USER-CENTERED METHODS & TOOLS FOR MEANINGFUL COMMUNITY ENGAGEMENT

Rationale: This document offers a non-exhaustive list of tools and resources to help designers, researchers, entrepreneurs and/or program managers effectively, genuinely, and meaningfully engage the users and communities in the design and implementation of projects and/or products in humanitarian and development settings. It is composed of three sections:

I.   Exercises and tools to effectively prepare your community engagement strategy.
II.   General methods of community engagement.
III.   Innovative methods and tools for meaningful community engagement.

I.   EXERCISES & TOOLS TO EFFECTIVELY PREPARE YOUR COMMUNITY ENGAGEMENT STRATEGY

The exercises and tools below are for you – managers, designers, researchers. They are here to help you prepare at best your community engagement strategy before going to the field – and be fully aware of opportunities and risks. We highly recommend you review and use them with your team and partners before any community engagement activity.

Exercise	Description	Web link / more info
Lean research toolkit	This toolkit aims to ensure rigorous, respectful, relevant, and right-sized research. It can help you understand whether you are doing "the right" thing.	▪ MIT-D Lab toolkit.
Informed consent template	This template can help you build your own informed consent process and template. You must pay particular attention to linguistic and literacy accessibility.	▪ Designing with people guidelines and templates.
Noticing bias and assumptions tools	This very important exercise helps you analyze how you position yourself as an external researcher /manager and helps you be aware of your perceptions and cultural biases.	▪ The National Equity Project (Dschool Stanford), Laboratory design cards.
Mapping context tool	This series of exercises help you better understand the problem and opportunity at stake (e.g. who is affected by it/ who is not and how). With illiterate communities, you can use the exploration exercise with cards or other visual materials.	▪ SAP AppHaus, Exploration template and guidelines, Page 4.

Mapping access tool	This helps you identify how to access the individual(s) you want to engage and analyze which barriers could prevent you from meaningfully reaching them.	▪ [Mindset-PCS's tool]().
Developing Language tool	This exercise helps you prepare the messages you want to share, and think of meaningful ways to do so (It looks into words, interpretations and symbols).	▪ [Mindset-PCS's tool]().
Engagement journey mapping	This help you map the experience of the engagement from the participant's perspective. Much like a customer journey map, it builds a picture of what a participant experiences, from the beginning of an engagement through the end. It is good for planning purposes (and anticipating risks & challenges!).	▪ [Mindset-PCS's tool]().
Manage risks when engaging with communities	These very important guidelines help you reduce the risks related to engagement by building and monitoring feedback loops.	▪ ELRHA [guidelines.]()
Mapping potential tool	This will help you explore the potential benefits of the participation process (who can benefit? what can participants get out of it). This is interesting preparatory exercise to address the challenges exposed earlier regarding the 'assessment fatigue'.	▪ [Mindset-PCS's tool]().
Local adaptation	This can help you understand how the project/solution interrelates with local systems as well as the risks it can create. This is a very sensitive topic that very much connects to do-no-harm – so it is to be used with cautious!	▪ ELRHA [guidelines.]()
Post engagement feedback tool	It is crucial to constantly obtain feedback from community members – and this starts with the feedback of the very engagement you had with them!	▪ ALNAP [guidelines]() on establishing feedback loops.

II.   GENERAL METHODS OF COMMUNITY ENGAGEMENT

Method	Description	Guidelines / web links
Traditional focus-group discussions	Group interviews and discussions. They can be gender-specific or mixed depending on your objectives. Important note: Current practice tends to move away from the traditional interviewer/interviewee format that can create a biased and skewed rapport (and can therefore produce biased and skewed results), and rather embraces a more participatory and horizontal approach for meaningful engagement *– See section 2 below.*	▪ IDEO [guidelines]() on group interviews**.** ▪ IDEO [guidelines]() for direct interviews in communities. ▪ Important [guidelines]() on selecting extremes and mainstreams (i.e. different types of target groups) in interviews.

