The Light Wheel toolkit

A facilitator's guide to understanding and measuring holistic wellbeing

Tearfund

The Light Wheel toolkit: a facilitator's guide to understanding and measuring holistic wellbeing

Written by Lydia Powell,
with Seren Boyd and Shannon Thomson.

Tearfund is a Christian charity that partners with organisations and churches in more than 50 of the world's poorest countries. We tackle poverty through sustainable development, responding to disasters and challenging injustice. We believe an end to extreme poverty is possible.

Tearfund

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An invitation

Are you passionate about seeing people flourish in every aspect of their lives? Do you want to see communities inspired to lead change for themselves? Would you like to learn from other change-makers around the world? If so, this toolkit is for you!

The Light Wheel is an innovative approach that helps communities to understand, work towards and measure holistic wellbeing in their lives. This toolkit has been co-created by a global community of Light Wheel practitioners, combining many years of experience and best practice. Our hope is for many more people to benefit from using the Light Wheel! Will you join us?

> **'The Light Wheel is not only a tool to measure transformation: it is a tool for *bringing* transformation.'**
>
> **Design, Monitoring and Evaluation (DME) Coordinator, Tearfund, Asia**

Left & previous page: Participants of a Light Wheel discussion in Bangladesh.
Photo: Amit Rudro/Tearfund

Toolkit contents

The **Introduction** and **Parts 1–2** are essential reading if you're new to the Light Wheel, and a useful refresher if you're already familiar with it, or training others. More experienced users may want to jump straight to **Parts 3–5**.

Helpful icons

This toolkit uses icons throughout to help you find what you need.

Navigation helps you find your way around the toolkit depending on your experience level and points you to relevant resources in different sections.

Contextualise highlights the concepts or tools that you should consider adapting to your local context before putting them into practice.

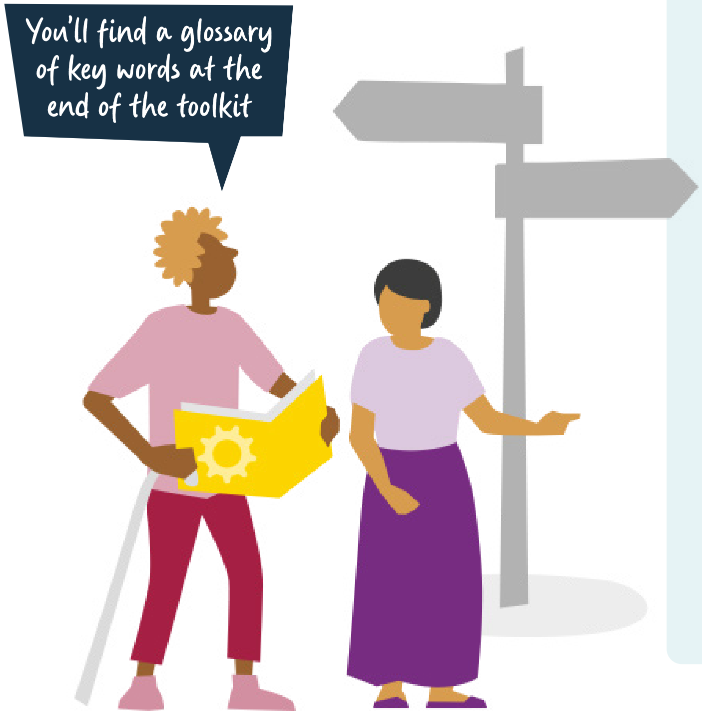
Key principles gives best practice advice on topics such as inclusion, safeguarding and informed consent, to help ensure your participants feel safe and welcome.

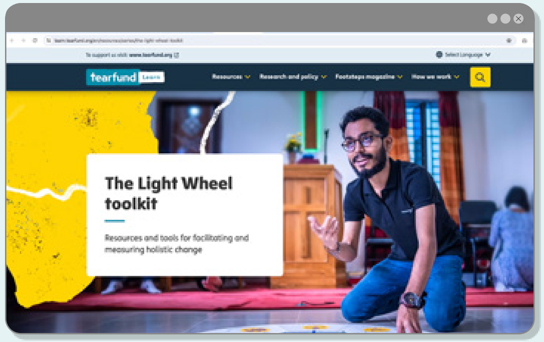
Bright idea highlights recommendations and suggestions from Light Wheel users around the world.

