



Engage**SDG**



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EngageSDG

Integrated Participatory Framework



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List of Abbreviations

Abbreviation	Full Term
CBPR	Community-Based Participatory Research
CSO	Civil Society Organisation
ECSA	European Citizen Science Association
GIS	Geographic Information System
HEI	Higher Education Institution
ICT4D	Information and Communication Technology for Development
IP	Intellectual Property
IPF	Integrated Participatory Framework
LNOB	Leave No One Behind
PA	Participatory Approach
PAME	Participatory Assessment, Monitoring and Evaluation
PAR	Participatory Action Research
PE	Participatory Epidemiology
PRA	Participatory Rural Appraisal
SADC	Southern African Development Community
SDG	Sustainable Development Goal
WASH	Water, Sanitation and Hygiene

1. Introduction

Participatory approaches (PAs) can be powerful catalysts for progress on the Sustainable Development Goals (SDGs), as they can help bridge data gaps, amplify marginalised voices, and co-producing interventions that reflect local priorities. For higher education institutions (HEIs) in the Southern African Development Community (SADC) region, embracing participatory approaches presents a unique opportunity to generate context-specific knowledge, build institutional and community capacity, and contribute meaningfully to local and regional SDG progress.

However, using participatory approaches for sustainable development is not a straightforward exercise or one-size-fits-all choice, as no two PAs are the same. Not only do they serve vastly different purposes ranging from consultation and data gathering to deep collaboration and co-creation, but their appropriateness also depends on the resources available, the characteristics of the participants involved, and the specific constraints of the local context. Moreover, each approach can be implemented with a wide range of concrete methods, each of them likewise serving different purposes and requiring different resources. Selecting and applying a participatory approach and methodology therefore requires careful, informed decision-making that considers these various criteria.

The Integrated Participatory Framework (IPF) was created to support this decision-making process. It serves both as a capacity-building resource and a practical tool for identifying, selecting, and applying participatory approaches in ways that are grounded, purposeful, and inclusive. Designed with the needs of HEIs in the SADC region in mind, the IPF offers structured guidance on how to navigate the landscape of participatory approaches.

Available as a dynamic online platform, the IPF brings together information on the value of participation, the link between PAs and the SDGs, the challenge of conducting inclusive PAs in the SADC context, as well as in-depth reflections on the various context-specific criteria to choose a suitable approach and method.

Most centrally, the IPF presents a curated dynamic directory of more than 25 participatory approaches and methods. Users can explore the directory using flexible filters based on goals, knowledge types, resource availability, and participant needs to find approaches that suit their specific context. For each method and approach, users find in-depth information, reflections concerning the key criteria, real-world examples, as well as links to practical toolkits and handbooks.



In essence, the IPF is structured around four core components:

- About PAs and the SDGs: users can learn how participatory approaches can be used in pursuit of the SDGs - and why they are essential for inclusive, grounded development.
- Inclusive participation and SADC: users can gain a better understanding of what makes participation particularly important in the SADC region, and explore the local realities that shape its possibilities and constraints.
- Selection criteria: users can learn how to navigate the key factors that influence their choice of approach, including project goals, knowledge needs, participant characteristics, and available resources.
- Examples: users can browse a wide range of real-life examples of different approaches and methods being applied in pursuit of different SDGs.
- Search directory: once users have gained the necessary understanding, they can use our dynamic search tool to identify the most appropriate participatory approach and method based on their specific context. They can learn about their various opportunities and challenges, explore real-world examples, and consult toolkits and practical guides.

The prototype of the IPF is [publicly available here](#).

2. Methodology

2.1 Defining the Criteria

To establish a robust evaluative framework, we systematically analysed approximately 30 toolkits and guidebooks on participatory approaches and methods. This review involved both explicit and implicit content analysis to extract underlying criteria used to assess or structure participatory practices. To expand this foundation, we conducted systematic coding of around 100 academic and practitioner publications that provided empirical examples of PAs from diverse global contexts. This analysis revealed a strong Global North bias in the underlying assumptions, framing, and implementation strategies.

To ensure the criteria were grounded in the realities of the SADC context, we identified context-specific gaps and supplemented our findings through a series of semi-structured expert interviews with regional practitioners, researchers, and policy-makers. These interviews enabled us to refine and validate a final set of evaluative criteria that better reflect the socio-cultural, political, and ecological realities of the SADC region.

2.2 Selecting Relevant Approaches and Methods

Building on our initial situational analysis, we identified a set of key participatory approaches and methods with demonstrated relevance to the SDGs and the SADC context. The process for identifying research methods for participatory research approaches, including citizen science, community-based participatory research (CBPR), participatory action research (PAR), and living labs, began by gathering an initial set of methods according to the specified approach. The methods were documented alongside their importance, ranking (high, medium, or low), and any additional comments. This helped identify common methods across approaches and assessed their relative importance. The data gathered was then standardised to allow for more consistent comparison, and processed by counting how often each method appeared, listing the approaches it belonged to, and calculating average importance. The methods were ranked from most to least common. Following this, additional sources were consulted, from previous literature studies and searches. These were incorporated to identify other relevant methods and compare the initial list against these broader sources. This comparison helped ensure comprehensiveness and revealed any gaps in the initial methods list. The terms and associated data were then consolidated into a unified list, and clustering techniques were used to identify relationships between common terms. A second round of clustering refined these associations, using search terms to find further connections. Once completed, the data was copied and separated into the four approaches. The initial selections were reviewed, scanned for additional relevant methods, and cross-checked against the results from the literature studies and searches.



The final results were compiled, ranked according to count and importance, discussed, and compared for commonality; leading to the determination of which methods to include, reject, or treat as special cases for an approach.

2.3 Applying the Criteria

The final phase involved applying the refined set of criteria to the selected approaches and methods. This was carried out through a systematic coding of methodological sections in existing handbooks, toolkits, and empirical studies that have implemented these approaches in Global South contexts, with particular emphasis on the SADC region. This process enabled us to identify the key strengths, limitations, and contextual fit of each approach - particularly in terms of their objectives, resource requirements, participant involvement, and scope. Moreover, this analysis allowed us to specify how different approaches and methods can be adapted to varying budgets, infrastructural realities, and local constraints, thereby informing the development of a flexible and context-sensitive engagement prototype.

3. Participatory Approaches and the Sustainable Development Goals

PAs are a perfect fit for achieving the SDGs because they ensure that progress is locally relevant, inclusive, and sustainable.



Why PAs are key to achieving the SDGs

SDG Monitoring:

Generating local data in regions where official statistics are scarce

SDG Implementation

Leveraging local knowledge to design context-sensitive solutions

SDG Needs Assessment

Capturing lived realities to ensure actions align with community priorities

Leave No-One Behind

Overcoming data inequalities by integrating unheard voices of marginalized groups

Empowerment

Enabling communities to shape decisions that affect their lives

Capacity Building

Strengthening local skills and institutions for long-term impact

3.1 How Can Participatory Approaches Support the Sustainable Development Goals?

By actively involving communities in research, decision-making, and implementation, PAs bridge data gaps, empower marginalised voices, and create interventions that truly reflect local needs. For higher education institutions in the SADC region, embracing participatory methods



offers an opportunity to play a crucial role in generating context-specific knowledge, fostering capacity building, and driving meaningful progress toward the SDGs.

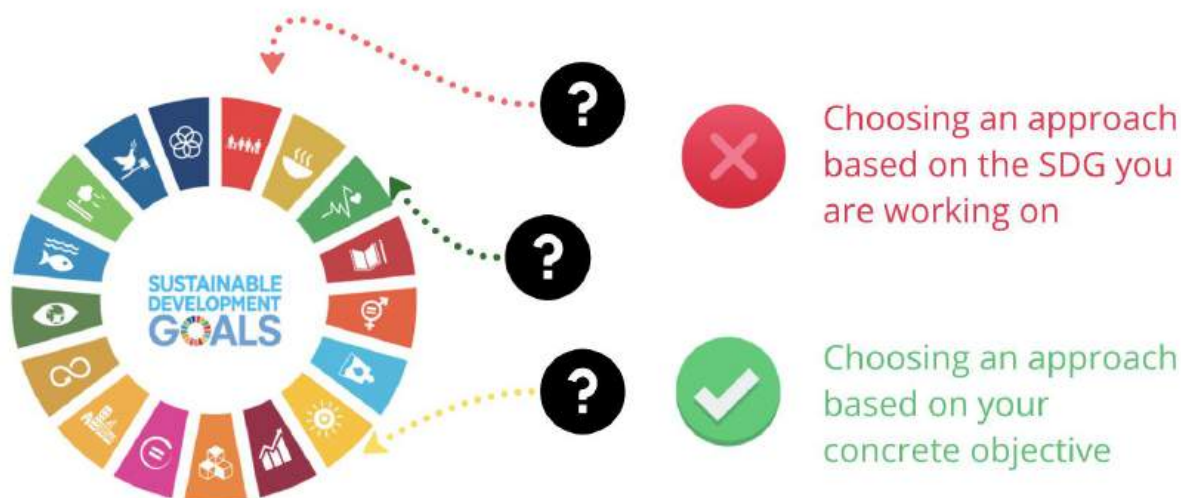
- **SDG monitoring:** in many parts of the world, particularly in data-poor regions, official statistics fail to capture the realities of local communities. PAs help fill these gaps by involving local populations in data generation and collection.
- **SDG implementation:** top-down solutions are often a poor match for local realities. PAs leverage local and indigenous knowledge, leading to solutions that are more sustainable, locally appropriate, and effective.
- **SDG needs assessment:** understanding what communities truly need requires direct engagement. By involving local populations in needs assessments, participatory methods ensure that SDG interventions reflect actual priorities.
- **Leave no-one behind:** marginalised groups are often excluded from policy discussions and data collection efforts. PAs actively include these voices, helping to dismantle systemic barriers and ensuring that SDG progress benefits all, not just the most visible populations.
- **Empowerment:** participation fosters agency, giving communities a stake in shaping processes that impact their well-being. Involving local communities in these processes enhances their ownership of SDG-related progress.
- **Capacity building:** PAs help build lasting capacity. Through collaborative learning and engagement, communities develop research, leadership, and problem-solving skills, strengthening institutions and ensuring ongoing development beyond individual projects.

3.2 The Link Between Participatory Approaches and the Sustainable Development Goals

At first glance, it might seem that the particular SDG you are working on dictates the PA or method you should use.

However, while certain methods are particularly effective in specific fields - such as participatory mapping for infrastructure planning or deliberative forums in health research - most approaches are adaptable across different SDGs.

? Which PAs for which SDGs?



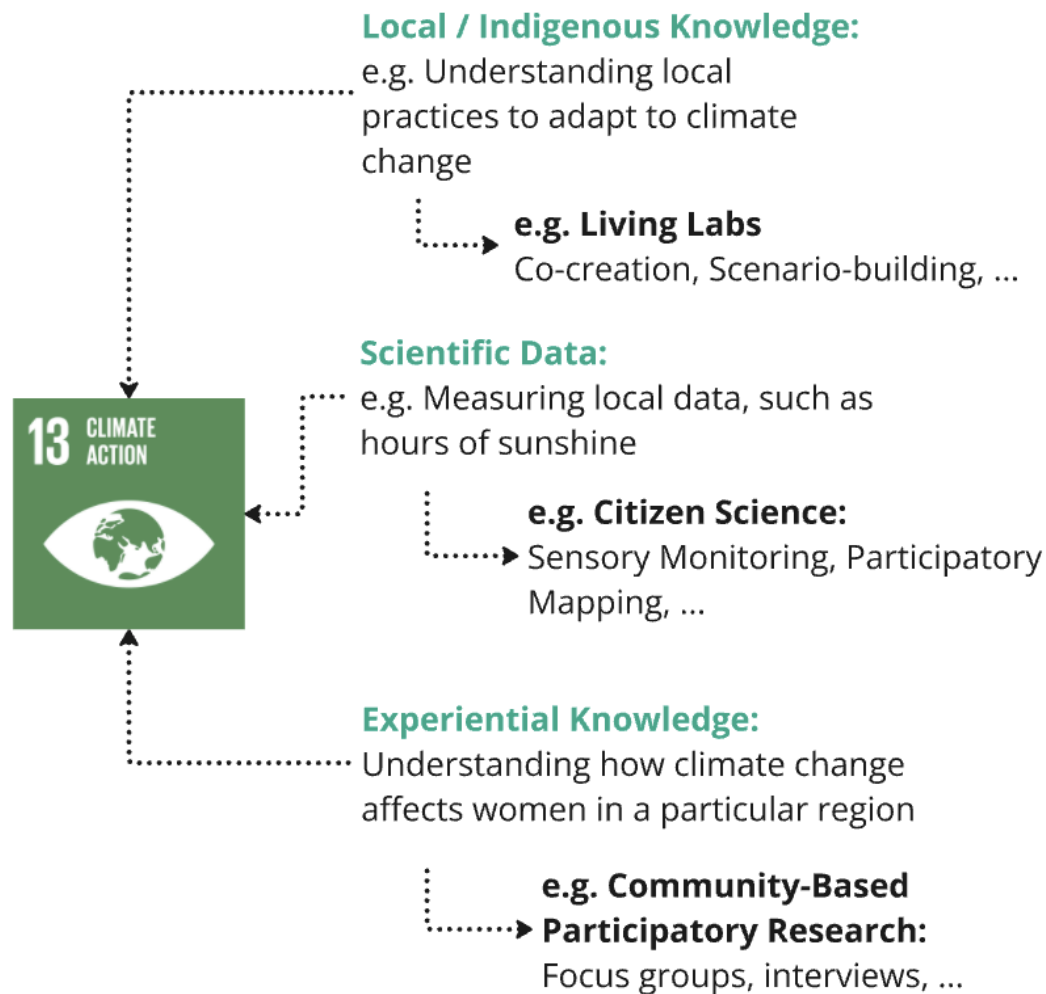
Take climate change as an example. Researching climate change does not automatically lead to a single participatory approach - it depends on the aspect being studied.

If we seek to leverage local knowledge, for example about climate adaptation strategies, we can turn to living labs to co-create insights with local and indigenous knowledge holders.

If we need scientific data on environmental conditions, citizen science offers a great opportunity, allowing communities to collect data on temperature, rainfall, or air quality.

To explore how climate change affects specific populations, such as women in rural areas, we rather rely on community-based participatory research, using methods like focus groups.

Example: Participatory approaches and Climate Change



4. Inclusive Participatory Approaches in the Southern African Development Community

PAs bear great potential for including unheard voices and 'leaving no one behind' (LNOB). Yet, they are not inclusive by default. Rather, we have to make conscious choices, taking into account local realities in the SADC region, to ensure that our use of PAs is truly inclusive.

4.1 Leave No One Behind and the Sustainable Development Goals

LNOB stands as a guiding principle of the SDGs, distinguishing this global agenda from previous development frameworks. More than a slogan, LNOB represents a cross-cutting objective, recognising the persistent patterns of exclusion and inequality that have shaped past development efforts. Seeing that development efforts often fail to reach the most vulnerable and marginalised populations, LNOB calls for targeted and context-sensitive strategies that prioritise those who are at the greatest risk of exclusion.

Additionally, the 2030 Agenda for Sustainable Development is founded on the LNOB principle, which prioritises the reduction of inequalities and the eradication of poverty, discrimination, and exclusion. Human rights frameworks, social equity theories, and development ethics serve as the theoretical foundations of LNOB. It ensures that marginalised groups are prioritised in the development and execution of policies, in accordance with the principles of participatory governance, inclusion, and justice. A shared framework for LNOB has been formalised by the United Nations, which embeds equality and non-discrimination as fundamental components of sustainable development. The author Branden Bines analysis on the limitations and opportunities of decolonising research methodologies, highlighting systemic barriers and epistemic hierarchies.

4.2 Participatory Approaches and the Promise of Inclusion

On the one hand, PAs are invaluable for the premise of LNOB, as they allow us to address some of the key drivers of exclusion. By involving those directly affected in the co-creation of knowledge and solutions, PAs can help redress data inequalities and bridge the gap between policy and lived experience. Traditional data systems often overlook marginalised groups, rendering their needs invisible in policy and practice. Likewise, interventions designed without input from marginalised groups risk reinforcing exclusion, as solutions may not meet their particular needs. By embedding co-creation, local knowledge, and community voice into the heart of development processes, PAs help make development more equitable and effective, granting visibility to previously invisible groups.



On the other hand, however, it is vital to recognise that PAs are not automatically inclusive. Without critical reflection, PAs can replicate existing hierarchies - privileging the voices of the more privileged groups while sidelining those who are hardest to reach. The challenge of LNOB requires us to reflect critically on how participation is structured, whose voices are heard, and whose remain absent.

4.3 Power Dynamics and Participatory Approaches in the Post Colonial Context

The post-colonial power dynamics in participatory research approaches in Southern Africa are influenced by historical inequalities, governance structures, socio-economic disparities, and the distribution of authority between researchers and communities that persists:

- Traditional leadership vs. democratic governance: in numerous rural regions, traditional leadership structures continue to exert a substantial influence, occasionally in conflict with democratic governance models that were implemented after independence. This tension has an impact on participatory development initiatives, as communities may choose to defer to traditional authorities rather than participate directly in decision-making.
- Resource allocation and external influence: numerous participatory research initiatives depend on international funding, frequently from former colonial powers. This can result in the formation of research agendas that are influenced by external priorities rather than local requirements, which can exacerbate dependency and restrict the development of genuine research.
- Legal and policy frameworks: numerous participatory research initiatives depend on international funding, frequently from former colonial powers. This can result in the formation of research agendas that are influenced by external priorities rather than local requirements, which can exacerbate dependency and restrict the development of genuine research.
- Knowledge production and epistemic hierarchies: participatory governance is frequently affected by the structures of the colonial era, which are frequently reflected in post-colonial legal systems. For instance, South Africa's constitutional framework prioritises transformative constitutionalism; however, challenges persist in guaranteeing equitable participation in development processes.

These dynamics have a substantial impact on engagement processes by influencing the authenticity of collaborative efforts, trust-building, and participation levels. Participatory Action Research (PAR) has been recognised as a decolonial methodology that aims to empower communities by incorporating their perspectives into the research process. For instance, in



South Africa, PAR has been implemented to mitigate the aftereffects of apartheid by engaging marginalised communities in the formulation of research objectives.

4.4 The Risk of Exclusion when Applying Participatory Approaches in the Southern African Development Community Region

The SADC region presents distinct challenges for implementing truly inclusive participatory approaches:

- Socioeconomic disparities: extreme wealth inequality within SADC countries means that the most marginalised often lack the resources to participate in development processes.
- Rural-urban divides: remote rural communities across countries like Malawi, Zambia, and Mozambique face significant barriers to inclusion in participatory processes.
- Language diversity: with over 100 languages spoken across the region, linguistic exclusion remains a persistent challenge in participatory approaches.
- Traditional governance structures: local cultural hierarchies and traditional leadership systems can both facilitate and hinder inclusive participation, depending on how they are engaged.
- Post-colonial legacy: historical patterns of exclusion continue to shape who has access to decision-making spaces in many SADC nations.

These challenges must be taken into account when choosing and designing your approach. The wrong choices can lead to exclusion, for example through:

Methodological Exclusion

- Digital methods: digital divides exclude those without internet access, digital literacy, or necessary devices - a significant concern in SADC where internet penetration ranges from just 14% in Madagascar to 68% in South Africa.
- Focus groups: may not be suitable for sensitive topics (e.g., gender-based violence, political oppression), leading to self-censorship, particularly in contexts where traditional norms discourage open discussion.
- Text-based or literacy-dependent methods: exclude those with limited literacy skills, particularly in multilingual contexts common throughout the SADC region.

Power Dynamics Within Communities

- Gender norms: may limit women's ability to speak freely in mixed-gender settings.
- Age hierarchies: may silence youth perspectives in favour of elders.

- Local power structures: may determine whose voice carries weight.
- Economic status: within communities often shapes who feels entitled to participate.

Researcher-Participant Dynamics

- Role of the researcher: as an outsider creates power imbalances that can influence participation.
- Academic or technical language: creates barriers to meaningful engagement.
- Extractive research practices: may alienate communities with histories of being "researched but not benefiting".

4.5 Strategies for Genuine Inclusion in Southern African Development Community Contexts

The primary objective of decolonising methodologies, from an inclusionary perspective, in Southern Africa is to empower indigenous knowledge systems and challenge Eurocentric research paradigms. To address these challenges, several context-specific strategies have proven effective in the SADC region:

Methodological Innovation

- Hybrid methods: combining digital and non-digital tools to reach diverse populations - such as Zimbabwe's successful radio-plus-mobile feedback systems.
- Safe and inclusive facilitation: ensuring confidentiality, trust, and appropriate group composition, including same-gender facilitators for sensitive discussions.
- Alternative and creative methods: visual methods (e.g., participatory mapping, photovoice), oral storytelling, and community radio have proven effective in low-literacy contexts across Botswana, Namibia, and Tanzania.
- Indigenous knowledge systems: integrating traditional knowledge-sharing practices that resonate with local cultural contexts.
- Autoethnography and reflexivity: scholars employ personal narratives and self-reflection to challenge the prevailing academic perspectives. In order to deconstruct colonial influences in education, this method has been implemented in South African universities.

Structural Approaches

- Capacity-building efforts: supporting digital and literacy skills to expand participation, including targeted training for women and marginalised groups.

- Reflexivity in participatory design: ongoing assessment to identify and mitigate exclusion risks through community feedback mechanisms.
- Long-term engagement: moving beyond one-off consultations to build trusted relationships that encourage participation from hesitant groups.
- Resource allocation: providing stipends, transportation, childcare, and appropriate timing to enable participation from those with economic constraints.

Policy and Governance Dimensions

- Legislative frameworks: several SADC countries have enacted policies mandating inclusive consultation, though implementation varies widely.
- Institutional reforms: creating dedicated mechanisms for marginalised group representation in formal decision-making structures.
- Accountability mechanisms: establishing community-led monitoring systems to ensure participatory processes lead to tangible outcomes.

The path to ensuring no one is left behind in the SADC region requires a fundamental rethinking of how participation is conceptualised and practised. Rather than viewing participation as a technical exercise, development practitioners must approach it as a political and ethical endeavour that confronts existing power structures. By combining methodological innovation with structural reforms and continuous critical reflection, participatory approaches can fulfil their promise of making the invisible visible and ensuring development truly benefits those most at risk of being left behind.

4.6 Ethics, Intellectual Property, and Data Considerations for Inclusive Research in the Southern African Development Community

In the context of inclusive participatory research within SADC, addressing ethical considerations, data ownership, and intellectual property (IP) is not merely a procedural requirement but a foundational element of trust-building and equity among diverse stakeholders. The socio-political and cultural diversity of the SADC region demands that participatory research methods be rooted in ethical integrity, transparency, and mutual respect, particularly when engaging communities that have historically been marginalised or underrepresented in academic research.

4.6.1 Project Registration and Ethical Clearance

In line with institutional best practices researchers should ensure that they obtain ethical clearance from their appropriate institutional ethics committees, especially for projects employing participatory approaches that involve direct engagement with communities. These



ethics approvals are critical in safeguarding the rights and dignity of participants and in ensuring that methodologies are not only scientifically sound but also culturally and contextually appropriate.

Furthermore, the inclusion of non-skilled or novice researchers, often students or community-based collaborators, requires specific authorisation to confirm that adequate supervision and support mechanisms are in place. This step is particularly important in participatory models where the boundaries between researcher and participant are fluid, and where knowledge is co-produced in real-time. This helps to ensure that all researchers, regardless of skill level, are prepared and ethically guided, which reinforces both the rigour and inclusivity of the process.

4.6.2 Intellectual Property, Data Ownership, and Broader Ethical Dimensions

Researchers should remember that clarifying data ownership and intellectual property from the outset is essential to promoting fairness and avoiding exploitation, particularly in cross-border and multi-institutional collaborations common in the SADC region. Data ownership should be defined collaboratively, taking into account the rights of the community partners who contribute local knowledge and lived experience. Institutional policies and funding agreements should guide access, use, and control of data, while remaining flexible to context-specific norms around communal knowledge and traditional intellectual resources.

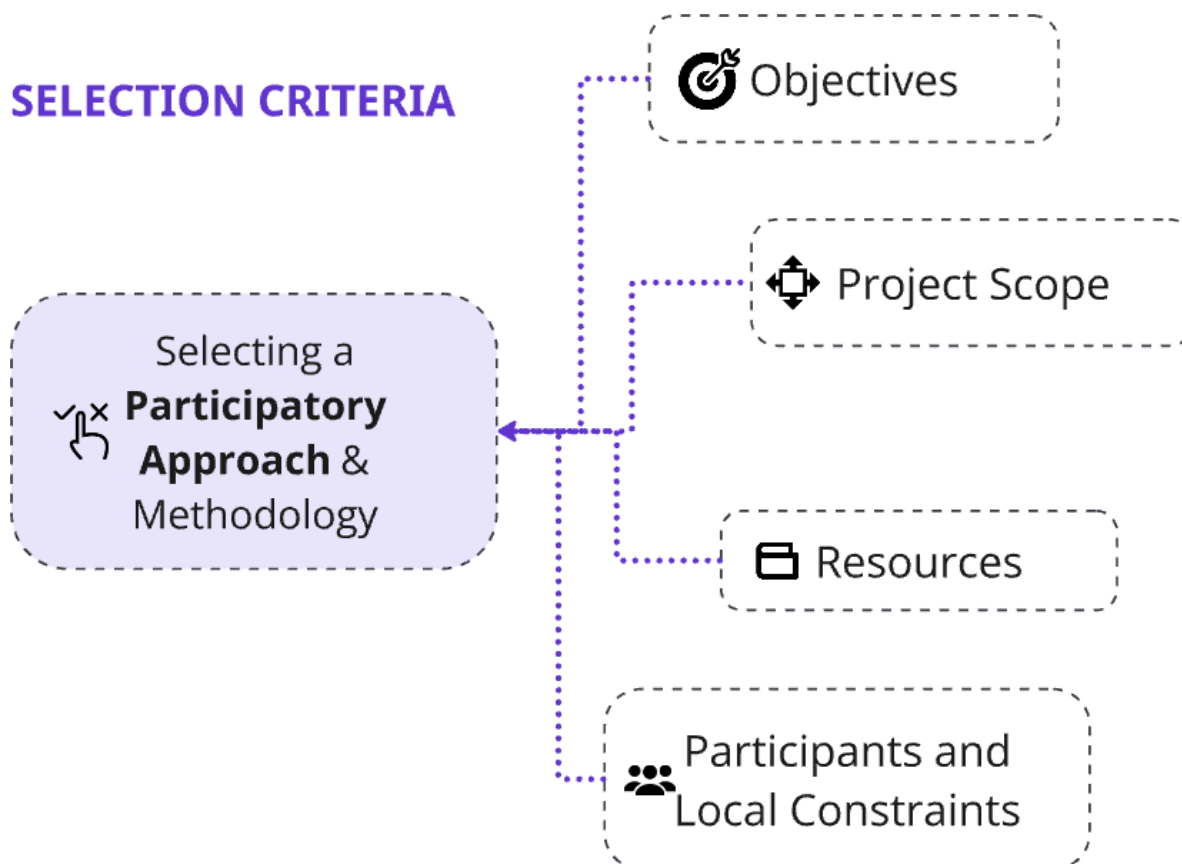
Intellectual property considerations extend beyond academic outputs to include tools, frameworks, and innovations co-developed during the research process. It is important that all contributors, academic and non-academic, receive appropriate recognition and benefit-sharing opportunities. This aligns with the principles of community ownership and local empowerment that underpin inclusive participatory approaches.

Other key ethical dimensions include maintaining confidentiality, ensuring responsible authorship, preventing conflicts of interest, and promoting open dialogue on issues of power and representation. Providing clear policy frameworks and capacity-building opportunities in these areas not only protects participants and researchers alike, but also strengthens collaboration and enhances the overall credibility of the research.

In sum, ethical practice in inclusive participatory research is an important consideration for researchers who operate in the SADC context. Considerations in this regard must be robust, responsive, and rooted in mutual respect. Addressing these issues proactively is central to ensuring that the participatory research processes and outputs are not only ethically compliant, but also socially just and regionally relevant.

