The Participation Compass:
A tool for navigating the participation landscape

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With support from HIF and NSF

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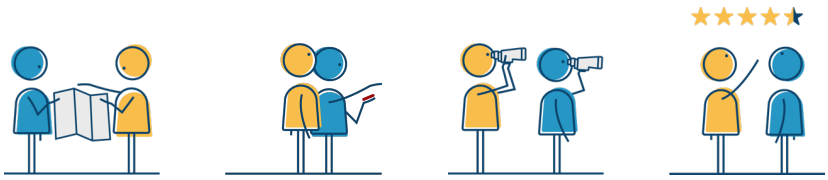
[welcome & introductions]

The participation compass is part of s suite of tools and frameworks created by MIT D-Lab with the goal of expanding the understanding of and increasing the pathways for participation in humanitarian innovation. The tools were created in collaboration with the Humanitarian Innovation Fund with additional support from the United States National Science Foundation.

[these notes are written for using the compass in a stand-alone activity, and therefore describe the participation toolkit as a whole, to provide context; if the activity is part of a session that includes the entire toolkit, then some of the slides should be adjusted].

The D-Lab Participation Toolkit

1. **The Participation Matrix**
2. **The Participation Compass**
3. **The Participation Activity Field Guide**
4. **The Participation Quality Advisor**



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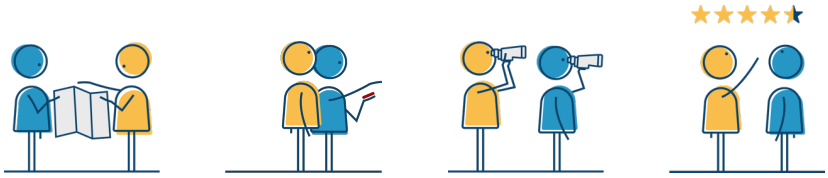
The toolkit is comprised of four elements, the first is a matrix that defines different types and levels of participation and what they look like in the different stages of the humanitarian innovation process. The matrix can be used in planning, assessing and refining participation strategies. The second is the participation compass, which helps implementors choose the type of participation that is most appropriate for their situation. The third is a guide to different activities that can be used to promote participation throughout the innovation process. The final element is quality advisor that provides guidance for how to ensure the quality of participatory activities.

The Four Step Approach

1. **Identify the stage**
2. **Choose the type of participation**
3. **Identify tools and activities**
4. **Ensure the quality**



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These elements can be used in a four-step approach for expanding and improving participation in humanitarian innovation.

Types of Participation

- Categorizing roles of users
  - **Consultation:** providing information, sharing opinions, giving feedback
  - **Partnership:** making decisions
  - **Leadership:** directing

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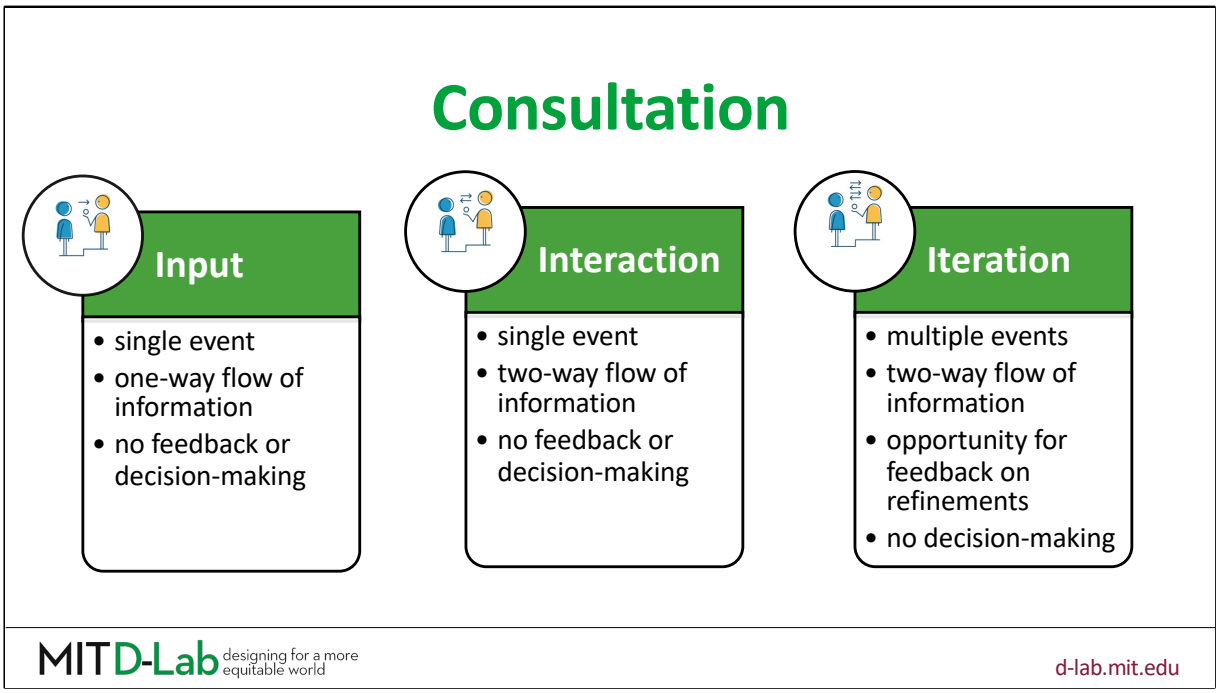
Before getting started with the participation compass tool, it is useful to review the different types of participation. They can be characterized by the role of the user in the innovation process. In consultation, the users provide input, share information and give feedback to the innovation team, however they are not involved in making decisions or setting the direction. In partnership, the users have decision-making authority, and in the leadership paradigm, they also set the direction of the project.



