A closer look at Needs Assessments

Desk review, 17 December 2020

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Introduction

There are several definitions and functions of Needs Assessments (NA). NAs can be used (1) to understand the situations and conditions faced by populations, (2) as a tool for making better decisions, and (3) to identify deficiencies in the current situation. Another key principle of a NAs is that 'need' is a relative term. What is considered 'needed' is relative and subject to change over time.[17] Note that while the focus of a NA is identifying the needs of the target group, it does not consider solutions to these needs.

Needs assessments play an important role in the allocation of Fair Trade Premiums. Fair Trade USA strives to empower producers and their communities through certification. The Needs Assessment is a key part of the Fair Trade USA certification process. It is a tool to guide the decision making process of where to invest Fair Trade Premium. Farmers, fishers and workers receive a Premium for the certified products they sell. This Premium can be used for many things, including supporting community development projects. Since the Premium belongs to the Fair Trade Premium Participants, they should jointly decide on how to invest the Premium. The NA is used in the decision making process to allocate Premium.

This document provides an overview of the different steps of the Needs Assessment. It highlights and tackles important topics and issues to be taken into consideration alongside the different steps of a NA. Theoretical knowledge and practical recommendations for the Needs Assessment process are combined into a pragmatic and step by step discussion of the entire NA process.

The document is based on a review of practical handbooks as well as academic and grey literature on Needs Assessment methodologies and community-driven development. We reviewed a total of 20 publications for this desk review.

This document is to be used as an overview of the available publications on Needs Assessment theory and practice, and aims to inform practitioners seeking to learn more about the different steps in the NA process.

Current approach to Needs Assessments by Fair Trade USA

Needs assessments are a key part of the Fair Trade USA certification process. The NA is used in the decision making process to allocate Premium. The NA assesses the social, economic, and environmental needs of Fair Trade Premium Participants (FTPPs), their families, communities, and their environment—as the main beneficiaries of the Premium.

FTUSA believes that it is essential that all Premium participants are represented in the NA. FTPPs are identified by the Certificate Holder. They are the individuals who have a voice and voting rights in Premium use decision-making and can be elected to be part of the Fair Trade Committee. The NA can also be conducted among a sample of Premium participants, in which case balanced representation is a requirement.

The direct input from FTPPs forms the foundation of the NA. The FTUSA standard requires that the NA must focus on identifying the needs through the analysis of information and objective data. The needs and wishes of the beneficiaries should be ascertained indirectly (e.g. when was the last time your vision was checked) to collect objective data.

The NA conducted in the FTUSA certification process must meet a number of requirements which are listed in the Agricultural Production Standard*. The Certificate Holder—usually a company or legal entity and not an individual person—holds the certificate and is responsible for complete compliance with the standard requirements, including the NA. The NA must include at least the following areas: access to education and childcare, food security, health care services, housing, and health and sanitation. The results of the NA should be submitted to the Fair Trade Committee for consultation as needed.

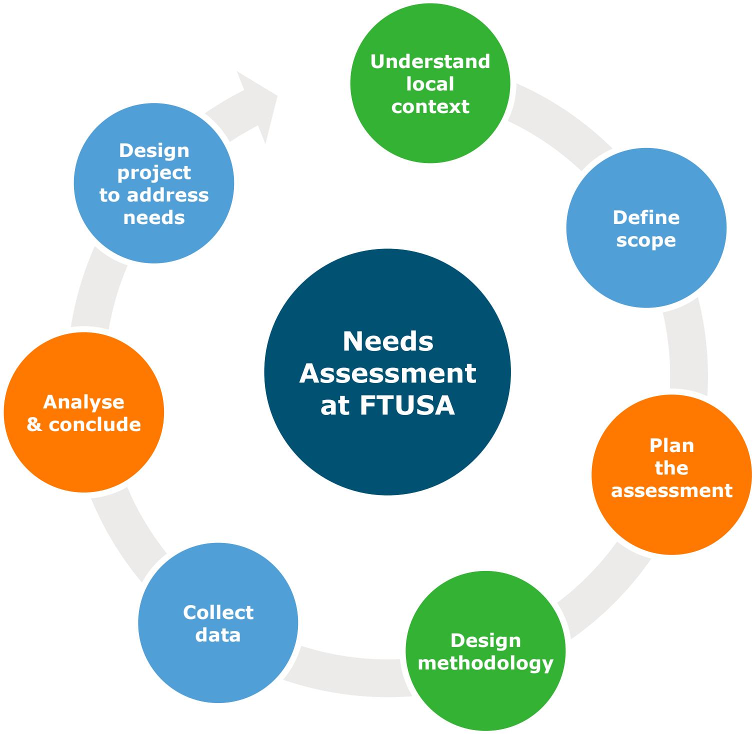
* FTUSA has multiple standards, however due to the scope of this study the focus is on the APS

The Needs Assessment process

The Needs Assessment process consists of several steps, all discussed in this document. The figure is interactive; click each box to jump to the corresponding section. On each page, there is a home button that will bring you back to this page, so you can navigate the different sections of the document as you wish.