5. Selection Criteria: Choosing the Most Suitable Participatory Approach

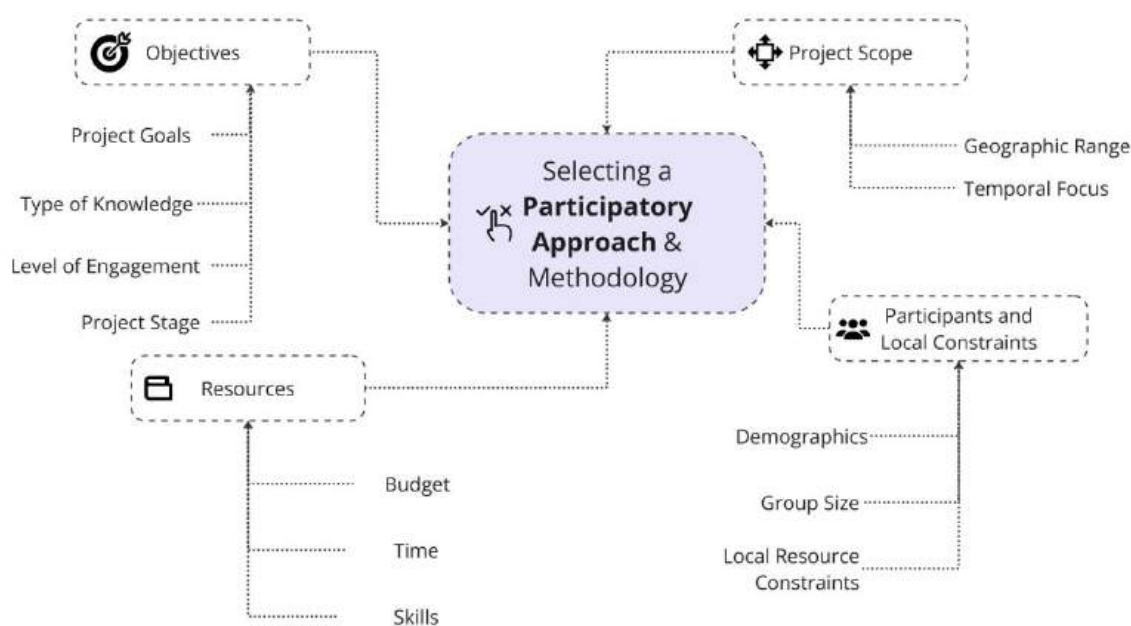
Choosing the right combination of PA and method requires asking the right questions about your objectives, your resources, your project's scope and the local constraints.



5.1 Which Criteria Shape Your Choice of Approaches and Methods?

No two PAs are the same. Each approach – as well as each concrete method applied with the approach – comes with different strengths, limitations, and affordances.

They allow for different objectives, require different resources, and can cater to different participant groups. Choosing the right combination of approach and method requires asking the right questions: What are the objectives of my project? What are my resources? What is my project's scope? And what do I know about my participants and the local realities?



5.2 Objectives

To select the most appropriate approach and methods for our project, we must begin by clearly defining our objectives. First, we need to clarify our project goals: Are we working on needs assessment, knowledge gathering and sharing, designing solutions, capacity building, or progress monitoring? Different approaches serve different purposes. For example, if the goal is a needs assessment, community-based participatory research can be highly effective, as it involves stakeholders in identifying and analysing their own needs. When the goal is testing and designing specific solutions, living labs offer a hands-on environment where users co-design and test innovations in real-life settings.

Moreover, we have to determine the type of knowledge we seek to generate. Are we looking for scientific data, experiential or Indigenous knowledge, behavioural insights, institutional knowledge, or subject expertise? Different approaches offer distinct strengths here. For example, citizen science is well-suited for gathering scientific data at scale, while PAR excels in surfacing experiential and indigenous knowledge by placing communities at the centre of the research process.

Furthermore, we must reflect on the level of engagement we want to enable, ranging from simply informing stakeholders to deeper forms of participation like consultation, collaboration, co-creation, or full empowerment. Lastly, it is important to assess the project stage, whether

the project is in initiation, planning and design, implementation, evaluation, maintenance, or progress monitoring.

These four categories help guide the selection of tools and processes that align with our strategic priorities and values. Oftentimes, approaches offer flexible frameworks that can be tailored to meet these varying needs across stages and engagement levels, depending on the concrete methods we choose.

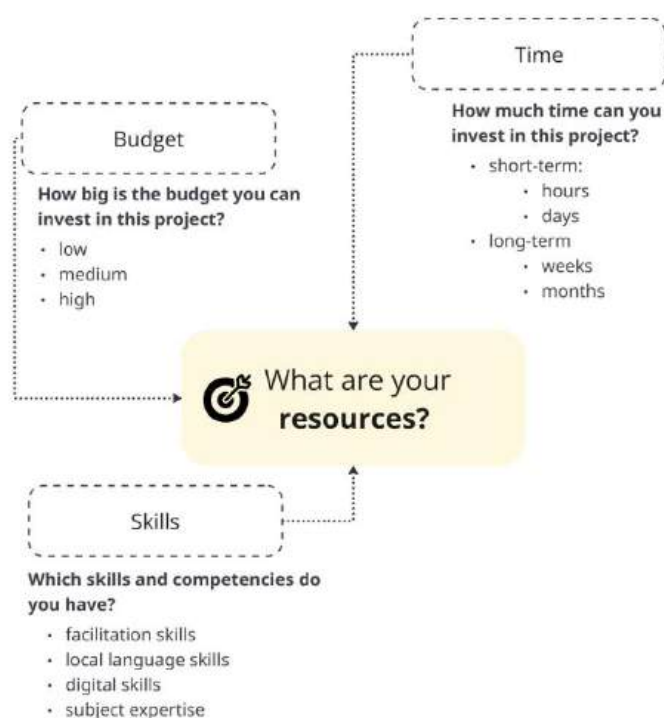


5.3 Resources

In addition to clarifying objectives, we must reflect on the resources available to us - particularly our budget, time, and skills - as these will significantly shape which approaches and methods are feasible.

While many participatory approaches are adaptable to different budget levels, there are still important differences in what each demands, especially when it comes to choosing concrete methods. Some methods rely on minimal resources, while others require substantial financial investment for tools, facilitation, or infrastructure. We must also be clear about the amount of time we are willing and able to invest. While some activities can be conducted in just a few hours or days, others require long-term engagement and iterative cycles over weeks or months.

Finally, we need an honest assessment of our own skills. Certain approaches demand strong facilitation skills, advanced digital competencies, or a solid foundation of subject expertise. In some contexts, fluency in the local language is also essential to ensure meaningful participation. Aligning our ambitions with our resources is key to choosing an approach that is realistic and sustainable.



5.4 Participants and Local Constraints

In addition to objectives and resources, we must also consider the participants we aim to engage with. One key factor is the group size. While some approaches, like living labs, typically require larger, diverse groups to function effectively, others work best with smaller, more focused groups. This becomes especially important when selecting concrete methods.

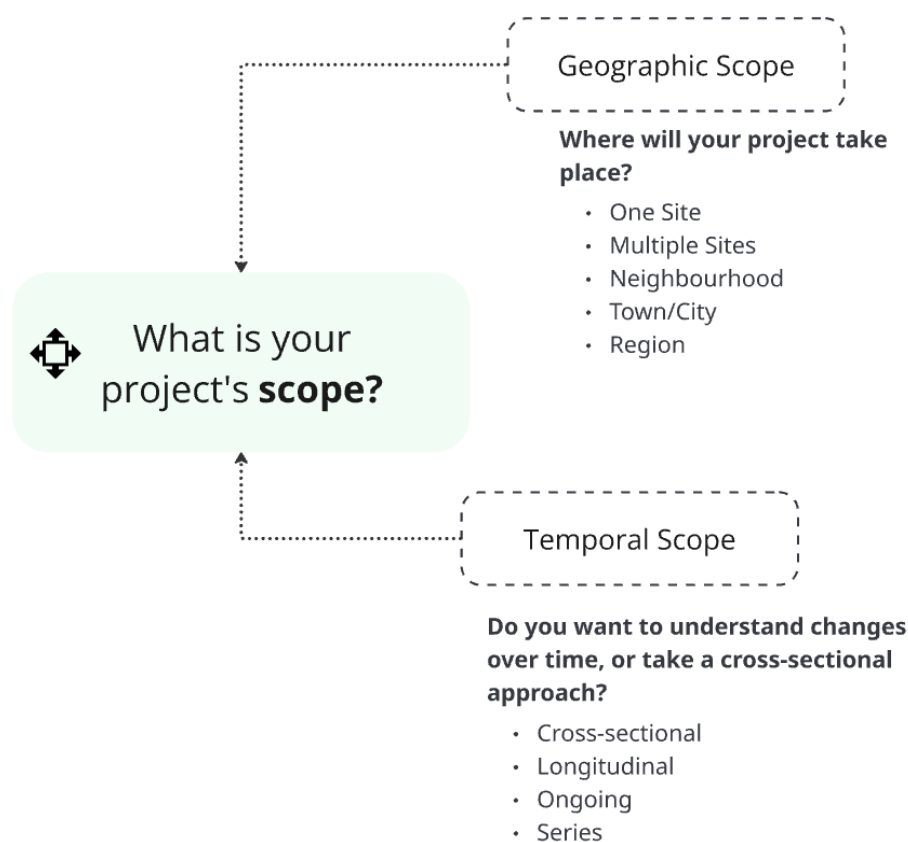
Beyond the number of participants, we must take into account their backgrounds and possible context-specific constraints. These may include challenges such as literacy levels, digital connectivity and access, electricity availability, public space limitations, mobility constraints, or gaps in digital skills. For instance, methods that rely heavily on mobile apps or online platforms may not be feasible in areas with limited internet access or low levels of digital literacy. Similarly, if literacy rates are low, methods and approaches must be adapted accordingly (read more). Understanding these local realities helps ensure that our methods are inclusive and accessible.



5.5 Project Scope

Lastly, we must carefully consider the scope of our project - both in terms of geography and time. The regional scope determines whether we are focusing on a single site, multiple sites, or a broader area such as a neighbourhood, town/city, or region. This has important implications. Some approaches are well-suited for localised engagement, while others are better equipped to operate across multiple or dispersed contexts.

Equally important is the temporal scope of the project. This refers not just to how much time we have available, but to the structure of our engagement over time. Is the project designed as a cross-sectional snapshot, a longitudinal study with repeated engagements, an ongoing process without a defined endpoint, or a series of engagements planned over a specific timeline? Understanding this helps us align expectations, design appropriate methods, and plan for the depth and continuity of participation we are aiming for.

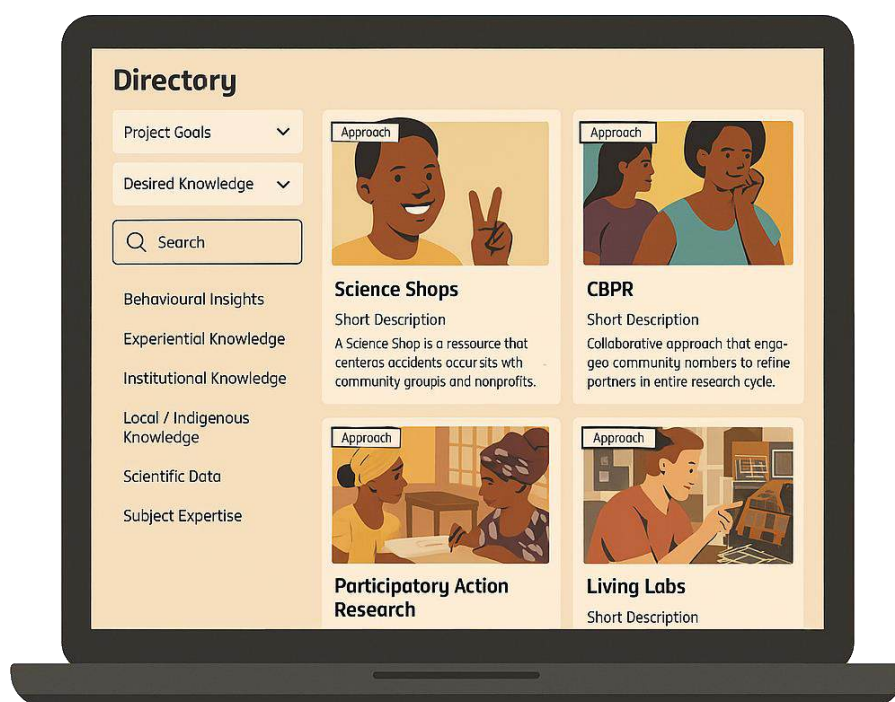


6. The Approaches Directory

At the core of the IPF, users find our [dynamic directory](#). Most centrally, the IPF presents a curated dynamic directory of more than 25 participatory approaches and methods. Users can explore the directory using flexible filters - based on goals, knowledge types, resource availability, and participant needs - to find approaches that suit their specific context. For each method and approach, users find in-depth information, reflections concerning the key criteria, real-world examples, as well as links to practical toolkits and handbooks.

In the directory, users can:

- Filter the approaches based on their needs and context.
- Click on an approach to learn more, explore examples and find guidance.
- Find the most suitable method, per approach, for their project.
- Learn about the pros and cons of different methods and explore examples from the field.



To browse the entire directory, [please access it here](#).



In the sections to follow, we showcase the key information about five central approaches from the IPF, these are:

- Citizen Science
- Participatory Action Research
- Living Labs
- Science Shops
- Community-Based Participatory Research

For each approach, you find in-depth reflections about the objectives, resources, participants, local constraints, and project scope for which the approach is suitable. In our directory, you furthermore find real-life examples of the approach in pursuit of different SDGs, as well as external toolkits and handbooks.

In Appendix A to this report, you will also find the same information for all 20 concrete methods that are featured in the IPF:

- Focus Groups
- Interviews
- Workshops
- Surveys
- World Café
- Participatory Rural Appraisal
- Crowdsourcing
- Co-Creation
- Prototyping
- Observations
- Citizens' Jury
- Participatory Epidemiology
- Storytelling
- Sampling and Specimen Collection
- Participatory Sensing
- Participatory Assessment, Monitoring and Evaluation
- Participatory Mapping and GIS
- Scenario Planning Workshop
- Walkthroughs
- Photovoice

7. Citizen Science

Citizen science is a participatory approach that actively engages the public in scientific research by promoting collaborations between scientists, local communities, and institutions.

Citizen science redefines traditional research paradigms by improving collaboration between experts and non-experts and redistributing power in the scientific process. This approach engages a broad range of participants, including students, educators, community members, activists, professionals from non-scientific fields, policymakers, minorities, vulnerable groups, and youth, in co-designing, collecting, analysing, and interpreting data within real-world contexts. Integrating diverse perspectives and knowledge systems improves collective learning, expands research capacities, and addresses complex scientific and societal challenges. Citizen science empowers communities to contribute to scientific research meaningfully, ensuring that research outcomes reflect shared priorities and local needs. This approach often applies digital tools and participatory frameworks for data gathering, monitoring and analysis. It also fosters community-driven innovation and supports informed decision-making on environmental, health, and societal challenges.

Citizen science is highly suitable for collecting or analysing data across large spatial scales and/or over extended periods. It is also applicable where traditional research methods face logistical or resource limitations. One of the main reasons to apply the citizen science approach is that it strengthens teamwork by engaging diverse groups of people in collaborative fieldwork, data gathering, and analysis, from localised, community-driven projects to continent-wide initiatives. Teamwork makes the dream work.

7.1 Is this the Right Approach for You?

Find out whether the approach matches your objectives, resources, participants, and scope.

7.1.1 Does the Approach Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Progress Monitoring**

Secondary fit: **Needs Assessment, Design Solutions**

Citizen science is a broad approach that can be used effectively for a range of project goals, particularly those that would benefit from large-scale data collection, community engagement, and participatory research. It is especially suited for gathering knowledge in areas such as biodiversity, ecology, environmental monitoring, public health (e.g., participatory disease tracking), cultural heritage preservation, and linguistics (e.g., transcribing historical texts).



Participants can collect large amounts of data across large geographic areas that would be impractical for professional researchers alone. For example, projects like eBird and iNaturalist rely on citizen scientists to collect data on bird populations and biodiversity, respectively. These platforms not only collect data but also engage the public in scientific research. Another example is the Zooniverse platform, which encourages and invites global volunteers to participate in data analysis tasks, such as transcribing historical documents or classifying galaxies.

Citizen science projects can significantly contribute to scientific knowledge by using the power of the crowd. The Cornell Lab of Ornithology's Citizen Science Toolkit presents guidelines for designing projects that collect data through public participation.

Citizen science also facilitates knowledge sharing between scientists and the public by involving non-experts in the research process. This approach can fill the gap between scientific communities and the general public. This not only helps researchers, but also educates participants about scientific approaches, tools, and results. For example, citizen science projects often offer interactive dashboards and platforms, including training programs and visualizations that help and educate participants, mostly non-experts, to understand scientific processes, findings, and data quality standards.

Citizen science is also very effective in progress monitoring. Projects like monitoring climate change impacts or tracking invasive species that require long-term data collection can benefit from the sustained involvement of citizen scientists. For example, the Audubon Society has organised the “Christmas Bird Count” for more than a century and provides valuable data on bird population trends. Also, the importance of the citizen science approach can be seen in its application to SDG monitoring through the use of citizen science data. In South Africa, for example, citizens participated in the Freshwater Watch project (which directly supports SDG 6 (Clean Water and Sanitation)), which supports the monitoring of freshwater ecosystems. Participants help in data gathering by collecting water samples from rivers, lakes, and wetlands and giving them to dedicated institutions to test for nutrient levels and turbidity. These data are shared globally to understand freshwater ecosystems better, inform local water management strategies, and raise awareness of the importance of freshwater conservation.

Typically, needs assessment needs a deep understanding of local contexts and specific community requirements, which may not always align with the broader, more generalised data collection goals of many citizen science projects. Although citizen science can contribute to needs assessment, it is not its primary strength. In some cases, to gather community-specific data, citizen science can be adapted that informs needs assessment. For example, in



participatory mapping projects, local communities can be engaged in identifying and documenting their needs and priorities.

Citizen science is less likely to be used to design solutions, which often requires specialised knowledge and expertise. However, in some contexts, particularly those involving CBPR, citizen scientists can help design solutions that address local problems. For example, the University of Washington's Community-Based Participatory Research Toolkit guides how to engage community members in all stages of the research process, including solution design.

Ownership in citizen science projects is contextual. If a project is designed to empower community ownership, it can be highly effective. For example, the "Our Voice" initiative helps communities to take ownership of their health and well-being by contributing to data collection and decision-making processes. However, ownership remains with the scientific institutions or researchers leading the project in many citizen science projects.

The implementation and maintenance phases of a project are the phases in which citizen science is most often applied. It is during these phases that public engagement and relevant data collection take place.

On the other hand, citizen science isn't often used during a project's initiation, planning & design, and evaluation phases, unless the project is designed as a participatory initiative from the start. In such cases, involving the public from the outset can help ensure that the project is aligned with the interests and needs of the community. For example, the Participatory Action Research (PAR) approach emphasises the importance of involving community members in the initiation phase to help define research questions and objectives. The European Citizen Science Association's (ECSA) Citizen Science Toolkit provides guidelines for involving stakeholders in the initiation phase to ensure that the project is relevant and inclusive.

Desired Knowledge:

Primary fit: **Experiential Knowledge, Local / Indigenous Knowledge, Scientific Data**

Secondary fit: **Institutional Knowledge, Behavioural Insights**

Citizen science is known for gathering data through public participation that is translated to scientific data, contributing to research and decision-making processes. Types of knowledge include: 1) Local knowledge, including traditional and Indigenous understandings, is especially useful in ecological studies (e.g., Indigenous tracking of environmental changes) and offers long-term, culturally embedded insights; 2) Experience-based knowledge comes into play when participants share observations based on their daily experiences and interactions; 3) The third type of knowledge is contextualised knowledge, which refers to the lived experiences of those directly affected by environmental or social issues, such as the Fukushima disaster; 4)



The fourth type is knowledge about public concerns that reflect community priorities and values. However, subject expertise is more on the organiser side. Institutional knowledge is less likely because it is more about organisational know-how. Behavioural insights could be a byproduct, but they are not the primary focus.

Desired Level of Engagement:

Primary fit: **Collaborate, Involve, Co- Create**

The level of public engagement in citizen science projects, based on the project's goals and design, can be broad. More application levels of engagement are available for involvement, collaboration, and co-creation and are less common for informing, consulting, and empowering. At the level of engagement involved, citizens actively participate and show their essential role in the research process, which typically happens through data collection or analysis. To better understand the level of public engagement in citizen science projects, Haklay offers a four-level framework to distinguish citizen science projects based on the depth and type of engagement. The first level is Crowdsourcing, in which citizen participation is limited to data collecting without understanding scientific goals. Its main use case is large-scale data gathering, such as reporting bird sightings, carrying sensors, or submitting photos of plants. The second level is distributed intelligence, in which citizens participate through data analysis or pattern interpretation that typically requires some training. In projects like "Galaxy Zoo," volunteers are invited to engage in tasks that contribute directly to scientific research. The third level of public engagement, called community or participatory science, involves participants in defining the problem, framing or contextualising scientific questions, and also collecting data. However, scientists and experts lead the process, such as community-based water monitoring projects. It is often seen in CBPR projects, where knowledge and solutions are co-created. Moreover, the final type of public participation is called collaborative science, in which citizens work alongside scientists and researchers in co-creating and co-designing a research agenda, tools, data gathering, data analysis, and result dissemination. This level of citizen engagement is mainly applied in citizen science projects to achieve science democratisation and community empowerment through mutual learning like the "Our Voice" project.

Project Stage:

Primary fit: **Implementation, Maintenance**

Secondary fit: **Initiation, Planning & Design**

Citizen science is most commonly applied in implementation and maintenance. It can sometimes be part of evaluation, depending on the project. Initiation planning and design are less common unless the project is defined as a participatory project from the start.

7.1.2 Does the Approach Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Secondary fit: **High**

Regarding the budget needed for applying the citizen science approach, it is important to distinguish between material and operational costs. On the one hand, some citizen science projects are cost-effective if they use participants' devices (e.g., smartphones or basic sensors) and crowdsource labour for data collection, such as biodiversity monitoring apps (e.g., iNaturalist or community weather stations). These projects require mostly low material investment, especially when using freely available platforms or open-source tools. However, project partners or institutions might need a higher budget for some citizen science projects requiring specialised devices (e.g., air quality sensors), data platforms, or training materials. There are also operational costs, including personnel (project coordination, training, and community management), recruitment and retention of participants, communication infrastructure (e.g., newsletters, websites, helpdesks), data management and quality assurance, legal and ethical compliance, insurance, and administrative overheads which affect on the budget required for citizen science projects. Therefore, while material costs may range from low to moderate, the cost of running a citizen science project must account for these critical operational components.

Available: Time:

Primary fit: **Long-Term, Months, Weeks**

Secondary fit: **Days, Hours**

Citizen science projects can vary broadly in terms of time commitment. Some projects may require just a few minutes of participants' time, while others might need more regular participation. For example, some projects might ask for a minimum of two observations per month, with each observation taking about 2 hours. So, citizen science projects can be short-term (a few days/weeks) like a bioblitz, or long-term (months/years) for monitoring.

Available Skills (Researcher):

Primary fit: **Digital Skills, Facilitation Skills, Local Language**

Secondary fit: **Subject Expertise**

In citizen science projects, participants are often non-experts, so the subject expertise required of their side is generally low since these projects are designed to be accessible to the public. However, high-level skills are needed within the project team, such as scientific expertise, facilitation, digital skills, and local language knowledge, to ensure effective community engagement and coordination and maintain the quality of the project.

7.1.3 Does the Approach Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Extra Large (100+), Large (50-100)**

Secondary fit: **Medium (20-50)**

Citizen science projects include a broad spectrum of project types, ranging from medium-scale (20-50), often engaging regional populations. These projects can include broader environmental or social issues such as watershed health, air quality monitoring, or regional biodiversity tracking to large (50-100) and also extra large (100+) such as those run by platforms like iNaturalist, Zooniverse, or eBird which mobilise thousands or even millions of participants across vast geographic regions. These types of projects are important tools for generating extensive datasets that would be infeasible for traditional research teams to collect alone. Overall, the group size for citizen science projects should be determined by the project's objectives, methodology, and required data volume rather than viewed as a fixed requirement.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Literacy Constraints, Digital Skills Constraints**

Secondary fit: **Electricity Constraints**

The critical resources for participants in citizen science are literacy, digital skills, and online connectivity. However, the other resources depend more on context; for example, public space is used for community meetings or field activities, and electricity is critical for tech-dependent projects.

7.1.4 Does the Approach Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, Region**

Secondary fit: **Neighbourhood**

Geographic scope: citizen science can be both local and global, with its strength lying in scalability. Citizen science projects are implemented in local neighbourhoods (such as monitoring air quality in a district or biodiversity in a local park or town) and multiple sites or regions, allowing for comparative and wide-scale analyses.

Temporal Scope:

Primary fit: **Longitudinal, Ongoing**

Citizen science often involves longitudinal or ongoing data collection, like monitoring climate change or species populations over the years. Cross-sectional is less common in this approach.



7.1.5 Related Methods

Participatory Sensing, Storytelling, Participatory Epidemiology, Crowdsourcing, Participatory Assessment, Monitoring and Evaluation, Participatory Mapping and GIS, Photovoice, Sampling and Specimen Collection.

8. Participatory Action Research

Participatory Action Research (PAR) is a bottom-up approach of involving local communities in the research for a well-rounded understanding of ground realities. It inculcates a sense of empowerment in the locals to work on finding solutions for their distinct issues.

PAR is an intersectional approach that is built upon the collaboration of researchers and local people to address complex and context-specific challenges. The solutions are designed with a strategic integration of the local stakeholders and experts for a holistic understanding of the problem at hand. The aim is to bridge the gap between abstract concepts and everyday realities for a profound understanding of the issue at hand.

8.1 Is this the Right Approach for You?

Find out whether the approach matches your objectives, resources, participants, and scope.

8.1.1 Does the Approach Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Needs Assessment, Ownership, Design Solutions, Capacity Building**

Secondary fit: **Capacity Building, Knowledge Sharing, Progress Monitoring**

PAR is widely used to assess the situation of a problem in a local context and decide what kinds of solutions can be tailored or created accordingly. The goal is also to gather and share knowledge. The locals are engaged to understand from their experience. This, combined with theoretical knowledge, creates new knowledge which is then shared within and outside the community. A salient aim of conducting PAR is fostering ownership as well. When the community members are actively involved in the research, they develop a sense of ownership and responsibility which is vital for the long-term viability of the research outcomes in that community.

Desired Knowledge:

Primary fit: **Experiential Knowledge, Behavioural Insights, Local / Indigenous Knowledge**

Secondary fit: **Subject Expertise, Institutional Knowledge**

The type of knowledge gained through PAR depends on the specific focus and design of the project. However, PAR is particularly well-suited for generating experiential knowledge and local or indigenous knowledge. In many PAR case studies - for example, those involving farmers - participants share rich, context-specific knowledge about agricultural practices rooted in lived experience and community traditions. This kind of knowledge is often highly personal and grounded in everyday realities, with participants contributing not only as informants but as co-researchers actively shaping the research process.



PAR values the legitimacy of community-held knowledge and seeks to surface insights that might otherwise be overlooked in more extractive research approaches. By engaging participants in cycles of reflection and action, it allows for deeper understanding of local dynamics, needs, and solutions. The result is knowledge that is both meaningful to those involved and highly relevant to the context in which it was produced.

Desired Level of Engagement:

Primary fit: **Collaborate, Empower, Involve**

Secondary fit: **Co- Create**

PAR allows for high levels of engagement, including involvement, collaboration, and empowerment. The method involves participants from the start of the project, learning about their insights and experience about the problem at hand. The whole research process is carried out in collaboration. This results in the empowerment of the participants as they learn more about the gravity of the problems, and the consequences of not addressing them, and are enabled to become part of the solution. This inculcates a sense of responsibility and empowerment in them.

Project Stage:

Primary fit: **Implementation, Planning & Design**

Secondary fit: **Implementation, Initiation, Progress Monitoring, Evaluation**

This method is often used during planning and design, and implementation stages. Members of the community are involved in assessing the situation and planning for a solution to address the problem. Their input is incorporated in the designing stage and later used for implementation.

8.1.2 Does the Approach Fit With Your Resources?

Available Budget:

Primary fit: **High, Medium**

Secondary fit: **Low**

The budget needed for PAR is dependent on the scope, size and participants in the project. However, PAR projects often require a medium to high budget due to their collaborative and iterative nature.

Key cost factors include compensating community partners and funding meeting facilitation and materials for workshops and discussions. Additionally, investing in training and capacity building for both community members and researchers is essential. While these factors can elevate the overall budget, it's important to note that PAR projects can be adapted to operate within more modest budgets through creative partnerships and leveraging existing community resources.