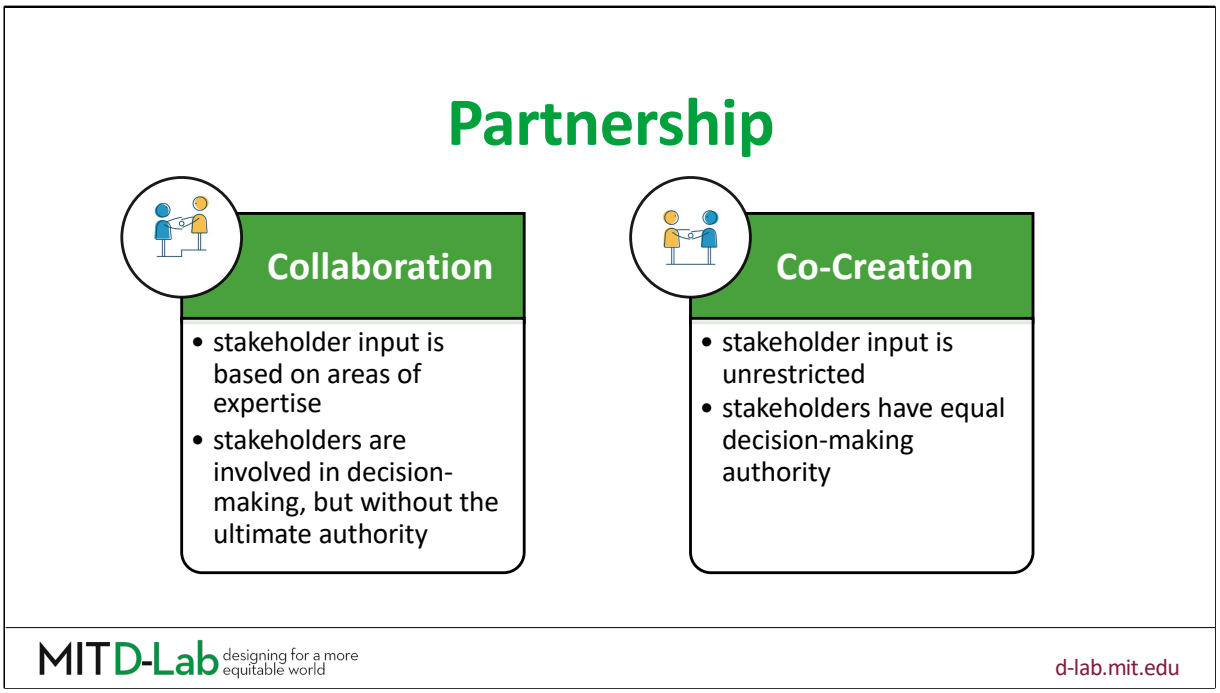
Each type of participation has different levels:

For the “input” level, users **provide** information, share their opinions and/or give feedback; however, there is no opportunity to interact or discuss with the innovation team, and the users do not have any decision-making power over how their input is incorporated into the project.

For the “interaction” level, users **provide** information, share their opinions and/or give feedback through a two-way, interactive process with the innovation team, who responds and reacts;

however, the users do not have decision-making power over how their input is incorporated into the project.

For the “iteration” level, users **provide** information, share their opinions and/or give feedback in **repeated** interactions which are used by the innovation team to make a series of refinements; however, the users do not have decision-making power over how the refinements are made or incorporated into the project.

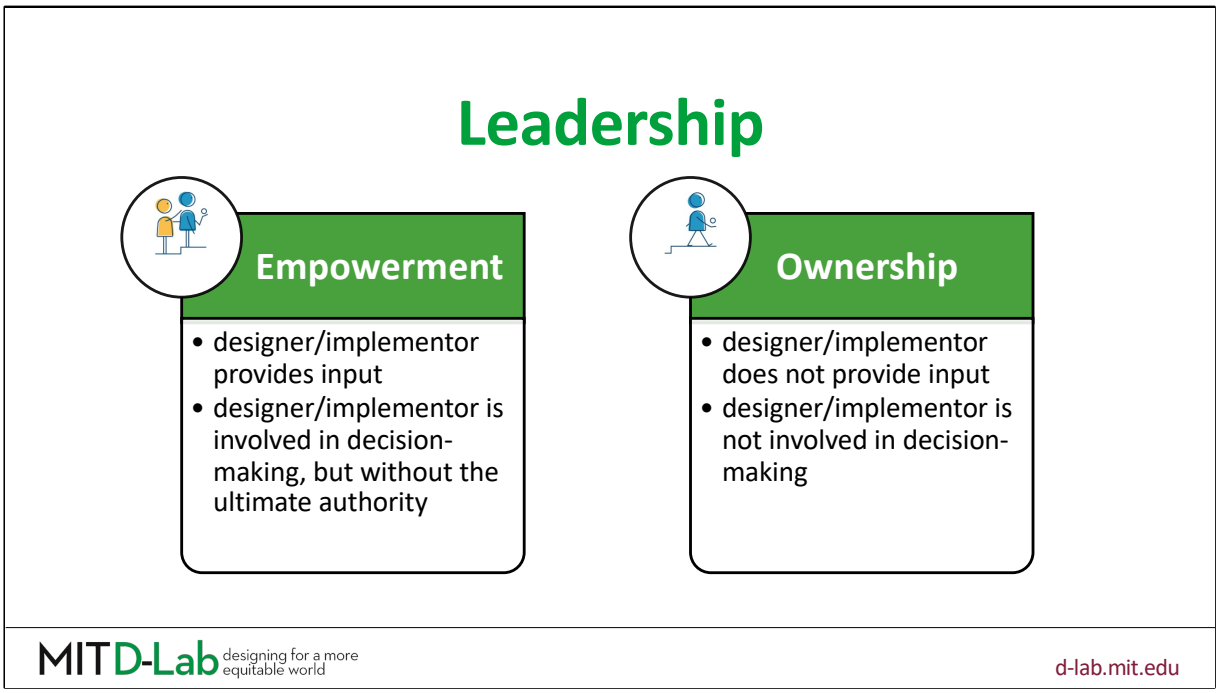


In partnership, the users and designers are working together on a longer-term basis as members of the same team.

For the "collaboration" level, the different stakeholders **take part** in planning and implementing the solution according to their field of expertise, but their role is determined by the innovation team; the stakeholders takes part in decision-making, but they do not have the same decision-making power as the innovation team.

For the "co-creation" level, The stakeholders **take part** in planning, developing and implementing the solution; they share equal decision-making power with the

innovation team.



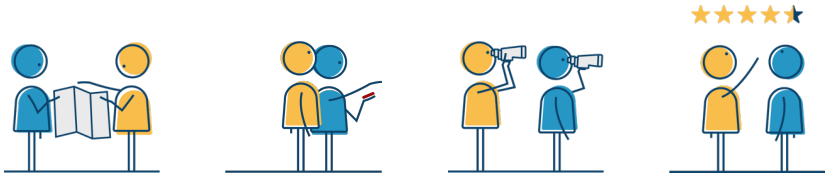
In leadership, the users are in charge of the project.

For the "empowerment" level, the users **lead** the planning, development and implementation of the solution with the innovation team providing input and support as needed; users have the final decision-making power.

For the "ownership" level, users **lead** the planning, development and implementation of the solution independently; they have the final decision-making power.

The Four Step Approach

1. Identify the stage
2. **Choose the type of participation**
3. Identify tools and activities
4. Ensure the quality



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The participation compass is a tool that helps innovation teams choose the most appropriate type of participation given the goals they want to achieve and the constraints they have to operate within.

The Participation Compass

Step 1
- Identify and assess **benefits**

Step 2
- Identify and assess **barriers**

Step 3
- Consider tradeoffs and choose **type**

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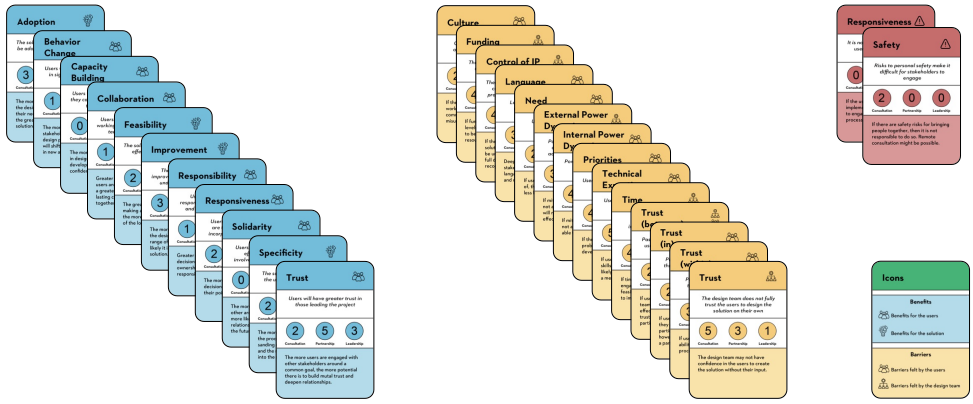
The process starts by prioritizing the benefits that the team is hoping to achieve, then assesses the barriers they face in doing so and then finally takes into account the most important benefits and the most limiting barriers to identify the most promising type of participation.