Reflect encourages you to take a moment to consider what you have read and how it might apply to your own life or work.

Case study shares stories that bring to life how the Light Wheel has been used in different places and the lessons that have been learnt.

Going deeper guides you to external resources that you can use to deepen your understanding of key ideas or concepts in the toolkit.





Additional resources

Here are two other useful resources that complement the toolkit:

- The **Introduction to the Light Wheel e-learning course** is a self-led, online course including case studies and practical examples of how to apply the Light Wheel. See: **learn.tearfund.org/LW-elearning**
- The **Light Wheel Bible studies** (Resource 3.1.7) will help you unpack the theology behind each of the nine aspects of wellbeing and explore what the Bible teaches us about each area.

How are you accessing the toolkit?

The toolkit can be used as a digital resource, or you can print it out to have in your hands. Here's some useful information about how to use the toolkit depending on how you are viewing it.

On a digital device

You can view this toolkit PDF on a computer, laptop, tablet or mobile phone using a free programme called Adobe Acrobat Reader. Go to **adobe.com/reader** for the latest version.

You can make your way around the PDF by clicking on the bold, underlined hyperlinks (eg **Section 1.1**) or the **navigation bar at the top of each page** (have a look above). You can also use the buttons in the left tab of each page to take you to the **main contents page, next page or previous page**.

The resources in **Part 3: Resources** are specially formatted so they can be viewed clearly, downloaded and edited on any digital device, including a mobile phone.

With a printed copy

If you want to print only part of the toolkit, you can specify the pages you need using the print options in Adobe Reader.

The toolkit is divided into parts and each part is subdivided into sections. So Part 1 contains **Section 1.1**, **Section 1.2** etc. This numbering will help you find your way around the toolkit, and the navigation bar at the top of the page will show you which part of the toolkit you are currently in.

How to use Part 3: Resources

Part 3: Resources is a library of resources that you can download or print to use during your Light Wheel activities. You will see these resources referenced throughout the other parts of the toolkit (eg **Descriptions of the nine aspects** (Resource 3.1.3)).

If you are a digital user, you can click the underlined hyperlink to be taken straight to Part 3: there, you can click through to our online learning platform, Tearfund Learn, where the resources are located. All resources can be downloaded and edited on a digital device, including a phone. To edit the files, you will need to download the Microsoft Word or Google Docs app onto your device.

If you are using a printed version of the toolkit, you can use the resource number to find that resource in Part 3.

Introduction

This introduction is an important first step on your Light Wheel journey! Let's see how the Light Wheel can help us explore and measure different aspects of wellbeing.

At Tearfund, we want to see people and communities transformed in a deep and enduring way. We believe that wellbeing has many different aspects. So our response to poverty must also bring change in every area of life, in order for individuals and communities to flourish.

That's why we created the Light Wheel: it's a framework with nine different aspects of wellbeing that we believe need to be addressed if we are to see **whole-life (or holistic) transformation**.

We also believe it's important to measure the impact of our work. If we want to see people thriving in every aspect of wellbeing, then we need to be able to show and measure the changes taking place.

And that's why we've developed this toolkit: it's a complete package of tools and resources, all based around the Light Wheel. It will guide you to use different participatory activities to explore what holistic wellbeing looks like in your community and measure progress as you move towards whole-life transformation.

Who is this toolkit for?

If you work with communities or churches and you want to help them work towards holistic transformation, then this toolkit is for you!

The Light Wheel helps people take the lead in assessing their situations, making decisions and bringing about change. As a facilitator, you're there to help guide their exploration. We have found that gathering people together to discuss, reflect and come up with ideas is a transformational experience in itself.

Where can it be used?

Over the years, the Light Wheel has been developed and used by practitioners across more than 25 countries and many different contexts. It has mainly been used within longer-term development initiatives and what Tearfund calls 'church and community transformation' (CCT) processes.[1] But it's also been adapted for use in multi-faith communities and Christian-minority contexts.