The first step, understanding the local context, is discussed from a more theoretical perspective, as this is an important precondition for all other steps. Therefore, it is crucial to understand the importance of this step and all the aspects that need to be taken into account.

The second section of the document discusses the subsequent steps in a more practical manner. The document ends with a short discussion of the process after completing the Needs Assessment process.



Flexibility in the design of the NA is essential due to differences in local contexts (1)

The Fair Trade USA NA is applied in various contexts around the world, and is always driven by the voices and choices of the beneficiaries. Due to these different contexts and beneficiaries, a certain amount of flexibility in the design of the NA is essential.

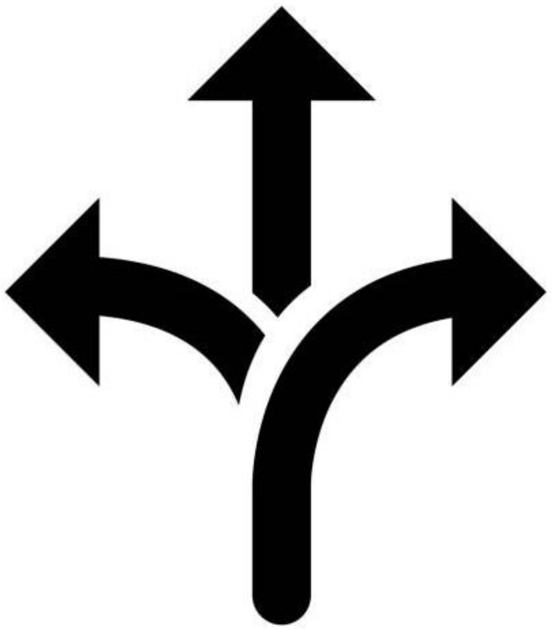
To identify which type of assessment design will best stimulate an inclusive NA, it is important to understand the local socio-political context and existing community decision-making processes. In different local contexts the composition of stakeholders may differ (e.g., including various religious and ethnic groups).[18] Hence, the type of questions included in the NA should be adapted to local cultural norms.[19] Moreover, decentralisation in the decision-making mechanism, situated as close to the local context as possible, facilitates quick response to change. **Note that the level of inclusiveness of the NA process must be evaluated regularly. Even though a NA may be inclusive at the initial stage, this may change over time.**[4]

The adaptation of the Needs Assessment approach to local conditions is crucial.
The Needs Assessment design should be flexible enough to fit local conditions and structures and should take into account existing community decision-making processes.[18]

Flexibility in the design of the NA is essential due to differences in local contexts (2)

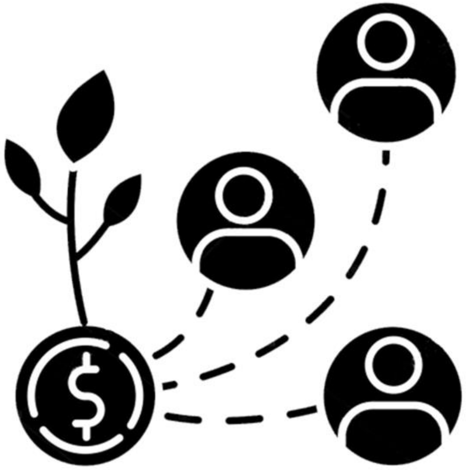
Since decisions on the allocation of Premiums might have an impact on workers' communities, it is important to pay attention to how geographic and conceptual community boundaries are defined. However, defining geographic or conceptual community boundaries is not always straightforward. For example, the increasing mobility of temporary migrants can transform community boundaries, which makes it complex to define geographic or conceptual community boundaries. Misinterpretation of community boundaries could undermine local structures that are likely to influence the outcomes of the NA.[14]

Scaling NA approaches based on best practices might be risky in cases where local contexts differ. Sharing best practices can be useful if cultural and social power structures are close to identical. However, emphasis should be placed on contextualised NA design.[14]