The Participation Compass Cards



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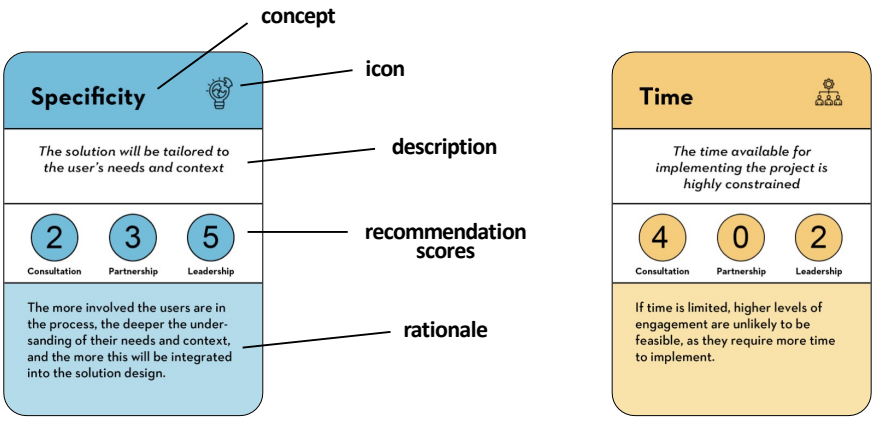
The compass tool is made up of several elements, the first is a deck of cards that consist of benefit cards, barrier cards, warning cards and an icon description card.

Elements of the Benefit and Barrier Cards



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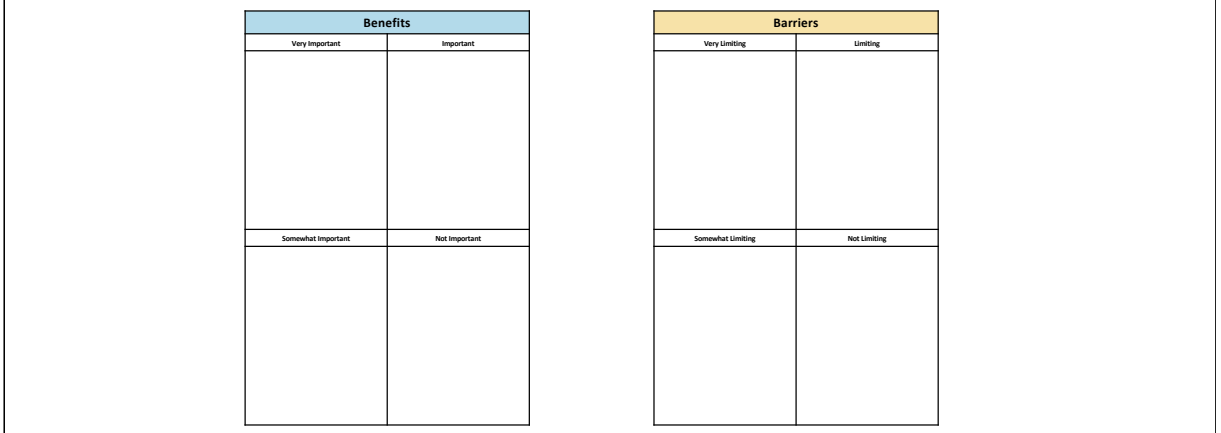
Each card has several elements:
The first is the name of the benefit or barrier
The second is an icon which tells whether the benefit is for the user, or the product, and whether the barrier is for the users or the implementation team
The third element is a brief description of the concept
The fourth element are the scores that indicate the degree to which each type of participation is recommended
The final element is the rationale behind the scores

In addition, there are several blank cards that can be filled in for benefits or barriers that are not included in the cards that are provided

The Participation Compass Sorting Mat



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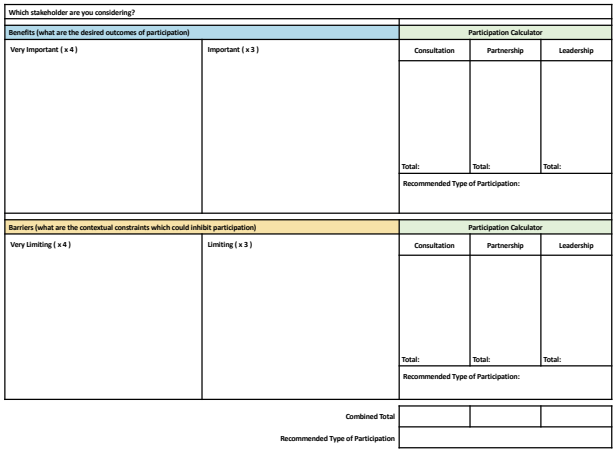
The compass also includes a sorting map, for prioritizing the benefits and barriers.

The Participation Compass Canvas



Which stakeholder are you considering?				
Benefits (what are the desired outcomes of participation)		**Participation Calculator**		
Very Important (x 4)	**Important (x 3)**	**Consultation**	**Partnership**	**Leadership**
		Total:	**Total:**	**Total:**
		Recommended Type of Participation:		
Barriers (what are the contextual constraints which could inhibit participation)		**Participation Calculator**		
Very Limiting (x 4)	**Limiting (x 3)**	**Consultation**	**Partnership**	**Leadership**
		Total:	**Total:**	**Total:**
		Recommended Type of Participation:		
	Combined Total			
	Recommended Type of Participation			

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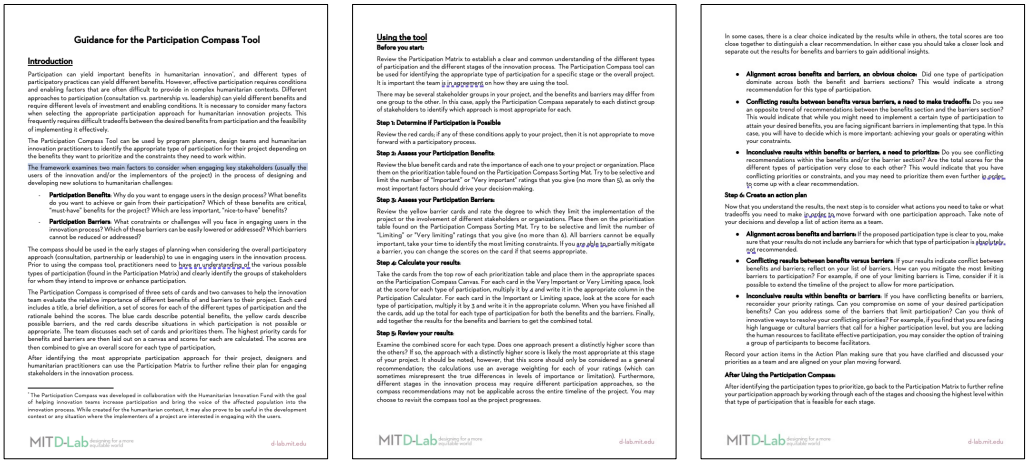
And a canvas for calculating the total scores.