We hope to keep gaining more insight and learning about how the Light Wheel can be adapted to support communities in different places, such as contexts of fragility and humanitarian work.

How has the toolkit been developed?

For many years, Tearfund has been at the forefront of seeking answers to the question: 'What does whole-life transformation look like?' We have been exploring this with staff and partners all over the world: their co-creation of the Light Wheel toolkit is what makes it so innovative and globally relevant.

The toolkit also draws heavily on our theology, as a Christian organisation, and our biblical understanding of God's vision for our lives, as well as academic research on development and wellbeing.

The Light Wheel has been in development since 2013, with the first toolkit produced in 2016. Since then, we've been collaborating and gathering learning with users globally. This second edition of the toolkit is the culmination of their experience, creativity and best practice.

We believe the Light Wheel can teach each of us something new about living life to the full. We're excited to share this toolkit with you and hope you will see the benefits of using it in your work.

Bright idea

The toolkit has been rigorously reviewed and tested, but there is always more to learn! We would love to hear about your experiences and questions. Please share your bright ideas and questions at **lightwheel.support@tearfund.org**

[1] Tearfund has helped develop a number of contextualised processes that take churches on a journey to respond holistically to the needs of their local community. For more information about these CCT processes, see: **learn.tearfund.org/LW1**

Why is it called the Light Wheel?

The Light Wheel was designed in the shape of a wheel to emphasise the interconnectedness and interdependence of all the different aspects of wellbeing, which are shown as the spokes of the wheel. **We sometimes use the word ‘spoke’ as shorthand to refer to an aspect of wellbeing.**

For a wheel to function well, it needs each of its spokes to be strong and resilient. The image of the wheel helps us to remember that each of the spokes is important and contributes to wellbeing. It also reminds us that wellbeing is complex and that change in one area of our lives is connected to and often dependent on change in another area (see case study, right). The Light Wheel can also help us identify unintended or unexpected consequences of our work, positive or negative.

It was originally called ‘The LIGHT Wheel’, and the acronym in English stood for ‘Learning and Impact Guide to Holistic Transformation’. As it became more popular and was translated into many languages, we simplified the name to Light Wheel to reflect the fact that it shines a light on the areas of life that matter to our wellbeing, and the changes taking place in our lives.

> **‘The Light Wheel illuminates the areas of life we want to impact in order to see individuals and communities flourish.’**
>
> **Peninah Kayitesi,** CCT Lead, Tearfund, East and Central Africa

Bangladesh. Photo: Amit Rudro/Tearfund

Case study

Self-help groups touch on different aspects of wellbeing

An evaluation team met with women from a self-help group in Rwanda, established by one of Tearfund’s local partners, to hear members’ experiences of the group. One woman who had been widowed in the genocide had been left deeply traumatised and struggling financially. The local church had encouraged her to join a self-help group. She explained that being part of the group had improved her material resources and restored her hope. But there were other benefits too: she valued the support, love and friendship the group gave her, making her feel more confident, resilient and included. Here we see how different aspects of her wellbeing have impacted each other, some unexpectedly.

Rwanda. Photo: Marcus Perkins/Tearfund

Tearfund's understanding of poverty

The Light Wheel is based on Tearfund's belief that our response to poverty should touch on every aspect of a person's life.

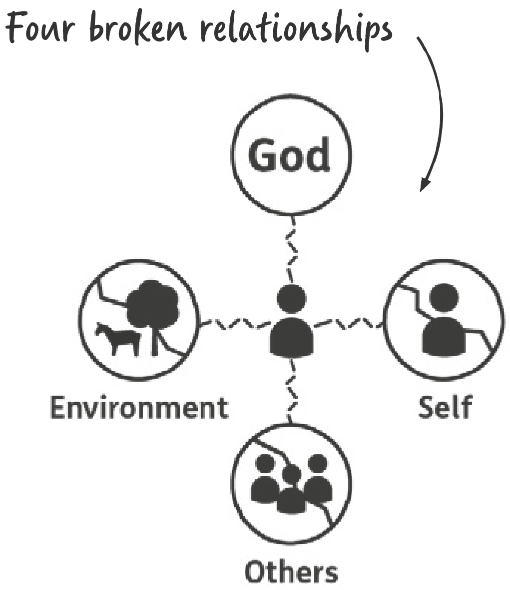
A picture of whole-life transformation

Tearfund believes that poverty is the result of four broken relationships: our **separation from God**, our distorted **understanding of self**, the ways we **treat others unfairly**, and the ways we **exploit the environment**.[2]