Available Time:

Primary fit: **Weeks, Months, Long-Term**

Secondary fit: **Short-Term, Weeks**

PAR requires a long-term time commitment, often extending over weeks to months, or even longer. While some initial activities might occur over days, the iterative nature of PAR - emphasising cycles of action and reflection - means it is generally not suited for very short-term engagements.

Available Skills (Researcher):

Primary fit: **Local Language, Facilitation Skills**

Secondary fit: **Subject Expertise**

Given the collaborative nature and local context of this research method, the researchers need to have a knowledge of the local language and possess facilitation skills for a smooth experience for both the community and the researchers. Expertise in the subject is also helpful in order to integrate theoretical knowledge into the experiential insights of the participants.

8.1.3 Does the Approach Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20), Medium (20-50)**

Secondary fit: **Micro (1-5)**

The group size is usually small or medium as it requires deep involvement at each step and a larger group would require more time and budget. The group size recommended for this approach can be managed with a hands-on method and deep involvement. Micro groups can work in very focused contexts, but scaling beyond 50 participants becomes challenging, as meaningful participation and facilitation become harder to sustain.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Electricity Constraints, Digital Connectivity & Access Constraints, Mobility Constraints, Digital Skills Constraints**

Secondary fit: **Public Space Constraints**

PAR is highly adaptable and can be implemented even under significant constraints. It does not rely on digital tools or high-tech infrastructure, making it suitable in contexts with limited connectivity, digital skills, or electricity. PAR can be conducted using low-tech, participatory methods such as storytelling, drawing, mapping, or group discussions. It is also inclusive of participants with low literacy, as it emphasises oral and visual communication.

However, the extent to which PAR can adapt to these constraints depends on the specific methods chosen – some may require literacy, digital access, or specialised skills, while others are designed to be fully inclusive and accessible.

8.1.4 Does the Approach Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, One Site, Neighbourhood, Town/City**

Secondary fit: **Region**

The geographic scope of the projects relating to PAR are also dependent on the participants and the resources available.

Local communities: most of the projects are one-site, and are aimed at local communities, and its focus may be on specific communities or neighbourhoods. These projects normally heavily focus on community participation, and seem to require building good relationships with people in the community. However, if the projects occur in local communities, perhaps resources could be a limitation.

Multi-site projects: some projects are multiple-site, and they include multiple communities and some local municipalities. These projects seem to span over multiple communities or neighbourhoods, but they require diverse perceptions. Depending on the projects, research across different communities and sites may be compared.

Regional level: some projects occur at a regional level. These projects are much bigger in comparison to one-site and multiple-sites, but not as common. Participation may be a limitation because the project is regional.

Temporal Scope:

Primary fit: **Ongoing, Longitudinal, Series**

Secondary fit: **Cross-sectional**

PAR is best suited for longitudinal scope, either ongoing or series-based, as it involves repeated cycles of action, reflection, and learning over time. These formats allow participants to continuously engage, analyse outcomes, and adapt strategies collaboratively. While PAR can be adapted for cross-sectional engagements, this is less common, as short-term formats limit the depth of participation and the iterative nature of the approach.

8.1.5 Related Methods

Focus Groups, Interviews, Surveys, World Café, Participatory Rural Appraisal, Storytelling, Participatory Sensing, Participatory Assessment, Monitoring and Evaluation, Co-Creation, Photovoice, Participatory Epidemiology.

9. Living Labs

Living labs are open innovation ecosystems that integrate research, experimentation, and co-creation in real-life environments.

Living Labs are participatory ecosystems that foster innovation through co-creation and real-world experimentation. They enable diverse stakeholders to collaborate on solutions to complex societal challenges. To transcend pilot project limitations, Living Labs must address sustainability, academic integration, reflexivity, and evaluation. They are built on the principles of participatory design, knowledge-sharing, and iterative development, making them powerful tools for addressing complex challenges. The concept has been widely adopted across various domains, including sustainability, digital transformation, urban planning, and social innovation, with methodologies that emphasise real-life experimentation, active user engagement, and multi-stakeholder collaboration.

In practice, living labs function as platforms where diverse actors co-create solutions through structured experimentation and continuous feedback loops. These initiatives often focus on tackling "wicked problems" - challenges that require adaptive, inclusive, and collaborative approaches. In the context of the SDGs, living labs can drive social impact by addressing issues such as climate change, inclusive urban development, digital inclusion, and circular economy practices. Examples of such initiatives include Urban Living Labs that test sustainable mobility solutions, Social Economy Living Labs that promote cooperative economic models, and ICT4D Living Labs that enhance digital access in underserved communities.

1. Co-Evolution in Digitally Mediated Systems

Digital systems involve interdependent technological infrastructure, actors, and practices that co-evolve iteratively. Living Labs provide methodological grounding for transparent, accountable socio-technical co-evolution. Infrastructure adapts to cultural and environmental factors while actors influence system design. The Living Lab mediates collaborative discovery and adaptation of digital innovation's affordances and limitations.

2. Institutionalising Reflexivity

Effective Living Labs embed reflexive practices—structured opportunities for stakeholders to interrogate assumptions and revise interventions. This requires formal integration of feedback loops, ethical deliberation, and adaptive governance. Institutionalised reflexivity transforms Living Labs into drivers of organisational change and epistemic tools that help societies learn about innovation.

3. Sustaining Beyond Pilot Phase

Many Living Labs fail after pilots due to insufficient funding and institutional anchoring. Essential strategies include:

- Diversified Funding: Combining public grants, municipal partnerships, and private engagement.
- Institutional Integration: Embedding within universities, government bodies, or NGOs.
- Community Governance: Leveraging local stakeholder contributions.
- Policy Alignment: Framing as contributors to regional development or SDG implementation.

4. Academic Integration

Living Labs must embed in academic ecosystems as research tools and pedagogical infrastructure:

- Teaching: Enriching curricula through project-based, experiential learning.
- Research: Serving as platforms for interdisciplinary, transdisciplinary research.
- Academic Valorisation: Integrating into thesis supervision, doctoral training, and publications.

5. Meta-Evaluation: Power and Participation

Living Labs risk reinforcing inequities without critical evaluation. Meta-evaluation must assess:

- Power Dynamics: Who participates, whose voices are heard, who influences decisions.
- Participation Quality: Depth of engagement, agenda-setting authority, shared ownership.
- External Oversight: Advisory boards ensuring transformative rather than performative reflexivity.

6. Iterative Learning and Embracing Failure

- Living Labs should normalise failure as necessary for innovation through:
- Facilitator Training: Building capacity in adaptive planning and ethical facilitation.
- Failure Documentation: Capturing why interventions fail and how they evolve.
- Process Orientation: Emphasising learning processes over final outputs.

9.1 Is this the Right Approach for You?

Find out whether the approach matches your objectives, resources, participants, and scope.

9.1.1 Does the Approach Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Design Solutions**

Secondary fit: **Knowledge Sharing, Knowledge Gathering**



Living labs are great for creating solutions to problems and for testing solutions. They bring together diverse stakeholders to co-create and test innovations. They are also highly effective for gathering knowledge and leveraging real-world experimentation and user feedback to generate valuable insights.

To some degree, they also offer an opportunity for knowledge sharing, as they bring together different stakeholders and expose them to new information and insights. Needs assessment is another possible goal for which living labs can be applied, as they help identify challenges and opportunities through stakeholder engagement.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge, Behavioural Insights**

Secondary fit: **Institutional Knowledge, Subject Expertise**

Living labs are particularly effective for gathering local/indigenous knowledge, as they actively engage communities in real-world settings to capture context-specific insights. Moreover, they can be used to gather behavioural insights and experiential knowledge, allowing for the observation of user interactions and preferences. Beyond these, living labs can incorporate institutional knowledge and subject expertise by involving relevant stakeholders such as policymakers, researchers, and industry experts.

Desired Level of Engagement:

Primary fit: **Co- Create, Collaborate**

Secondary fit: **Empower**

Living labs are highly participatory environments that allow for high levels of engagement. Concretely, they foster collaboration and co-creation, bringing together multiple stakeholders to jointly develop, test, and refine solutions. While living labs can also support empowerment, true long-term ownership by participants depends on the specific structure and governance of the lab. To some degree, they also offer an opportunity for knowledge sharing, as they bring together different stakeholders and expose them to new information and insights. Needs assessment is another possible goal for which living labs can be applied, as they help identify challenges and opportunities through stakeholder engagement.

Project Stage:

Primary fit: **Initiation, Planning & Design, Evaluation**

Secondary fit: **Evaluation, Implementation**

Living labs are most commonly applied in the planning and design phase, where they facilitate co-creation, experimentation, and iterative development of solutions. They are also useful in the evaluation stage, as they provide real-world feedback and data to assess the impact of innovations. Additionally, they can play a role in the initiation phase, helping to define project objectives and engage key stakeholders.



More importantly, living labs are not a one-time intervention within a single project stage. They consist of their own structured phases - exploration, experimentation, and evaluation - which can be integrated throughout a project's lifecycle.

9.1.2 Does the Approach Fit With Your Resources?

Available Budget:

Primary fit: **Medium, High**

Secondary fit: **Low**

Living labs tend to be resource-intensive, often requiring a medium to high budget to support infrastructure, facilitation, and stakeholder engagement. While low-budget living labs are less common, they can still be effective by leveraging existing community spaces, digital collaboration tools, and voluntary stakeholder participation.

Available Time:

Primary fit: **Long-Term, Months, Weeks**

Secondary fit: **Short-Term**

In terms of time commitment, living labs follow an iterative and cyclical process, requiring sustained engagement over months or even years. A short-term intervention may yield initial insights, but true co-creation and impact emerge through multiple iterations.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

Secondary fit: **Subject Expertise**

As an organiser or facilitator of a living lab, you do not need to be an expert in everything—but certain skills are essential. Facilitation skills are key: you will need to manage diverse stakeholders, guide co-creation processes, and ensure inclusive participation. To this end, local language proficiency is equally important.

Digital skills are optional, as digital tools or online collaboration are not a key requirement for living labs. Subject expertise can help frame the problem and evaluate solutions. However, you can involve experts as needed - the most critical role you play is creating a collaborative, and adaptive environment for innovation.

9.1.3 Does the Approach Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Medium (20-50), Small (5-20)**

Secondary fit: **Large (50-100)**

In living labs, small and medium group sizes are generally the most appropriate. They offer a good balance between the diversity of stakeholders and the ability to engage in meaningful,



interactive co-creation processes. Small groups, however, should not be too small, as they risk lacking the diversity needed to represent different user and stakeholder perspectives. Micro groups are typically too limited for Living Lab activities that require co-design, validation, or broader deliberation. Large and extra-large groups are generally not well-suited for interactive living lab formats unless carefully structured into sub-groups.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Literacy Constraints, Digital Skills Constraints, Electricity Constraints**

Secondary fit: **Public Space Constraints, Mobility Constraints**

Living labs typically benefit from basic infrastructure, such as internet connectivity and electricity, to support digital collaboration and data collection. However, they can still function in low-resource settings by adapting their methods. For instance, in areas without internet, living labs can rely on offline tools like paper-based surveys, in-person workshops, and physical prototyping. Without electricity, activities can be conducted during daylight hours, using printed materials and manual demonstration techniques rather than digital simulations. While connectivity enhances data-sharing and scalability, living labs can still operate in analogue environments with creative adaptations.

Regarding participant resources, living labs are designed to be inclusive, making them effective even for people with low literacy levels. By emphasising hands-on participation, storytelling, visual methods, and role-playing exercises, they enable non-literate participants to contribute meaningfully. Facilitators play a key role in bridging gaps by translating complex ideas into accessible formats. The flexibility of the Living Lab model allows it to adapt to diverse contexts, ensuring that innovation remains grounded in the needs and realities of local communities.

9.1.4 Does the Approach Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, Neighbourhood, One Site, Region, Town/City**

Living labs are highly adaptable and can be implemented at various geographic scales. They may operate on a single site – such as a school, a public space, or a health centre – or span multiple sites to compare interventions across settings. Labs can focus on a neighbourhood, a town or city, or even a region, depending on the goals and available partnerships. The key is not the size but the ability to facilitate real-life engagement and involve relevant local stakeholders in each context.

Temporal Scope:

Primary fit: **Cross-sectional, Longitudinal, Ongoing, Series**

Living labs can be adapted to different time frames depending on your project needs. They may take the form of a cross-sectional engagement (e.g., a single co-creation workshop) or be



conducted as a series of structured activities over a defined period. Many living labs operate in a longitudinal mode, with repeated engagement to refine and evaluate solutions. Others function as ongoing platforms, remaining open-ended and evolving alongside stakeholder needs and project opportunities.

9.1.5 Related Methods

Focus Groups, Interviews, Surveys, World Café, Workshops, Prototyping, Storytelling, Participatory Assessment, Monitoring and Evaluation, Scenario Planning Workshop, Participatory Mapping and GIS, Co-Creation, Walkthroughs.

10. Science Shops

A Science Shop is a resource that connects academic expertise with community groups, civil society organisations, and nonprofits, making scientific knowledge accessible to address societal needs and challenges.

A science shop is an independent entity that bridges the gap between researchers and society, ensuring that scientific expertise is accessible to communities, nonprofits, civil society organisations (CSOs), and other societal groups; rather than being a research approach on its own. Science shops do this by acting as intermediaries, linking real-world problems with academic research, often through student-led projects supervised by university staff. These entities operate primarily within universities, though they can sometimes be found in other types of organisations. When a community presents a research problem to a science shop, the science shop evaluates and refines the proposal before connecting it with students, faculty, or other stakeholders to conduct the study. Science shops provide free or low-cost research support, making academic expertise more accessible to those who may lack the resources to investigate issues independently. The benefit to universities is that they afford students practical research experience, develop transferable skills, and enhance employability. Additionally, researchers gain access to real-world data and interdisciplinary collaboration. By fostering dialogue and ensuring that research aligns with societal needs, science shops exemplify participatory research by strengthening the connection between academia and the wider community in which they operate.

10.1 Is this the Right Approach for You?

Find out whether the approach matches your objectives, resources, participants, and scope.

10.1.1 Does the Approach Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Knowledge Sharing**

Secondary fit: **Knowledge Gathering, Ownership, Design Solutions, Progress Monitoring**

Science shops play a key role in identifying and refining community-based research questions by working collaboratively with societal groups to shape these needs into research proposals. They facilitate research that gathers and combines knowledge in new ways, often involving students, researchers, and community stakeholders to collect, organise, and analyse relevant information. Prioritising accessibility, science shops engage in dialogue to share research findings with stakeholders through workshops, reports, academic papers, posters, and policy briefs. While they emphasise community involvement and co-development, throughout the research process to ensure relevance and shared ownership, their primary focus is facilitating research leading to an advice, or designing products, which can be implemented by the community partners. Progress monitoring may occur within student-led projects, but it is not a central element of the science shop model. Science shops should be implemented if a university, faculty or department wishes to build and enhance community-driven research capacity, that strengthens student learning, expands research opportunities and fosters institutional engagement with their broader community. Such engagement helps to position universities as key actors in community partnerships, connecting academia with local governments, businesses,



and NGOs to address community-driven challenges. Ultimately, launching a science shop is a strategic investment that allows universities to remain academically and socially relevant, equipping students, researchers, and institutions with the tools to drive innovation, research, and provide community-based solutions.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge**

Secondary fit: **Institutional Knowledge**

Science shops, with their low-cost, scalable model, makes them particularly useful in developing countries. This can help to tackle under-resourced, but impactful real-world community-centred research initiatives that, in turn, can help to bridge the gap between academia and society. In doing so, science shops help to strengthen local knowledge sharing and systems and ensure that the research universities produce, contributes directly to communities, and thus to sustainable development. Science shops can act as a powerful facilitation mechanism for driving inclusive, evidence-based, and community-centred solutions, and building institutional knowledge, which in turn is essential for achieving the various United Nations Sustainable Development Goals (UN-SDGs).

Desired Level of Engagement:

Primary fit: **Involve, Collaborate, Co- Create**

Secondary fit: **Inform, Consult, Empower**

Science shops engage with stakeholders at varying levels. They inform stakeholders by sharing knowledge through research findings without expecting direct input, such as by publishing reports or hosting workshops. They consult with stakeholders by seeking feedback on research questions, priorities, or preliminary findings, while researchers lead the process. They involve stakeholders by using participatory approaches that enable stakeholders to help shape the research, contribute data, and provide local knowledge, though researchers still guide the project. They ensure collaboration by facilitating partnerships where researchers and stakeholders work together throughout the research process, benefiting from local expertise. Further, through co-creation, they deepen this engagement by enabling communities to help define project objectives and participate in key stages of the research. Finally, they empower stakeholders, and communities, by returning research findings, equipping relevant parties with the knowledge to take independent action and implement solutions based on the research outcomes.

Project Stage:

Primary fit: **Initiation, Planning & Design, Evaluation**

Secondary fit: **Implementation, Maintenance**

Science shops act as facilitators by engaging with civil society organisations, nonprofits, and community groups during the project initiation stage to assess pressing issues that could benefit from academic research, ensuring practical relevance through needs assessments and stakeholder discussions. In the project planning and design stage, they help align academic methods with real-world problems by co-developing project objectives, research questions, and methodologies, and defining stakeholder roles. During the project implementation stage, science shops help facilitate student-led research projects, supervised by faculty, where students, researchers, and community stakeholders collaborate to collect data, analyse issues, and explore



solutions, maintaining community engagement throughout. In the project evaluation stage, science shops supports assessing project outcomes for both academic value and community usefulness, incorporating stakeholder feedback to refine future research. Finally, during the project maintenance stage, while they do not retain long-term responsibility for implementation, science shops helps to ensure stakeholders take ownership of findings by providing presentations, reports, and follow-up discussions to help communities apply the research outcomes in practice.

10.1.2 Does the Approach Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Secondary fit: **High**

Regarding budget, running a science shop can come with costs for the university or department associated with employing staff for the science shop, and general office and administration costs depending on the formality of the structure. Human resource costs can include pay for chairpersons, communications assistants and coordinators. Additionally, in rare cases, if a project requires large resources, science shops may seek external funding, university grants, or partnerships to support a high-budget project; but this is not common.

A lower budget option is to divide the responsibility for science shop work between existing university staff and faculty members. Human resource costs may then just include pay for a program manager and a coordinator. Science shops can also limit the cost of research projects for communities, to low-cost or free, by leveraging existing university resources such as students (who can do projects as part of their curriculum; e.g., practical, colloquium, internship, bachelor or master (research) project, etc.), faculty (who can supervise projects as part of their teaching load), labs and equipment (which are used in education already). In fact, regular costs for student learning are made anyway, so there are no additional costs other than the process management by Science Shop staff. This enables communities to gain access to high-quality research expertise at no to low cost. Simultaneously, students get motivated because they are working on a impactful assignment, and develop social awareness; researchers benefit from obtaining new leads or angles to their research, the university benefits from incorporating challenge-based learning, good public relations, and connection to local communities; and also policy makers can benefit from results of the commissioned research when they need to make decisions.

Available Time:

Primary fit: **Long-Term, Months**

Secondary fit: **Short-Term, Hours, Weeks**

In terms of time, science shops will facilitate longer-term projects that can cover several months to years. In these cases, such research is generally carried out by students in pursuit of a master's or doctoral degree. The duration and extent of the research needed will be determined by the type of project under investigation and may involve longitudinal studies, policy development, or complex data collection and analysis. However, it is possible there could be cases where short-term exploratory, pilot studies or training projects are needed, which can be completed faster, in hours or weeks, but this is less common.

Available Skills (Researcher):

Primary fit: **Subject Expertise, Facilitation Skills, Local Language**

Secondary fit: **Digital Skills**

Those tasked with facilitating a research project at a science shop would not require direct subject expertise but would require research, communication and project planning skills. Such skills could include soliciting clients, evaluation, problem mapping, helping with preliminary research to formulate a research question, finding relevant students and supervisors for the project, maintaining communication processes, facilitating the publication and implementation of results, formulating follow-up actions and conducting general administration activities.

Additionally, basic digital skills, in line with those required for research and administration, are needed to operate a science shop. These will align to facilitate research, communication, project planning and the dissemination of results. It is also helpful for science shops to have, or to be able to access, the capacity to engage with stakeholders in local languages. Doing so can enhance inclusivity and accessibility, particularly for research involving marginalised or non-native-speaking communities. It can also enable communities to more easily approach a science shop with their research projects.

Finally, as science shops are primarily research facilitators, the ability to guide discussions, foster collaboration, and ensure active participation among diverse stakeholders is important. This can involve practical skills such as helping to manage group dynamics, ensuring productive dialogue and keeping the research process focused, inclusive and participatory. It can also include project management and coordination skills.

10.1.3 Does the Approach Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5), Extra Large (100+)**

Secondary fit: **Medium (20-50), Large (50-100), Small (5-20)**

Regarding running a science shop, the number of staff a science shop employs directly is generally small and is dependent on the structure and placement of the science shop within the university. This can either be as a standalone entity or within a faculty or department. Concerning project collaboration, the number of people that science shops engage with at a time will vary based on the type and number of research projects the science shop is facilitating. It can easily extend into the hundreds if there are a large number of projects to work on; though usually collaboration is with contact persons representing a larger group (with or without legal status).

Feasibility with Local Constraints:

Primary fit: **Public Space Constraints, Digital Connectivity & Access Constraints, Digital Skills Constraints**

Secondary fit: **Literacy Constraints, Electricity Constraints, Mobility Constraints**

Science Shops function primarily as facilitators of university–community collaboration, focusing on brokering relationships, identifying researchable questions, and supporting participatory engagement. When initiating contact and building trust with community partners, face-to-face meetings—whether held on campus, on location, or virtually—can be essential for establishing mutual understanding and shared goals. Depending on local contexts, constraints



such as limited digital access, low connectivity, or low digital literacy may make in-person or telephone engagement more appropriate than online formats.

While Science Shops do not typically conduct the research themselves, they play a crucial role in ensuring the research design is contextually appropriate. In areas where literacy constraints exist, research teams may choose participatory methods like storytelling, photovoice, or community workshops, which rely on oral or visual engagement rather than text-heavy tools such as surveys. Similarly, mobility or electricity challenges may be addressed in the research phase by selecting accessible venues or scheduling sessions during daylight hours. For example, walkthroughs can be adapted to suit participants with limited mobility or conducted virtually when needed.

It is important to distinguish between the facilitative role of Science Shops and the research activities themselves. While Science Shops help frame the project and connect relevant actors, methodological decisions—such as whether to use surveys, focus groups, or participatory methods—fall within the scope of the research process and should be tailored to the community’s context and the objectives of the specific project.

10.1.4 Does the Approach Fit With Your Project’s Scope?

Geographic Scope:

Primary fit: **Neighbourhood, Town/City**

Secondary fit: **Multiple Sites, Region**

Science shops typically engage with geographically defined communities, usually within the neighbourhood, town/city, or regional level - associated with the institution - making them highly effective at addressing localised issues. However, special issue-communities can be served (e.g. patient associations, consumer organisations, environmental organisations, labour organisations, etc.) that may work on a national or even international level (e.g. develop collaboration organisations).

Temporal Scope:

Primary fit: **Cross-sectional, Series**

Secondary fit: **Longitudinal, Ongoing**

Science shops typically accommodate and facilitate projects with various temporal scopes, as they often respond to community-defined, immediate issues. However, quite often these are placed in a wider context (because good mediators look for the ‘question behind the question’ and can investigate possible systemic changes that would be in order). Moreover, continued collaboration with specific societal stakeholders will deepen the research questions addressed, because of mutual learning and continuous strategy development. It should be noted that very practical, good research and even finding students will take some time.

10.1.5 Related Methods

Focus Groups, Interviews, Surveys, World Café, Workshops, Prototyping, Storytelling, Participatory Assessment, Monitoring and Evaluation, Participatory Mapping and GIS, Co-Creation, Walkthroughs, Participatory Sensing, Participatory Epidemiology, Crowdsourcing, Photovoice, Sampling and Specimen Collection.

11. Community-Based Participatory Research

Community-based participatory research (CBPR) is an equitable collaborative approach involving community members as active participants throughout the entire research cycle and beyond.

Community-based research has emerged as a significant methodological approach in the Southern African Development Community (SADC) region, emphasising collaborative knowledge production and social transformation. Before embarking on CBPR, it is essential to assess its suitability by examining your project's objectives, available resources, target audience, and scope. This assessment will help determine if CBPR aligns with your research needs and contextual realities within the SADC region.

11.1 Is this the Right Approach for You?

Find out whether the approach matches your objectives, resources, participants, and scope.

11.1.1 Does the Approach Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Needs Assessment**

Secondary fit: **Progress Monitoring, Ownership, Design Solutions**

CBPR is most appropriate for projects aiming to address community-identified needs, promote local empowerment, or create sustainable change through participatory processes. Research in the SADC region demonstrates that projects with goals aligned with community priorities achieve greater sustainability and impact. If your project seeks to generate knowledge primarily for academic purposes without practical applications, traditional research methods might be more suitable.

For knowledge generation: CBPR is suitable when seeking a contextually grounded understanding of complex social phenomena. In Zimbabwe, participatory knowledge generation revealed a nuanced understanding of water governance systems invisible to conventional research.

For intervention development: CBPR ensures interventions respond to actual rather than perceived needs. In Malawi, community-designed nutrition programs showed significantly higher uptake compared to externally designed alternatives.

For policy influence: CBPR strengthens advocacy efforts by grounding them in community experiences. Tanzanian fishing communities successfully used participatory research to influence national fisheries policies by documenting local management practices.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge, Subject Expertise, Behavioural Insights**

Secondary fit: **Institutional Knowledge, Scientific Data**



CBPR is ideal for generating contextually relevant knowledge that combines scientific and indigenous perspectives. Research from Lesotho and Eswatini emphasises the value of integrating traditional and scientific knowledge systems to address complex challenges like climate change adaptation. Consider whether your research questions benefit from this integration of knowledge types.

Desired Level of Engagement:

Primary fit: **Co- Create, Consult, Collaborate, Involve**

Secondary fit: **Inform, Empower**

Consider the depth of community engagement you envision. CBPR requires meaningful participation where community members act as co-researchers rather than mere subjects or informants. Studies from countries like Namibia, Zimbabwe, and South Africa show that deeper forms of engagement lead to more culturally relevant interventions and greater community ownership.

Consultative engagement: minimal CBPR approach where community input informs but doesn't direct research. While less resource-intensive, SADC research shows this approach often fails to challenge power imbalances.

Collaborative engagement: partners share decision-making while researchers maintain primary responsibility. In Mozambique, this approach successfully balanced scientific rigour with community relevance in HIV prevention research.

Transformative engagement: communities lead problem definition and research processes with researchers serving as facilitators. Studies from Lesotho demonstrate this approach's effectiveness in addressing sensitive topics like gender-based violence.

Project Stage:

Primary fit: **Initiation, Planning & Design, Implementation**

Secondary fit: **Design Solutions, Evaluation, Maintenance, Progress Monitoring**

Community-based research is particularly effective during formative stages of development initiatives when community input can shape the research direction and implementation strategies. In the SADC context, early engagement allows researchers to incorporate indigenous knowledge systems that might otherwise be overlooked in conventional research approaches. However, CBPR can also be valuable during implementation and evaluation phases where continuous community feedback enables adaptive management.

For new projects: CBPR helps establish baseline community needs and priorities, ensuring research questions reflect community concerns rather than external assumptions. For example, in rural Zambia, researchers found that involving communities in problem definition led to more relevant agricultural interventions.

For ongoing initiatives: CBPR facilitates mid-course corrections and adaptation based on community feedback. Research in urban settlements in South Africa demonstrates that continuous community engagement helps identify implementation barriers not visible to external researchers.



For evaluation purposes: CBPR enriches assessment by incorporating community-defined success indicators. Studies from Botswana and Namibia show that community-defined metrics often differ significantly from standardised indicators.

11.1.2 Does the Approach Fit With Your Resources?

Available Budget:

Primary fit: **Low**

Secondary fit: **Medium, High**

CBPR typically requires significant financial resources to support community participation, capacity building, and extended fieldwork. In resource-constrained SADC contexts, inadequate budgeting for community engagement activities can undermine the research process. Assess whether your funding can support fair compensation for community researchers, translation services, and participatory workshops throughout the research lifecycle.

Available Time:

Primary fit: **Days, Weeks, Hours, Short-Term**

Secondary fit: **Months, Long-Term**

CBPR demands substantial time investment to build trust, develop relationships, and ensure genuine community participation. Research timelines in the SADC region often need to accommodate seasonal activities, cultural events, and community rhythms. If your project has rigid deadlines or requires rapid assessments, CBPR may present challenges.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language, Subject Expertise**

Secondary fit: **Digital Skills**

Effective CBPR requires facilitation skills, cultural competence, and the ability to navigate complex social dynamics. Researchers in the SADC region need to develop skills in cross-cultural communication, conflict resolution, and power-sharing. Assess whether your team possesses these competencies or can develop them through training and mentorship.