The Participation Compass Guidance



Guidance for the Participation Compass Tool

Introduction

Participation can yield important benefits in humanitarian innovation*, and different types of participatory practices can yield different benefits. However, effective participation requires conditions and enabling factors that are often difficult to provide in complex humanitarian contexts. Different approaches to participation (consultation vs. partnership vs. leadership) can yield different benefits and require different levels of investment and enabling conditions. It is necessary to consider many factors when selecting the appropriate participation approach for humanitarian innovation projects. This frequently requires difficult tradeoffs between the desired benefits from participation and the feasibility of implementing it effectively.

The Participation Compass Tool can be used by program planners, design teams and humanitarian innovation practitioners to identify the appropriate type of participation for their project depending on the benefits they want to prioritize and the constraints they need to work within.

The framework examines two main factors to consider when engaging key stakeholders (usually the users of the innovation and/or the implementors of the project) in the process of designing and developing new solutions to humanitarian challenges:

- **Participation Benefits**. Why do you want to engage users in the design process? What benefits do you want to achieve or gain from their participation? Which of these benefits are critical, "must-have" benefits for the project? Which are less important, "nice-to-have" benefits?
- **Participation Barriers**. What constraints or challenges will you face in engaging users in the innovation process? Which of these barriers can be easily lowered or addressed? Which barriers cannot be reduced or addressed?

The compass should be used in the early stages of planning when considering the overall participatory approach (consultation, partnership or leadership) to use in engaging users in the innovation process. Prior to using the compass tool, practitioners need to have an understanding of the various possible types of participation (found in the Participation Matrix) and clearly identify the groups of stakeholders for whom they intend to improve or enhance participation.

The Participation Compass is comprised of three sets of cards and two canvases to help the innovation team evaluate the relative importance of different benefits of and barriers to their project. Each card includes a title, a brief definition, a set of scores for each of the different types of participation and the rationale behind the scores. The blue cards describe potential benefits, the yellow cards describe possible barriers, and the red cards describe situations in which participation is not possible or appropriate. The team discusses each set of cards and prioritizes them. The highest priority cards for benefits and barriers are then laid out on a canvas and scores for each are calculated. The scores are then combined to give an overall score for each type of participation.

After identifying the most appropriate participation approach for their project, designers and humanitarian practitioners can use the Participation Matrix to further refine their plan for engaging stakeholders in the innovation process.

*The Participation Compass was developed in collaboration with the Humanitarian Innovation Fund with the goal of helping innovation teams increase participation and bring the voice of the affected population into the innovation process. While created for the humanitarian context, it may also prove to be useful in the development context or any situation where the implementers of a project are interested in engaging with the users.

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Using the tool

Before you start.

Review the Participation Matrix to establish a clear and common understanding of the different types of participation and the different stages of the innovation process. The Participation Compass tool can be used for identifying the appropriate type of participation for a specific stage or the overall project. It is important the team is in agreement on how they are using the tool.

There may be several stakeholder groups in your project, and the benefits and barriers may differ from one group to the other. In this case, apply the Participation Compass separately to each distinct group of stakeholders to identify which approach is most appropriate for each.

Step 1: Determine if Participation is Possible

Review the red cards; if any of these conditions apply to your project, then it is not appropriate to move forward with a participatory process.

Step 2: Assess your Participation Benefits.

Review the blue benefit cards and rate the importance of each one to your project or organization. Place them on the prioritization table found on the Participation Compass Sorting Mat. Try to be selective and limit the number of "Important" or "Very important" ratings that you give (no more than 5), as only the most important factors should drive your decision-making.

Step 3: Assess your Participation Barriers.

Review the yellow barrier cards and rate the degree to which they limit the implementation of the project or the involvement of different stakeholders or organizations. Place them on the prioritization table found on the Participation Compass Sorting Mat. Try to be selective and limit the number of "Limiting" or "Very limiting" ratings that you give (no more than 6). All barriers cannot be equally important, take your time to identify the most limiting constraints. If you are able to partially mitigate a barrier, you can change the scores on the card if that seems appropriate.

Step 4: Calculate your results.

Take the cards from the top row of each prioritization table and place them in the appropriate spaces on the Participation Compass Canvas. For each card in the Very Important or Very Limiting space, look at the score for each type of participation, multiply it by 4 and write it in the appropriate column in the Participation Calculator. For each card in the Important or Limiting space, look at the score for each type of participation, multiply it by 3 and write it in the appropriate column. When you have finished all the cards, add up the total for each type of participation for both the benefits and the barriers. Finally, add together the results for the benefits and barriers to get the combined total.

Step 5: Review your results.

Examine the combined score for each type. Does one approach present a distinctly higher score than the others? If so, the approach with a distinctly higher score is likely the most appropriate at this stage of your project. It should be noted, however, that this score should only be considered as a general recommendation; the calculations use an average weighting for each of your ratings (which can sometimes misrepresent the true differences in levels of importance or limitation). Furthermore, different stages in the innovation process may require different participation approaches, so the compass recommendations may not be applicable across the entire timeline of the project. You may choose to revisit the compass tool as the project progresses.

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In some cases, there is a clear choice indicated by the results while in others, the total scores are too close together to distinguish a clear recommendation. In either case you should take a closer look and separate out the results for benefits and barriers to gain additional insights.

- **Alignment across benefits and barriers, an obvious choice**: Did one type of participation dominate across both the benefit and barriers sections? This would indicate a strong recommendation for this type of participation.
- **Conflicting results between benefits versus barriers, a need to make tradeoffs.** Do you see an opposite trend of recommendations between the benefits section and the barriers section? This would indicate that while you might need to implement a certain type of participation to attain your desired benefits, you are facing significant barriers in implementing that type. In this case, you will have to decide which is more important: achieving your goals or operating within your constraints.
- **Inconclusive results within benefits or barriers, a need to prioritize.** Do you see conflicting recommendations within the benefits and/or the barrier section? Are the total scores for the different types of participation very close to each other? This would indicate that you have conflicting priorities or constraints, and you may need to prioritize them even further in order to come up with a clear recommendation.

Step 6: Create an action plan

Now that you understand the results, the next step is to consider what actions you need to take or what tradeoffs you need to make in order to move forward with one participation approach. Take note of your decisions and develop a list of action items as a team.