In the Bible (John 10:10), Jesus says: 'I have come that they might have life, and have it to the full.' At Tearfund, our vision is to mobilise and equip local organisations and churches around the world to respond to the brokenness in our world and play a role in bringing about this whole-life transformation that Jesus talks about. We call this holistic response **integral mission**.

> **'If our understanding of poverty is holistic, then our response to poverty and transformation also has to be holistic – and we can see that through the Light Wheel.'**
>
> **Jean Paul Nemerimana,** CCT practitioner, Tearfund, Burundi

In practice, this means serving others in a way that considers every aspect of wellbeing, not just the more traditional areas, such as material resources and physical health, but also aspects that have typically been harder to measure, such as faith, social connections and mental wellbeing. Experience tells us that these less tangible aspects contribute significantly to people's sense of wellbeing and transformation.



Malawi. Photo: Alex Baker/Tearfund

> **'I have come that they might have life, and have it to the full.'**
>
> **John 10:10**

Take a moment to reflect on John 10:10

- *What do you think it means for individuals and communities to live life to the full?*
- *What are some of the factors in your community that prevent people from living full lives?*

[2] For more on Tearfund's theory of poverty, see our resource *Understanding poverty: restoring broken relationships* at: **learn.tearfund.org/LW1**

Measuring what matters

The Light Wheel helps us think in a deep and practical way about what integral mission looks like. But then we have to ask: How do we know if holistic transformation is taking place? Have our activities contributed to that change?

The nine spokes of the Light Wheel link with the four broken relationships and give tangible examples of the areas of life we need to consider, and measure, if we want to see relationships restored and lives fully transformed. For more detail, see **The nine aspects of wellbeing and the four broken relationships** (Resource 3.1.8).[3]

The Light Wheel tools help us organise participatory activities that gather data and capture the reality and richness of people's experiences and perceptions of their wellbeing in all aspects of life.

> **'The Light Wheel enables us to capture the richness of people's lived experiences and the depth of change they are experiencing.'**
>
> **Jonathan Simpson,** Light Wheel practitioner, Zimbabwe

What does 'Living faith' mean to you?

As Christians, we see 'Living faith' as a key part of the Light Wheel and an essential aspect of wellbeing. It underpins the way we see all other areas of life and it is a catalyst for transformation in the lives of individuals and communities.

But we work with people of all faiths and none. That's why themes of faith addressed in the Light Wheel are designed to be general enough to be discussed by people of different faiths and adapted for different contexts. It's important that everyone feels included and welcome to explore how their faith contributes to their wellbeing. There may be some contexts in which it is not safe or relevant to discuss the subject of faith, and that's okay too.

We also want to support Christians to reflect on if and how they are strengthening and living out their Christian faith. We want to help them consider the biblical calling of the church in each aspect of wellbeing. That is why some resources in the toolkit have specific questions to help Christians think through these sorts of topics.

Tearfund has developed a short animated video called **Understanding poverty** that explains more about our beliefs and values in relation to poverty and transformation. See: **learn.tearfund.org/LW1**

Both: Bangladesh. Photo: Amit Rudro/Tearfund

[3] See page 6 for a reminder about how to find resources in **Part 3: Resources**.

What makes the Light Wheel distinctive?

As it has developed, the Light Wheel has drawn on the best practice and experience of users across the world. Here's why people love using it:

'It helps us to think holistically'

The Light Wheel helps us to think about the many different aspects of wellbeing that contribute to real transformation in people's lives. It means our responses to poverty are more holistic, and so are our outcomes. It also helps us see how different aspects of wellbeing interact with one another.

'It ensures everyone is included'

The Light Wheel tools are designed to help ensure everyone feels included and valued. Everyone needs to be involved in the Light Wheel process, especially people from marginalised or excluded groups, if the whole community is to experience transformation (see box, right).