A sense of ownership will lead to a more responsive NA in the community (1)

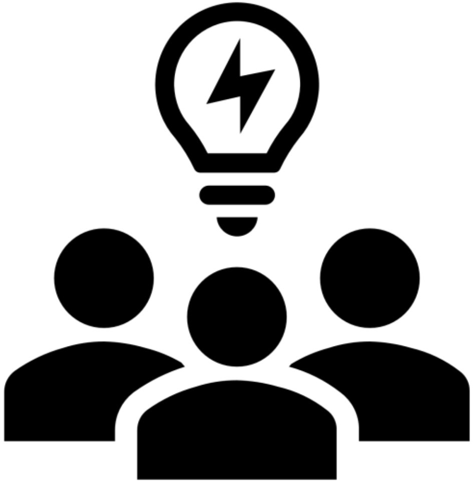
Empowerment of Fair Trade Premium Participants depends principally on their **access to information, their inclusion and participation, greater accountability** among the beneficiaries and the Certificate Holder, and the sustainability of partnerships among the different stakeholders.



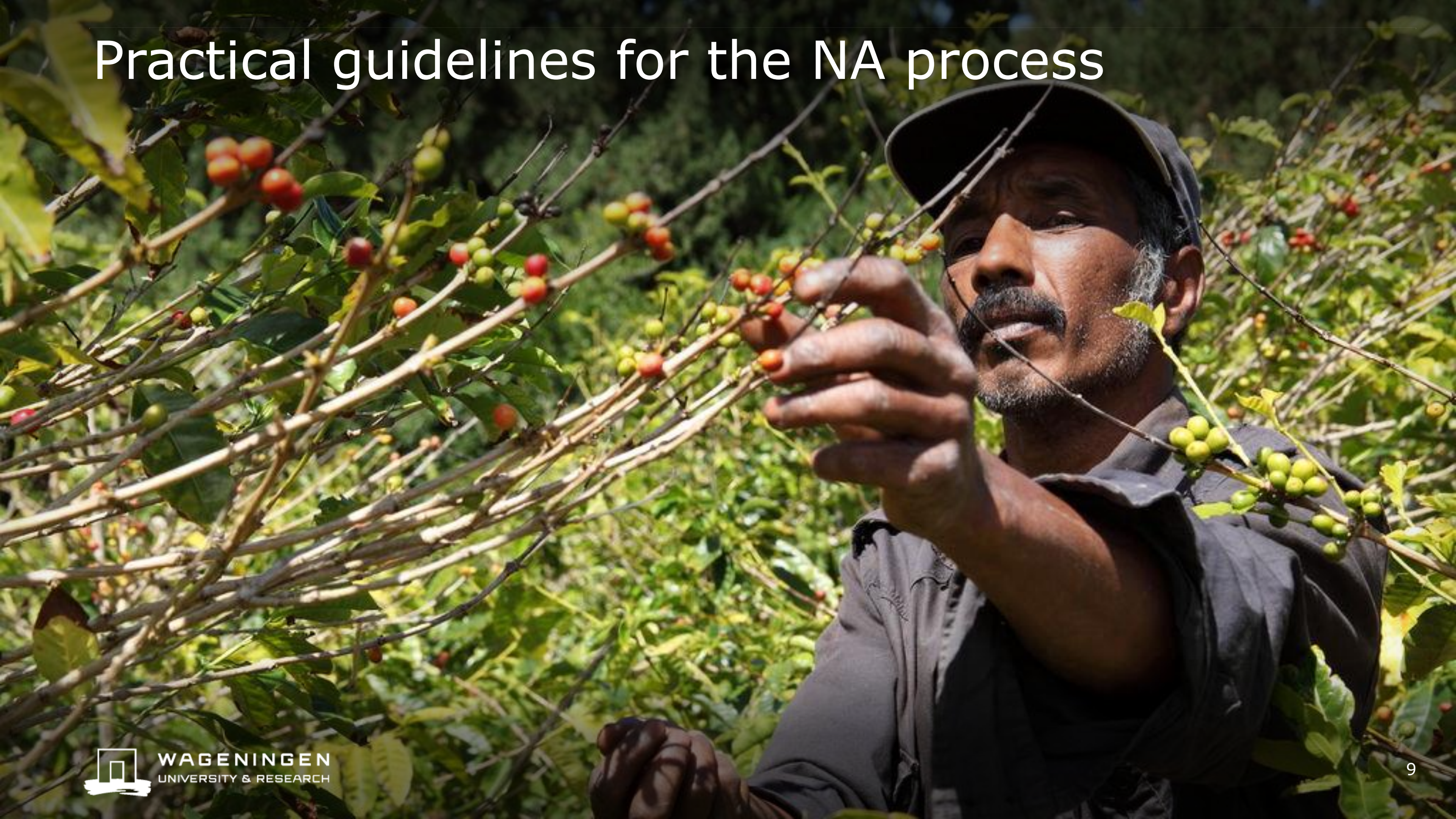
Prior to the planning of the NA, social structures and power relations should be mapped to create agency and ownership among the beneficiaries and to identify key informants or Fair Trade Premium Participants. Identifying key members of the community is important due to their role as possible mediators when accessing minority groups.[7,19] Moreover, social structures and power relations should be considered to create more trust and ownership in relation to the objectives of the Premium spending. A bottom-up approach to the NA would create more agency and voice for the community members, allowing them to have more control over the Premium spending. This will lead to more self-initiated development interventions, which are expected to better address the needs of the community.[12,14]