- **Alignment across benefits and barriers:** If the proposed participation type is clear to you, make sure that your results do not include any barriers for which that type of participation is absolutely not recommended.
- **Conflicting results between benefits versus barriers.** If your results indicate conflict between benefits and barriers, reflect on your list of barriers. How can you mitigate the most limiting barriers to participation? For example, if one of your limiting barriers is Time, consider if it is possible to extend the timeline of the project to allow for more participation.
- **Inconclusive results within benefits or barriers**. If you have conflicting benefits or barriers, reconsider your priority ratings. Can you compromise on some of your desired participation benefits? Can you address some of the barriers that limit participation? Can you think of innovative ways to resolve your conflicting priorities? For example, if you find that you are facing high language or cultural barriers that call for a higher participation level, but you are lacking the human resources to facilitate effective participation, you may consider the option of training a group of participants to become facilitators.

Record your action items in the Action Plan making sure that you have clarified and discussed your priorities as a team and are aligned on your plan moving forward.

After Using the Participation Compass:

After identifying the participation types to prioritize, go back to the Participation Matrix to further refine your participation approach by working through each of the stages and choosing the highest level within that type of participation that is feasible for each stage.

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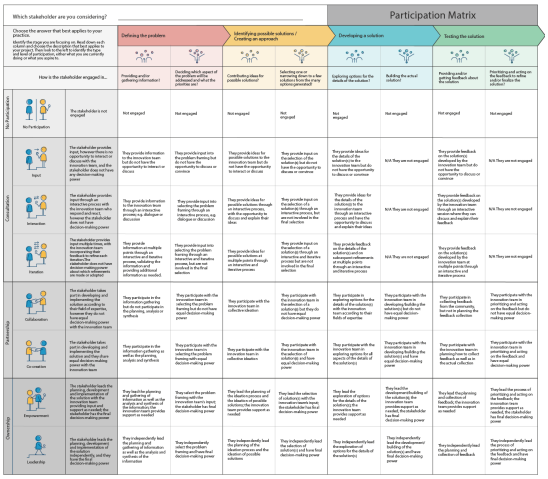
There is also a guidance document with details for how to use the compass tool

The Participation Compass Quick Guide

And a quick guide that lists the steps.

The Participation Matrix



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And finally, we have a copy of the Participation Matrix which can be used to refine the selection made by the compass tool.

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- Calculate the scores
- Calculate the results
- Review the results
- Choose the level of participation using the matrix
- Capture your learnings

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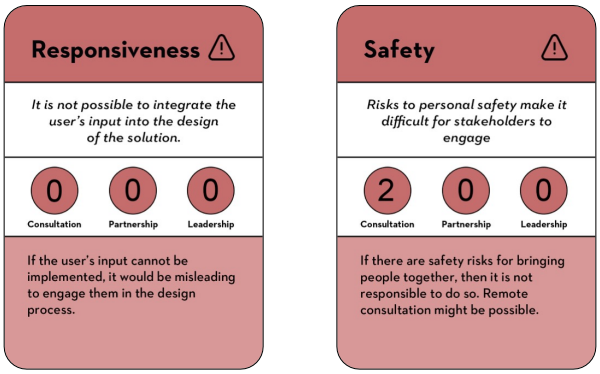
[note that from this point forward, the annotations are framed as instructions, where "you" means the participants in the activity]

Before getting started, it is important to note that the discussion that happens while using the compass is equally important as the result that the tool provides, perhaps even more so. Make sure that you document the process and take note of key insights that arise during your conversations.

Before you start…



Is participation possible?

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The first thing to do is to determine if participation is even possible. If, for example, it is not possible to integrate the input from the users into the solution, then it is unethical to waste their time and raise their expectations. Or if it is not safe for the users to engage in participation, the you would not want to put them at risk. The red warning cards are used for this step.

The Process…

- Decide if participation is possible
- **Rank the benefits using the sorting mat**
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- Calculate the scores
- Calculate the results
- Review the results
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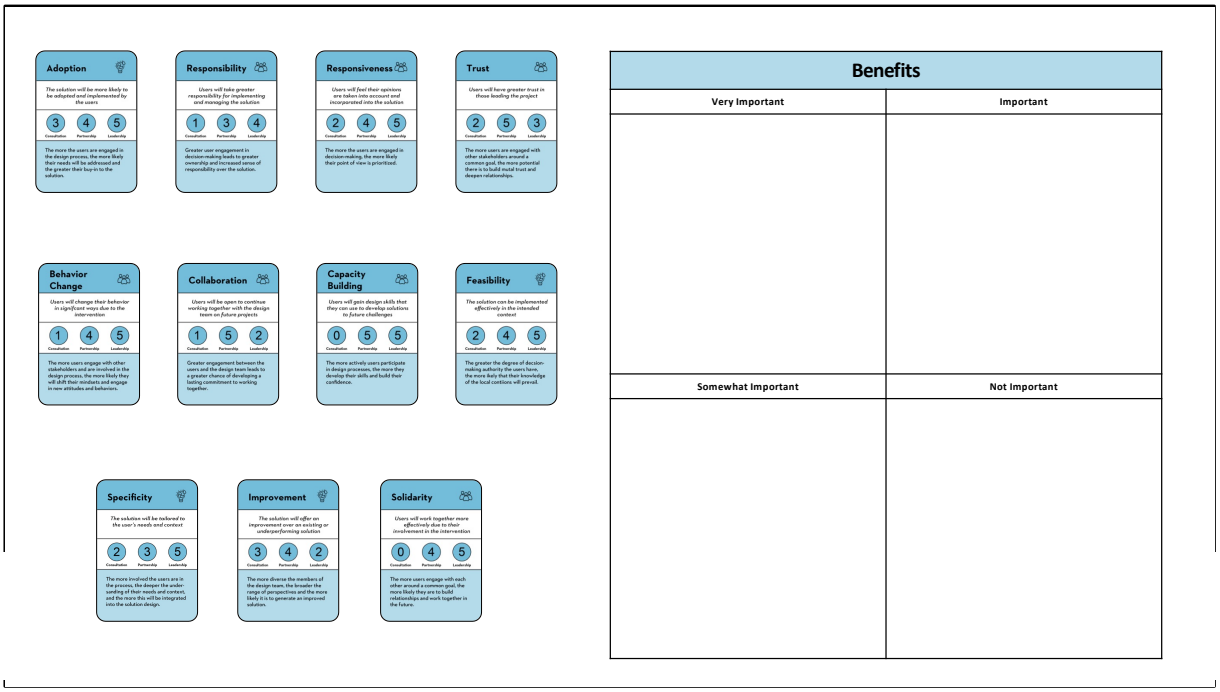
The next step is to review and prioritize the benefits.



There are 11 benefit cards and the team should review and discuss each one, rank its level of importance and place it on the appropriate space on the sorting mat. In the end, you should not have more than 4 or 5 cards (total) in the top two squares.

As an example, we can imagine a project where a solution had been attempted, but was not adopted by the users. The innovation team is hoping to develop a solution that will better meet the needs of the users, and to lay the groundwork for on-going collaborations to develop more solutions in the future.

[the following descriptions accompany the animation of the slide]

Specificity, the degree to which the solution meets the user's needs, would therefore be a Very Important benefit to the design team.

