a way that host country colleagues view as professional. Create a graphic representation of the human structure at your school that reflects the operational hierarchy within.

Source: [National Education Association](#)

School Profile Tool

Discover

Go on a fact-finding mission to better understand the demographics, local geography, operational practices, and history that make up the context of your school. Much of this information can be unearthed by connecting with fellow teachers informally and will ground your future work

Source: [National Education Association](#)

Community Language Profile

Discover

Uncover the dynamic linguistic environment of your school and surrounding community. This will help you to accurately plan the amount of content that can be covered in an activity, collaborate with a colleague who can support translation if needed, and prepare materials in the most appropriate way.

Source: [National Education Association](#)

Materials Review

Discover

Before jumping into teaching or co-teaching, identify and explore past and current materials available at the school. Colleagues and students will see this effort as an indicator of a serious and professional teacher. Furthermore, a materials review will help you get started with lesson planning, determining if additional materials are needed, and discovering existing school mechanisms for material production.

Source: [National Education Association](#)

Home Visits

Design

Ensure that you implement school activities in a way that accommodates for the realities learners face outside of school. Making a couple strategic home visits can inform where and when you establish clubs, if and how you assign homework, and when you hold a parents' meeting at school.

Source: [National Education Association](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for ED Booklet.

PACA FOR EDUCATION

PACA for Education in Action

An Education Volunteer arrives at her new school to teach English. The head teacher at the school asks her to teach two Grade 7 and two Grade 8 classes, share creative teaching methods, and find ways to promote girls' education. Her counterpart, also an English teacher, teaches the other two Grade 7 and 8 classes. Over the course of her service, the PCV uses the following tools from the PACA Field Guide and the sector-specific PACA for ED Booklet to help inform the way she will plan her English lessons, collaborate with fellow teachers and identify, design, and implement enrichment activities:

1. **School Profile Tool:** The PCV goes on a fact-finding mission that provides past and current demographic data for teachers and students, understanding of the local geography, and details about the school's mission, traditions, history, and operations. She participates in school assemblies just as the other teachers do, singing songs for morning assembly and using the dismissal routine. Her new colleagues see her as professional.
2. **Organization Chart:** The PCV meets with her head teacher and counterpart to learn about the way the school is staffed, taking notes on roles, duties, and responsibilities associated with each position. The PCV then knows to meet with the English department head to iron out a scheduling conflict and to put in a request for materials.
3. **Materials Review:** The PCV locates the English syllabus and works with her counterpart to share the work of lesson planning and cover the required competencies. She also searches through the storage room for English textbooks and student workbooks, and then determines she should put in a request for additional workbooks to Darien Book Aid.
4. **Needs Assessment and Priority Ranking:** The PCV asks her supervisor if she can do a priority-ranking activity at a staff meeting. The PCV and her team find that they are all experiencing problems with students completing homework.
5. **Home Visits:** The PCV suggests that she and her counterpart make home visits to learn more about what is happening at home that encourages or detracts from students completing their homework. They then lead activities at school that promote awareness among students about these supports and barriers and suggest concrete steps for students to get their homework done.
6. **Peeling the Onion:** The PCV and her counterpart find that by the end of the second term, most of their students who had sometimes completed homework previously were doing more, but students who never did homework previously showed no change. They use the Peeling the Onion tool at a staff meeting and decide they need to see if the second group of students has the reading skills necessary for independent work.
7. **Progress Monitoring with CORE Phonics:** The PCV uses CORE Phonics to assess basic decoding skills and finds that some students only recognize words they have memorized by sight. She shares the findings with her counterpart and the head teacher, and together they determine the best way to do a literacy intervention and help these students read independently.

PACA FOR ENVIRONMENT

What PACA Means for Environment

In most communities where Volunteers live, community members are usually aware of the link between their local environment and their own well-being. Because so many communities rely on local natural resources for their livelihood, Environment Volunteers can use PACA to explore and discover how community members perceive and relate to their local natural resource base. A focus on participatory PACA tools allows for gender-sensitive community needs assessment and invites community members to voice their concerns and express unique way to take ownership in environment projects. As Volunteers learn about their communities' relationship with the local environment, they will become more valuable community assets for capacity building and development.