A sense of ownership will lead to a more responsive NA in the community (2)

Community development practice facilitates a sense of ownership among community members. A sense of ownership consists of three elements: a sense of ownership of the process, outcome, and distribution. **Process** refers to who has voice and whose voice is heard. **Outcome** refers to who has influence over decisions and what results from the decision making process. Finally, **distribution** refers to who is affected by the process and outcome.[12] To understand cause and effect in community development, it is essential to investigate these three elements of ownership. If community members believe they do not have enough ownership of the process, outcome and distribution, they might begin to see themselves as deficient and incapable of taking charge of their lives and the community. The community members will start to act like consumers of services with no incentive to take control as the owners of the community development objectives.[1,15] Therefore, before designing the NA plan, the Certificate Holder executing the NA should consider how to create ownership within the community, especially if the Certificate Holder is further up the value chain.



Practical guidelines for the NA process



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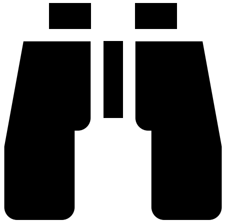
Effective planning and management of a NA requires a well-defined scope

If the scope of a NA is not defined well in the preparation phase, the scope can end up too broad or too narrow. An overly broad scope will make it very difficult to execute a Needs Assessment of sufficient depth and detail, and a too narrow scope will overlook potentially important aspects, such as specific target groups, therefore omitting certain needs.[6]



Every Needs Assessment is constricted in some ways: by resources, time, lack of experience/knowledge or otherwise. This means that decisions always need to be made to focus the assessment. A NA with a larger scope includes more questions to be answered, more and different types of stakeholders, more people to gather information from and more data to be analysed and therefore, requires a larger team working on the assessment.[20]

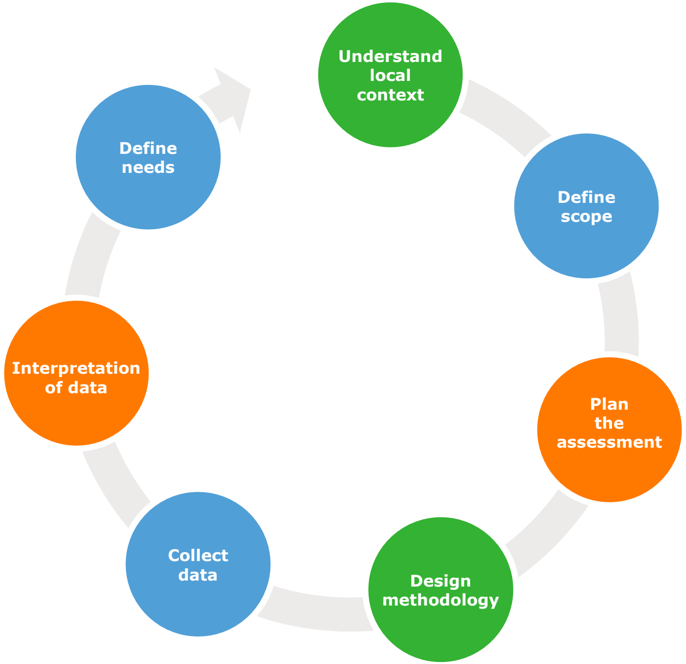
Areas to consider while defining the scope are:

- **Target groups:** After looking at the specific context, one needs to make decisions on which groups to specifically focus on in the assessment. Does there need to be special attention given to the needs of migrant workers? Women? Youth?
- **Geographical area:** How large is the community? Are there different natural borders that separate people? How will the assessment take into account these different areas?
- **Community and individual needs:** Is there a specific focus on community needs only, or is there an option to cater for individual needs as well? How are these going to be taken into account?
- **Themes:** Which topics are going to be addressed?[19]

A clear coordinator and team, time frame, and desired output will improve the NA process (1)

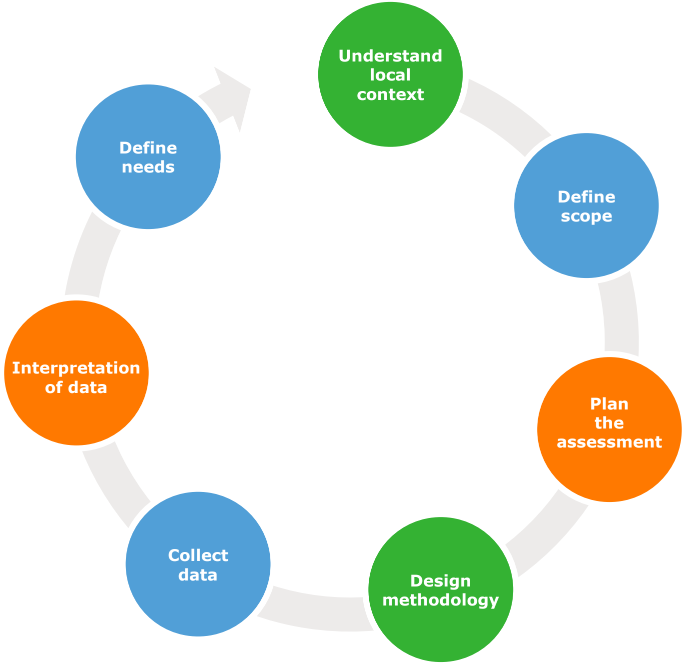
Once the scope is defined, the rest of the Needs Assessment can be planned. The following three things need to be planned or decided on:

- **Assessment coordination and implementing team**: Who will coordinate the assessment? And who will be involved in conducting the NA? Doing a Needs Assessment is typically more work than one individual can manage, and it is potentially risky to conduct a NA from a single perspective. If the NA is conducted by the Certificate Holder further up the supply chain, it is wise to include relevant value chain actors in the NA team to increase ownership, and to provide different perspectives. It is also important that the persons asking the questions in the NA speak the right language/dialect, are impartial towards potential needs, and that the respondents feel comfortable sharing with that person (considering power relations). They should also have adequate skills for the chosen assessment method.



A clear coordinator and team, time frame, and desired output will improve the NA process (2)

- **Time frame**: It is important to adequately plan a Needs Assessment over time, and to take into account the production cycle of the crops the community is producing, so that people have time to participate and are not busy with, for example, harvesting. The necessary time to complete the NA depends on many conditions, such as:
    - Scope
    - Experience of coordinator (and team)
    - Existence of previous Needs Assessments
    - Deadlines (for example deadlines from FTUSA, or seasonality in production)
- **Outputs and communication:** What outputs are required/requested? A report? A dissemination workshop with the community? How are results from the NA process communicated to the participants? How does one deal with data ownership, anonymity of results and other ethical considerations?[19,20]



Combining qualitative and quantitative methods where possible helps to reach a good balance of “depth and breadth”

Qualitative: Focus group discussions (FDGs) and other participatory methods

Ideally, methods target community members and stakeholders in different combinations, individually and in both heterogenous as well as homogenous groups (e.g. women only, men and women mixed). Power relations and group pressure can lead to avoidance of delicate questions or only elicit socially acceptable answers. However, these relations are often crucial for studying community needs (and the feasibility of addressing the needs).[8]

Advantages[20]	*Disadvantages*[20]
▪ Multiple people can be interviewed at once ▪ People can build on each other’s views, creates synergy and provides insight into group dynamics ▪ Can help a group reach consensus and make difficult decisions	▪ Not everyone may contribute equally or feel comfortable expressing opposing views ▪ Heavily dependent on good facilitation

Some possible FGD tools and participatory methods

- Critical Incident Technique
- Brainstorming
- Straw polls
- Round robin reporting
- Participatory mapping
- Transect walks

There are of course many more possible methods that can be effective in assessing needs, but these two are among those most commonly used. A useful overview of methods (and tips and tricks for their implementation) can be found here and here.