11.1.3 Does the Approach Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20), Medium (20-50), Micro (1-5)**

Secondary fit: **Large (50-100)**

CBPR works effectively with manageable community sizes where meaningful representation and participation are possible. Studies across the SADC region show that overly ambitious geographical coverage can dilute engagement quality. Consider whether your intended group size allows for deep rather than superficial engagement.

The approach is particularly valuable when working with marginalised populations whose voices are often excluded from mainstream research. In the SADC context, CBPR has proven effective with rural communities, informal settlement residents, and indigenous groups. Consider whether your participant groups would benefit from and be receptive to collaborative knowledge production approaches.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Mobility Constraints, Public Space Constraints**

Secondary fit: **Digital Connectivity & Access Constraints, Digital Skills Constraints, Electricity Constraints**

Community-based approaches require the assessment of local capacities and resources that can be mobilised. Research from Malawi, Zambia, and Mozambique highlights the importance of recognising and building upon existing community structures and knowledge systems. Consider whether communities have organisational structures, leadership, and expertise that can be integrated into the research process.

11.1.4 Does the Approach Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Neighbourhood, Town/City, Region**

Secondary fit: **Multiple Sites**

CBPR functions optimally within defined geographical boundaries where researchers can develop deep contextual understanding. Studies from Tanzania and Botswana demonstrate that a focused geographical scope enables more meaningful community engagement. If your research spans multiple diverse communities across the SADC region, consider whether sufficient resources exist to ensure quality engagement in each location.

Temporal Scope:

Primary fit: **Ongoing, Longitudinal**

Secondary fit: **Cross-sectional, Series**

Long-term research agendas often align well with CBPR approaches, allowing for iterative learning and adaptive research processes. In the SADC context, a longer temporal scope enables researchers to understand seasonal variations and build the trust necessary for authentic participation. Other approaches might be more appropriate if your research requires only a snapshot assessment.

11.1.5 Related Methods

Focus Groups, Interviews, Surveys, World Café, Participatory Rural Appraisal, Observations, Workshops, Prototyping, Storytelling, Sampling and Specimen Collection, Participatory Assessment, Monitoring and Evaluation, Scenario Planning Workshop, Participatory Mapping and GIS, Co-Creation, Walkthroughs, Photovoice, Citizens' Jury, Participatory Epidemiology, Crowdsourcing.

12. Conclusion

The prototype of the IPF marks a significant milestone in the project. The IPF is a practical learning tool that will strengthen the capacity of HEIs in the SADC region to meaningfully employ participatory approaches in pursuit of the Sustainable Development Goals.

The framework provides HEIs with an accessible way to learn about different participatory approaches, their link with the SDG agenda, and the challenge of leaving no one behind when employing these approaches in the SADC region. Moreover, it stimulates crucial reflections on the various criteria that shape the selection of appropriate approaches and methods considering a project's objectives, resources, participants and scope. In this way, the framework does not merely present options, it supports institutions in asking the right questions, and in doing so, fosters a more informed, reflective, and context-sensitive approach to SDG-related engagement.

Importantly, the IPF actively supports systematic decision-making. The dynamic directory allows HEIs to select the most appropriate participatory methods and approaches, tailored to the key criteria outlined in this report. Rather than promoting a one-size-fits-all model, the framework encourages deliberate choices grounded in situated understanding. The framework thus has the potential to enhance meaningful use of PAs that is sustainable, effective, and inclusive, thus promising to truly support the SDGs.

In the next phase of the project, the IPF will undergo a more extensive peer-review process, both within the consortium and through engagement with external experts and stakeholders. These reviews will help to refine its structure, language, and usability. Concurrently, the framework will be tested in practice through the pilot projects described in the subsequent work packages. These pilots will generate feedback that will be used to iteratively strengthen the IPF's relevance and utility.

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14. Glossary

Term	Definition
Citizen Science	Public participation in scientific research where non-experts collect or analyse data to support scientific or policy outcomes.
Citizens' Jury	A deliberative method where a group of citizens examines an issue in-depth, consults experts, and provides recommendations to decision-makers.
Co-Creation	A process that brings together diverse stakeholders including community members and professionals to collaboratively design solutions.
Co-Creation	Joint development of interventions or solutions by stakeholders and beneficiaries, ensuring relevance, ownership, and sustainability.
Community-Based Participatory Research	A method in which researchers and community members equally contribute to the research process to ensure culturally relevant and actionable outcomes.
Crowdsourcing	Collecting ideas, data, or services from a large group of people (often online), used to enhance decision-making or problem-solving.
Deliberative Forums	Structured discussion settings that engage citizens in informed debate and decision-making, often used in participatory governance.
Focus Groups	Structured group discussions led by a facilitator to explore community needs, priorities, or experiences. Useful for gathering diverse perspectives and promoting group dialogue.
Geographic Information Systems	Systems that capture, store, and analyse geographical and spatial data, often used in participatory mapping.
Integrated Participatory Framework	A structured tool designed to help institutions select and apply participatory methods based on context, resources, goals, and participant needs especially in the SADC region.
Interviews	One-on-one conversations, often semi-structured, that enable deeper understanding of individual experiences, opinions, and context-specific insights.
Leave No One Behind	A central principle of the SDGs aimed at ensuring the inclusion of marginalised populations in development efforts.

Living Labs	Real-life environments where stakeholders collaboratively design, test, and refine innovations. Common in urban planning, sustainability, and social innovation.
Observations	Systematic recording of behaviours, conditions, or interactions within a setting, often used to complement self-reported data.
Participatory Action Research	A collaborative approach involving community members in identifying problems, conducting research, and developing solutions.
Participatory Approaches	Methods that actively involve communities and stakeholders in research, decision-making, and implementation to ensure inclusiveness and relevance to local contexts.
Participatory Assessment, Monitoring and Evaluation	Involves communities in tracking progress, evaluating impacts, and making course corrections for programmes or policies.
Participatory Epidemiology	Community engagement in identifying, mapping, and interpreting health issues using local knowledge and informal reporting systems.
Participatory Mapping and GIS	Using maps and geospatial tools collaboratively with communities to visualise local assets, risks, or land use.
Participatory Rural Appraisal	A set of visual and interactive tools to engage rural communities in identifying issues, analysing conditions, and planning responses based on local knowledge.
Participatory Sensing	Engaging individuals in collecting and interpreting environmental or social data through sensors, mobile devices, or digital platforms.
Photovoice	Participants use photography to document, reflect, and communicate community strengths and challenges from their lived experience
Prototyping	Creating and testing early versions of products, services, or processes with community input to refine solutions before full implementation.
Sampling and Specimen Collection	Involves communities in the collection of biological or environmental samples, usually within citizen science or health surveillance.
Scenario Planning Workshop	A foresight tool where stakeholders imagine and plan

	for multiple future scenarios, often used for climate resilience or urban planning.
Science Shops	University-affiliated services that connect communities with academic resources to address community-driven research questions.
Storytelling	A qualitative method used to gather narrative data from communities, often employed to surface lived experiences and cultural knowledge.
Storytelling	Gathering and analysing narratives from individuals or communities to highlight lived experiences, historical knowledge, and social dynamics.
Surveys	Structured data collection tools used to gather quantitative or qualitative information from a defined group. Effective for large-scale assessments.
Sustainable Development Goals	A set of 17 global goals adopted by the UN to achieve a better and more sustainable future for all by 2030.
Walkthroughs	Guided physical or virtual explorations of environments to assess accessibility, safety, or community features through participant observation.
Walkthroughs	Guided tours of environments (physical or digital) to assess barriers, assets, or conditions from the participant's perspective.
Workshops	Interactive group sessions used for collaborative problem solving, capacity building, or planning, often involving a variety of tools or activities.
World Café	A conversational process for facilitating open discussion and sharing knowledge in large groups, where participants move between tables with evolving questions.

Appendix A - Methods

A1 Focus Groups

Focus groups are small, structured gatherings of people (typically 6-10 participants) who are brought together to discuss a specific topic or product under the guidance of a moderator. They're a qualitative research method used by companies, organisations, and researchers to collect opinions, feedback, and insights from target audiences' descriptions.

Key characteristics of focus groups include:

- Participants are usually selected based on shared characteristics relevant to the research (demographics, buying habits, etc.)
- Sessions are led by trained moderators who guide the conversation using prepared questions.
- Discussions are typically recorded for later analysis.
- The interactive group setting encourages spontaneous responses and builds on shared ideas.
- They provide deeper insights than surveys by allowing researchers to probe responses and observe non-verbal cues.

Focus groups are commonly used for market research, product development, testing advertising concepts, understanding consumer behaviour, and gathering feedback on services or experiences.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Ownership, Knowledge Gathering**

Secondary fit: **Progress Monitoring, Ownership, Design Solutions, Capacity Building**

Focus groups are highly effective for needs assessment and knowledge gathering, as they allow researchers to deeply explore participants' perspectives, desires, and challenges through guided discussion. The interactive format helps uncover not just what people think but why they think it, revealing underlying motivations and contextual factors that might remain hidden in more structured research methods. Additionally, focus groups excel at knowledge sharing and fostering local ownership, as the collaborative environment encourages participants to build upon each other's ideas, creating a sense of community engagement that often leads to more authentic input and greater buy-in for resulting initiatives.

For organisations working on sustainable development, focus groups can be particularly valuable for SDG progress monitoring and solution design, providing rich qualitative data that complements quantitative metrics and illuminates the human experience behind the numbers.



The method creates space for diverse voices to contribute to program development, ensuring that solutions are culturally appropriate, practically feasible, and aligned with community priorities rather than imposed from outside.

Desired Knowledge:

Primary fit: **Experiential Knowledge, Behavioural Insights, Local / Indigenous Knowledge, Expert Insights**

Secondary fit: **Scientific Data, Institutional Knowledge**

Focus groups excel at capturing experiential knowledge and behavioural insights by creating a social environment where participants can articulate their lived experiences, preferences, habits, and decision-making processes. The interactive nature of focus group discussions often reveals implicit knowledge that participants might not express in surveys or interviews, as the group dynamic encourages deeper reflection and helps surface unconscious motivations or barriers that influence behaviour. This method is particularly effective at uncovering the "why" behind opinions and actions, providing organisations with a contextual understanding of how people interact with products, services, or systems in real-world settings.

Additionally, focus groups are valuable tools for accessing local and indigenous knowledge by bringing together community members to share insights about their environments, traditions, and social dynamics. When thoughtfully composed and facilitated, these groups can surface collective wisdom about local conditions, historical contexts, and cultural perspectives that might otherwise remain inaccessible to outside researchers. The collaborative discussion format allows participants to build upon each other's contributions, creating a more comprehensive picture of community-specific knowledge that can inform more culturally appropriate and effective interventions or solutions.

Desired Level of Engagement:

Primary fit: **Consult, Collaborate, Co- Create, Involve**

Secondary fit: **Empower, Inform**

Focus groups primarily enable consultative engagement, creating a structured environment where organisations can gather rich, nuanced feedback from target audiences through facilitated discussion. This method allows stakeholders to express opinions, share experiences, and provide insights about specific topics, products, or services in a setting that encourages authentic dialogue and deeper exploration of perspectives. The guided yet conversational nature of focus groups helps organisations understand not just what participants think, but why they think it, generating valuable context that informs more responsive decision-making.

When effectively implemented, focus groups also foster involved engagement by encouraging participants to interact with each other and collectively explore issues. As group members build upon one another's contributions and respond to different viewpoints, they often transition from simply providing feedback to actively participating in problem identification and preliminary solution development. This collaborative dynamic creates opportunities for more meaningful stakeholder input while giving participants a sense that their perspectives are genuinely valued and will influence subsequent actions, even though the organising entity ultimately maintains control over how this input is applied.

Project Stage:

Primary fit: **Planning & Design, Design Solutions, Initiation, Evaluation, Maintenance**

Secondary fit: **Implementation, Progress Monitoring**

Focus groups are exceptionally valuable during the planning and design stage of projects, providing rich qualitative insights that help shape development before significant resources are committed. At this early phase, focus groups allow project teams to explore stakeholder needs, preferences, and pain points in depth, helping to identify potential challenges and opportunities that might otherwise be overlooked. The interactive format enables teams to test preliminary concepts, gather feedback on proposed approaches, and refine solutions based on direct input from the intended beneficiaries or users, ultimately leading to more user-centred designs and increased likelihood of project success.

Focus groups also serve as powerful tools during the evaluation stage, offering a structured method for gathering in-depth reflections on implemented projects or programs. By bringing together stakeholders to discuss their experiences with a completed initiative, organisations can collect nuanced feedback about what worked well, what fell short of expectations, and how participants were affected, insights that often complement quantitative metrics with crucial context and explanation. These discussions frequently reveal unexpected outcomes, provide clarity on why certain elements succeeded or failed, and generate valuable recommendations for future improvements, making focus groups an effective mechanism for learning and adaptation throughout the project lifecycle.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium**

Secondary fit: **Low, High**

Focus groups typically require a medium budget, with costs primarily driven by participant recruitment, incentives, venue bookings, recording equipment, and professional moderation. The process involves expenses for screening and selecting appropriate participants, providing compensation for their time, securing a comfortable meeting space with appropriate seating arrangements, and employing experienced moderators who can effectively guide discussions. Additional costs may include refreshments, transcription services, and analysis of the collected data, which can be labour-intensive when working with qualitative information.

For organisations with limited resources, low-budget focus group options are certainly feasible with some creative adjustments. These might include: utilising existing organisational spaces instead of renting external facilities; recruiting participants through community networks or social media rather than paid recruitment services; offering modest incentives or non-monetary compensation (like meal vouchers or product samples); using staff members with good facilitation skills rather than hiring external moderators; and employing simple recording methods such as smartphone voice recorders instead of professional audio/video equipment. Virtual focus groups conducted through video conferencing platforms can further reduce costs by eliminating venue and travel expenses, though they may sacrifice some of the benefits of in-person interaction.



Available Time:

Primary fit: **Weeks, Hours, Days, Short-Term**

Secondary fit: **Months**

Focus groups are typically short-term research activities that can be implemented relatively quickly compared to other participatory methods. A standard focus group session usually lasts between 60-90 minutes, though specialised topics or in-depth explorations may extend to two hours. The entire process from planning through analysis generally spans 3-6 weeks, with the most time-intensive aspects being participant recruitment (1-2 weeks), conducting the sessions (often scheduled over 1-2 weeks to accommodate multiple groups), and analysing the qualitative data (1-2 weeks depending on the depth of analysis required).

For organisations seeking minimal time investment, a streamlined focus group approach can be completed in as little as 2-3 weeks by using existing contact databases for recruitment, limiting the number of sessions, employing rapid analysis techniques, and focusing on specific, well-defined questions. However, rushing the process risks compromising the quality of insights gained. For comprehensive understanding, researchers typically conduct multiple focus groups with different participant segments until they reach "saturation" the point where new sessions no longer generate significant new information which provides a natural endpoint to the data collection phase without unnecessarily extending the timeline.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language, Subject Expertise**

Secondary fit: **Digital Skills**

Focus groups primarily demand strong facilitation skills from the moderator, who must create a welcoming environment that encourages open participation while maintaining focus on the research objectives. Effective moderators need excellent active listening abilities, emotional intelligence to read group dynamics, and the capacity to probe for deeper insights without leading participants toward predetermined answers. They must skilfully manage dominant personalities, draw out quieter voices, navigate sensitive topics with tact, and adapt their approach in real time as conversations evolve. This combination of structured guidance and responsive flexibility is essential for generating rich, authentic data while ensuring all participants feel heard and respected.

While subject expertise is beneficial for understanding technical terminology and recognising significant insights, moderators need not be subject matter experts if they possess strong facilitation capabilities. More important is cultural competence and local language proficiency, particularly when working with community-based groups where building rapport and understanding nuanced expressions are crucial for accurate interpretation of feedback. Additional valuable skills include qualitative analysis abilities for interpreting the resulting data, organisational talents for coordinating logistics, and basic technical knowledge for managing recording equipment or digital platforms when conducting virtual focus groups.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5), Small (5-20)**

Secondary fit: **Medium (20-50)**

Focus group methods are most effective with micro (1-5) to small (5-20) participant groups. The ideal focus group typically consists of 6-10 participants, allowing for rich discussion where everyone has an opportunity to share their perspectives while maintaining manageable group dynamics. Groups that are too small may lack diverse viewpoints, while those that are too large can limit individual participation time and make facilitation challenging.

For instances like community-based research, micro to small group sizes would be most appropriate. This ensures the potential participants can meaningfully engage in discussion while respecting their time constraints and allowing for deep exploration of complex topics.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Electricity Constraints**

Secondary fit: **Digital Skills Constraints, Digital Connectivity & Access Constraints, Mobility Constraints, Public Space Constraints**

Focus group methods can be adapted to work with various local constraints. While traditional focus groups benefit from reliable electricity, adequate meeting spaces, and sometimes digital recording equipment, they fundamentally require only a suitable meeting location and a skilled facilitator. For digital connectivity constraints, in-person focus groups eliminate the need for internet access or digital skills. When literacy is a concern, the verbal nature of focus groups makes them accessible to participants with varying literacy levels, as discussions don't require reading or writing skills.

To address specific constraints with participants, consider these adaptations: For electricity constraints, schedule sessions during daylight hours and use manual notetaking instead of electronic recording. For mobility constraints, select central meeting locations or rotate venues between different institutions to reduce travel burdens. Public space constraints can be addressed by utilising community halls, university meeting rooms during off-peak hours or any location that people can engage comfortably in. If digital skills or connectivity issues arise with some participants, provide clear, non-technical instructions for joining hybrid sessions and ensure technical support is available. These considerations ensure all participants can contribute meaningfully regardless of local resource limitations.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Town/City, Multiple Sites**

Secondary fit: **Region, One Site, Neighbourhood**

Focus group methods are most effective when implemented at one site or across multiple specific sites. They work particularly well when participants can physically gather in a single location, making them ideal for projects concentrated in one institution, neighbourhood, or



town/city. While focus groups can be conducted across multiple sites (either sequentially or simultaneously with different facilitators), this approach requires additional coordination and may introduce variations in facilitation style or group dynamics that need to be accounted for during analysis.

Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Series**

Focus group methods are versatile in their temporal application but are most used in cross-sectional research designs, capturing perspectives at a specific point in time. They provide a rich snapshot of participants' current opinions, experiences, and insights around a particular topic. However, focus groups can also be effectively deployed in a series format, where the same or different participants engage in multiple sessions over time to explore evolving topics or to dive deeper into specific themes that emerge from initial discussions.

A2 Interviews

Interviews are a qualitative research method used to collect in-depth information from individuals about their experiences.

Interviews involve direct, face-to-face, phone, or online conversations between the interviewer and the interviewee.

There are three types of interviews:

1. Structured interviews, which make use of predetermined questions.
2. Semi-structured Interviews follow a flexible framework with some set questions.
3. Unstructured interviews, these interviews have an open-ended conversational format.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Knowledge Gathering, Capacity Building**

Secondary fit: **Design Solutions, Knowledge Sharing, Progress Monitoring, Ownership**

Interviews can assist in capacity building by facilitating knowledge transfer, skill development and organisational growth. This can be achieved through knowledge sharing, and skill assessments which help identify the gaps among individuals or communities. Furthermore, interviews play a crucial role in needs assessments as they allow the interviewer to identify key issues by gathering detailed insights by making use of open-ended conversation. This allows the interviewers to gain an understanding of the community's needs. In addition, interviews can assist in achieving knowledge gathering as they enable direct interaction with individuals, allow for the interview to clarify complex concepts and provide context to the lived experiences of various communities.

Furthermore, interviews assist in knowledge sharing by facilitating the exchange of information, experiences and insights between individuals or groups. Whereas, design solutions, provide valuable insights into user needs and real-world perspectives. In addition, interviews assist in reaching ownership by fostering engagement, inclusion and shared responsibility. This encourages partnership, building trust and clarifying roles and expectations. Lastly, interviews are crucial for progress monitoring as they provide qualitative insights, stakeholder feedback and real-time assessments of an initiative's effectiveness. It can assist in tracing implementation by gathering information from stakeholders, ensuring that planned activities are being carried out as expected. It allows stakeholders to identify challenges and barriers too.



Desired Knowledge:

Primary fit: **Experiential Knowledge, Behavioural Insights, Local / Indigenous Knowledge, Expert Insights**

Secondary fit: **Institutional Knowledge, Scientific Data**

Interviews assist with experiential knowledge as this is gained through lived experiences, including lessons learned, case studies and first-hand accounts of events. Interviews can also assist in gaining behavioural insights, as interviews can be used to understand people's lived experiences and why people act and behave the way they do. In addition, local and Indigenous knowledge is accessible through interviews as a method as these methods' primary function is the transfer of qualitative information and thus it can be a tool to be used to gain a deep background in people's local environment and their Indigenous background.

Desired Level of Engagement:

Primary fit: **Empower, Collaborate, Involve**

Secondary fit: **Co- Create, Consult, Inform**

Interviews can assist in collaborative engagement as they facilitate collective input, discussion and consensus-building among multiple communities and stakeholders. Furthermore, it assists in empowering engagement by giving individuals (the community) a voice in the conversation, interviews create space for marginalised or less-heard perspectives thus, fostering inclusivity. Lastly, it assists in involved engagement as it allows for communities to be involved and not create merely a top-down approach.

Project Stage:

Primary fit: **Evaluation, Initiation**

Secondary fit: **Planning & Design**

Interviews are primarily helpful in the evaluation stage, as they allow the interviewer to gather detailed insights, assist in understanding stakeholder perspectives, it can identify strengths and weaknesses, it validates other data sources by allowing the interviewer to provide context and explanation for results, it helps to assess impact and effectiveness, and it encourages honest feedback. Furthermore, it is helpful in initiation as it allows for understanding needs and context, assists in gathering expert insights, helps to define objectives and priorities and assists in the identification of risks and challenges.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium**

Secondary fit: **High**

Interviews can be medium budget, as it includes multiple communities within the SADC region. The budget could increase if professional transcription services are needed, recording devices, or travelling is needed for interviewers.

Available Time:

Primary fit: **Months**

Regarding interviews, the timeframe is usually dependent on the scale of the project. The time required is medium-term as multiple interviews are needed to be done and depending on whether traveling is needed for the interviews the timeframe will increase.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

Secondary fit: **Subject Expertise, Digital Skills**

As a result of the interviews being based in the SADC region local language skills will be required as individuals residing in the SADC region speak multiple languages and in some cases, English is not their home language. Furthermore, facilitation skills or rather interviewer skills will be needed as well as interviewers being trained on how to navigate interviews with vulnerable groups as well.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5)**

The most common format, is through gathering in-depth insights from an individual. Thus, a micro group size is generally best suited.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Public Space Constraints**

Interviews can work with digital connectivity restraint as an internet connection is not needed for face-to-face interviews and interviewers can record the interviews on their own devices. Interviews cannot work with mobility restraint for if the interviewees do not have access to transport, then the interviewers need a form of transportation to go to the participants. Public space constraints might be a hindrance because the interviewee does not feel safe within a secluded environment, they might feel hesitant to share confidential or personal experiences. Regarding literacy constraints, interviewers who are proficient in different SADC languages would be an advantage. In addition, interviews are conversationally based and thus do not require participants to be fluent in reading or writing. However, it is important to note that there might be a challenge in gaining consent from participants with literacy constraints. Interviews work with electricity constraints and skills constraints.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites**

Interviews are flexible and can be done across various geographical scopes. It is solely dependent on the type of project. Therefore, this project is focused on the SADC region and interviews can be done in any part of the SADC regions.



Temporal Scope:

Primary fit: **Cross-sectional, Longitudinal**

Interviews allow for the cross-sectional scope as they can capture current perspectives or conditions and longitudinal interviews allow the researcher to track changes and evaluate long-term impact or studying trends.

A3 Workshops

Workshops are interactive sessions that are utilised for learning, sharing skills, and developing skills.

Workshops are participatory classes or meetings that bring together individuals or groups to learn, discuss, and collaborate on specific topics, skills, or projects via discussion and interaction. Facilitators or experts frequently instruct them, which may encompass ideation and problem-solving exercises to practical training sessions. To foster collaboration, share knowledge, and develop skills, workshops are frequently implemented in the fields of education, business, and community development.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Capacity Building, Knowledge Gathering, Knowledge Sharing, Ownership**

Secondary fit: **Progress Monitoring, Needs Assessment, Design Solutions**

Community engagement, particularly in Africa, is a noteworthy objective of workshops. These workshops are conducted to promote community engagement and participation in development initiatives. Subsequently, solving problems: these workshops are conducted to resolve particular challenges or concerns communities encounter. Furthermore, policy development is accomplished by convening stakeholders, experts, and policymakers to deliberate and devise strategies for effective governance and regulation. In this manner, policies are informed and shaped.

Desired Knowledge:

Primary fit: **Institutional Knowledge, Scientific Data, Expert Insights, Experiential Knowledge**

Secondary fit: **Behavioural Insights, Local / Indigenous Knowledge**

Numerous forms of knowledge can be acquired from workshops, depending on the project, objectives, and participants. A key goal of practical knowledge workshops, primarily in the Southern region of Africa, is to teach digital literacy and agricultural skills. The participants are provided with practical strategies and instruments to resolve specific issues, including the enhancement of crop yields and the management of small businesses.

Additionally, workshops can be used to acquire innovative knowledge by encouraging participants to develop innovative approaches and address challenges by thinking outside the box.

The policy workshops are typically attended by policymakers, researchers, and stakeholders, who frequently generate knowledge that influences the development and reform of policy.



Cultural knowledge exchange workshops offer participants the opportunity to learn and share experiences from various kinds of cultural traditions and perspectives. Lastly, workshops can also generate knowledge about sustainable development, including eco-friendly practices like conservation, refuse management, and renewable energy. Participants acquire knowledge regarding methodologies that facilitate inclusive growth, mitigate poverty, and enhance livelihoods.

Desired Level of Engagement:

Primary fit: **Co- Create, Collaborate, Consult, Involve**

Secondary fit: **Empower, Inform**

The facilitator's role in directing the discussion is crucial in terms of engagement. It is also their responsibility to establish an inclusive environment in which all participants feel at ease and can contribute. It is also essential to encourage participants to reflect on the knowledge they have gained through feedback and reflections. Participants can create a multiplier effect by sharing the knowledge and skills they have acquired with those who were unable to attend the workshop due to the scaling impact.

Project Stage:

Primary fit: **Planning & Design, Initiation, Implementation**

Secondary fit: **Maintenance, Progress Monitoring**

To accomplish varied objectives, workshops may be implemented at different phases of a project. During the conceptualising phase, workshops are essential for brainstorming sessions that generate and refine project ideas, as well as for identifying key challenges and opportunities. In the planning and design phase, workshops can be of assistance in the development of strategies, workflows, and timelines, as well as the identification of risks and the development of mitigation strategies.

Workshops can be advantageous in procuring funding, partnerships, and resources. This is accomplished by presenting the project to potential donors, partners, and investors. Collaboration with stakeholders can also be employed to identify funding opportunities. Workshops can be a valuable tool in the examination of project progress and the identification of areas for development during the implementation stage. Finally, workshops may be implemented during the exit and sustainability phases to involve stakeholders in the development of sustainability and ownership strategic plans. In addition, devising strategies to facilitate maintaining project results.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **High, Medium, Low**

Secondary fit: **High, Low, Medium**

Budgets for workshops may be classified as high, medium, or low, contingent upon the project. Training local producers on sustainable agriculture is an example of a low-budget initiative. Building the capacity of healthcare professionals is the primary objective of the medium budget. The hefty budget applies to conferences that are held on an international scale.

Available Time:

Primary fit: **Days, Hours**

Secondary fit: **Days, Hours**

The duration of workshops in Southern Africa is dependent upon a variety of factors, such as the complexity of the subject matter, the audience, and logistical considerations. Awareness-raising workshops are conducted to educate participants about specific issues, such as environmental issues, and can last between two and four hours.