Collaboration is also important, but perhaps not quite as much, so it would go in the Important box

Adoption is critical to the success of the project, so it should also be placed in the Very Important box.

Solidarity is not one of the goals of this project, so it would go in the Not Important box.

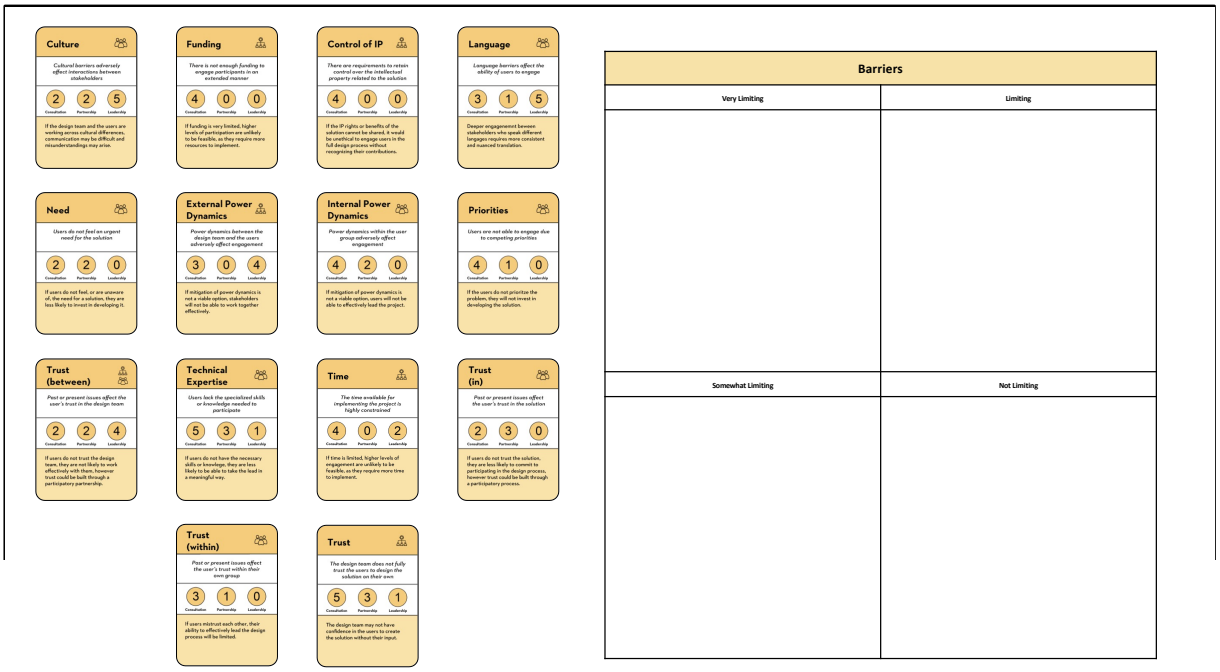
The team would continue with all of the cards, and at the end, if there are more than 4 or 5 cards in the top two squares, they would need to discuss further to decide which ones should remain and which ones can be demoted.

And remember, there are blank cards that you can fill in if there is a benefit that is important, but not it the deck.

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- **Rank the barriers using the sorting mat**
- Place the cards on the canvas
- Calculate the scores
- Calculate the results
- Review the results
- Choose the level of participation using the matrix
- Capture your learnings

Now we are ready to do the same thing with the barriers…



There are 14 barrier cards, and you go through the same process with them.

[the following descriptions accompany the animation of the slide]

In this case, there is a history which has caused some barriers, and the community may not have Trust (In) the solution, so this could be a Very Limiting barrier.

It may also be that there's a short window to get the project completed, in which case Time would also be Very Limiting

Control over IP may not be a consideration, in which case it would be ranked as Not Limiting

Language differences between the design team and the users might be a Limiting factor, and so it would be moved into that box.

Again, limit the number of cards in the top row to 4 or 5. And if there are barriers that are not found in the deck, you can make your own cards.

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- **Place the cards on the canvas**
- Calculate the scores
- Calculate the results
- Review the results
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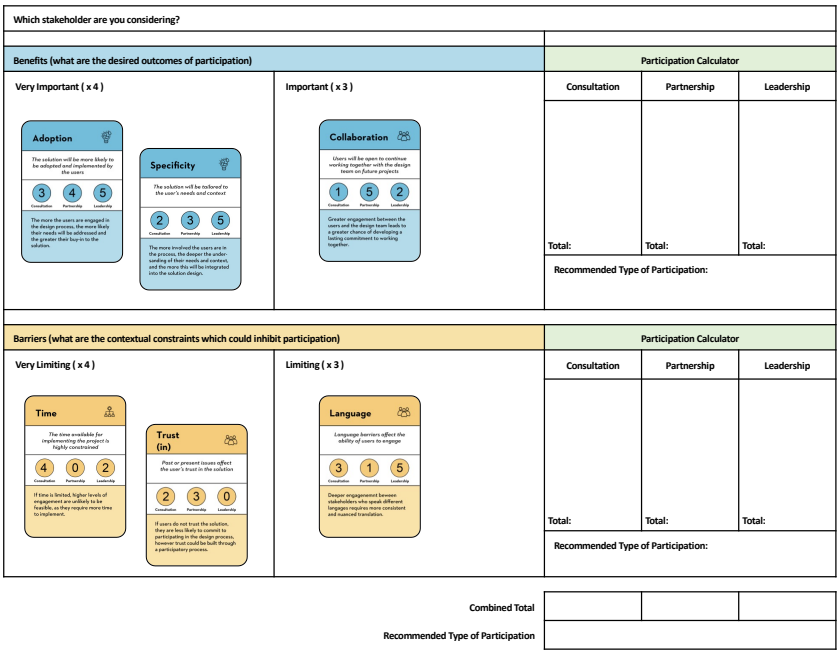
Now you can move the cards onto the canvas…



Only transfer the cards from the top two squares for both benefits and barriers…

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- **Calculate the scores**
- Calculate the results
- Review the results
- Choose the level of participation using the matrix
- Capture your learnings

… and now you are ready to calculate the scores

The Scoring Process

- The different levels of priority are weighted:
  - the very important and very limiting recommendation scores are multiplied by a weighting value of 4
  - the important and limiting recommendation scores are multiplied by a weighting value of 3
- The compass tool is designed so that scores on both types of cards indicate the degree of appropriateness of each type of participation, therefore the scores of the benefits and barriers are added together at the end.

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[it is useful to explain how the scoring works (as described above) before doing the example]

This is when you use the scores on the cards to figure out which approach makes the most sense for your project. The scores are multiplied by a weighting factor; the very important and very limiting recommendation scores are multiplied by a weighting value of 4 and the important and limiting recommendation scores are multiplied by a weighting value of 3.

The scores on each card indicates the degree to which each type of participation is appropriate. This is true for both benefits and barriers, therefore, at the end, the scores for both benefits and barriers are added together to determine the overall recommendation.