Qualitative: Interviews

Interviews are a relatively straightforward but, nevertheless, very informative method to learn about needs. Interviews can be used to gather information from specific key-informants and can go into depth on specific topics. However, they are labour intensive if they need to cover a wider group.

Quantitative: Surveys

Surveys are frequently used for NAs and can be especially powerful in processing information of large groups. Using surveys can greatly improve representativeness of a NA (if sampling strategy is appropriate).

Advantages[20]	*Disadvantages*[20]
▪ Some surveys are relatively easy to develop ▪ Data can usually be clearly transformed into useful information ▪ Can capture perspectives of multiple groups ▪ Anonymous	▪ Designing a good survey requires experience ▪ Can be labour (and capital) intensive if enumerators need to be used (illiterate or unschooled populations) ▪ Survey fatigue ▪ No opportunity for follow-up questions

Types of surveys

- Dual-response surveys
- Questionnaire

Each method relies on specific key criteria for success

Criteria for success[5,20]

- **One of the most important success factors for all methods is the design of the questions to be asked in the interview, the focus group discussion or the survey. Questions should be non-leading, clear, concise and avoid difficult terminology.**
- **Questions should follow a logical order, and preferably progress from relatively easy to more difficult. This may change during the interview.**
- **Questions should be pilot tested to be sure they are correctly understood by participants and interviewees. This should be done with participants who are very similar to the target participants.**
- **If multiple people are administering the questions (in whatever form), it is crucial that they all understand and interpret the questions in exactly the same way.**

FGDs and participatory workshops

- Good facilitators who:
  - Are well prepared
  - Lead and facilitate the discussion
  - Stimulate participation
  - Manage dominant participants
  - Manage time (allowing time to think)
  - Verbally report back summaries of discussion
- Write down observations during the FGD
- Systematic analysis of data
- Deliberate choice of participants in one group, while aware of group/power dynamics

Interviews

- Good preparation
- Good, non-leading questions
- Careful selection of interviewees
- Be aware of role of interviewee in the context and any (hidden) agendas
- Verbally report back summaries of answers

Surveys

- Design for the audience it targets (terminology, sample size) and the collection method (enumerator, self-administered)
- Limit the amount of information gathered in one question
- Avoid complexity
- Well-trained enumerators and/or clear instructions
- Careful sampling (or widely distributed if self-administered, but then be aware of whether specific people fill in the survey and others do not)
- Avoid surveys that are too long (self-administered max 15-20 min, with enumerator max. 1-1.5 hr)

The choice of sampling method depends on the NA scope, methods and the community characteristics (1)

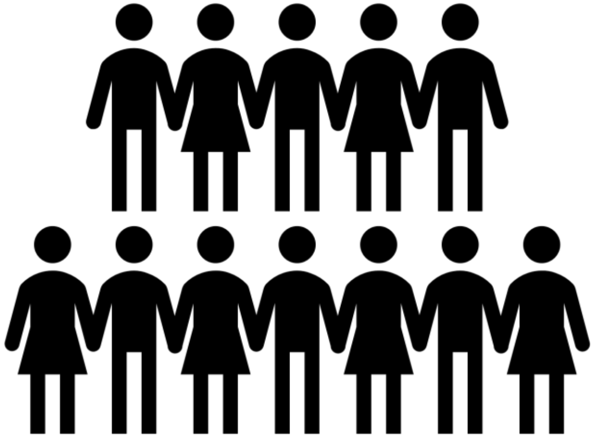
A crucial part of preparing the data collection stage of the NA is to pick the appropriate sampling strategy. When the target group is defined in the scope definition stage, it is not yet clear how to select the specific people that will be consulted during the process. In many of FTUSA value chains, (worker) communities are not homogenous, for example, because they consist of both permanent as well as temporary (migrant) workers. It is challenging, yet important, to take into account sufficiently the needs of these different groups in the NA.

Whether one is using (a combination of) focus group discussions, surveys, or participatory methods, it is important that the sample of participants forms a good representation of the community. The most effective way to achieve a representative sample depends on the data collection method used. Theoretically, each sampling method can be used for both qualitative as well as quantitative methods, with differing sample sizes. Nevertheless, each of the described methods have sampling strategies that are most commonly used.

In the case of **surveys** a stratified random sampling strategy can be used to identify respondents across different groups, such as migrant, native, temporary and permanent workers, or female and male workers. If sample sizes are large enough, one can expect that a simple random sampling strategy will yield a representative sample. For small populations, the problem is often that simple random sampling results in overrepresentation of certain groups. Sampling within the groups of interest avoids this problem. However, if samples are more constrained, it is wise to sample (randomly) from selected groups (strata). These strata can, for example, be based on gender, age, farm size, or any other characteristics that are relevant to the community at hand.