The goal of skill building is to impart practical entrepreneurship skills, and these seminars typically last between two and three days. Additionally, policy advocacy workshops may require 2-4 days.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language, Subject Expertise**

Secondary fit: **Facilitation Skills, Local Language, Subject Expertise**

The skills necessary to conduct workshops are also contingent upon the objectives of the workshop. Additionally, it necessitates a blend of interpersonal and technical abilities. The facilitator must possess adaptability, public speaking, and listening skills. Cultural awareness, which encompasses language proficiency, sensitivity to diversity, and knowledge of local customs, is frequently required.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Extra Large (100+), Large (50-100), Medium (20-50)**

Secondary fit: **Extra Large (100+), Large (50-100), Medium (20-50)**

Workshops' group sizes are contingent upon their objectives and context. The workshops that necessitate profound discussions, collaborations, or personalised attention are best suited for small groups that are highly interactive and participatory. The management and facilitation of these seminars are more straightforward. Medium groups are typically employed for training sessions, capacity-building programs, and community engagement. These seminars may include gender equality, youth engagement, or community-based workshops.

It is generally recommended to use large groups and extra-large group workshops for large-scale training programs or awareness-raising campaigns. Events designed to attract a broad audience. The following are appropriate for workshops that have restricted time or resources. Examples of these include workshops for stakeholder consultation and large-scale agricultural training programs.

Feasibility with Local Constraints:

Primary fit: **Electricity Constraints, Mobility Constraints, Public Space Constraints**

Secondary fit: **Digital Skills Constraints, Literacy Constraints**

Workshops can be effective despite local limitations. Careful planning, adaptability, and the implementation of innovative strategies that are consistent with the local context are essential



for success. A visual and oral method that incorporates visuals, such as diagrams, images, and videos, is one of the possible approaches. Communicate information to overcome literacy limitations.

Utilise offline resources, including posters, flip charts, and physical tools, to surmount digital connectivity limitations. To mitigate electricity constraints, workshops are conducted during the day to prevent the need for electricity for lighting. Low-tech solutions that do not depend on electronic devices. Use flip charts, whiteboards, and physical objects instead. Other methods through which workshops can function despite local constraints include utilising local resources, such as community centres, schools, and open spaces, rather than relying on formal venues.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, Neighbourhood, One Site, Region, Town/City**

Secondary fit: **Region, Town/City**

The geographical scope is contingent upon the target audience, objectives, and logistical considerations. For example, workshops can be implemented at the neighbourhood level to address the needs of the community, including women, youth, and community leaders. Workshops can be conducted at the regional level to address issues that impact multiple communities or districts, such as regional entrepreneurship training programs.

Workshops may be implemented in urban areas to resolve nationwide concerns, including policy formulation, national campaigns, or vast training initiatives.

Temporal Scope:

Primary fit: **Ongoing, Cross-sectional**

Secondary fit: **Ongoing, Series**

Workshops can be classified into various temporal scopes based on their design, objective, and implementation. Workshops are particularly well-suited for large-scale development programs, as they can be incorporated into the longitudinal program, which involves participants engaging in multiple sessions over months or years to evaluate progress, develop skills, or execute long-term projects. Workshops can be incorporated into an ongoing program, such as monthly training sessions for entrepreneurs, or innovation centres.

Workshops may also be included in a series, where each session is designed to build upon the previous one to accomplish a particular objective. This is most suitable for thematic initiatives and training programs.

A4 Surveys

Surveys are research methods that are used to collect data. The data is collected from a specific group of people. The size of the group usually varies. The data is collected by creating a set of questions.

Surveys are used to gather different types of information from the respondents. Surveys come in different forms; some are telephone surveys, some are administered through paper and some are digital, in the form of mobile apps.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Knowledge Gathering, Design Solutions**

Secondary fit: **Progress Monitoring, Knowledge Sharing**

Surveys may help identify different issues within communities, be it social, environmental and economic issues and it could ensure that any interventions put in place address these real issues. It may also contribute to knowledge gathering by collecting necessary information on community practices, challenges, and solutions.

Desired Knowledge:

Primary fit: **Experiential Knowledge**

Secondary fit: **Local / Indigenous Knowledge**

Surveys may collect various types of knowledge, depending on the project and participants, but the main knowledge collection it allows for is experiential knowledge, because they focus on capturing the real life, lived experiences and challenges of community issues and members. They could also assist in understanding and collecting data on common practices in the communities like farming.

Desired Level of Engagement:

Primary fit: **Consult, Inform**

Secondary fit: **Involve, Co- Create, Empower, Collaborate**

Surveys levels of engagement vary, depending on how they are designed and implemented in the project. However, this method does allow for the community to be informed and consulted, because necessary information is gathered and shared surrounding the communities, and the community members can actively participate and give feedback concerning the communities and projects. This allows for communities to be actively involved.



This method also allows for researchers to work directly with the communities and their members to try and solve problems. It also gives the community a voice and a chance to make decisions, empowering them.

Project Stage:

Primary fit: **Initiation**

Secondary fit: **Planning & Design**

Surveys are normally used at the beginning of a new project to analyse what communities need, highlight issues and create solutions. Surveys also contribute to planning and design because they may help shape project plans with different input from participants and stakeholders. This method may be used in other stages of the approach, but it is less common.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Secondary fit: **High**

The time to conduct surveys normally varies, and the budget usually depends on the scale and length of the project. However, most that occur within SADC regions are short-term and are therefore lower in budget. Simple surveys, like ones online or by phone, have lower costs, but some lower-income communities may not have access to these things. If this is the case, then in-person surveys would occur, however, these are considered high-budget.

Available Time:

Primary fit: **Short-Term**

Secondary fit: **Long-Term**

Normally, surveys are short-term, and not very time-consuming, as immediate data collection is often required. Surveys may be quick, depending on how data is collected, for instance, if the questions are short, digital, and structured well. However, they could become time-consuming if the data collected is in-person, or if the surveys have more in-depth questions and analysis.

Available Skills (Researcher):

Primary fit: **Subject Expertise, Facilitation Skills**

Secondary fit: **Digital Skills, Local Language**

Subject expertise is necessary for designing, interpreting and understanding surveys, while facilitation skills are needed to help participants stay engaged. The local language is needed to cater to anybody in the community who primarily uses it, and it helps with accuracy and being inclusive. Digital skills are not as important but could be necessary for phone or online surveys.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Medium (20-50), Small (5-20)**

Secondary fit: **Large (50-100)**

For many surveys in the SADC region, a small to medium sample size is required to get the necessary information, because it primarily occurs in local communities, but depending on the size of the project, the size of participants may be larger.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Mobility Constraints**

Secondary fit: **Digital Connectivity & Access Constraints, Electricity Constraints**

Face-to-face surveys are common in rural areas; however, it is expensive and time-consuming. Collecting data this way may be better for low-income, low-literacy and areas with no access to digital platforms. Surveys that occur online, through Google Forms etc. are common in more urban areas, they are cheaper but exclude offline participants.

Surveys that occur through the phone are common in any areas that have phone access; they are cheaper but exclude participants without phone access. It may be convenient for participants who are unable to travel. Written surveys are common in areas without internet connectivity, or areas like schools, medical facilities etc. It could be expensive because of printing. However, it may overcome literacy barriers if pictures are used to help the participant respond.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Multiple Sites**

Secondary fit: **Neighbourhood**

The geographic scope of the projects is dependent on the participants and the resources available. However, one-site surveys are very small, and centred on a very localised group, while multiple-site projects are not as small, they allow for short-term surveys and projects. Surveys occurring in neighbourhoods or towns, allow for research about communities, and the input of larger powers within the community. Regional and national projects that require surveys are not as common, as they require larger budgets and partnerships. Within this approach, one-site and multiple-site surveys are most common.

Temporal Scope:

Primary fit: **Cross-sectional, Series**

Secondary fit: **Longitudinal, Ongoing**

Cross-sectional surveys are convenient and quick, common among short-term projects. These are the most common ways to solve community issues quickly and efficiently. When surveys are conducted in a series, it requires surveys to be conducted with breaks in between, large or short.



Longitudinal surveys are possible, but require constant monitoring and funding, while ongoing surveys require constant data collection, and are often used in large studies and are not very common.

A5 World Café

The world café method is a structured yet informal group discussion approach that fosters collaborative dialogue, idea-sharing, and collective problem-solving through rotating small-group conversations.

World cafés are a structured yet informal approach to group discussions that encourages participants to exchange ideas in a dynamic, engaging way. The method is designed to simulate the atmosphere of a café, with small tables where participants discuss a guiding question in rounds of conversation, typically lasting 15–30 minutes each. After each round, participants move to a new table while a designated table host stays behind to summarise key insights from the previous discussion. This cross-pollination of ideas allows knowledge and perspectives to build organically, leading to deeper understanding and innovative thinking.

At the end of the session, the key themes and insights from all tables are brought together in a plenary discussion, where patterns, connections, and next steps can be explored. The method is particularly effective for collaborative brainstorming, stakeholder consultations, and participatory planning, as it allows for multiple voices to be heard in an engaging and interactive format. While it is commonly used in in-person settings, it can also be adapted for virtual or hybrid formats.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Needs Assessment, Ownership**

Secondary fit: **Capacity Building**

The world café method is great for knowledge gathering, knowledge sharing, needs assessment, and fostering local ownership. Creating a structured yet informal environment, allows participants to engage in deep, meaningful conversations that surface diverse insights, making it an effective tool for gathering knowledge from different perspectives. It is equally strong in knowledge sharing, as participants not only contribute their own experiences but also learn from others, helping to create a collective understanding of an issue. This participatory nature makes it ideal for needs assessments, as communities, organisations, or stakeholders can articulate their priorities, challenges, and aspirations in a way that reflects lived realities rather than just top-down analysis. Furthermore, the method naturally fosters local ownership—because the process is inclusive and conversational, participants feel heard and involved, increasing their investment in the outcomes and any follow-up actions.

While capacity building is not the primary focus, it often happens as a byproduct of the process. As people engage in dialogue, they develop skills in listening, critical thinking, and collaborative problem-solving. The exposure to different viewpoints and shared knowledge can strengthen their ability to contribute more effectively to future discussions or initiatives.

Desired Knowledge:

Primary fit: **Behavioural Insights, Experiential Knowledge, Local / Indigenous Knowledge**

Secondary fit: **Institutional Knowledge, Expert Insights**

World cafés are particularly effective for capturing experiential knowledge and local or indigenous knowledge. Its informal, conversational structure allows participants to share lived experiences, making it an excellent tool for surfacing experiential knowledge. The method also creates space for local and indigenous knowledge, offering a platform for cultural traditions, community-specific insights, and historical wisdom that might not be well-documented elsewhere. By facilitating open discussions, world café ensures that this type of knowledge is both recognised and integrated into broader decision-making processes.

Behavioural insights may surface as participants discuss and reflect on how people interact, make decisions, and respond to challenges. Less commonly, institutional knowledge can emerge if the Café is used within or between organisations. Subject expertise can be incorporated when experts participate in discussions, but the World café is not designed as a one-way knowledge transfer method.

Desired Level of Engagement:

Primary fit: **Collaborate, Consult, Involve**

Secondary fit: **Co- Create**

World cafés go beyond simply informing stakeholders—they actively engage them through consultation and involvement, making it a valuable tool for participatory processes. Unlike top-down approaches that merely deliver information, world café sessions create structured, yet informal, spaces where participants contribute their perspectives, share experiences, and shape discussions. This makes it particularly effective for consulting diverse stakeholders and ensuring their insights help inform decision-making. It also fosters involvement, as participants take an active role in exploring key issues and refining ideas through multiple discussion rounds. The method even allows for collaboration, as ideas are built upon collectively, leading to deeper understanding and potential consensus. However, when it comes to co-creation and empowerment, world cafés serve merely as a starting point rather than a standalone solution.

Project Stage:

Primary fit: **Evaluation, Planning & Design, Initiation**

World cafés are particularly valuable in the initiation and planning and design stages of a project. During initiation, it helps identify key issues, gather diverse perspectives, and build a shared understanding of challenges and opportunities. In the planning and design phase, world café can facilitate brainstorming sessions, helping to generate ideas, refine objectives, and explore possible solutions. While it is less commonly used in later stages, world café can still be beneficial during evaluation, particularly for qualitative assessments. It provides a space where participants can reflect on outcomes, discuss lessons learned, and offer feedback in a way that goes beyond traditional surveys or reports.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

World cafés generally fall into the low to medium budget range, depending on the scale and setting of the event, and offer cost-effective options compared to other participatory methods. At its core, the method requires only a suitable venue and simple materials like paper, markers, and flip charts, making it accessible even for organisations with limited resources. A low-budget version can be hosted in a community centre or even outdoors, with participants using notebooks, sticky notes, or digital tools instead of large writable tablecloths. Volunteers or internal facilitators can lead discussions instead of hiring professional moderators.

For a medium-budget approach, costs may increase if renting a venue, hiring a professional facilitator, or providing catering. Additional expenses might include recording discussions, graphic facilitation, or producing printed materials for documentation and follow-up.

Available Time:

Primary fit: **Days, Hours, Short-Term**

The World café is a short-term engagement that typically lasts between 1.5–4 hours, depending on the number of discussion rounds and the depth of dialogue desired. A minimal session can be completed in about 75–90 minutes, with three rounds of 20-minute discussions followed by a short plenary wrap-up. However, for more in-depth exploration, sessions can be extended to half-day or full-day formats. While the discussions themselves are brief, additional time may be needed for preparation and follow-up.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

The primary skills required for a world café facilitator are facilitation skills and familiarity with the local language. Since the method is built on open, inclusive dialogue, the facilitator must create a welcoming atmosphere, guide discussions effectively, and ensure all participants feel heard. They should be skilled in active listening, managing group dynamics, and encouraging participation. Language is also critical—if the facilitator does not speak the local language fluently, they should work with a co-facilitator or translator to ensure accessibility and full engagement.

The facilitator does not need deep subject expertise in the discussion topic but should understand the core principles of participatory dialogue and be able to steer conversations.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Medium (20-50), Large (50-100), Extra Large (100+)**

Secondary fit: **Small (5-20)**



The method is highly flexible when it comes to group sizes. It is most effective for medium to extra-large groups, as its structured conversation rounds allow for meaningful engagement even at scale. With smaller groups, the method can still work but may feel less dynamic, as fewer perspectives circulate. Micro groups are not well-suited for this method, as the key benefit of World café comes from the cross-pollination of ideas across multiple tables.

Feasibility with Local Constraints:

Primary fit: **Digital Skills Constraints, Digital Connectivity & Access Constraints, Electricity Constraints, Literacy Constraints**

Secondary fit: **Public Space Constraints**

The world café method is highly adaptable to local constraints. Since discussions are primarily verbal, literacy is not a barrier, making it accessible for communities with limited reading or writing skills. Likewise, digital connectivity and digital skills are not required, as the method is traditionally conducted in person, relying on face-to-face interactions rather than digital tools. In areas with electricity constraints, the method can still be implemented with minimal resources—conversations take place using simple materials like paper, markers, and flipcharts, without the need for projectors, microphones, or online tools. These factors make World café an effective participatory approach for regions with limited technological infrastructure.

Public space constraints can be addressed by hosting smaller-scale world cafés in alternative locations, such as homes, community centres, or outdoor areas.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Neighbourhood, Region, Town/City**

Secondary fit: **Multiple Sites**

World cafés are highly adaptable in terms of geographic scope, making it effective for one-site gatherings as well as multi-site discussions at the neighbourhood, town/city, or regional level. At its core, the method is designed for in-person engagement at a single location, making it ideal for community meetings, town hall discussions, or institutional workshops. However, with proper coordination, multiple world café sessions can be held across different locations—for example, in different neighbourhoods within a city or multiple towns within a region—with results later synthesised to capture broader perspectives.

While traditional world café sessions rely on physical presence, adaptations using online tools or hybrid formats can help connect discussions across geographically dispersed sites, though this requires additional planning and digital access.

Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Series**

The world café method is primarily a cross-sectional approach, designed for one-time events where participants engage in structured dialogue over a few hours. It is well-suited for gathering



diverse perspectives at a single point in time, making it ideal for brainstorming, knowledge exchange, and stakeholder consultation.

The method can also be used as a series, where multiple world café sessions are held over time to explore evolving issues, refine ideas, or track changes in perceptions. This is especially useful for community-driven projects, where iterative discussions help build consensus and momentum. However, world café is not naturally suited for longitudinal tracking.

A6 Participatory Rural Appraisal

Participatory Rural Appraisal (PRA) is an interactive and visual, community-based approach where participatory methods are used to empower local people to analyse their conditions and work towards sustainable solutions.

PRA is an effective way of conducting participatory action research in a relatively shorter time, using pragmatic, context-adapted visual tools. This leads to learning about the circumstances to better co-design solutions for the locals.

Problems are identified through methods like social mapping or visual diagrams. Transect walks and focus groups are set up to collect data about the problem at hand. Once the problem is identified and the supporting data is collected, researchers work with the locals to devise solutions that can be carried forward by the locals even when the research is completed. They use cause-effect diagrams, utopian sketching, and visual drawings to understand the effect of implementing certain solutions.

This approach caters to the silent voices that are present in practicality but not in literature. New forms of practical knowledge are created as the lessons and adaptations from the lived reality of the locals combine with the theoretical knowledge of researchers. The hands-on involvement of the local communities fosters ownership and encourages them to keep working on the solutions even when the researchers leave.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Needs Assessment, Ownership, Capacity Building**

Secondary fit: **Design Solutions**

The PRA method is specifically designed for rural communities, enabling them to analyse their conditions, identify the issues, and think about solutions that can be continued even after the research.

PRA uses knowledge gathering through contextual ways, for example, using maps and visual elements to bridge any communication gap. This makes the locals more involved in the research, empowering them to take active charge of the situation and develop the capacity to bring betterment to their community. Sometimes, learnings from PRA may contribute to designing solutions but PRA is a short-term method, limiting the implementation scope of the solution.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge**

Secondary fit: **Behavioural Insights**



Local/indigenous knowledge, along with experiential knowledge, is the main focus of PRA as it aims to learn from participants' lived realities. Behavioural insights can come out as a by-product of the two mentioned above and can aid in developing a more context-based understanding of the challenges faced by locals.

Desired Level of Engagement:

Primary fit: **Collaborate, Empower, Involve**

Secondary fit: **Co- Create**

PRA ensures a non-hierarchical collaboration among the researchers, facilitators, and community members. The locals' voices are actively involved and incorporated in the research, leading towards their empowerment. Co-creation can also be seen as PRA allows local knowledge to be combined with theoretical knowledge for context-based solutions. However, as mentioned above, designing solutions or implementing them is usually out of PRA's scope, but its findings can act as a precursor to the solutions.

Project Stage:

Primary fit: **Planning & Design, Implementation**

This method is often used during the stages of planning and design and implementation. Members of the community are involved in assessing the situation and planning for a solution to address the problem. Their input is incorporated in the designing stage and later used for implementation. The participatory nature of this method enables a bottom-up approach for a contextually and culturally appropriate resolution of identified issues.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low**

PRA usually requires a low budget as it is specifically designed for rural areas with budget constraints. The researchers do not necessarily need an extensive budget. The methods employed can be managed affordably. However, if the scope of the project is large and it requires participation from multiple localities or sites, the researchers will require a high budget to manage the research.

Available Time:

Primary fit: **Short-Term, Months, Weeks**

Secondary fit: **Long-Term**

The PRA method is often employed for rapid assessments and community engagement on a short-term basis. This can range from weeks to a few months. The main focus is on collecting data and insights from the lived experiences of local members of the community. The focus is concentrated on the key community issues. However, if the scope of the project is larger and the researchers aim to implement and monitor the findings of the research, it can be extended to a long-term project.

Available Skills (Researcher):

Primary fit: **Local Language, Facilitation Skills**

Secondary fit: **Subject Expertise**

Given the collaborative nature and local context of this research method, the researchers need to have a knowledge of the local language and possess facilitation skills for a smooth experience for both the community and the researchers. Expertise in the subject is also required as it requires a deep understanding of the problem, its scope, and the right way to integrate theoretical knowledge into the experiential insights of the participants.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20)**

Secondary fit: **Medium (20-50)**

The group size is usually small or medium as it requires deep involvement at each step and a larger group would require more time and budget. The group size recommended for this approach can be managed with a hands-on method and deep involvement. The researchers must be able to manage the discipline of the research without compromising on the value of the outcomes with the group involvement.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Digital Skills Constraints, Electricity Constraints, Literacy Constraints**

Participatory Rural Appraisal is modified to circumvent local resource constraints in regions with scarce resources. If the area that researchers aim to cover is deficient in digital connectivity, access, and electricity, the research will not be hampered by it. The method uses simple and traditional ways of data collection and analysis such as in-depth conversations, pictorial mapping, community walk-throughs, and storytelling through oral and visual means. If the group is too large, constraints related to public space may arise but they can be managed by splitting participants into smaller groups.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Neighbourhood**

Secondary fit: **Region**

PRA is an in-depth, context-based method of research that is restricted to a limited geographic area to ensure profound research results. The primary geographic scopes are one site and neighbourhoods. The method delves deep into the local understanding of meanings and cultural relevance to analyse the identified issues with ground realities in perspective. Sometimes, PRA is used for regions as a whole with wide similarities like in South-East Asia for a more surface-level understanding of similar regions.



Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Ongoing, Longitudinal**

This method is often used in rapid assessments of rural regions, hence, the temporal scope is usually cross-sectional. A single point in time is targeted to assess current conditions, challenges, and opportunities for improvement. If the researchers aim to study the implementation of a program or develop findings of the research over time, ongoing or longitudinal methods can be used. This is usually common in development projects where monitoring and tracking of project implementation is needed for long-term rural planning.

A7 Crowdsourcing

Crowdsourcing is a participatory method where a large group of people, often volunteers, contribute to data collection, analysis, or problem-solving to advance scientific research.

Crowdsourcing as a participatory research method enables researchers to collect and analyse data on a much larger scale, usually sourced via the Internet. Implementing crowdsourcing methods in the citizen science approach can build public trust in research. By involving non-researchers in the scientific process, researchers can gain insights into public perspectives, and the public's scientific understanding improves. It also enhances citizen engagement. Various disciplines, including astronomy, ecology, history, medicine, and political science, can benefit from crowdsourcing. By leveraging crowdsourced solutions, organisations can address complex problems by tapping into external knowledge and a broader pool of problem solvers rather than relying solely on scientific resources. The advantages of crowdsourcing include cost savings, speed, and access to skills that may not be available within a scientific team.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Progress Monitoring, Knowledge Sharing**

Secondary fit: **Capacity Building, Ownership**

Crowdsourcing has emerged as a powerful tool within the citizen science approach, particularly in knowledge gathering. It uses the public's collective intelligence to collect, analyse, and interpret huge amounts of data that would be otherwise unavailable for individual researchers or small teams. Additionally, crowdsourcing performs well in knowledge sharing by fostering a two-way exchange of information between experts and participants, empowering communities with new insights, and fostering a deeper understanding of scientific processes. This method also supports SDG progress monitoring by enabling the tracking of environmental, social, and economic indicators through widespread participation, making it easier to assess progress toward global sustainability goals.

Desired Knowledge:

Primary fit: **Scientific Data, Local / Indigenous Knowledge, Behavioural Insights, Experiential Knowledge**

Scientific data and local and indigenous knowledge are key contributors to crowdsourcing. Scientific data relies on the collective efforts of participants to collect, classify, or analyse information on a scale that traditional research methods can't achieve. At the same time, local and indigenous knowledge adds invaluable context and depth to projects, especially in environmental or cultural studies, where community insights can reveal patterns or solutions that might otherwise be overlooked. In addition, experiential knowledge and behavioural



insights emerge as participants share their personal experiences and behaviours, offering unique perspectives that can contribute to the research.

Desired Level of Engagement:

Primary fit: **Involve, Collaborate**

Secondary fit: **Consult, Empower**

Crowdsourcing allows for a spectrum of engagement types, highlighted by Involve and Collaborate. These levels of engagement build a sense of ownership and connection to the project, encouraging participants to work with researchers to refine methods, interpret results, or even shape the direction of the study. In addition, consulting participants for feedback or insights can improve the quality and relevance of the research, while empowerment emerges as a long-term outcome as participants gain skills, knowledge, and confidence through their involvement.

Project Stage:

Primary fit: **Implementation, Planning & Design**

Secondary fit: **Evaluation, Maintenance**

Crowdsourcing comes into play during the implementation phase when volunteers engage in data collection and contribute their time and skills to move the project forward. Its impact at this stage is undeniable, transforming everyday people into co-creators of knowledge and driving projects toward meaningful outcomes. In addition, crowdsourcing can play an essential role in the planning and design phase, where public input helps shape research questions, define goals, and identify key areas of interest. While it's less commonly used in phases such as evaluation or maintenance, its potential in these areas should not be overlooked.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium**

Secondary fit: **Low**

A medium budget is generally required for crowdsourcing. This is because many crowdsourcing platforms and tools are affordable or free (e.g., Zooniverse, iNaturalist); project design, data management, and participant engagement often involve costs. However, there are also low-budget options, such as using social media platforms to collect data for smaller projects or using existing crowdsourcing tools with minimal customisation to keep costs down. High-budget projects, while less common, may involve the development of custom platforms or extensive outreach campaigns. Overall, crowdsourcing offers flexibility that makes it accessible to various financial resources.

Available Time:

Primary fit: **Short-Term, Days, Weeks, Months**

Secondary fit: **Long-Term**



Crowdsourcing for data gathering is often a short-term method, sometimes spanning just weeks or months. In contrast, ongoing monitoring or iterative projects that require continuous public involvement can support long-term initiatives.

Available Skills (Researcher):

Primary fit: **Digital Skills, Facilitation Skills, Local Language**

Digital and facilitation skills, as well as knowledge of the local language, are important for using crowdsourcing methods. Digital skills are important for setting up and managing online platforms, analysing data, and ensuring inclusive participation. Facilitation skills are essential for engaging and motivating participants, giving clear instructions, and ensuring that everyone feels valued and heard. Knowledge of the local language can improve communication and trust between researchers and participants.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Extra Large (100+), Large (50-100)**

Secondary fit: **Small (5-20), Micro (1-5), Medium (20-50)**

Crowdsourcing typically works best with Extra Large (100+) groups, as it relies on thousands of contributors to gather, analyse, or classify large data sets such as Galaxy Zoo or eBird platforms. However, this method can also work effectively with medium (20-50) or large (50-100) groups, especially for more specialised tasks that require a moderate level of participation. While smaller groups (micro or small) are less common for traditional crowdsourcing, they can still be helpful for pilot projects or highly targeted projects.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Digital Skills Constraints**

Secondary fit: **Electricity Constraints, Literacy Constraints**

Regarding applying crowdsourcing as a participatory method, crowdsourcing is most effective in digitally connected environments, and constraints like digital connectivity and access and digital skills constraints should be considered the most challenging. However, these constraints can be solved by incorporating offline data collection methods (e.g., paper-based surveys) or providing digital skills training to participants. Literacy Constraints and Electricity Constraints are secondary constraints, as they can also make participation difficult but are more manageable with creative adaptations, such as using visual or audio-based tools for illiterate populations or organising community hubs with shared resources.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, Region**

Secondary fit: **Town/City, Neighbourhood**

Crowdsourcing is particularly effective for region-wide or multi-site projects, often focused on large-scale data collection and monitoring challenges, where the power of collective



participation and diverse geographic input can significantly enhance the quality and scope of research results. Crowdsourcing can also be scaled down to the city/town or neighbourhood level. However, this is less common and typically requires more targeted engagement to ensure meaningful participation and locally relevant results.

Temporal Scope:

Primary fit: **Cross-sectional, Ongoing**

Secondary fit: **Longitudinal**

Regarding the temporal scope, crowdsourcing is mainly applied for cross-sectional and ongoing projects, often focused on challenges of rapid data collection or ongoing monitoring, where the immediate and sustained contributions of participants can significantly increase the depth and scope of research findings. This method can also be adapted for longitudinal studies, but it is less common and requires specific planning to maintain participant engagement and ensure consistent data quality over time.



A8 Co-Creation

Co-creation is a participatory research method that brings together researchers and communities to collaboratively identify problems, develop innovative solutions, and generate relevant knowledge.

Co-creation is a participatory research method that brings together researchers and communities to collaboratively identify problems, develop innovative solutions, and generate relevant knowledge. Typically, co-creation is conducted through structured workshops or sessions and emphasises open innovation and user-centred design. This helps to ensure active community participation and culturally appropriate outcomes, where community members take an active role in making the decisions that affect them. By integrating local expertise and experiential insights, co-creation fosters community ownership and produces practical, contextually meaningful solutions. Through co-creation, communities help shape the process, rather than respond to it, as they provide specific knowledge based on their experiences, needs and preferences.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Design Solutions, Knowledge Gathering, Knowledge Sharing**

Secondary fit: **Ownership, Capacity Building**

The co-creation method strongly aligns with goals such as designing solutions, gathering and sharing knowledge, fostering local ownership and capacity building. By involving community members directly in decision-making processes, co-creation ensures solutions are tailored to local contexts, in turn helping to enhance the sense of ownership and accountability within the community. Additionally, co-creation effectively gathers experiential knowledge, strengthening both local capacity and understanding of community needs. Co-creation, operating on different participation levels, which fit the goal of the project, has the potential to enhance the project's outcomes and transformative potential.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge**

Co-creation excels at integrating communities' local, indigenous and experiential knowledge, through collaborative processes, input and decision-making into design and solution processes. This enables projects to leverage community insights to better align with local cultural contexts; thus, creating more meaning and ownership for communities related to the projects they are engaged in. Co-creation can also indirectly help researchers acquire deeper contextual insight, related to communities, which in turn contributes to their knowledge and experience.