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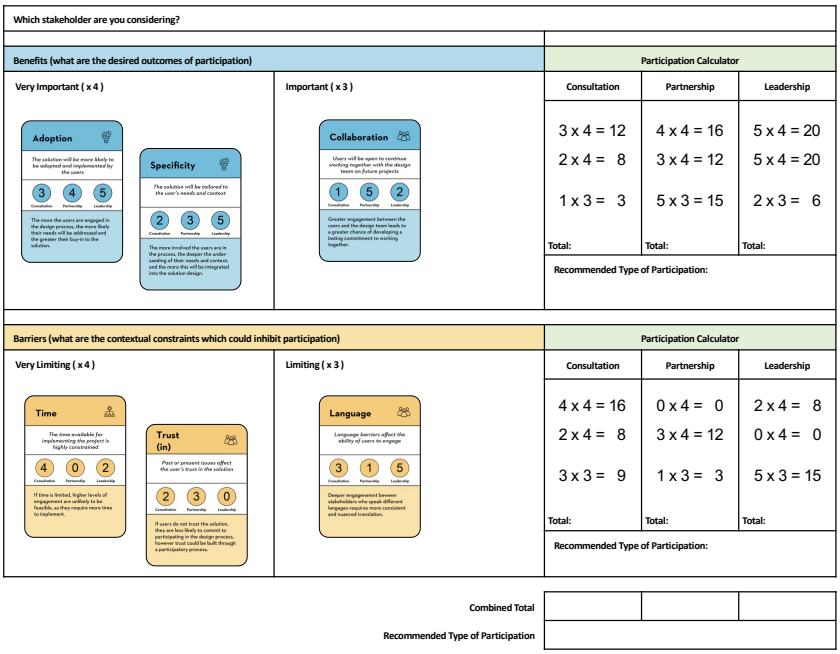


Starting with the Adoption card, look at the score for each type of participation on the card and multiply by 4, because it was a “Very Important” benefit. Fill in the numbers on the Participation Calculator. Do the same with the Specificity card.

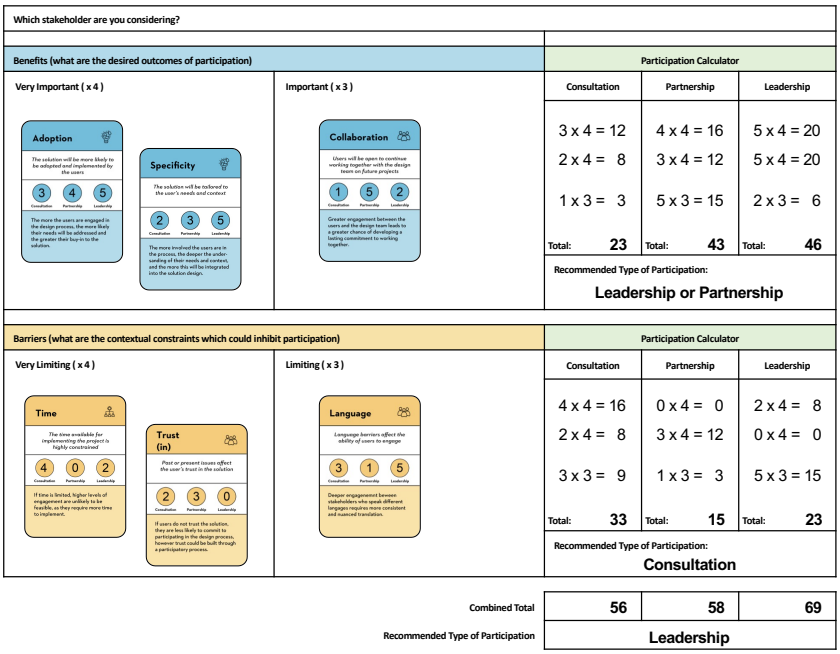
Then move to the Collaboration card, which is in the Important box, so this time the scores for each type of participation will be multiplied by 3.

Now we can move to the barrier cards and do the same thing, making sure to multiply each of the participation scores on the cards in the Very Limiting section of the canvas by 4 and the each of the participation scores in the Limiting section by 3

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- Calculate the scores
- **Calculate the results**
- **Review the results**
- Choose the level of participation using the matrix
- Capture your learnings

Next, we can move to calculating the scores…



Add the scores for each type of participation in the benefits section, and then determine which is the recommended type. It may be that the scores are very close, in which you might need to consider two types.

Then do the same in the barriers section.

Once you've done the recommendations separately, add the totals together to see what the final recommendation is.

Recall that this is a suggestion, however it is not a perfect system, because the weightings may not accurately reflect the relative importance of the benefits, or the relative degree of limitation of the barriers. Review the guidance sheet to help analyze the results.

To finalize your approach, you will use the participation matrix, however that we'll get to that at the end of the activity, once you've tried using the cards and canvas yourself.

Questions?

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Before we move on, are there any questions?

Let's Try It Out!!

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So now, let's try it out…

Let's Try It Out!!

- **Decide if participation is possible**
- **Rank the benefits using the sorting mat**
- **Rank the barriers using the sorting mat**
- **Place the cards on the canvas**
- **Calculate the scores**
- **Calculate the results**
- **Review the results**
- Choose the level of participation using the matrix
- Capture your learnings

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We will start with the portion of the activity that uses the cards.

Let's Try It Out!!

- Use a project of your own

or

- Choose a case study
  - community radio station in Rhino Camp refugee settlement in Uganda
  - fuel-saving cooking technology in Kakuma refugee camp in Kenya
  - community lighting in Kutupalong refugee camp in Bangladesh

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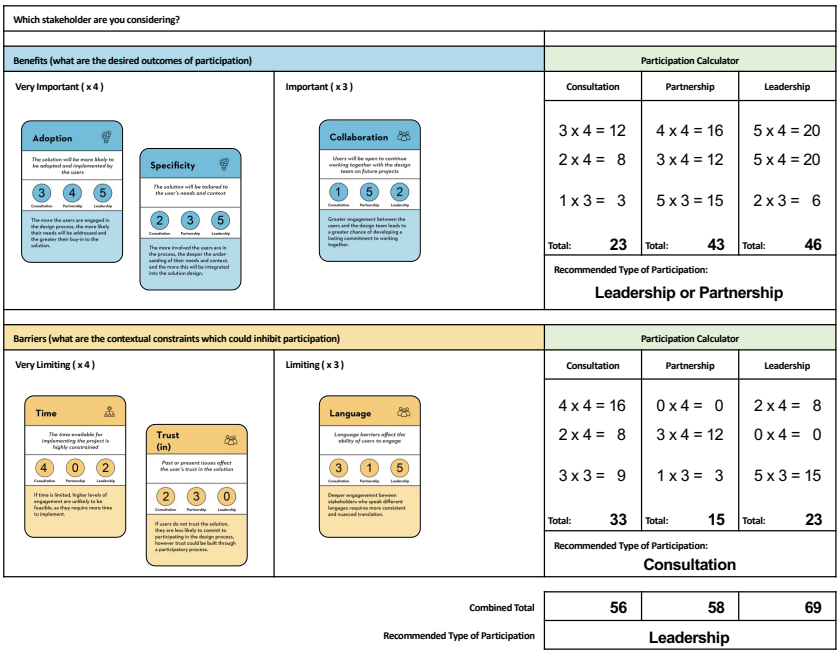
It's best if you have a project of your own, as the conversations around the benefits and barriers will be more genuine, but if you don't, there are three case studies that you can use to try out the compass. [describe them briefly]

[here you should form the groups, with 3 – 4 people per team, and then give out the materials: a deck of cards, the sorting mat, the canvas, the markers, the guidance notes and the quick guide. don't give out the matrix and action plan until they have gone through the first part of the process.]