The choice of sampling method depends on the NA scope, methods and the community characteristics (2)

Stratified random sampling is also often used for **FGDs** or participatory workshops (e.g. sampling a random group from migrant farm workers). Another sampling method that is often used for qualitative methods (FGDs, interviews, or other) is purposive sampling. For example, one can look for the most critical voice, or for special cases (e.g. workers who have been around the longest). Another effective option is to look for sources who can give the most additional information. In this case, one would be looking for a new perspective from every additional source. For example, if the NA is looking to cover the wider community needs it would make sense that, after talking to workers, they talk to spouses and other community members.



Various methods can be used to prioritize needs

Remain flexible, look at multiple data analysis tools, and do not begin the needs analysis with a solution in mind. Needs analysis is a process that aims to make sense of information and to draw conclusions about need prioritization. There are different points at which the collected data can be analysed and interpreted, depending on the purpose and nature of the data collection. There are four different phases of analysis including:[19]

Description	Explanation	Interpretation	Anticipation
Grouping, summarising, and comparing data in order to identify trends, patterns and outliers.	Determining why certain patterns and trends are present and the underlying factors and processes that led to their existence.	Drawing conclusions on priorities and judging the amount of evidence that supports the conclusions.	Predicting or forecasting a situation’s likely evolution(s) based on past and present data.

As mentioned before, there are multiple methods to collect the data, which results in different methods to analyse the data. The collected data need to be converted into useful knowledge through reflection, links to community issues, and by sharing with others to gain valuable perspectives. It is important to enter the data analysis with a blank slate and to focus only on the identified needs and not on the possible solutions. There are various data analysis options and techniques to facilitate the decision making process. Detailed information on the different decision-making tools (including advantages and disadvantages) can be found here.[17] These tools also play a role in the first steps after the needs are defined, namely the process to investigate potential solutions.

The findings from the analysis should be transposed into clear information products (e.g. assessment report, verbal presentation, dashboard, maps, infographics) and should be shared not only with the FT Committee but also with the assessed communities. The assessed communities should be given explanations as to how the information will be used and what decisions it will impact.[19]

Summary and follow-up process after NA

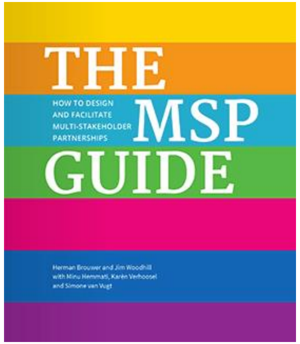
The next step is a careful process around determining how to address the defined needs

This document provided (theoretical and practical) information on how to conduct an inclusive and effective NA. A NA is a decision making tool, required by FTUSA to facilitate the decision making process of Premium spending. To design an inclusive and effective NA, local conditions and structures should first be investigated. The NA should be flexible to differences in local contexts. Moreover, the needs of the community will be better addressed in the NA when the beneficiaries are empowered to contribute to the different stages of the NA.

Effective planning and managing of the NA process requires some clear decisions. First, a well-defined scope in terms of the target group, time frame and desired output should be defined. Based on these preparations, the NA team or coordinator can choose the desired methods for the specific situation and determine a sampling strategy adequate for this method. Interpretation of the collected data and defining the needs are the last stages of the NA. There are multiple decision making tools to interpret and prioritise the needs of the community. It is important to begin the analysis without a solution in mind. In the end, the results of the analysis should be reported in an informative manner with a clear set of needs identified.

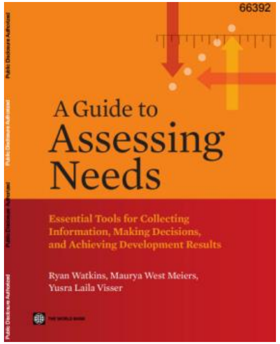
The NA is only one part of the full process around planning a development project (or spending the Premium). It does not determine potential ways to address the defined needs. The options for these solutions, as well as their feasibility and desirability, should also be carefully considered. For this, many of the same considerations should be taken into account as for the Needs Assessment, such as ownership of the process for the community, and the power dynamics at play. This part of the process is beyond the scope of this document, but that does not mean it is any less important.

Further reading



A guide on Multi-Stakeholder Partnerships. The section on methods and tools includes many approaches also applicable to Needs Assessments.