Desired Level of Engagement:

Primary fit: **Co- Create**

Secondary fit: **Collaborate**

Co-creation emphasises active engagement, primarily at the co-create level, allowing communities and researchers to work jointly, ideally, through all project-level stages. This deep collaboration empowers communities and ensures their voices, knowledge and expertise directly shape outcomes. It also facilitates collaboration, as stakeholders exchange ideas, negotiate decisions, and jointly refine solutions.

Project Stage:

Primary fit: **Planning & Design**

Secondary fit: **Implementation**

Co-creation is particularly useful during planning and design, as it facilitates collective ideation, and refinement of solutions, and ensures the designed interventions are contextually relevant. Additionally, co-creation remains valuable during implementation, maintaining community involvement and continuous adaptation of any co-developed solutions.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium**

Secondary fit: **Low**

The co-creation method typically requires a medium budget. Costs usually include facilitation, workshop materials, venue costs, and possibly digital platforms. However, co-creation can also be adapted to low-budget scenarios by leveraging existing community spaces, virtual meetings, free digital platforms and simple digital or written formats for collaboration.

Available Time:

Primary fit: **Short-Term, Weeks, Months, Long-Term**

Secondary fit: **Days, Hours**

Co-creation projects vary in length depending on purpose, scope, funding, and community engagement needs. There's no one-size-fits-all. Co-creation can be applied to projects over a short to long-term period, typically spanning a few weeks, months or several years to allow sufficient iteration and community involvement at different stages of the project. In the context of conducting co-creation workshops, these can span several hours or days.

Available Skills (Researcher):

Primary fit: **Facilitation Skills**

Secondary fit: **Local Language, Digital Skills**

Facilitators using co-creation methods primarily require strong facilitation skills, including effective moderation, conflict management, and inclusive engagement practices to help define group values, identify best practices and establish a workshop culture. This includes things like ensuring equal speaking time, building on the ideas of others, respecting confidentiality (where



applicable), adopting an open and non-judgmental posture and quality of presence. Additionally, local language proficiency, or familiarity, significantly enhances interaction and understanding among participants.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20)**

Secondary fit: **Medium (20-50)**

Co-creation methods typically perform best with small (5-20) or medium (20-50) groups, ensuring sufficient representation, diversity of perspectives, and meaningful interactions. Larger groups can also participate with careful facilitation or segmentation into smaller sub-groups of 4-6 participants. These smaller sub-groups can focus on specific tasks or activities, and later report back to the larger group to share ideas and communicate outcomes.

Feasibility with Local Constraints:

Primary fit: **Mobility Constraints, Public Space Constraints, Literacy Constraints**

Secondary fit: **Digital Connectivity & Access Constraints, Digital Skills Constraints, Electricity Constraints**

Co-creation can have some constraints for participants, depending on the project goals and engagement mechanisms used. These can be in terms of the availability of public space to conduct workshops, mobility and literacy issues. However, mitigations can be found to work around these issues such as finding other accessible community-based locations or providing transport to help with mobility and extra intermediaries to help with literacy issues. If participants have digital access and skills, virtual or hybrid formats can be used to overcome physical access and collaboration barriers. Furthermore, co-creation can be adapted to overcome constraints related to electricity, digital skills, connectivity and access issues by using written, session recording or face-to-face alternatives. However, using such options may also require additional resources and time.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Neighbourhood, Town/City, One Site**

Secondary fit: **Multiple Sites**

Co-creation is particularly effective for projects at the neighbourhood or town/city level, often focused on public sector and design challenges, where targeted engagement, localised insights, and community-specific insight can significantly influence solution outcomes. Co-creation can also be scaled to multiple sites but this is less common and requires careful coordination.

Temporal Scope:

Primary fit: **Ongoing**

Secondary fit: **Series**



Co-creation can work for projects with an ongoing scope, in the context of solution design, allowing for continuous feedback at all, or singular project phases, as the research project progresses. In doing so, subsequent adaptation and refinement of solutions, based on evolving community feedback, is achieved. In the same context, co-creation can also be applied under a series approach, repeated periodically to assess progress and re-orientate project design strategies, based on community feedback.

A9 Prototyping

Prototyping in participatory research is a method used to collaboratively design, build, and test early versions of ideas, tools, services, or solutions with active input from participants.

The purpose of prototyping is to validate ideas and concepts before full-scale production, which is the primary characteristic of prototyping. Secondly, the feedback stage is employed to collect feedback from users, stakeholders, and team members during the testing phase, which identifies and resolves issues at an early stage in the development process.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Needs Assessment, Capacity Building**

Secondary fit: **Progress Monitoring, Design Solutions, Ownership**

Prototyping is a critical instrument in a variety of sectors in the SADC region, including healthcare, agriculture, education, and agriculture. Prototyping in this region is intended to address specific local challenges and opportunities.

Prototypes are instrumental in the development of solutions that are specifically designed to resolve local challenges, including energy shortages, water scarcity, and healthcare access. Prototyping is also essential for the promotion of innovation and entrepreneurship by nurturing a culture of innovation and encouraging local entrepreneurs to develop and test new ideas. Prototyping is also crucial for enhancing access to essential services, such as agricultural innovations.

Desired Knowledge:

Primary fit: **Experiential Knowledge, Institutional Knowledge, Scientific Data, Local / Indigenous Knowledge**

Secondary fit: **Experiential Knowledge, Scientific Data, Expert Insights**

In the design and development process, prototyping is a powerful tool for the acquisition and generation of knowledge. This knowledge is crucial for the refined development of ideas, the enhancement of solutions, and the guarantee that the final product meets the expectations. Some of the knowledge that can be acquired includes technical expertise that ascertains whether a concept can be technically executed with the available resources. Identifying design flaws that may not be evident in initial concepts or sketches is another application of design knowledge that can be acquired. One can also gain marketing knowledge by evaluating the potential market demand and user interest in the product.

Desired Level of Engagement:

Primary fit: **Collaborate, Co- Create, Consult**

Secondary fit: **Empower, Inform, Involve**

The following elements are necessary for successful prototypes in the SADC region: local participation, which involves communities in the design and testing process to ensure that solutions address their real requirements and are culturally appropriate.

Collaborating with community members as active collaborators rather than passive beneficiaries. In terms of knowledge exchange, mentorship programs, capacity-building training, skills development, and knowledge sharing.

Project Stage:

Primary fit: **Design Solutions, Planning & Design**

Secondary fit: **Evaluation, Initiation, Maintenance, Progress Monitoring**

Prototyping is indispensable throughout the entire project lifecycle. For example, during the conceptualisation phase, prototyping is vital for problem identification and ideation. During the design and planning phase, prototyping is crucial for the collection of comprehensive requirements from stakeholders. This involves the creation of initial diagrams or digital models of the prototype.

During the development phase, it is crucial to construct the prototype's initial iteration using carefully chosen materials and techniques. It is also crucial to conduct preliminary evaluations to identify areas for improvement and identify issues.

It is imperative to test prototypes under a variety of conditions during the testing and evaluation phase to guarantee that they satisfy the necessary specifications. During the refinement stage, identify areas that require improvement based on the feedback received during testing. The final stage involves the completion of the design after all testing has been completed.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **High, Medium**

Secondary fit: **High, Medium**

The cost of prototypes is contingent upon a variety of factors, such as the complexity of the projects, the material used, the stage of development, and the specific objectives of the prototype. The budget and the type of labour required are both important factors to consider. The project's technological and instrument requirements, as well as its geographical location.

Available Time:

Primary fit: **Days, Long-Term, Short-Term, Months, Weeks**

Secondary fit: **Days, Long-Term, Months, Short-Term, Weeks**

The time required for prototype projects in the SADC region is contingent upon a variety of factors, such as the complexity of the project, the resources available, the stage of development,



and the specific objectives of the prototype. The conceptualising phase of prototype projects typically requires a time frame of 1 to 4 weeks, while the design and planning phases require 2 to 8 weeks. The prototype development process can require 4-12 weeks, while the testing and evaluation process can take 4-12 weeks and the finalisation process 2-4 weeks.

Available Skills (Researcher):

Primary fit: **Digital Skills, Facilitation Skills, Subject Expertise**

Secondary fit: **Facilitation Skills, Local Language**

For successful design, construction, testing, and refinement, a variety of skills are necessary. To design and construct physical prototypes, technical skills, such as mechanical engineering, are necessary. The skills required for manufacturing and fabrication include welding, machining, and other fabrication techniques. It is also necessary to possess project management skills to develop comprehensive project plans, which are essential for planning and scheduling.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5), Small (5-20), Large (50-100)**

Secondary fit: **Micro (1-5), Small (5-20), Large (50-100)**

Numerous variables, including the complexity of the project, the availability of resources, and the prototype's specific objectives, influence the group size of prototypes. In general, small teams of 3-5 members are suitable for small-scale initiatives, validation, initial concepts, and simple prototypes. Complex initiatives necessitate a combination of expertise and skills, and medium-sized teams are the optimal choice. Multiple disciplines and extensive testing necessitate large teams for highly complex projects.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Digital Skills Constraints, Electricity Constraints**

Secondary fit: **Literacy Constraints, Mobility Constraints**

In the SADC region, prototyping projects are also constrained by resource availability, which encompasses both material scarcity and supply chain issues. These issues include the difficulty of sourcing and procuring materials because of undeveloped supply chains. Additionally, the prototyping process can be disrupted by infrastructure that fails to provide a consistent power supply, particularly for projects that necessitate a continuous power supply. The issue of skilled labour exists, especially in specialised disciplines like engineering. Further, there are regulatory and bureaucratic obstacles that can be time-consuming and expensive to navigate in complex regulatory environments and attain the requisite certification.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, One Site**

Secondary fit: **Region, Neighbourhood, Town/City**



The geographical scope is contingent upon the project's objectives, resources, and nature. In certain cases, prototyping necessitates the use of multiple domains. This encompasses the case in which the project requires testing in a variety of environments. For instance, a water purification prototype may require testing in both arid and humid regions. Broader substantiation and scalability insights are among the benefits of having multiple sites.

Prototypes may necessitate a singular site in certain circumstances. If the prototype is intended to address a particular localised issue or context, a single site may be sufficient. The benefits include ease of administration, cost-effectiveness, and focused feedback.

Temporal Scope:

Primary fit: **Longitudinal, Ongoing**

Secondary fit: **Ongoing, Series, Longitudinal**

In the SADC region, longitudinal prototyping projects are frequently implemented for initiatives that necessitate long-term observation, iterative development, and adaptation to changing conditions. The duration of these initiatives is often extended, and they may require years of continuous testing, refinement, and scaling.

Typically, this type of scope is employed to confront intricate systematic challenges, including renewable energy, agriculture, and climate change. The longitudinal method has the advantage of being adaptable, allowing solutions to evolve in response to evolving user requirements and changing conditions over time. Secondly, sustainability, long-term initiatives enable comprehensive testing and refinement, thereby guaranteeing sustainable and impactful solutions.



A10 Observations

The observation method is a qualitative research technique where researchers systematically observe and record behaviour, events, or phenomena in their natural setting.

It involves watching and documenting what people do, how they interact, and how processes unfold without directly interfering or participating.

Key features of the observation method include:

- Direct observation of behaviours or events as they occur naturally.
- Systematic recording of observations using field notes, checklists, or technology.
- Can be structured (using predetermined categories) or unstructured (open-ended).
- Maybe participant (researcher joins the group) or non-participant (researcher observes from outside).

This method is particularly valuable for studying behaviours that participants might not be aware of or able to accurately report, understanding complex social interactions, and gathering data in contexts where other methods might disrupt natural behaviour.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Capacity Building, Design Solutions**

Secondary fit: **Capacity Building, Design Solutions**

The observation method is particularly effective for needs assessment and knowledge-gathering goals. By systematically watching behaviours, interactions, and processes in their natural context, researchers can identify actual needs rather than perceived ones, uncovering gaps and challenges that might not emerge through interviews or surveys alone. This method allows for the collection of rich, contextual data about how people behave, what tools they use, and what obstacles they encounter, providing deeper insights than self-reported information.

As a secondary benefit, observation supports design solutions by allowing researchers to witness firsthand how current systems or processes function in real-world conditions. This direct experience helps identify pain points and opportunities for improvement that might otherwise be overlooked, leading to more contextually appropriate and user-centred designs. Additionally, when conducted respectfully and transparently, observational research can contribute to capacity building by involving local stakeholders in the research process and sharing insights that enhance their understanding of their contexts.

Desired Knowledge:

Primary fit: **Behavioural Insights, Experiential Knowledge, Local / Indigenous Knowledge**

Secondary fit: **Expert Insights, Institutional Knowledge**

The observation method excels at gathering behavioural insights by capturing how people behave in authentic contexts rather than how they report behaving. Researchers can document patterns of interaction, decision-making processes, and responses to environmental factors that participants themselves might not be aware of or able to articulate. This unfiltered view of behaviour provides crucial insights into the gap between stated intentions and actual actions, revealing tacit knowledge, unconscious habits, and social dynamics that influence outcomes.

Additionally, observation effectively captures experiential knowledge by allowing researchers to witness firsthand how individuals navigate their environments and respond to challenges. By systematically documenting these experiences, researchers gain an understanding of the lived realities of participants, including emotional responses, adaptive strategies, and practical workarounds that might not emerge through other research methods. This contextual understanding of how people experience systems, spaces, and processes provides valuable information for designing more effective interventions that align with real-world needs and constraints.

Desired Level of Engagement:

Primary fit: **Co- Create**

The observation method primarily serves to Inform the research process, as it allows researchers to gather firsthand information about behaviours, processes, and interactions without actively engaging participants in dialogue. By systematically documenting what they see, researchers build a foundation of knowledge that informs subsequent research activities and decision-making. This approach is particularly valuable when researchers need to understand natural behaviours without influencing them through direct interaction.

When implemented with transparency and appropriate follow-up, observation can also serve to consult with communities. After gathering observational data, researchers can share their findings with participants, seeking validation, clarification, or additional context. This creates opportunities for community members to provide feedback on the researchers' interpretations and contribute their perspectives, though their involvement remains relatively limited compared to more participatory methods.

Project Stage:

Primary fit: **Evaluation, Planning & Design**

Secondary fit: **Design Solutions, Initiation**

The observation method is particularly valuable during the Initiation stage of projects, where it provides a crucial baseline understanding of behaviours, processes, and contextual factors before interventions are designed. By systematically observing existing practices and challenges, researchers can identify actual rather than assumed needs, spot opportunities for improvement, and develop a nuanced understanding of the environment in which the project will operate. This early observational data helps ensure that subsequent planning and design decisions are grounded rather than assumptions.



Observation also proves highly beneficial during the evaluation stage, where it offers an objective means to assess how interventions are functioning in practice. By comparing observed behaviours and outcomes with pre-intervention baselines or expected results, researchers can identify successes, unintended consequences, and areas for improvement. This direct observation of results provides validation beyond self-reported data, capturing actual rather than perceived changes and revealing subtle shifts in behaviour or usage patterns that might otherwise go unnoticed.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low**

Secondary fit: **Medium**

The observation method can be implemented at a relatively low budget, particularly when using simple tools like notebooks, checklists, or basic recording devices. In its most economical form, observation requires only trained observers, basic documentation tools, and time making it accessible even with limited resources. Low-budget options include using smartphone cameras for photo or video documentation, creating simple observation checklists on paper, conducting time-limited observation sessions, and training community members as observers rather than hiring professional researchers.

Available Time:

Primary fit: **Short-Term, Hours, Days**

Secondary fit: **Months, Weeks**

The observation method can be implemented across varying time scales, though it typically falls into the short-term category when designed as discrete research activities. Simple observational studies can be conducted in as little as a few hours or days, making them feasible for projects with tight timelines or limited resources. At a minimum, meaningful observations can be conducted in 1–2-hour sessions, though multiple sessions are typically required to capture patterns and account for variability in the phenomena being observed.

For a more comprehensive understanding, Medium-term observation periods spanning several weeks or months may be necessary, particularly when studying seasonal variations, cyclical processes, or gradual behavioural changes. The time investment depends largely on the complexity of the behaviours being observed, the frequency of their occurrence, and the depth of understanding required. While extended observation provides richer data, even time-constrained projects can benefit from targeted observation sessions focused on specific aspects of behaviour or processes.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Subject Expertise**

Secondary fit: **Local Language**

The observation method primarily requires strong facilitation skills from the researcher, including the ability to remain attentive, patient, and unobtrusive while systematically documenting behaviours and interactions. Effective observers must develop keen attention to



detail, disciplined note-taking practices, and the capacity to distinguish between objective observations and subjective interpretations. They need skills in organising and structuring their observations according to research objectives while remaining open to unexpected but relevant phenomena. The ability to maintain ethical boundaries while observing, particularly in sensitive contexts, is also essential.

Subject expertise becomes important as a secondary skill set, as observers must understand what aspects of behaviour or interaction are most relevant to document and how to interpret what they see within the appropriate context. Knowledge of the domain being studied helps observers recognise significant patterns, deviations, or innovations that might otherwise go unnoticed. Additionally, familiarity with observational research methodologies and analytical frameworks enhances the rigour and validity of the data collected. While technical documentation tools can be simple, basic training in their use ensures consistent and reliable data capture.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20)**

Secondary fit: **Medium (20-50)**

The observation method works most effectively with micro (1-5) and small (5-20) group sizes, where researchers can maintain detailed attention to individual behaviours, interactions, and patterns. With smaller groups, observers can capture nuanced aspects of behaviour, document interactions between specific individuals, and maintain comprehensive records without becoming overwhelmed by too many simultaneous activities. This focused approach allows for rich, detailed data collection that reveals subtle patterns and variations in behaviour that might be missed in larger settings.

While primarily suited for smaller groups, the method can be adapted for medium (20-50) sized groups through strategic sampling techniques and multiple observers. In these cases, researchers might focus on specific subgroups or individuals within the larger context, or employ time sampling methods where observations cycle through different participants. Technology such as video recording can also help capture data from larger groups for later analysis, though this typically requires more resources and raises additional ethical considerations regarding privacy and consent.

Feasibility with Local Constraints:

Primary fit: **Public Space Constraints, Mobility Constraints**

Secondary fit: **Electricity Constraints, Digital Skills Constraints, Literacy Constraints, Digital Connectivity & Access Constraints**

When implementing observation methods in resource-constrained environments, local constraints significantly impact effectiveness. Literacy constraints can be addressed by using visual documentation methods (photographs, drawings) and verbal interviews rather than written surveys. For digital connectivity, access, and skills constraints, paper-based observation tools and in-person documentation can substitute digital solutions, with data digitisation happening later in better-connected locations. Electricity constraints necessitate battery-powered equipment with backup options and manual recording techniques. Public space constraints may require permission-seeking, timing adjustments to observe during less crowded



periods, or focusing on representative smaller areas. For mobility constraints, local community members can be trained as observers to access restricted areas or observation points can be strategically positioned to maximise visibility from limited locations.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Multiple Sites**

Secondary fit: **Town/City, Region, Neighbourhood**

Observation methods are highly adaptable across various geographic scopes, though their implementation and resource requirements change with scale. At the single-site level, observation can be intensive and thorough, allowing researchers to deeply understand specific dynamics and behaviours within a contained environment. This approach works particularly well for focused studies of community centres, specific infrastructure points, or unique public spaces. When extended to multiple sites or neighbourhood levels, observation remains effective but requires more planning, potentially multiple observers, and coordination to ensure consistent documentation approaches across locations. The method becomes more resource-intensive at town/city or regional levels, typically requiring sampling strategies rather than comprehensive coverage, with observers strategically positioned at representative locations.

Temporal Scope:

Primary fit: **Cross-sectional, Series**

Secondary fit: **Longitudinal, Ongoing**

Observation methods offer flexibility across various temporal scopes, though each approach yields different insights. Cross-sectional observations provide valuable snapshots of conditions at specific moments, capturing detailed point-in-time data that are useful for establishing baselines or documenting current states. This approach works well when immediate conditions are the primary concern. Longitudinal observations track changes over extended periods, revealing patterns, progressions, and causal relationships that single observations cannot detect. Series observations strike a middle ground, with repeated observations at strategic intervals to capture cyclical patterns or incremental changes. Ongoing observations, while resource-intensive, provide the most comprehensive temporal understanding by maintaining continuous monitoring presence.

A11 Citizens' Jury

A citizens' jury is a participatory method where a small, diverse group of citizens gather to discuss complex issues deeply and develop collective recommendations for policy or decision-making.

A citizens' jury involves bringing together a representative group of randomly selected community members to explore, deliberate, and provide informed input on complex societal or policy issues; through a highly structured process. Participants engage with experts and expert testimony, ask critical questions, and share their lived experiences through these structured and facilitated discussions. The approach emphasises inclusive participation, informed dialogue, and collective decision-making, to answer a primary question (the charge). In doing so, communities are empowered as citizen voices are incorporated into actionable, deliberated recommendations, that often shape policy decisions or broader community initiatives.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Design Solutions**

Secondary fit: **Ownership**

Citizens' juries effectively support the project goals of knowledge gathering and designing solutions (jury recommendations), as primary goals, by deeply engaging a representative group of citizens in structured deliberations. This method is particularly valuable for synthesising diverse viewpoints into actionable insights for policy or practice. As a secondary goal, citizen juries promote ownership by ensuring that recommendations reflect community values, enhancing legitimacy and fostering buy-in from stakeholders involved in policy or research implementation.

Desired Knowledge:

Primary fit: **Experiential Knowledge**

Secondary fit: **Expert Insights**

Citizens' juries facilitate the integration of experiential knowledge as a primary knowledge type, capturing lived experiences and practical insights of community members regarding local issues. Secondly, citizens' juries allow for the inclusion of expert insights, as participants interact with specialists and informed stakeholders who present evidence-based perspectives during the deliberation process.

Desired Level of Engagement:

Primary fit: **Collaborate**

Secondary fit: **Empower**



The citizen's jury method primarily aligns with the collaborate engagement level, by actively involving citizens through structured discussions and dialogues with experts to jointly reach actionable recommendations. Additionally, citizens' juries can also promote empowerment, as participants are given substantial influence over decisions, contributing meaningfully to outcomes that can directly shape policies and practices.

Project Stage:

Primary fit: **Planning & Design**

Secondary fit: **Evaluation**

Citizens' juries are suited to the planning and design stage of a project, helping to shape approaches, strategies, or solutions before implementation. As a secondary option, citizen juries also suit the evaluation stage, allowing communities to assess existing practices, policies, or interventions and provide recommendations for further improvement.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **High**

Secondary fit: **Medium**

Citizens' juries typically require a high budget, and usually require an impartial sponsor such as a government or organisation to cover costs. Costs may include participant recruitment, staff and facilitator expenses, expert consultations, venue hire, and participant compensation (such as honoraria); this if the process if followed very formally. However, lower-budget adaptations are possible, such as reducing group size, leveraging existing community spaces and making use of volunteer facilitators to mitigate costs.

Available Time:

Primary fit: **Weeks, Months**

Secondary fit: **Days**

Conducting citizens' juries generally requires a commitment of weeks to months, factoring in careful planning, participant selection, and thorough deliberations. Apart from the planning required, the actual jury engagement and deliberation process is normally completed in 2-5 days; often spread out over multiple weeks or weekends. Shorter, condensed formats can occasionally be implemented over days or weekends, though a longer duration is preferable for deeper deliberation and more meaningful recommendations.

Available Skills (Researcher):

Primary fit: **Facilitation Skills**

Secondary fit: **Subject Expertise**

Planning and facilitation of a citizens' jury demands strong skills as a primary requirement, given the need to manage logistics, diverse viewpoints, maintain neutrality, encourage balanced participation, and guide productive dialogue. Secondary skill requirements include subject expertise, which is useful for effectively curating information, evidence, and expert input presented during the jury sessions.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20), Medium (20-50)**

Secondary fit: **Large (50-100)**

Citizens' juries are optimal for groups of between 8-24 participants, which ensures robust, manageable, and meaningful dialogue among participants. If the geographic area to cover is large, they can be scaled by convening several citizens' juries with a final jury deliberating on combined recommendations. In such cases, it should be noted that this may require additional resources to provide adequate facilitation and support to maintain productive deliberations; greatly increasing costs.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints**

Secondary fit: **Literacy Constraints**

Citizens' juries can function effectively despite digital connectivity and access constraints, as sessions typically occur face-to-face, which reduces dependency on digital platforms. Secondly, the method can accommodate literacy constraints by utilising verbal communication, visual aids, facilitation techniques, and accessible language during deliberations, which can make the process inclusive regardless of literacy levels.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Neighbourhood**

Secondary fit: **Multiple Sites, Region, Town/City**

Citizens' juries primarily align well with a neighbourhood or area within a town or city, focusing deeply on localised issues and offering decision-making relevant to specific communities. If the scope is larger, citizens' juries can also be adapted to a multiple-site approach, conducting parallel or sequential juries in different locations to inform broader regional or comparative analysis.

Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Series**

Citizens' juries primarily suit a cross-sectional temporal scope, designed to address specific issues at a particular point in time. However, in some instances, they can be adapted into a series approach where they are repeated periodically, providing longitudinal insights into changing community perspectives and enabling ongoing policy adaptation and development.

A12 Participatory Epidemiology

Participatory Epidemiology (PE) actively involves community members in identifying and addressing health issues. By combining local knowledge with scientific methods, the method helps in disease surveillance and control, and in the development of prevention strategies, especially in resource-scarce settings.

PE inculcates empowerment and capacity building in the locals, ensuring that health activities include the ground realities, and are sustainable. Data collection is done by involving farmers, healthcare workers, and residents. It is often perceived as a low-cost, rapid disease monitoring method. It uses participatory tools like mapping, ranking exercises, and interviews, making it adaptable to rural, conflict-affected, and underserved areas.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Needs Assessment, Ownership**

Secondary fit: **Design Solutions, Knowledge Sharing**

PE helps identify local health challenges and disease risks by collecting data from local communities and assessing the gravity of the situation. Knowledge is gathered by using participatory tools such as mapping, ranking, and interviews to collect epidemiological data with local insights. The exercise empowers communities to take charge of disease surveillance and response, paving the way for long-term sustainability.

The secondary output of this approach can come in the form of knowledge sharing as it facilitates two-way learning between researchers and communities, improving disease prevention strategies. The learnings from the approach can also be used to develop context-specific, community-led interventions for disease control and health improvement.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge, Scientific Data**

Secondary fit: **Behavioural Insights, Institutional Knowledge**

The knowledge gained about risk factors, health patterns, and traditional remedies is based on the local insights and experiential knowledge of the community. Researchers also collect quantitative and qualitative data through surveys and interviews to analyse objective patterns. In addition, behavioural insights and institutional knowledge are collected that can help in understanding the healthcare infrastructure, and the local sentiment about disease management for a more pragmatic application of health interventions.

Desired Level of Engagement:

Primary fit: **Collaborate, Involve, Empower**

Secondary fit: **Consult, Co- Create**

PE actively involves communities in data collection, disease surveillance, and risk assessment, ensuring their participation in health initiatives. Researchers and local stakeholders collaborate to understand disease patterns and validate findings.

As a result, PE helps the locals to become more mindful in monitoring and responding to the onset of diseases to ensure long-term health resilience.

In addition, health experts may consult with local health providers or the general public to understand the context of their actions in disease management and co-create lines of action to minimise the harm.

Project Stage:

Primary fit: **Implementation, Evaluation**

Secondary fit: **Planning & Design, Initiation**

PE can be most relevant during the implementation phase where the disease is monitored and actively controlled by collecting local data, keeping an eye on outbreaks, and applying local knowledge to combat its spread. The approach also contributes to the evaluation of health interventions, collecting local feedback to gauge impact and suggest improvements.

Pre-emptively, sometimes PE can acquire community consultation during the planning phase to ensure health solutions are locally relevant and culturally appropriate. PE can also help identify health needs and engage communities to define priorities and adjust the focus of the project.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low**

PE is a cost-effective method, largely dependent on community involvement, and local knowledge. It employs low-cost methods of data collection like mapping, interviews, and ranking exercises which make it suitable for settings with budget constraints.