Community Member Profiles

The community members most often involved in ENV projects include:

Farmers and landowners: Individuals who are interested in managing the natural resources on their land responsibly

Household members: Community members who are committed to implementing environmentally sound practices, such as handling solid waste, planting trees, and using fuel-efficient cook stoves

Young people: Youth are often eager to become active, environmentally conscious citizens

Local governments: Influential actors willing to institute environmental policies and community initiatives

Key PACA Considerations for ENV Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring ENV projects to life, keep in mind the following key considerations:

- What are the environmental issues confronting your community? How do these issues impact the health, prosperity, and well-being of community members, both now and in the future?
- Which environmental issues most concern community members? How do these concerns vary according to different groups (e.g., women, farmers, youth, community leaders, local merchants, and business owners)?
- What do people need to do to effectively address these issues?
- Why is it (or is it not) in people's interests to change their behavior so that these issues are addressed?
- What are the barriers preventing people from adopting new behaviors (e.g., educational, cultural, logistical, and financial)?
- What facilities, organizations, and service providers exist in your community that can provide the necessary technical, logistical, educational, and/or financial support for your environmental efforts?
- Who has access to the resources and services these entities provide?

PACA FOR ENVIRONMENT

How might I use the tools in the Field Guide as an ENV Volunteer?

Community Walk

Develop Relationships

Walk around the community and observe environmental practices and conditions.

Community Mapping

Develop Relationships

This tool can help you identify how people are interacting with their environment and visualize how they want to improve it.

SWOT Analysis

Discover

A SWOT Analysis guides your work with focus groups in evaluating potential solutions to environmental issues.

Needs Assessment & Priority Ranking

Dream

Use this tool to work with focus groups to pinpoint the environmental issues that most concern the community.

Network Contract for Partnership

Design

Encourage project participants to consider how they can contribute to the project's success and commit to doing so. The Network Contract for Partnership can also help you keep track of who is participating in your project and how.

Community Project Evaluation Plan

Design

Using this tool, you can detail how you are going to measure the success of your program, ideally when you are still designing your project.

Sustainable Development Reflection

Deliver

This reflection guides discussion during which stakeholders consider the sustainability (environmentally, culturally, politically, economically, and managerially) of their project after you leave.

Stories of Change

Deliver

Project participants share stories that describe how your project has affected them. You can use these accounts to adjust your project and/or record its impact.

PACA FOR ENVIRONMENT

In addition, here are a few sector-specific tools central to sound ENV PACA:

Community History Chart

Discover

Use this tool to talk with long-time community residents and learn how environmental conditions have changed over time and the impact this has had.

Source: [80 Tools for Participatory Development](#)

Watershed Diagram

Discover

This is one of many similar tools that can be used for assessing an organization's existing capacity and formulating ongoing capacity-building strategies.

Source: [80 Tools for Participatory Development](#)

Commons Use Map

Discover

Collaborate with groups to identify commonly owned resources (e.g., pastureland, woodlots, fishing grounds) and the people who use them.

Source: [80 Tools for Participatory Development](#)

Map of Exchanges

Discover

Diagramming what people say and the ways in which they obtain and exchange information can help identify the most effective means of communicating with target audiences.

Source: [80 Tools for Participatory Development](#)

Planning Self-Assessment and Field Analysis

Dream

This tool allows people to analyze past environmental efforts and learn from them.

Source: [80 Tools for Participatory Development](#)

Objective Matrix

Design

Community members visualize their project objectives and how to accomplish them.

Source: [80 Tools for Participatory Development](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for ENV Booklet.

PACA FOR ENVIRONMENT

PACA for Environment in Action

An Environment Volunteer arrives at his site ready to help his new community manage its natural resources wisely. His sponsoring agency, the Ministry of Forests and Natural Resources, is concerned with countrywide deforestation and would like the PCV to help motivate community members to plant trees in the area. In addition, there is an environmental committee at his site made up of volunteer community members whom he meets with regularly over the next several months.