[it is useful to have this slide showing on the screen as people are working, so that they can look at how things were done in the example]

Reflection:
Thoughts, Comments, Questions?

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[This is an opportunity for people to reflect on the process as well as the outcome of the participation tool.]

Now What??

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Now that you've used the participation calculator, and you have a recommendation for the type of participation, there are two more steps to the process.

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- Calculate the scores
- Calculate the results
- Review the results
- **Choose the level of participation using the matrix**
- Capture your learnings

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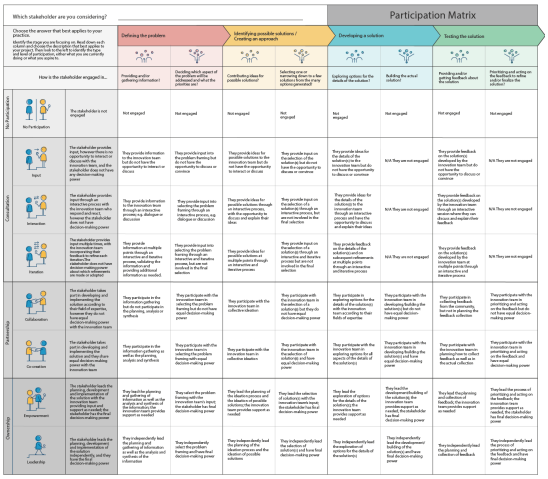
The next step is to use the participation matrix to fine tune the level of participation that will be best for your project, starting with the result from the participation calculator. The participation matrix also lays out the different stages of the design cycle, which can help in the process of identifying which level of participation is appropriate for each stage.

The Participation Matrix



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[give a copy of the matrix to each team]

The participation matrix has the different types and levels of participation on the left side, and the stages of the innovation process along the top.

On the left you can see the 3 types of participation that were on the cards, and then each of these is subdivided into different levels. The description of each level is in the next column.

Along the top are the stages of the design process, with an icon that shows whether it is a divergent process (a fountain) or a convergent process (a funnel). This is useful to keep in mind, because ideas, opinions and input are part of the divergent processes, whereas decision-making and direction-setting are part of the convergent processes. The next row provides a brief description of the stage.

All the other cells of the matrix provide a brief description of what each level of participation looks like at the given stage. Choose which stages you are most interested in exploring and read the different levels within the type that you selected using the compass. Select the highest level that is feasible.

Bear in mind that the compass tool is not infallible, and it might be that you end up selecting a different type of participation, however the compass tool gives you a good place to start looking…

The Process…

- Decide if participation is possible
- Rank the benefits using the sorting mat
- Rank the barriers using the sorting mat
- Place the cards on the canvas
- Calculate the scores
- Calculate the results
- Review the results
- Choose the level of participation using the matrix
- **Capture your learnings**

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The first step is to use the participation matrix to fine tune the level of participation that will be best for your project, starting with the result from the participation calculator. The participation matrix also lays out the different stages of the design cycle, which can help in the process of identifying which level of participation is appropriate for each stage.

Capture Your Learnings

- Make sure you document the process
  - The prioritization of benefits and barriers on the sorting map
  - Key points that came up in the discussion
  - The scoring on the canvas
  - The rationale for choosing the level on the matrix
- As you move on to the next steps, consider and capture the following:
  - What could you do to mitigate the barriers?
  - Are there ways that you can enhance the benefits
  - Who do you need to engage in the planning and implementation of your participatory approach?

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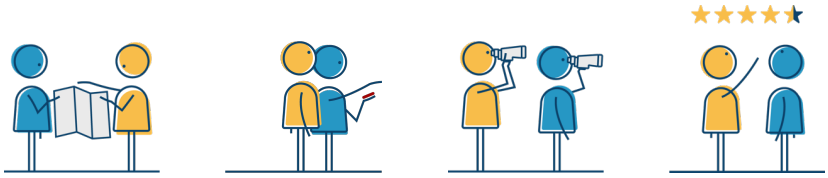
Now that you have identified the level of participation, it's important to capture the learnings from the compass tool and integrate them into the next steps of the process. First, make sure that you've documented the key steps of the participation compass, not only the elements of the tool but also the insights that came up during your discussions. After that, think about what you might do to enhance your participatory strategy– can you decrease the barriers or increase the benefits? Finally, consider the key stakeholders for moving forward with your approach.

The Four Step Approach

1. Identify the stage
2. Choose the type of participation
3. Identify tools and activities
4. Ensure the quality



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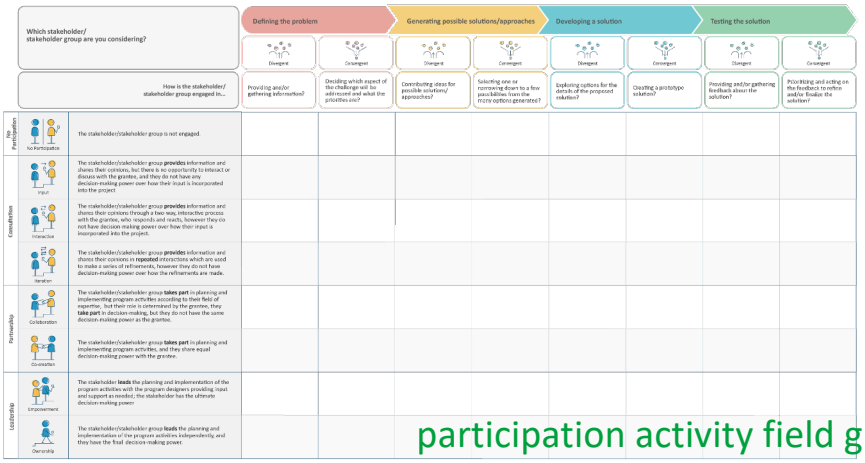
And finally, once the type and level of participation are selected, the innovation team can move on to the next steps of the four-step approach

3. Identify Tools & Activities



participation activity field guide

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… and use the field guide to develop activities to implement the participation strategy…

4. Ensure the Quality

Before		During		After	
Planning	**Preparation**	**Environment**	**Engagement**	**Following Up**	**Finishing Up**
Representation	Building Relationships	Physical Environment	Content	Appreciation	Reporting
Inclusion	Managing Expectations	Enabling Environment	Facilitation	Communication	Reflecting
Logistics	Building Skills, Knowledge & Understanding	Power Dynamics	Documentation	Managing Relationships	Transition
Mindsets	Mindsets	Mindsets	Mindsets	Mindsets	Mindsets

quality advisor

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… and then use the quality advisor to ensure the quality of the participation activities.

Thank You