Available Time:

Primary fit: **Days, Months**

Secondary fit: **Months**

The time needed to conduct PE can range from days to months, depending on the scope of the research. Quick investigative research results can be obtained through PE, specifically during a disease outbreak or a health emergency, for prompt resolution. PE can extend for months if the scope requires disease monitoring, capacity building, and health interventions.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

Secondary fit: **Digital Skills**



The researchers must have strong facilitation skills that are vital in guiding community members for efficient data collection, discussions, and decision-making, ensuring smooth and active participation. Knowing the local language is also essential for this method as it is required for gathering local knowledge and engaging in health-related conversations, otherwise, language barriers can hinder participation.

In addition, basic digital literacy may be required for data collection using mobile devices or online platforms, but it's not a primary focus.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Medium (20-50), Small (5-20)**

PE is usually conducted with small groups of community members and/or local health workers for specific disease monitoring, community engagement, and data collection. This group size is ideally manageable for localised interventions.

Additionally, PE can be extended to medium-sized groups that include more community representatives like village committees and local volunteers. These group sizes are often chosen for sustained surveillance and health assessments.

Feasibility with Local Constraints:

Primary fit: **Digital Skills Constraints, Electricity Constraints, Literacy Constraints, Mobility Constraints**

Secondary fit: **Public Space Constraints, Digital Connectivity & Access Constraints**

PE is a simple participatory method that is not hindered by many constraints. The methods of data collection and discussion do not necessarily need to be based on digital skills or literacy. Data can be collected through traditional means such as oral communication, mapping, and interviewing. Even with low literacy, locals can contribute significantly to the research. Similarly, electricity and mobility constraints will not affect the research necessarily.

If the scope of PE requires large-scale data collection, constraints of digital connectivity and access may come into play. Also, if researchers are relying on traditional methods of data collection that require physical interaction, the availability of public spaces may be needed.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Neighbourhood, One Site**

PE is ideal for one site or a neighbourhood as disease management and health intervention can truly be localised and conveniently handled. The targeted health interventions and active community engagement are most result-oriented at the local level as expanding the geographic scope requires more resources and involves complex management of local contexts.



Temporal Scope:

Primary fit: **Cross-sectional, Longitudinal**

Secondary fit: **Series, Ongoing**

PE often uses cross-sectional and longitudinal studies. The cross-sectional approach is ideal for rapid assessments or short-term interventions in health management. A longitudinal angle is employed when changes have to be observed over a long time and trends are acquired to analyse the situation. Depending on the scope and goal of the research, PE can also use series or ongoing approaches.

A13 Storytelling

Storytelling is a method where participants share personal narratives and lived experiences to help researchers understand the ground realities and social dynamics of the locals.

Storytelling is a powerful method for understanding the lived experiences of the locals, enabling researchers to comprehend the interconnectedness of social dynamics in everyday life. By uncovering hidden narratives, that might otherwise remain unseen, it offers an inclusive way to engage communities, address concerns, and inform decision-making processes. The method gives voice to the marginalised locals, fostering collective reflection, empowerment, and trust.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Ownership**

Storytelling provides researchers with in-depth qualitative data about cultural insights and local wisdom to facilitate knowledge gathering. The research findings from personal narratives and experiences are then shared as these stories uncover hidden social realities that may not be evident from structured interviews or surveys. The engaging nature of this method makes it effective in fostering ownership among the participants, empowering them to actively engage with the solutions.

Desired Knowledge:

Primary fit: **Behavioural Insights, Experiential Knowledge, Local / Indigenous Knowledge**

Participants' personal stories show how they see the world around them, react to its realities, and navigate formal/informal social systems. Their first-hand lived experiences reflect deeper societal issues that are absent from structured data. These stories are also an insightful way of gathering local/indigenous knowledge that is passed down in the community but not documented like theoretical knowledge, allowing for a deeper context-based understanding of society.

Desired Level of Engagement:

Primary fit: **Involve, Empower, Collaborate**

Secondary fit: **Co- Create**

Storytelling makes participants the centre of research and lets them direct the research angles with their lived realities. Locals and researchers collaborate to unpack the stories, identify themes, and analyse the key findings. This process inculcates a sense of empowerment in the locals by giving voice to their experiences, and by incorporating their narratives into proposed solutions.



Project Stage:

Primary fit: **Initiation, Planning & Design, Evaluation**

Storytelling, at the time of initiation, is highly relevant as it allows researchers to identify everyday local problems and social dynamics to determine the direction of their research. At the time of planning and design, storytelling plays an important role in ensuring that the approaches adopted by researchers are participant-driven and culturally resonant. Finally, at the evaluation stage, storytelling allows for reflection on the outcomes of the research, determining how impactful the project had been.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Storytelling is usually a low-budget method as it is a grassroots technique that focuses on the community. The locals can share their narratives in a verbal form or through visuals. Inexpensive recording equipment is used to capture them. Sometimes, the participants may volunteer to share their stories without monetary incentives, making it an accessible and low-budget method.

Available Time:

Primary fit: **Short-Term**

Storytelling is usually conducted on a short-term basis ranging from hours to weeks. This allows for a quick collection of impactful stories from the locals on a low budget. Depending on the scope of the project, it can be longer as well in some cases.

Available Skills (Researcher):

Primary fit: **Local Language, Facilitation Skills**

Secondary fit: **Subject Expertise**

Being a participant-driven approach, storytelling requires top-notch facilitation skills and knowledge of the local language. They both are essential to engaging the community, collecting authentic stories, and guiding the discussions in a respectful and culturally appropriate manner. Subject expertise is also needed to address the topic professionally so the ground realities can be combined with theoretical knowledge.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5), Small (5-20)**

Storytelling requires extensive time, attention, and engagement. It is best to conduct it at a micro to small level for the most effective outcomes as each narrative is a deep dive into the participant's lived experiences and social realities.



Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Digital Skills Constraints, Electricity Constraints**

Secondary fit: **Mobility Constraints**

This method is not heavily constrained. Communities with limited digital connectivity and access, digital skills, or electricity can still effectively take part in storytelling as the method relies on the simplest rules of a conversation. However, mobility constraints may hinder the access of researchers to the local community or vice versa.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Neighbourhood**

Secondary fit: **Multiple Sites**

Storytelling at only one site or a neighbourhood is ideal for getting access to authentic and rich narratives. Neighbourhoods are often explored to capture specific community narratives. Sometimes, multiple sites are reached out to have comparable narratives. Overall, an engaging research method like storytelling requires a small and practical geographic scope for the effectiveness of the project.

Temporal Scope:

Primary fit: **Cross-sectional, Series**

The most relevant scopes due to limited resources for storytelling are cross-sectional and series. The cross-sectional scope allows the collection of anecdotes about a specific topic or point in time. Storytelling can also be based on a series over a defined, short period where participants build on their narratives, bringing forward different voices focused on a single theme.

A14 Sampling and Specimen Collection

Sampling and specimen collection methods are used in various scientific, medical and research fields to gather data or biological materials for analysis.

Sampling and specimen collection methods encompass diagnosing, monitoring or studying specific conditions. This is done by selecting a representation of a portion of a specific population or material for study. The purpose of this method is for diagnosis, which is the collection of specimens to diagnose diseases or conditions. These are also applied to research, to gather samples for a particular condition, process, or organism.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Knowledge Gathering, Knowledge Sharing, Design Solutions**

Secondary fit: **Capacity Building, Ownership, Progress Monitoring**

Sampling and specimens can be beneficial in the needs assessments, as it will be able to provide objective data by collecting environmental samples provides objective, quantifiable data which can be essential for identifying community needs. This method can be particularly helpful in assessing public health, as well as gathering information regarding environmental science. It allows for understanding to be built and informed decision-making. Concerning knowledge sharing, it is easy to share information that is in survey format as it is more accessible, it is easier to distribute information and is convenient for respondents. Sampling and specimen collection also make designing solutions easier as they provide the researcher with targeted interventions.

Desired Knowledge:

Primary fit: **Behavioural Insights, Scientific Data, Local / Indigenous Knowledge**

Secondary fit: **Expert Insights, Experiential Knowledge**

This method can particularly allow for local and indigenous knowledge as it can be used to gain data on the environment which includes the local environment. Furthermore, it allows for scientific data as it allows scientists to conclude a population or phenomenon based on a subset of data. Sampling is essential for gathering behavioural insights; by carefully selecting a representative subset of individuals or groups, researchers can conclude broader behavioural patterns, attitudes, preferences and trends within a population.

Desired Level of Engagement:

Primary fit: **Consult, Empower, Collaborate, Involve**

Secondary fit: **Co- Create, Inform**



Informed engagement ensures that participants are fully aware of what is involved in the data collection process, the purpose of sampling, how their samples will be used and any potential risks or benefits. Sampling and specimen collection can facilitate consultation engagement, especially in contexts where the perspectives, feedback or input of participants or stakeholders are essential to the study's design, implementation or interpretation of results. Sampling and specimen collection can assist with involved engagement as it allows for active participation in the data collection process. It also allows participants to collaborate in the decision-making process, by making decisions about how samples will be collected, what type of specimens are needed and what procedures should be followed. Thus, empowering participants and allowing them to feel a sense of ownership.

Project Stage:

Primary fit: **Initiation, Evaluation, Implementation**

Secondary fit: **Planning & Design**

Sampling is particularly helpful in the early stages of a project as it allows researchers to define the target population and select a manageable subset for study. Whereas, with specimens, the researchers gather physical samples to study specific phenomena or test hypotheses. It is helpful in the planning and design phase as it plays a key role in shaping how data will be gathered, analysed and interpreted. It is helpful in the implementation because this is where the data collection process begins. These methods also make evaluation particularly easy as it is easy to interpret the data.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium, High**

The budget required for sampling and specimen collection can vary depending on several factors including the scope of the study, the nature of the samples, the methodology used and the specific field research. In general sampling costs may involve recruitment, survey tools, and logistics while specimen collection requires materials, labour, compliance and potentially expensive transportation and analysis.

Available Time:

Primary fit: **Months**

The total timeframe for sampling can range from one month to several months, depending on recruitment, sample, size and data collection methods. Specimen collection is also one to several months, especially if fieldwork, transportation, or specialised storage/processing is required.

Available Skills (Researcher):

Primary fit: **Digital Skills, Subject Expertise**

Secondary fit: **Facilitation Skills, Local Language**

Sampling and specimen collection require a range of skills that are essential for ensuring that data is collected accurately. With sampling, statistical analysis, survey design, ethical knowledge, data collection and management, communication, project management and



recruitment skills are needed. Whereas, with specimen collection technical expertise in collection methods, attention to detail, ethical knowledge, quality control, lab safety, equipment proficiency, specimen storage and problem-solving are skills required.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Large (50-100), Extra Large (100+), Medium (20-50)**

The group size for both sampling and specimen collection can vary depending on the nature of the research, the study's objectives and the available resources. For sampling small group 10-100 participants (for qualitative studies, pilot studies), Medium group 100-500 (social science surveys, small clinical trials), large group 500-5000 (natural surveys, large clinical trials).

Whereas for specimen collection small groups 10-100 (case studies, small clinical studies), medium group 100-1000 specimens (multi-centre clinical studies, ecological studies), large group 1000-10000 specimens (large-scale epidemiological studies, global health research).

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Digital Connectivity & Access Constraints, Electricity Constraints, Digital Skills Constraints**

Secondary fit: **Public Space Constraints**

Sampling and specimen collection can be significantly impacted by various constraints namely the following:

Literacy constraints - if the individuals involved in sampling and specimen collection lack literacy skills, it can hinder their ability to correctly follow instructions, and understand forms. This can result in errors, incomplete data or misinterpretation of sampling handling protocols.

Digital connectivity and access constraints can make it difficult for those involved to participate in digital tools for specimen tracing, reporting or coordination.

Mobility constraints can affect stakeholders who may face limited mobility due to transportation issues, geographical isolation or physical disabilities, they may struggle to access sampling locations. This can be solved by ensuring that the research takes place at a local hall where connectivity, space and easy access are available.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, One Site**

Secondary fit: **Town/City, Neighbourhood**

Sampling and specimen collection can be conducted across multiple sites. Sampling across multiple sites allows researchers to compare data from different locations, ensuring more comprehensive and generalisable results. This method is often used in research that focuses on a specific location or a localised phenomenon. Conducting sampling at one site can simplify logistics, and control variables, and provide in-depth insights into the characteristics or



conditions of that particular location. Sampling and specimen collection can be done in both rural and urban areas.

Temporal Scope:

Primary fit: **Longitudinal, Ongoing**

Secondary fit: **Cross-sectional, Series**

Sampling and specimen collection can indeed allow for a cross-sectional temporal scope by capturing data at a single point in time. This approach is particularly useful for providing a snapshot of current conditions but does not offer insights into changes or trends over time. It is often used for baseline studies, one-time assessments, and situations where understanding the present condition is the primary goal.

Sampling and specimen collection can support a longitudinal temporal scope by allowing for repeated data collection at multiple time points. This approach is particularly valuable for tracking changes, trends and the long-term effects of variables or interventions. However, this approach comes with challenges related to resource needs, study duration and participant retention.

Sampling and specimen collection can be designed to allow for an ongoing temporal scope, which involves continuous or frequent data collection over an extended period. This approach is particularly valuable in fields such as environmental monitoring, public health, agriculture, and biodiversity studies, where real-time or long-term data is essential. Although ongoing sampling provides numerous benefits, such as real-time data and early detection of trends, it also comes with logistical, financial and data management challenges that need to be addressed to ensure success.

Sampling and specimen collection allow for a series temporal scope, where data is collected at regular or set intervals over time. This approach is particularly useful in research where tracing changes over time at periodic intervals is necessary, without requiring continuous or real-time data collection. It offers flexibility, reduces resource demands compared to ongoing monitoring and provides meaningful data for understanding trends, patterns, or effects over time.

A15 Participatory Sensing

Participatory sensing is a method of data collection where individuals or communities use personal or shared devices to collect and share data about their environment, behaviours, or experiences.

Participatory sensing is a method that involves individuals or communities in the active collection and sharing of data using personal or readily available digital devices such as smartphones, wearable sensors, or GPS-enabled tools. Unlike traditional top-down data collection approaches, participatory sensing empowers participants to contribute real-time, location-specific data about their environment, behaviours, or experiences. This method is particularly useful for capturing dynamic, context-rich information at scale, and is often employed in areas such as environmental monitoring, public health, urban planning, and transportation. By engaging participants directly, participatory sensing not only generates valuable data but also promotes awareness, community engagement, and localised insight. Participatory sensing can be done in a group or by someone on their own. Normally, applications on cell phones are used, making data easy to collect and share.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Progress Monitoring, Knowledge Gathering, Needs Assessment**

Secondary fit: **Design Solutions, Ownership**

Participatory Sensing functions mainly as a data collection and monitoring tool, it aligns most with progress monitoring, knowledge gathering, and needs assessment. Although it may make use of solution design and local ownership, it can contribute to it, but its primary use is data collection.

Desired Knowledge:

Primary fit: **Expert Insights, Scientific Data**

Secondary fit: **Local / Indigenous Knowledge, Institutional Knowledge, Experiential Knowledge**

Subject expertise is needed to promote accuracy, while scientific data is measurable, and can be viewed objectively it may be expensive. Since participatory sensing is mainly online data collection, understanding knowledge this way may be the primary way to collect such knowledge.

Desired Level of Engagement:

Primary fit: **Co- Create, Collaborate, Involve, Empower**

Secondary fit: **Inform, Consult**



Since this method is very participant-based, collaboration is the most relevant for this method. It Promotes collaboration between the community and researchers. Co-creation is important because it helps empower communities to come up with solutions to community problems to design solutions. It also involves the community in data collection. While consulting and informing are important in participatory sensing, it is not as relevant as the levels of engagement.

Project Stage:

Primary fit: **Implementation, Planning & Design**

Secondary fit: **Evaluation, Maintenance, Initiation**

Implementation is the most relevant because it involves active data collection in real-time. Planning and design involve defining what data is needed, how it will be collected, and who participates. Since participatory sensing is primarily data collected by participants, these two stages are the most relevant. Evaluation, maintenance and initiation are also important, but not as important as implementation and planning and design.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Secondary fit: **High**

Participatory sensing projects in the SADC region differ depending on factors like funding, project scale, technology and data infrastructure. Projects can range from low-cost, which are normally community-driven to high-cost regional or national programs. Small-scale, local projects are less expensive in comparison to national or regional projects. Projects that make use of smartphones and crowdsourced data are usually low-cost because participants' existing phones are used. Bigger projects that make use of satellite data are more expensive, because of different aspects like more advanced hardware requirements etc.

Available Time:

Primary fit: **Short-Term, Months**

Secondary fit: **Long-Term**

Participatory Sensing projects in the SADC region usually occur within a couple of months to a few years. It depends on the project goals and scope. In the context of the SADC region, some areas may be limited in terms of resources, therefore, the timeframe may differ.

Available Skills (Researcher):

Primary fit: **Digital Skills, Facilitation Skills, Local Language, Subject Expertise**

Various skills are important for participatory sensing, especially when considering different projects. Their importance will vary, however, normally the subject expertise is important, particularly in projects that require technical understanding. Digital skills are also important, as they are necessary for participants who are using digital ways to collect their data. Facilitation skills are important, as they help the participants understand what is expected of them and could promote trust and proper engagement. Local language promotes inclusivity during the project and makes understanding the projects easier and more accessible for the local community.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20)**

Secondary fit: **Large (50-100)**

The group size will vary depending on the size, and scale of the project where participatory sensing occurs. Small groups are usually common in local or community projects, medium-sized groups are usually common in city projects, and some projects are large-scale, which require a large group of participants. However, in the context of the SADC region, a small group may be best to start with.

Feasibility with Local Constraints:

Primary fit: **Digital Connectivity & Access Constraints, Electricity Constraints, Digital Skills Constraints**

Secondary fit: **Literacy Constraints, Mobility Constraints, Public Space Constraints**

Digital skills are important in participatory sensing because they rely on technology (apps and software). However, some participants may not know how to use apps or technology required for it. Online connectivity is necessary for sharing data in real-time, however, it could cause problems if the participants have limited access to the internet in rural places. Electricity is needed to power devices, which are the main components for data collection, however, in SADC, rural areas, and even some urban areas may have power outages, especially in Africa.

Literacy skills are important because they may be helpful in data collection and understanding certain texts and interactions, however, some people lack literacy skills so this may be a problem. It could be solved, however, by making use of pictures. Some people may be impacted by mobility issues and may not be able to physically partake in the data collection as it may be beyond their means. Public spaces are not essential in this data collection, but they could be helpful, there may be issues with capturing data in public spaces because of community rules or municipal rules.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Multiple Sites, Neighbourhood**

Secondary fit: **Region, Town/City**

For the SADC region, the most common geographic scope is local and regional or national. Local scale usually involves residents and organisations, it usually only uses simple sensor applications or cell phones and it is also very low in cost compared to regional/national scale projects, which are larger and more expensive and may include researchers and government partnerships.

Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Longitudinal, Series**



Cross-sectional projects are good for collecting data once off. Longitudinal studies are good for long-term data collection. Ongoing captures data in real-time, while a series has breaks in between, and data is captured periodically. For the SADC regions, collecting cross-sectional data is important within short-term projects, which may expand to series or longitudinal data collection if the projects are longer.

A16 Participatory Assessment, Monitoring and Evaluation

Participatory assessment, monitoring and evaluation (PAME) is an approach that actively involves stakeholders especially beneficiaries and community members in designing, implementing, and analysing assessment, monitoring, and evaluation processes to improve program effectiveness and sustainability.

PAME empowers local communities and project stakeholders to take ownership of program assessment, monitoring, and evaluation processes rather than being passive subjects of external evaluations. This approach recognises that those most affected by programs possess valuable knowledge and insights that traditional expert-led evaluations might miss. By engaging stakeholders in defining success metrics, collecting data, analysing findings, and making decisions, PAME builds local capacity, increases transparency, enhances accountability, and generates more contextually relevant and actionable information. The collaborative nature of PAME typically leads to higher rates of program adoption, greater community buy-in, more sustainable outcomes, and strengthened relationships between implementing organisations and the communities they serve, while also addressing power imbalances inherent in traditional top-down evaluation approaches.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Ownership**

Secondary fit: **Knowledge Sharing**

PAME is particularly effective for achieving multiple development objectives by placing local stakeholders at the centre of evaluation processes. As a primary goal, PAME excels at fostering local ownership since it transfers evaluation control from external experts to community members, empowering them to define success criteria, collect data, analyse results, and make decisions about programs affecting their lives. This ownership increases sustainability as stakeholders develop a vested interest in program outcomes and gain skills to continue initiatives independently.

As secondary goals, PAME significantly contributes to capacity building, knowledge gathering, and knowledge sharing. It builds local capacity by training community members in evaluation methodologies and analytical skills while validating local knowledge systems. The approach systematically gathers diverse perspectives that might be missed in traditional evaluations, particularly from marginalised groups. By bringing stakeholders together in participatory processes, PAME creates platforms for knowledge exchange between community members, implementing organisations, and technical experts, leading to innovative solutions that combine local wisdom with outside expertise.



Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Behavioural Insights**

Secondary fit: **Experiential Knowledge, Institutional Knowledge**

PAME excels at integrating diverse knowledge systems, with strength in capturing local and indigenous knowledge alongside experiential knowledge. The approach explicitly values and elevates community perspectives, traditional practices, and contextual understanding that might be overlooked in conventional evaluation methods. By creating spaces where local stakeholders can articulate success metrics from their worldview, PAME surfaces deeply embedded cultural knowledge that often proves crucial for program effectiveness. This local knowledge includes an understanding of social dynamics, historical context, environmental conditions, and community priorities that external evaluators might miss or misinterpret.

PAME also systematically harnesses experiential knowledge from multiple stakeholders, including program participants, community leaders, field staff, and other actors involved in implementation. This lived experience provides invaluable insights into how interventions function rather than in theory, revealing unexpected outcomes, adaptation strategies, and implementation challenges. The method can additionally incorporate institutional knowledge from implementing organisations and scientific data when appropriate, but its distinctive value lies in its ability to bridge these formal knowledge systems with the informal, tacit knowledge held by communities. This knowledge integration creates a more comprehensive and nuanced understanding that better reflects complex social realities and leads to more contextually appropriate programming decisions.

Desired Level of Engagement:

Primary fit: **Collaborate, Involve, Consult, Inform, Co- Create**

Secondary fit: **Empower**

PAME primarily operates at the highest levels of stakeholder engagement: empower and collaborate. At its core, PAME empowers communities by transferring significant decision-making authority to local stakeholders throughout the evaluation process. Community members determine which indicators matter most, what success looks like from their perspective, and how findings should inform program adjustments. This approach fundamentally shifts power dynamics, recognising local participants as experts in their contexts rather than merely sources of data. When fully implemented, PAME enables communities to lead their development processes, with external organisations serving as facilitators rather than directors.

Project Stage:

Primary fit: **Implementation, Planning & Design, Initiation**

Secondary fit: **Design Solutions, Progress Monitoring**

PAME is versatile across project stages but proves particularly valuable during evaluation phases, where it transforms traditional end-point assessments into ongoing learning opportunities. During evaluation, PAME enables communities to define success criteria, collect data, analyse findings, and determine how results should influence future programming. This participatory approach to evaluation ensures that judgments about program effectiveness reflect beneficiary priorities rather than only external measures. Additionally, PAME strengthens accountability to communities by making evaluation processes transparent and accessible to those most affected by program outcomes.



PAME is also highly effective during implementation, serving as a continuous feedback mechanism that supports adaptive management. Unlike conventional monitoring approaches where data flows primarily to program managers, participatory monitoring creates regular opportunities for collective reflection and adjustment. Community members actively gather information about program progress, discuss emerging challenges, and collaborate on course corrections. This real-time stakeholder involvement helps programs remain responsive to changing conditions and evolving community needs. The implementation stage benefits from PAME's ability to detect early warning signs of issues that might otherwise be missed until formal evaluation points, allowing for timely adjustments that improve program effectiveness and community satisfaction.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Medium**

Secondary fit: **High**

PAME typically requires a medium budget allocation, though costs can vary significantly based on implementation scale, geographical scope, and depth of participation. The approach demands investment in facilitation expertise, stakeholder training, community meetings, transportation for participants, and potentially stipends or compensation for community evaluators' time. These costs reflect PAME's emphasis on meaningful engagement rather than simply gathering data from participants. Organisations must also budget for translating materials into local languages, using culturally appropriate communication methods, and sometimes providing childcare or timing activities to accommodate community members' existing responsibilities.

Lower-budget PAME options are possible through several adaptations that maintain core participatory principles. Organisations can train local volunteers or existing community groups in basic evaluation techniques rather than hiring external facilitators. Simple, low-cost data collection methods like community scorecards, participatory mapping exercises, or most significant change stories require minimal materials while generating valuable insights. Leveraging existing community meetings instead of creating separate evaluation events reduces logistical costs. Digital tools like mobile data collection platforms can decrease expenses for larger-scale initiatives while still enabling community input. However, even when implementing lower-cost versions, organisations should avoid cutting corners on inclusive participation, adequate training, and genuine power-sharing, as these elements are essential to PAME's effectiveness.

Available Time:

Primary fit: **Weeks, Days, Months**

Secondary fit: **Long-Term**

PAME typically requires a medium to long-term time commitment to fully realise its benefits, as meaningful participation cannot be rushed. A comprehensive PAME process often spans several months to years, particularly when implemented across all phases of a program cycle. The approach front-loads significant time investment in building relationships, developing trust, training community evaluators, and collaboratively designing evaluation frameworks. These foundational activities typically require 2-3 months before data collection even begins. Subsequent participatory data gathering, collective analysis sessions, community validation of



findings, and collaborative decision-making about program adjustments add additional time compared to conventional evaluation approaches.

Short-term PAME adaptations are possible but necessarily limit the depth of participation and capacity development. At a minimum, even a streamlined participatory evaluation requires 3 to 4 weeks to maintain core principles of meaningful stakeholder engagement. Organisations can accelerate timelines by focusing participation on specific evaluation components rather than the entire process, working with existing community structures that already have established decision-making processes, or using rapid participatory methods like community scorecards or most significant change techniques. However, practitioners should recognise that compressed timelines may reduce opportunities for inclusive participation, especially from marginalised community members, and limit the depth of local capacity development both key benefits of full PAME implementation.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

Secondary fit: **Subject Expertise**

Facilitation skills stand as the most critical competency for effectively implementing PAME. Practitioners must excel at creating inclusive spaces where diverse stakeholders including those with varying levels of formal education, social status, and confidence can meaningfully contribute. This requires expertise in participatory methodologies, power dynamics management, conflict resolution, and the ability to balance structure with flexibility in group processes. Skilled facilitators must remain neutral while ensuring marginalised voices are amplified, recognise and address their own biases, and adapt facilitation techniques to match local cultural contexts and communication styles.

Local language proficiency is equally essential, as authentic participation depends on stakeholders' ability to express nuanced perspectives in their preferred language. When facilitators don't speak local languages, high-quality interpretation becomes necessary, though this introduces additional layers of complexity and potential misunderstanding. Beyond language itself, facilitators need cultural competence to understand contextual factors influencing participation, including social hierarchies, gender dynamics, and culturally appropriate communication patterns. While subject expertise in evaluation methodologies is beneficial, particularly for designing robust data collection tools, this technical knowledge becomes most valuable when combined with strong facilitation skills and local language abilities that truly enable community ownership of the evaluation process.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20), Medium (20-50)**

Secondary fit: **Large (50-100), Extra Large (100+)**

PAME works most effectively with small to medium group sizes (5-50 participants), which create optimal conditions for meaningful engagement and genuine participation. Small groups of 5-20 people provide intimate settings where even reserved participants can comfortably share perspectives, power dynamics are more easily managed, and deeper discussions can emerge. These smaller configurations are particularly valuable for sensitive topics, working with



marginalised populations, or detailed analytical work. Medium-sized groups of 20-50 participants offer sufficient diversity of perspectives while still allowing for substantive contribution from most participants through techniques like breakout sessions, rotating small groups, or structured dialogue methods.