The PCV and environmental committee decide to focus on addressing a water shortage brought about by an extended drought. Their plan includes:

- Promoting a soil management campaign that will teach and motivate households to carry out simple practices, including composting and constructing berms and swales;
- Teaching gardeners and small farmers how to implement agroforestry schemes in their fields; and
- Organizing the community to establish a buffer zone along the community creek.

The Volunteer and the environmental committee use the following tools to aid the development of their project:

1. **Community Walk:** The PCV begins by walking around the community and noting the environmental conditions and practices he sees. Town residents serve as his guides on most of these walks, and the Volunteer develops his language skills as he asks questions.
2. **Community Mapping:** The PCV and committee map out their community, paying particular attention to the environmental practices they have noticed.
3. **Needs Assessment and Priority Ranking:** The PCV uses this tool to pinpoint the environmental issues that most concern the community. Among other things, he learns that the committee is worried about increasing water shortages, a shortened rainy season, and a hotter climate.
4. **Map of Exchanges:** The PCV works with the committee to identify the most effective ways of communicating with their target audiences through diagramming what people say and the ways in which they obtain and exchange information.
5. **Community Project Evaluation Plan:** The committee decides how the ultimate success of the project is going to be measured.
6. **Action Plan Worksheet:** This ensures that everyone involved with the project agrees about project tasks and who is responsible for each task. In this case, committee members will present community workshops, visit households, establish a bio-intensive garden demonstration plot, obtain SPA funding for tree seedlings, and visit town leaders to enlist their support for the project.
7. **Stories of Change:** Once the project is underway, this will help to record its impact, aid in revising the program, and ensure continued community support and participation.
8. **Sustainable Development Reflection:** A focused reflection will allow the committee to identify how to maintain the sustainability (environmentally, culturally, politically, economically, and managerially) of the project once the Volunteer leaves.

PACA FOR HEALTH

What PACA Means for Health

Within the Health (HE) sector, the Peace Corps is well-positioned to play a vital role in efforts to address critical global health needs. Thousands of Volunteers work at the grassroots level with dedication and enthusiasm to facilitate awareness building, education, behavior change, and improved care-seeking.

It is crucial for Health Volunteers to use PACA tools for:

- Building partnership and promoting effective dialogue—two essentials for the success of community-based health interventions
- Empowering communities to be at the forefront of their own health development
- Uncovering barriers to accessing health and community support services
- Designing and implementing project activities that are community led and owned.

Community Member Profiles

The community members most often involved in HE projects include:

Individuals and households: Pregnant women; mothers and fathers; grandmothers; adolescent boys and girls; children under 5 years old; adults and children affected by or infected with HIV

Health service providers: Doctors; nurses; midwives; vaccinators; community health workers; traditional birth attendants; traditional healers; social workers

Community leaders: Teachers; school counselors; religious and community leaders; district health or social service officers

Key PACA Considerations for HE Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring HE projects to life, keep in mind the following key considerations:

- Who does what health activities in your community?
- What health facilities, services, and service providers are available in your community?
- Are there already services or linkages in the community between health clinics, community organizations, schools, etc.?
- Who has access to opportunities, resources, and services?
- Who controls or makes decisions about those opportunities, resources, and services?
- How do gender and age considerations play a role in these activities or services? For example, what are the gender norms or roles that contribute to health risks in the community? Are youth able to access services?
- What are the cultural expectations that affect males and females in health?
- What are the cultural expectations that affect the health of youth?
- Are there any professional or trained individuals in the community that you can work with?
- Are there any health support groups that exist in the community? Sports or other social groups?

PACA FOR HEALTH

How might I use the tools in the Field Guide as an HE Volunteer?

Seasonal Calendars (for Health and Disease)

Develop Relationships

This tool allows you to see the relationship between well-being, illness, and seasonal changes.

Community Mapping (for Health Facilities and Services)

Develop Relationships

By mapping available services, institutional support is better understood. Consider coupling this tool with informal interviews or formal focus groups to determine where the service delivery is optimal and where there are gaps.