Wageningen University & Research: Wageningen Centre for Development Cooperation (2016).



An elaborate document on all aspects of Needs Assessments.

The World Bank (2012)

BetterEvaluation

Information on sampling, defining research questions and evaluation tools.

A lot of information on tried and tested methods and approaches for planning, monitoring and evaluation of development cooperation.

Wageningen University & Research: Wageningen Centre for Development Cooperation.

An elaborate document on all aspects of Needs Assessments in (post)conflict settings but very applicable to other settings.

UNHCR (2017)

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FGD techniques and participatory methods (1)

Critical Incident Technique: In their responses to focus group questions, participants are asked to provide past events as examples. Each event should include a description of the conditions or context for the event, the people involved in the event, the place of the event, and the associated activities or behaviours of people involved in the event. The focus of the discussions is then on previous incidents related to the topic rather than on speculations and generalisations.

Straw Polls: An informal voting method that can be used to quickly probe opinions of participants. Straw polls give all participants the chance to share their opinion through a response, such as a "yes" or "no", to a question. This can be done through a digital tool, by collecting paper votes or just raising hands. It is important to recognise that straw polls are not generally considered to be binding, official votes. Instead, they are used to gain a sense of the pulse of a group in relation to a specific issue or theme, and they can orient the subsequent discussion. Straw polls can be used effectively in situations where there is a long list of ideas and where you want the group members to eliminate ideas that have little or no support. The straw poll approach lets each group member choose a given number of items from the list for inclusion or elimination.

Brainstorming: This technique can be used to quickly generate new ideas or to identify and consider alternative solutions to a given problem. To initiate a productive brainstorming session, you should identify the specific topic that you would like group members to concentrate on. Introduce the topic, and encourage group members to brainstorm freely for a given amount of time. Encourage "on-the-spot" thoughts and ideas. Record all contributions from group members (it is helpful to record their thoughts in a format that is visible to all group members, such as a video-projected concept map or a word processing document). Categorise and combine ideas under overarching headings. Analyse and evaluate the ideas with the group, and prioritise the ideas in terms of their usability in the Needs Assessment.

Round Robin Reporting: This technique can be implemented in at least two different ways, both of which are based on having a specific question or suggestion. One approach is to share the question or suggestion with the group members and then to ask all group members to write down their ideas in relation to the question or issue. You then go around the group and have each person take turns to share one idea from his or her list. Continue this process by going around the room until nobody has any ideas left to share. Another approach is to share the question or suggestion with the group and then ask each person to give his or her reactions and ideas in relation to the question or suggestion presented. In both formats, the round robin approach allows each group member to share equally in the group process, thereby ensuring that no one person dominates the discussion.

From: Watkins, R., West Meiers, M., & Visser, Y. (2012). *A guide to assessing needs: Essential tools for collecting information, making decisions, and achieving development results*. The World Bank. P. 97-98

Another useful resource with practical guidelines on implementing various methods can be found here.

FGD techniques and participatory methods (2)

Participatory mapping:

The process used to create participatory maps can be very valuable in itself. They are planned around a common community goal and should be made with input from an entire community. The result is a product that represents the knowledge of the entire community. Participatory mapping can use a variety of different techniques, ranging from 'earth maps' (usually a drawing in sand in a communal space in a village) to sophisticated digital maps. Where the maps are intended to inform outside groups, they follow recognised cartographic conventions. It is a powerful tool that allows remote and marginalised communities to represent themselves spatially, bringing their local knowledge and perspectives to the attention of governmental authorities and decision-makers.

Transect walks:

Transect walks are an option for gathering spatial data on an area by observing people, surroundings and resources while walking around an area or community. Through the observation of specific indicators and the participation of a variety of stakeholders, significant amounts of both qualitative and quantitative data can be collected on transect walks. It is important to engage as wide an array of stakeholders as possible when undertaking the walk. The decision of who to engage should be informed by the indicators which you shall be observing. Different stakeholders will have different views on a situation based on their experience, expertise, values, gender and age. If a group appears to be too large, consider dividing the group and undertaking the same walk a number of times so that all views can be properly heard and taken into account. The route chosen should be replicated each time the walk is undertaken so as to keep observable variables stable. A transect walk can take anywhere from one hour to one day to complete, depending on the distance covered, the terrain of the area and the transport used.

From: Laidlaw (2014) and Rainforest Foundation (2020)
A useful resource with practical guidelines on implementing various methods can be found here.