While PAME can be adapted for larger groups, doing so requires careful design to avoid diluting participation quality. For larger communities or projects spanning multiple locations, practitioners often employ a representative approach, where small groups from different stakeholder categories participate directly in evaluation activities and then share findings with their broader constituencies. Alternatively, they might use a cascading model where trained community evaluators facilitate small group sessions throughout a larger population, later bringing synthesised insights to a central analysis process. These adaptations help maintain PAME's participatory essence while expanding its reach, though facilitators must ensure representatives truly reflect diverse community perspectives, including those of less powerful or vocal groups.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Digital Skills Constraints, Digital Connectivity & Access Constraints, Mobility Constraints, Public Space Constraints**

Secondary fit: **Electricity Constraints**

PAME demonstrates remarkable adaptability to various resource constraints, particularly excelling in environments with literacy limitations. The approach inherently prioritises oral communication methods and visual techniques that don't require reading or writing skills, such as participatory mapping, community scorecards using symbols, photovoice, dramatisation, and storytelling circles. These visual and verbal methods often generate richer data than text-based approaches by enabling expression through culturally relevant communication styles. When documentation is necessary, PAME practitioners can employ audio recordings, community notetakers, or visual documentation systems that use locally meaningful symbols to track progress.

PAME also functions effectively despite public space and mobility constraints through creative adaptations. Where formal meeting spaces are unavailable, evaluations can occur in traditional gathering places like shade trees, religious buildings, or community members' homes. To address mobility limitations, particularly for women, elderly, or persons with disabilities, practitioners can organise multiple smaller sessions in different locations, design mobile evaluation approaches where facilitators travel to participants rather than vice versa, schedule activities around agricultural or household duties, or provide transportation stipends. Digital connectivity constraints are easily accommodated as PAME fundamentally relies on face-to-face interaction rather than technology, making it particularly suitable for remote areas with limited electricity or internet access while still generating robust evaluation insights.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Town/City, One Site, Neighbourhood**

Secondary fit: **Multiple Sites, Region**



PAME works most effectively at the one site or neighbourhood level, where direct and sustained engagement with a defined community is possible. This localised focus enables the deep relationship-building, contextual understanding, and inclusive participation that form PAME's foundation. At this scale, facilitators can ensure diverse community representation, hold regular face-to-face interactions, and develop evaluation processes that genuinely reflect local priorities and communication styles. The site-specific approach allows for a nuanced understanding of local power dynamics, cultural contexts, and community structures that influence how participation unfolds and how findings are interpreted.

Temporal Scope:

Primary fit: **Ongoing**

Secondary fit: **Longitudinal**

PAME functions most powerfully as an ongoing process that integrates assessment activities throughout a program's lifecycle rather than confining evaluation to discrete endpoints. This continuous approach enables regular reflection cycles where stakeholders collaboratively gather data, analyse findings, make adjustments, and assess the impact of these changes. By embedding participatory evaluation within implementation workflows, programs create feedback loops that support adaptive management and responsive programming. The ongoing nature of PAME helps build community evaluation capacity over time, deepens stakeholder ownership, and creates institutional memory about what works in the local context.

PAME can also be effectively implemented as a series of connected participatory events at strategic program junctures. This might include initial baseline assessments, midterm reviews, and final evaluations, with each engaging the same core stakeholder groups to ensure continuity. This series approach is particularly valuable when resource constraints prevent fully ongoing participation or when programs have natural implementation phases. Organisations can design each evaluation moment to build on previous participatory processes, with community evaluators growing in skills and confidence over time. Whether ongoing or series-based, the longitudinal dimension of PAME allows communities to track changes over time, identify factors influencing program success or failure, and develop deeper insights than single-point assessments can provide.

A17 Participatory Mapping and GIS

These tools and processes are frequently employed in conjunction with local communities and stakeholders to acquire, visualise, and analyse spatial data.

Participatory mapping is a collaborative process that entails the creation of maps by local communities to represent their knowledge, perspectives, and use of land and resources. It is implemented to empower communities by giving them a voice in the decision-making process, particularly in the areas of land management and land conservation.

On the other hand, a Geographic Information System (GIS) is a technology-based system employed to acquire, store, analyse, and visualise spatial or geographic data. It integrates data from a variety of sources, including surveys, GPS, and satellite imagery. Consequently, GIS and participatory mapping are potent instruments for the management and comprehension of spatial data.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Knowledge Gathering, Knowledge Sharing, Capacity Building**

Secondary fit: **Design Solutions, Progress Monitoring**

Participatory mapping and geographic information systems (GIS) are employed to resolve a variety of environmental, economic, and social issues. These instruments are implemented in southern Africa to empower local communities, particularly those that are marginalised and Indigenous, by providing them with a voice in the decision-making process, particularly about land rights and resource management.

Ensuring sustainability and equitable access, these tools are also employed to engage local communities in the management of natural resources, including water, forests, and wildlife. Additionally, these tools are employed to identify vulnerable regions and devise strategies to reduce the effects of climate change and natural disasters. Furthermore, it is important to ensure that communities are involved in conservation efforts and that their knowledge and practices are incorporated into biodiversity protection strategies. As well as to enhance urban planning and upgrade informal settlements.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Institutional Knowledge**

Secondary fit: **Behavioural Insights, Expert Insights, Scientific Data**

Participatory mapping and (GIS) have been especially valuable in the production of a wide range of knowledge, particularly in the fields of environmental management, urban planning, and community development. These instruments facilitate the integration of scientific data with local



and indigenous knowledge, which enables the comprehension of socio-environmental dynamics, resource distribution, and ecosystem changes. These methods also enable the sharing of ecological and cultural knowledge across generations and the development of community capacity to engage with spatial data and decision-making this facilitates knowledge transfer and capacity.

Desired Level of Engagement:

Primary fit: **Consult, Inform, Involve**

Secondary fit: **Empower, Collaborate, Involve**

Community-centred engagements, such as participatory mapping and GIS, prioritise empowerment and collaboration. Participatory mapping involves local communities in the identification and mapping of resources, land use, and cultural sites, which is a form of community engagement.

Moreover, participatory mapping employs capacity building and training, which involves the implementation of training programs to provide community members with GIS and mapping skills, thereby enabling them to actively engage in data collection and decision-making. Additionally, it promotes collaboration among NGOs, governments, and communities.

Project Stage:

Primary fit: **Initiation, Planning & Design, Implementation**

Secondary fit: **Evaluation, Maintenance**

GIS and participatory mapping are valuable instruments that can be implemented throughout the entire project's lifecycle. Spatial data collection, community requirements comprehension, and resource and risk identification are all implemented during the planning phase. At the design stage, these instruments assist in the refinement of project plans by incorporating a detailed spatial analysis. GIS can be employed to generate detailed maps and models for infrastructure design during this phase, and participatory mapping guarantees that the design is consistent with local preferences and realities.

At the implementation stage, these tools can monitor progress, ensure alignment with plans, and adapt to unforeseen challenges. It is possible to monitor and evaluate project outcomes by engaging communities in participatory mapping, while GIS can monitor changes in land use and infrastructure development.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **High, Medium**

Secondary fit: **Low, Medium**

The costs for the implementation of participatory mapping and GIS projects may vary contingent on the project's scope and context. Training, workshops, hardware, and software may be necessary for certain initiatives. Salaries, data collection, data administration, and community engagement may also be subject to variation from project to project to determine operational costs.



Internet and electricity access in Southern Africa must be considered, particularly in rural areas where they may be unreliable. Additionally, a project may be required to allocate funds for culturally appropriate engagement strategies, such as traditional mapping tools or translation services.

Available Time:

Primary fit: **Long-Term, Months**

Secondary fit: **Long-Term, Months**

The total amount of time necessary to implement participatory mapping and geographic information systems (GIS) tools in a project is dependent upon a variety of factors, such as the project's size, the complexity of the data, the level of community engagement, and the availability of resources. Goals are established during the project planning phase, which typically lasts between one and three months. This phase involves engaging with community stakeholders, local governments, and other stakeholders to solicit their support and input. Budgeting and training planning may also be included in this phase. The actual training and capacity-building process may require 1-3 months. This may involve conducting participatory mapping seminars, providing digital literacy training, and instructing the local community on GIS tools.

The geographic scope and accessibility of the area can determine the duration of data collection, which can extend to six months. This phase, which entails the organisation, analysis, and visualisation of the collected data, may require 2-4 months. Depending on the project, community feedback and validation may require approximately two months. This process involves presenting maps and findings to the community for evaluation and input.

Available Skills (Researcher):

Primary fit: **Digital Skills, Subject Expertise**

Secondary fit: **Facilitation Skills, Local Language**

A wide range of skills, including technical proficiency, community engagement, and project administration, are necessary to implement participatory mapping and GIS. Technical proficiency in GIS software and data management, which encompasses data management abilities, is essential. The ability to analyse satellite imagery or drone data is also classified as a technical skill.

It is imperative to possess community engagement skills to guarantee that local communities embrace and participate in meaningful ways. To guarantee inclusive and respectful participation, the project may necessitate the ability to facilitate participatory mapping seminars and focus group discussions, as well as the ability to resolve conflicts and comprehend customs, language, and tradition. Additionally, project management abilities are essential for the project's planning, execution, and monitoring.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20), Medium (20-50)**

Secondary fit: **Medium (20-50), Large (50-100)**



The size of the group necessary to implement Participatory mapping and GIS is predicated upon the project's scope, the complexity of the tasks, the level of community engagement, the budget and resources available, and the duration of the project. The planning coordination and technical execution core team may consist of 3-5 individuals. The field data collection team is a group that is responsible for conducting fieldwork, which includes participatory mapping exercises and data collection. For a small initiative, the team may consist of 5-10 individuals. Medium projects involve 10-20 individuals, while large projects involve 20 or more individuals.

Feasibility with Local Constraints:

Primary fit: **Electricity Constraints, Digital Skills Constraints, Mobility Constraints**

Secondary fit: **Digital Skills Constraints, Public Space Constraints**

There are numerous limitations that Participatory Mapping and GIS may encounter, including inadequate financial resources, such as inadequate funding for GIS software. Additionally, technological constraints include the availability of electricity and reliable internet connectivity. Effective communication and participation may be impeded by language and literacy barriers, as well as diverse language and literacy levels. Spatial information that is accurate and current is frequently unavailable and inaccessible.

To mitigate constraints, these could involve the implementation of cost-effective tools, such as mobile-based mapping applications. Additionally, localised methodologies are appropriate for cultural contexts and languages that are specifically spoken in the region. Furthermore, this presents an opportunity to collaborate with government agencies, universities, and NGOs to consolidate resources and expertise.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Multiple Sites, Region, Town/City**

Secondary fit: **Neighbourhood, One Site**

Participatory mapping and geographic information systems (GIS) can provide a broad geographic scope. Participatory mapping enables local communities to map their land use, resources, and cultural sites at the local level. This is especially beneficial in rural areas for the management of natural resources. GIS can be employed to map and manage transboundary resources, including forests, rivers, and wildlife corridors, at the regional level. In addition, at the transnational level, border collaborations may occur, wherein communities such as the Southern African Development Community (SADC) can utilise GIS to collaborate on initiatives such as managed shared ecosystems.

Temporal Scope:

Primary fit: **Cross-sectional, Longitudinal**

Secondary fit: **Ongoing, Series**

Participatory mapping and GIS can incorporate a variety of temporal scopes, which are contingent upon the project's specific objectives and the availability of data. In Southern Africa, longitudinal studies are employed to monitor land use changes, such as urbanisation and deforestation, over several decades. Additionally, real-time disaster monitoring, such as the



monitoring of floods, is a common application of ongoing initiatives that are designed to respond to real-time changes and monitor current conditions. This is also employed for projects that necessitate the collection of data at a specific point in time to provide a snapshot of a situation, such as the assessment of infrastructure distribution, in terms of cross-sectional scope. Furthermore, time series are employed to track fluctuations in agricultural productivity or water availability.

A18 Scenario Planning Workshop

A scenario planning workshop is a participatory approach where citizens engage with each other to share knowledge and experiences, develop shared visions, debate ideas, provide constructive feedback, and create a community action plan for future developments.

The scenario planning workshop originates from the Scandinavian tradition of citizen involvement. In this approach, scenarios are developed and presented by experts (scientists) to a group of local community citizens during a workshop that spans two to three days. Also, the scenario planning workshop focuses on identifying causes, areas for development, and potential challenges that may arise in addressing local community issues. These workshops serve as a platform where participants from the local community engage in discussions, deliberate on actions, and act as decision-makers to create a communal plan of action. The primary goal of a scenario workshop is to facilitate dialogue among policymakers, experts, and ordinary citizens on local matters such as water resources, transportation, and so on.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Design Solutions**

Secondary fit: **Capacity Building, Knowledge Sharing, Ownership**

A scenario planning workshop method can help design solutions by enabling stakeholders to envision multiple plausible futures collaboratively, assess associated risks and opportunities, and co-create adaptive strategies. Through guided exploration of diverse scenarios, participants critically examine underlying assumptions, integrate diverse perspectives, and identify robust responses that align with long-term objectives. This participatory approach supports the relevance and resilience of proposed solutions and contributes to capacity building, knowledge sharing, and ownership by promoting participants' strategic thinking and adaptive planning skills.

Desired Knowledge:

Primary fit: **Expert Insights**

Secondary fit: **Experiential Knowledge, Local / Indigenous Knowledge**

A scenario planning workshop is a structured method that facilitates collaborative thinking about possible future developments by engaging diverse stakeholders in exploring a range of plausible scenarios. This approach allows for integrating multiple types of knowledge to inform strategic planning and decision-making. Notably, it can incorporate expert insights through the involvement of subject specialists who provide in-depth analysis, local and indigenous knowledge, which contributes culturally grounded and place-specific understandings, and experiential knowledge derived from participants' lived experiences. The value of scenario



planning lies in its capacity to blend these knowledge forms to create strong, contextually relevant, and adaptive strategies.

Desired Level of Engagement:

Primary fit: **Co- Create**

Secondary fit: **Collaborate**

A scenario planning workshop allows co-creation by actively engaging stakeholders in developing future narratives and strategic responses. Participants are not merely consulted but are deeply involved in shaping scenarios based on their contextual knowledge, values, and priorities. This collective process fosters shared understanding, mutual learning, and joint ownership of outcomes. Furthermore, it often leads to innovative and context-sensitive strategies, as diverse expertise and perspectives are integrated into the planning process, supporting stakeholder collaboration.

Project Stage:

Primary fit: **Planning & Design**

Secondary fit: **Initiation**

Scenario planning workshops are particularly valuable during a project's planning and design stage, where strategic direction, priorities, and potential risks must be assessed before implementation. At this stage, the method helps stakeholders explore diverse possibilities collaboratively, identify uncertainties, and stress-test potential decisions against various scenarios. This process supports the development of more resilient and flexible plans by anticipating challenges and opportunities. The workshop format also helps build consensus and shared understanding among participants, ensuring that the planning phase is inclusive and grounded in a broad evidence base.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **High**

Secondary fit: **Medium**

Scenario planning workshops are not suitable for narrow issues. Additionally, when there are not enough participants, these types of participatory workshops are not helpful because a productive and successful workshop cannot be accomplished. A weakness of scenario planning workshops is that the cost to run them is typically high. Furthermore, organising participants from across the community can be difficult because it requires a good amount of planning to ensure a diversity of participants and a rewarding workshop session.

Available Time:

Primary fit: **Days, Months, Weeks, Long-Term**

A scenario planning workshop typically consists of three phases: a critical phase, a visionary phase, and an implementation phase. Time is allocated for brainstorming, discussion, presentations, and voting during the scenario workshop. For a scenario workshop to be successful, participants must be carefully selected. Choosing and contacting participants takes a



lot of time. A society's regional structure must be considered when selecting participants, as well as the players involved in the workshop's topic. Organising participants within a workshop could start several months in advance to conduct a thorough and successful workshop. These workshops usually last two to three days to ensure a successful and productive scenario planning workshop.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language, Subject Expertise**

Facilitating a scenario planning workshop requires a mix of skills to ensure inclusive participation and strategic foresight. The facilitator must possess subject expertise to guide discussions with credibility and contextual understanding, ensuring scenarios are relevant and grounded. Strong facilitation skills are essential to manage group dynamics, encourage diverse viewpoints, and maintain focus throughout the process. Additionally, a good knowledge of the local language ensures that all participants can contribute effectively, which is important for full engagement and understanding.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Medium (20-50)**

Secondary fit: **Small (5-20)**

A scenario planning workshop may adopt different group sizes and have a variable participant count. Small (5–20) to medium (20–50) groups generate the best results. These sizes provide effective communication, various viewpoints, and controllable breakout sessions without overbearing facilitation. Medium-sized groups contribute a wider range of ideas for creating creative scenarios, while smaller groups allow for more in-depth communication and speedier consensus-building. Maintaining high-quality involvement and coherence becomes more complex, even though the approach may be expanded to bigger audiences with enough planning and digital support resources.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints**

Secondary fit: **Digital Skills Constraints, Mobility Constraints**

Although careful design and facilitation are critical, scenario planning can be successfully modified to operate within several local constraints. When there are literacy obstacles, facilitators can guarantee full participation without too much depending on reading or writing by using visual aids, storytelling, role-playing, and oral discussion tactics. Similarly, the approach can be used entirely offline with real resources like printed templates, flip charts, and group mapping exercises in situations where digital proficiency or connectivity is restricted. This makes it possible to participate without requiring complex technologies. Scenario planning workshops can be held in decentralised forms, where smaller, localised groups are facilitated in parallel, or through mobile facilitation, where the facilitator visits participants in places with mobility or public space constraints.



Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Neighbourhood, Town/City**

Secondary fit: **Region**

Scenario planning workshop is a future-thinking technique that can be applied from a targeted neighbourhood level to a broader regional scope. At the neighbourhood level, this technique enables close collaboration with local stakeholders to create futures tailored to the local context at the neighbourhood level or town/city level. In addition, it is used at a regional level making it easier for people from different communities, industries, and regions to work together, which helps match long-term plans with common regional opportunities and concerns. Overall, this technique is helpful for both localised actions and more comprehensive policy or development planning due to its scale adaptability.

Temporal Scope:

Primary fit: **Longitudinal**

Secondary fit: **Series**

Scenario planning workshops are especially excellent for a longitudinal approach. This approach assists stakeholders in considering long-term trends, uncertainties, and strategic consequences in addition to their immediate concerns. It can also be carried out as a sequence of workshops or sessions, which helps participants to gradually modify techniques, add new data, and incrementally improve scenarios.

A19 Walkthroughs

Walkthroughs are a participatory research method where researchers and community members collaboratively explore, observe, and discuss community environments, either physically or virtually, to identify challenges, resources, and opportunities.

Walkthroughs involve researchers and local participants jointly navigating specific areas, either physically or virtually, to directly observe and discuss local realities. This participatory method includes variations such as transect walks to understand environmental or social conflicts, walkability assessments that evaluate pedestrian infrastructure and accessibility, and virtual walkthroughs enabling remote exploration when physical presence is not feasible. By facilitating open dialogue and firsthand observations, the method empowers community members, encourages co-learning, fosters ownership of research outcomes, and captures diverse local perspectives that traditional research approaches might overlook.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Knowledge Gathering, Ownership**

Secondary fit: **Knowledge Sharing, Design Solutions**

A walkthrough effectively supports primary project goals such as needs assessment, knowledge gathering, and fostering local ownership. It does so by engaging participants directly in exploring their environment, which enables researchers and community members to identify local challenges, resources, and opportunities firsthand. This process facilitates rich dialogue, ensuring findings authentically represent community perspectives, thus increasing local ownership of research outcomes. Secondary goals that align well with walkthroughs include knowledge sharing and designing solutions, as participants can collaboratively propose improvements based on direct observations made during the walkthrough.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge, Experiential Knowledge**

Secondary fit: **Behavioural Insights**

Walkthroughs are particularly effective in gathering primary knowledge types such as local indigenous and experiential Knowledge, since community members directly observe and interpret their surroundings. As a secondary outcome, the method can generate valuable behavioural insights by noting how individuals interact with their physical and social environments during walks.

Desired Level of Engagement:

Primary fit: **Inform, Collaborate, Consult**

Secondary fit: **Empower, Inform**

Walkthroughs inherently support project engagement through involvement, collaboration and consultation of participants. This is because participants actively contribute to data collection and interpretation during the walk. Participants do not just passively inform but rather engage in meaningful conversations which helps to shape research directions and outcomes. Furthermore, this collaborative process can also empower communities by giving them a central voice in decisions that may directly affect them and their locality. On a secondary level, walkthroughs can also support engagement levels by empowering and informing researchers and participants, depending on the extent of participants' decision-making roles in the research and its objectives.

Project Stage:

Primary fit: **Initiation, Planning & Design**

Secondary fit: **Implementation, Evaluation**

Walkthroughs are particularly beneficial as a primary approach during the initiation, planning and design stages of a research project. Planning a walkthrough allows for the identification of local contexts and community priorities that can help shape subsequent research activities. Additionally, walkthroughs can also serve as a secondary tool during the implementation and evaluation stages of a project, by providing an ongoing check-in mechanism to track changes and ensure interventions remain aligned with local realities.

Does the Method Fit With Your Resources?

Available Budget:

Primary fit: **Low, Medium**

Secondary fit: **High**

Walkthroughs are typically a low to medium-budget method, requiring minimal financial resources. Basic materials include maps, notebooks and pens and sometimes digital cameras or voice recorders for documentation or interview purposes. Low-budget variations can rely entirely on locally available resources, with minimal technological inputs. If funding permits, higher-budget options might include advanced mapping technologies or virtual walk-throughs using specialised software.

Available Time:

Primary fit: **Short-Term, Hours, Days**

Secondary fit: **Long-Term, Weeks, Months**

Walkthroughs are most commonly conducted over a short-term time frame, easily completed within a few hours to days. However, if required, to thoroughly understand evolving community dynamics or document long-term changes, the method can be repeated periodically; making it adaptable to medium-term projects (weeks or months). Walkthroughs are reasonably flexible, allowing researchers to adjust frequency and duration based on available time, accessibility and project objectives.

Available Skills (Researcher):

Primary fit: **Facilitation Skills, Local Language**

Secondary fit: **Digital Skills, Subject Expertise**

Conducting a walkthrough requires primary skills in facilitation and ideally the use of local languages. Facilitators should skillfully guide conversations, manage diverse participant interactions, and capture accurate insights. Secondary, but useful, skills also include subject expertise, for interpreting nuanced observations, and basic to advanced digital skills for documenting and mapping the findings.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Micro (1-5), Small (5-20), Medium (20-50)**

Secondary fit: **Large (50-100)**

Walkthroughs work optimally with micro (1-5), small (5-20) and medium-sized (20-50) groups, allowing inclusive dialogue while at the same time not overwhelming participants or facilitators. Smaller groups facilitate deeper conversations and also ensure easier management of interactions. However, although less common, the method can scale up by organising multiple walks in parallel, which can then accommodate larger participant numbers, covering larger areas.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints, Electricity Constraints, Digital Skills Constraints**

Secondary fit: **Mobility Constraints, Digital Connectivity & Access Constraints**

Walkthroughs can still function effectively despite constraints such as literacy, electricity or digital skills constraints; as walkthroughs primarily rely on direct observations and spoken communication. Walkthroughs can also be easily adapted to overcome secondary constraints such as public space or mobility constraints through virtual walkthroughs or shorter, more accessible routes, and digital connectivity constraints by using offline documentation methods (e.g., paper maps, manual notes).

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **One Site, Neighbourhood, Town/City**

Secondary fit: **Multiple Sites, Region**

Walkthroughs best align with a primary geographic scope of a single site, neighbourhood, or a specific location within a town or city. This is because walkthroughs provide in-depth local insights ideal for geographically contained areas. As a secondary option, walkthroughs can be conducted across multiple sites or expanded to larger areas within a region to facilitate comparative or more broader scale analysis.



Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Series, Longitudinal**

Walkthroughs are well suited primarily for cross-sectional studies, as they provide immediate snapshots of local conditions and insights at a particular point in time. They can also be effective when conducted periodically, as a series, which can allow for deeper longitudinal insights into changes experienced over time; as a secondary temporal scope.

A20 Photovoice

Photovoice is a participatory research method where participants capture their lived experiences through photography, using visual storytelling to support reflection, dialogue, and community-driven advocacy.

Photovoice empowers community members, who are often marginalised, by providing them with a platform to document and share their lived realities visually; leading to action orientated output. Participants use photographs to capture key aspects of their environment, experiences, or challenges, then engage in structured group discussions to interpret these images collectively. This collaborative process highlights community perspectives, fosters local ownership, and facilitates meaningful dialogue among stakeholders. Photovoice is particularly effective for conducting needs assessments, building community capacity, and informing policy or advocacy initiatives by authentically representing local and experiential knowledge.

Is this the Right Method for You?

Find out whether the method matches your objectives, resources, participants, and scope.

Does the Method Fit With Your Objectives?

Project Goals:

Primary fit: **Needs Assessment, Capacity Building**

Secondary fit: **Knowledge Sharing**

Photovoice is particularly effective for project goals related to needs assessment, as participants visually document community realities, challenges, or assets. Photovoice directly supports capacity building by empowering communities to express concerns and solutions from their own perspective, thus strengthening community voice and advocacy. The method also facilitates knowledge sharing, making local insights visible and accessible to policymakers or broader audiences.

Desired Knowledge:

Primary fit: **Local / Indigenous Knowledge**

Secondary fit: **Experiential Knowledge**

Photovoice excels in capturing local and indigenous knowledge because it values and highlights participants' direct lived experiences and community context; a picture is worth a thousand words. Additionally, it provides experiential knowledge, allowing nuanced understanding of participants' daily lives, behaviours, and perceptions beyond traditional quantitative methods.

Desired Level of Engagement:

Primary fit: **Empower**

Secondary fit: **Collaborate**



Photovoice strongly emphasises empowerment, as participants have agency in selecting and representing their experiences visually, enabling marginalised voices to be heard authentically. Additionally, it fosters collaboration among community members, researchers, and stakeholders through structured dialogue sessions where photos serve as conversation starters for collective analysis and planning.

Project Stage:Primary fit: **Initiation**Secondary fit: **Evaluation**

Photovoice is especially beneficial during the initiation stage of projects when initial exploration, needs assessment, and community engagement are critical. It is also useful in the evaluation stage, providing visual evidence of changes over time or community impacts that are often overlooked by traditional evaluation methods, helping to encourage critical consciousness.

Does the Method Fit With Your Resources?

Available Budget:Primary fit: **Medium, High**Secondary fit: **Low**

Photovoice is typically considered a medium to high budget method because it requires basic equipment (cameras or smartphones), printing or digital sharing capabilities, and facilitation mechanisms for group discussions. However, lower-budget variations are possible, such as using disposable cameras (although developing photos commercially may still be costly) using participants' own devices (phone cameras) or using free digital platforms for image publishing/dissemination, which can reduce costs significantly.

Available Time:Primary fit: **Weeks, Long-Term, Months**Secondary fit: **Days**

Photovoice is usually conducted over a medium to long-term period of several weeks, months or years. This includes time for initial training, photo-taking activities, reflection workshops, and action planning. For simpler or more focused applications, it could also be condensed into a shorter timeframe of a few days, particularly when rapid assessments or small-scale engagements are required.

Available Skills (Researcher):Primary fit: **Facilitation Skills**Secondary fit: **Digital Skills**

Photovoice requires strong facilitation skills, as researchers must lead reflective dialogues, ensure ethical practices, and support participants through the process effectively, including training. Additionally, having adequate digital skills can help to manage digital tools and processes, such as image sharing, editing, and virtual engagement platforms if needed.

Does the Method Fit With Your Participants and Local Constraints?

Group Size:

Primary fit: **Small (5-20)**

Secondary fit: **Micro (1-5)**

Photovoice is best suited for small groups (5-20), ensuring meaningful participant engagement and in-depth reflection. It can also effectively support micro group (1-5) engagements when deeper personal storytelling or intimate community reflections are desired.

Feasibility with Local Constraints:

Primary fit: **Literacy Constraints**

Secondary fit: **Digital Connectivity & Access Constraints**

Photovoice naturally accommodates participants with literacy constraints because visual storytelling does not rely heavily on written language. It also readily adapts to contexts with digital connectivity and access constraints, as disposable cameras and printed photographs can facilitate in-person discussions without requiring consistent digital access.

Does the Method Fit With Your Project's Scope?

Geographic Scope:

Primary fit: **Neighbourhood**

Secondary fit: **Multiple Sites**

Photovoice typically aligns well with the scope of a defined community group or neighbourhood, where specific local realities and perspectives are captured vividly. It can easily scale to include multiple sites, allowing comparative analysis across different locations within broader geographic or thematic projects, but this is less common.

Temporal Scope:

Primary fit: **Cross-sectional**

Secondary fit: **Series**

Photovoice is commonly employed in a cross-sectional manner, offering a snapshot of community life or conditions at a specific moment in time. It is also effective when employed as part of a series to monitor changes or developments over multiple intervals, providing visual documentation of community evolution or project impacts over time.