Problem Tree

Dream

By drawing a trunk, roots, and branches of a tree, community members can identify a health problem and the cause and effect of this issue, leading to meaningful solution-oriented discussions.

Action Plan Worksheet

Deliver

Use this tool to help manage the implementation of health project activities by building an action plan containing the tasks for each project objective, roles and responsibilities of the community and other project stakeholders, and the timeline for getting the project done.

Participatory Photography

Deliver

Participatory photography gives stakeholders the chance to document their health needs. Whether it is adolescent girls capturing the reality of menstrual hygiene to better support WASH needs at school or an HIV support group documenting perceived community stigma, this tool gives community members a voice within project design.

PACA FOR HEALTH

In addition, here are a few sector-specific tools central to sound HE PACA:

Health and Community Service Mapping

Discover

This tool helps you identify what and where health and community services exist, who knows about these services, who has access to them, and what strategies can be developed to improve among what is there.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

Trend Diagram

Discover

This tool offers community members the chance to reflect on trends or changes over time. Once trends are charted, the diagram can prompt conversations about why these changes may have happened, what expectations or hopes community members have for the future, and strategies to address these trends.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

Health Journey

Discover

By drawing the story of a person's health over a period of time, including the ups and downs, the treatment and support they've received, and the challenges they've faced, you can identify where there is room for improvement and ways to work together for better health access.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

Projection

Dream

This tool allows you to use the power of projection to help an orphan, vulnerable child, or a person living with HIV to step beyond their current reality, and see how decisions today impact their lives tomorrow.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

Impact Matrix

Dream

This a great way to see how a strategy or activity will likely impact a community. It looks at both how many people the activity will reach and the intensity of that activity, and then compares the two to show the overall impact.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

Low Hanging Fruit

Design

This a great way to lead a discussion about why certain activities and services would be easier than others to carry out in your community. This tool also helps differentiate between barriers and opportunities to introduce new activities.

Source: [Int'l HIV/AIDS Alliance Tools Together Now!](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for HE Booklet.

PACA FOR HEALTH

PACA for Health in Action

Over the first weeks of her service, a Health Volunteer's counterpart kept mentioning that there was a high rate of teen pregnancy in the community and that many girls were finding out they had HIV late in their pregnancy. The PCV decided to dedicate the next few weeks to building intentional relationships that would not only build trust in the community but also help garner some insight into the young women's situation. Her counterpart was excited to help, and the two used the following PACA tools to concentrate their efforts:

1. They started with a **Community Walk**. The PCV and her counterpart were able to have meaningful conversations that helped her learn more about mainstream and traditional health services. Additionally, she used a few guides from **Conducting Interviews** to do informal interviews with community members and health-care workers. This simple activity sparked energy for the Volunteer and the folks she spoke with.
2. From the introductions she had with community members (many of whom were adolescent girls, parents, and teachers) and health-care workers, the PCV and her counterpart scheduled follow-up conversations to complete a **Community Mapping** focused on traditional and mainstream health services, a **Seasonal Calendar**, and a **Social Network Mapping**.
3. Through these meetings, the PCV became close with a few adolescent girls and young women. She invited them to her house a few evenings each week to hang out. During these get-togethers, the group started keeping **Diaries** based on prompts the Volunteer created.
4. Additionally, the PCV did a **Trend Diagram** with the group, which helped her understand when HIV rates started spiking for these young ladies.
5. After a few months of meeting with the girls, it became apparent that many young women in her community were having sex with older men for school fees. She decided she needed to get a few different perspectives on this issue, so she held individual focus groups with adolescent girls, caregivers, school personnel, the faith community, and health-care workers. During these conversations, she used the **Problem Tree** tool to help community members identify what the health issues were for young women and their causes and effects. From there they started to discuss meaningful solutions to these challenges.
6. The Volunteer and her counterpart identified leaders in each of these areas to help pinpoint ways to improve the health outcomes of these young women. With this group they began to dream of what was possible. While they came up with many options, the team knew they needed to focus on a project that was achievable and still created impact. The PCV and her counterpart walked the group through the **Impact Matrix** activity to identify where they should focus their energy in the next year.