Interviews with Key Informants	One-to-one interviews (also called experts interviews) - e.g. with practitioners, service providers, donors, etc.	▪ IDEO guidelines.
On-site observations	Observations 'from outside'. Important note: Make sure that your presence and methods used full reflect the do-no-harm principle, safety (yours and the communities you work with), and cultural sensitivity.	▪ ELRHA guidelines. ▪ IDEO Example of guided tour.
Immersions	Immersion (observation 'from within') into the communities' daily life, e.g. spend a day shadowing a specific group or person, have them walk you through their day and how they make decisions; play with them; and observe them as they cook, socialize, visit the doctor.	▪ IDEO guidelines. ▪ DIY toolkit guidelines on shadowing. ▪ See 'Day in a life of' method.
Analogous inspirations.	Methodology that help you shift your focus to a different context. Analogous settings can help you isolate elements of an experience, interaction, or product, and then apply them to your specific context. This can work well specifically for innovation processes.	IDEO guidelines.
Peers observing peers	Situation in which the external researcher/manager asks a local/national actor to conduct the observation and research from within a specific context (e.g. a community mobilizer in his/her own community).	IDEO guidelines.

III.   SPECIFIC TOOLS FOR MEANINGFUL COMMUNITY ENGAGEMENT

We recommend participatory methods that move away from the 'traditional' yet often counterproductive top down 'focus-group discussion-only' format which tends to create unbalanced relationships between interviewers and interviewees. We recommend using the tools below from different sources to engage users/communities more meaningfully into programmatic and/or innovation processes as well as to build rapport and trust. These tools can easily be integrated into interviews and discussion groups but also into existing programmatic activities such as women or youth groups, training courses, and community outreach activities. Integrating data collection exercises into regular known community activities allows 1) not to disturb the community 'rhythm' and habits; 2) maximize a trusting and safe environment; and 3) collect information (with consent) in a more comfortable, engaging, genuine, and horizontal manner.

Tool	Description	Web link / more info
Conversation starters	Conversation Starters help spark dialogue by suggesting discussion topics (questions, pictures, etc.) around a central theme to make participants react and engage.	▪ IDEO guidelines. ▪ Specific (and really interesting) example of loan surprise game (to understand loan systems in a specific context). ▪ Other interesting example in Uganda (on agriculture).
Cart sorting	A card sort is a quick and easy way to spark conversation about what matters most to the participants/users. It helps you understand priorities.	▪ IDEO guidelines. ▪ Example of activity on post-harvest lost for small-holder farmers.
Collage	This can help understand how users/communities think, what they value, etc. Collages are an easy way to encourage people to put their thoughts into a tangible output and then explain what it means.	▪ IDEO guidelines. ▪ Example of a health program.
Drawing	This exercise can help understand how people perceive a specific location or activity (especially when it comes to safety). It can help you understand challenges in access, comfort, perceptions etc. This is a good method to conduct safety audits for instance (e.g. before a distribution).	▪ IDEO guidelines.
Resources flows	This really interesting and useful exercise can help you better understand individuals and households' priorities based on how money is generated and spent. It can also help understand gender-based power relations within a household or community. Highly recommended!	▪ IDEO guidelines. ▪ Example of women group in Katmandu.
Experience mapping	This exercise helps you analyze how an individual experiences a specific need (e.g. going to the toilet) as well as (later on) how she/he will experience the project/solution. This could also be used to understand the different needs and opportunities of specific at-risk groups (e.g. people with disabilities). It is interesting to conduct such exercise at the very beginning to create a baseline of needs and opportunities (and understand what people usually do to address this need), then another time to test the project/ solution during implementation, and then finally at the end of the process for evaluation purposes, to see how the project/solution is being used.	▪ DIY guidelines. ▪ IDEO's journey mapping.

Personas exercise & empathy mapping	This exercise allows you to build a persona, which is a description of a person who represents a group of users/communities. This will help you understand the end user and generate initial insights into the nature of the problem from the perspective of the user/beneficiary. **Note:** We are personally not a big fan of this exercise because it requires many levels of assumptions, and can therefore be skewed by the researcher's own perception and cultural understanding.	- DIY guidelines on persona. - ELRHA guidelines on persona. - Overview of both exercises: - Additional links about empathy map (in non humanitarian contexts): - https://www.wedesignthinking.com/en/tools/empathy-map/ - https://www.nngroup.com/articles/empathy-mapping/

GREAT RESOURCES THAT YOU CANNOT MISS:

1. ELRHA innovation guide: https://higuide.elrha.org/
2. IDEO Toolkit: http://www.designkit.org/
3. DIY Toolkit: https://diytoolkit.org/tools/
4. Stanford Design Thinking Bootleg: https://dschool.stanford.edu/resources/design-thinking-bootleg.
5. Designing with People website: http://designingwithpeople.rca.ac.uk/methods