The team decided to concentrate on building the capacity of caring adults and building stronger youth-friendly health services. Over the next 14 months, an implementing team consisting of youth leaders and adult community members was able to train 70 educators on youth reproductive health, HIV services, and gender-based violence prevention; establish youth groups focused on prevention and adolescents living with HIV; conduct trainings at local health facilities; advocate to the ministry of health for regular access to condoms and family-planning essentials; and establish youth advisory boards to provide oversight, monitoring and evaluation, and accountability for these projects.

PACA FOR YOUTH IN DEVELOPMENT

What PACA Means for Youth in Development

Youth in Development (YD) Volunteers shine in their communities because of the relationships they build with young people and their caregivers. Using the PACA approach, YD Volunteers can work with youth to help them identify community needs, their interests and skills to come up with solutions to address their concerns. This approach empowers youth to become active problem-solvers in their communities and change agents for community good.

Community Member Profiles

The community members most often involved in YD projects include:

Youth: Young people between the ages 15–24 who are eager to engage in their communities.

Parents and caregivers: Adults who look after the physical and social-emotional needs of youth.

Youth service providers: Individuals who work directly with youth or who work for organizations that serve youth. This can include teachers, mentors, coaches, etc.

Key PACA Considerations for YD Volunteers and Projects

As you work with your community members and use the tools in the Field Guide to bring YD projects to life, keep in mind the following key considerations:

- What are the different periods in the life a young person? How would the transition from childhood to adulthood be described?
- Who are the different types of youth in your community?
- What are the cultural expectations of youth to take on adult responsibilities such as work and marriage?
- What services such as schools, clubs, youth centers, clinics, religious institutions are available for youth?
- How do gender, age, and ethnicity play a role in youth accessing these services?
- Who are service providers that support youth, e.g., older youth, teachers, coaches, religious leaders?
- What health issues specifically affect youth?
- What are the challenges for youth gaining employment?
- What do youth do with their spare time?
- What leadership roles do youth play in their community?

PACA FOR YOUTH IN DEVELOPMENT

How might I use the tools in the Field Guide as a YD Volunteer?

Community Mapping

Develop Relationships

This activity allows youth to determine both their community's assets and needs before starting a project. Mapping also helps youth identify stakeholders that they can engage in their projects.

Define Your Audience

Dream

For all projects, youth will need to define their target audience. Who will the project benefit? Students, out of school youth, or another specific population. This tool aids youth in answering these questions.

Decision Dots

Dream

This is a fast and easy way to get youth to engage in the decision making process. Everyone can have a voice with decision dots.

Network Contract for Partnership

Design

Partnerships are essential to any effective community based project. Community partners will help youth achieve their goal by providing support by volunteering, sharing resources or spreading the word. This tool can guide youth in thinking through the role of partners.

Pilot

Deliver

Piloting a project is a great way for youth to test out their ideas and get practice in implementing their project while managing the expectations of their community.

Before and Now Diagram

Deliver

This is a Tool to encourage youth to reflect on the change that they have witnessed either through their actions or the actions of others. This can also prompt a meaningful dialogue about what else needs to change.

PACA FOR YOUTH IN DEVELOPMENT

In addition, here are a few sector-specific tools central to sound YD PACA:

Bean Sort

Develop Relationships

This method can visually illustrate the issues that youth face. Possible areas of discussions could include gender differences among youth, school enrollment and out-of-school youth.

V2 Identify What You Know

Discover

This activity includes a process for youth to reveal what they already know about an issue. It also encourages youth to discuss some of the causes of the issue using a mind mapping approach.

Source: [Volunteerism Action Guide - Multiplying the Power of Service](#)

Ranking

Dream

This tool allows youth to express themselves, rank their responses and identify solutions.

Source: [Volunteerism Action Guide - Multiplying the Power of Service](#)

V2 Plan of Action

Design

This tool allows you to use the power of projection to help an orphan, vulnerable child, or a person living with HIV to step beyond their current reality, allowing them to see how their decisions today impact their lives tomorrow.

Source: [Volunteerism Action Guide - Multiplying the Power of Service](#)

V2 Assess and Reflect

Deliver

This is a great way to see how a strategy or activity will likely impact a community. It looks at both how many people the activity will reach and the intensity of that activity, and then compares the two to show the overall impact. This allows the community to discuss how to improve an activity and identify which strategies not to use in case their impact is insignificant.

Source: [Volunteerism Action Guide - Multiplying the Power of Service](#)

You can find detailed instructions for these and many more sector-specific PACA tools in the separate PACA for YD Booklet.

PACA FOR YOUTH IN DEVELOPMENT

PACA for Youth in Development in Action

A YD Volunteer is excited to work with young people in the community to start a volunteer club. Since the village that the Volunteer works in is a very low resource environment where most families are struggling to make ends meet, the YD Volunteer hopes to instill a spirit of volunteerism among the youth that really want to make a difference in a variety of sectors within the community.

The PCV uses the following tools to engage the young people in a participatory process that gives the volunteer club focus and puts ideas into action:

1. **Community Mapping** with the volunteer club members to identify what the youth like most about their community and start discussions about areas that could benefit the most from a volunteer club's services.
2. Create a **Seasonal Events Calendar** with students and teachers to better understand the community's special events throughout the year that could be used as an entry point for the volunteer club's services.
3. The PCV supports students in using the **Define Your Audience** tool to understand who they should target with their volunteer work.
4. **The Ranking** tool supports a club discussion about what the students have learned thus far about the most viable and promising opportunities for service projects in their community.
5. The **V2 Assess and Reflect** tool will help the youth strategize and plan their service projects as well as think through the impact their service can have on the community.

6

RELATED RESOURCES & CONTENT



Peace
Corps

More participatory tools!

The Field Guide content borrows from the following sources, which collectively contain hundreds of additional participatory tools that can be used as part of PACA.

80 Tools for Participatory Development

Geilfus, Frans. 2008. 80 tools for participatory development: appraisal, planning, follow-up and evaluation. San Jose, C.R.: IICA.

Building Blocks in Practice: Participatory Tools

Building Blocks in Practice: Participatory Tools to Improve the Development of Care and Support for Orphans and Vulnerable Children. 2004. International HIV/AIDS Alliance.

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The Technical and Operational Performance Support (TOPS) Technical and Operational Performance Support Program. 2017. Designing for Behavior Change: A Practical Field Guide. Washington, DC: The Technical and Operational Performance Support Program.

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Smith and Linder. 2014. IDDS Design Workbook. Arusha, Tanzania: IDDS.

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IDEO.org. 2015. The Field Guide to Human-Centered Design. San Francisco: IDEO.org.

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International HIV/AIDS Alliance. 2006. Tools Together Now! 100 participatory tools to mobilise communities for HIV/AIDS. Hove, UK: International HIV/AIDS Alliance.

Mind Tools

www.mindtools.com

National Education Association

www.nea.org

The New Project Design and Management Workshop

Office of Overseas Programming and Training Support (OPATS). 2003. The New Project Design and Management Workshop Training Manual. No. T0107. Washington D.C.: Peace Corps.

An NGO Training Guide for PCVs

Office of Overseas Programming and Training Support (OPATS). 2003. An NGO Training Guide for PCVs. No. M0070. Washington D.C.: Peace Corps.

PACA: Using Participatory Analysis for Community Action

Office of Overseas Programming and Training Support (OPATS). 2005. PACA: Using Participatory Analysis for Community Action. No. M0086. Washington D.C.: Peace Corps.

Peace Corps Gender Guidance

Office of Overseas Programming and Training Support (OPATS). 2015. Guidance for Promoting Gender Equality and Women's Empowerment in Peace Corps Programming. No. M0117. Washington D.C.: Peace Corps.

A Practical Guide for Facilitating Social Change

Hunjan and Pettit. 2011. Power: A Practical Guide for Facilitating Social Change. Trust Fife, KY: Carnegie UK.

Qualitative Resource for Development: Guide for Practitioners

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