'It equips facilitators'

Local-level facilitators play a vital role in bringing about holistic change. This toolkit helps them facilitate in-depth conversations so communities and churches can assess their current situation and decide the changes they want to see.

'It creates a culture of reflection and celebration'

The Light Wheel process involves local communities in monitoring and evaluating their own situations, to help them reflect, decide their priorities and celebrate progress. It becomes a familiar framework to help them regularly measure change taking place in their lives and dream for the future.

'It encourages collaboration'

Reflecting on the Light Wheel can help communities, churches and other organisations to see where their strengths and resources lie and where they need to seek support from and collaboration with others, to address gaps. The Light Wheel process also strengthens relationships within the community.

Everyone is included

Tearfund believes that every human being has value and is loved by God exactly as they are: no one's life is less valuable than anyone else's. We want to ensure that everyone has equal access to what they need to live fully in each aspect of wellbeing, including and especially people from marginalised or excluded groups (eg people living with a disability). For more information on how to make your Light Wheel activities inclusive, see **Section 2.1.1**.

> ‘The Light Wheel helps communities to become more conscious of their situations, to analyse and reflect, and the process of reflecting helps the people to develop and grow!’

AMI San Lucas, Guatemala

A group of Light Wheel facilitators in Bangladesh.
Photo: Amit Rudro/Tearfund

Part 1

Prepare

If you're ready to start your Light Wheel journey, you are in the right place! In this part, we will introduce you to the nine aspects of wellbeing, as well as the different Light Wheel tools and how they can be used. It will help you decide how you want to use the Light Wheel in your life or work. So let's get started!

If the Light Wheel is completely new to you, we recommend that you work through this part in detail. If you are more familiar with the Light Wheel, you may want to use this part for reference only, or for training others.

In Part 1, you will find:

- a summary of the nine aspects of wellbeing
- an introduction to the Light Wheel tools
- the different ways the Light Wheel can be used

Contents: Part 1

Use the links below to move to the sections that are most relevant to you.

1.1 The nine aspects of wellbeing

1.2 The Light Wheel tools and how to use them

Top: Nigeria. Photo: Nanmet Anthony/Tearfund
Bottom: Bangladesh. Photo: Amit Rudro/Tearfund

1.1 The nine aspects of wellbeing

Before you decide how to apply the Light Wheel in your work, it is important to have a good understanding of each of the nine aspects of wellbeing (also known as spokes). As you read through them, think about how they relate to your context.

A summary of the nine aspects

Living faith

Our faith in God and the way our daily lives are shaped by it. This spoke explores our commitment to practising faith regularly and the ways we rely on it in times of difficulty. It also looks at whether we engage in acts of service that are prompted by faith, and whether we collaborate with people from other faith groups.

Personal relationships

The love, security and respect we find in marriages, families and close friendships. This spoke considers whether we trust and are trusted by the people whom we are close to. It considers the benefits that healthy personal relationships bring to our wellbeing, and how we make decisions and resolve disagreements with the people we live with.

Emotional and mental wellbeing

How we feel about ourselves and the opportunities we see in our future. This spoke considers whether our daily lives include activities that excite and interest us, and whether our future gives us hope. It also explores the ways we cope with responsibilities and difficult situations, and how well supported we are emotionally.

Social connections

The extent to which we connect with and support each other as a community. This spoke considers the benefits of being part of community groups and shared projects, and looks at how inclusive we are of people who are different from us. It also looks at how safe and secure we feel in our communities.

Participation and influence

Using our voice to influence decision-makers and make our communities a better place. This spoke looks at whether we feel able to share our views in public spheres and whether we believe that we can create or influence positive change. It also considers whether we know what practical steps to take to engage with decision-makers.

Physical health

Looking after our bodies and having access to good-quality health services. This spoke looks at how healthy the people in our community are. It also considers whether we can access or know about ways to stay healthy, such as drinking safe water, practising good hygiene and having a varied diet.

Material assets and resources

Using our creativity to make the most of our resources, make new resources, and share our resources with others. This spoke considers the resources we own and the ways we earn a living and save money. It looks at the ability this gives us to pay for essential household needs and even share our resources with others. It also explores how resilient our assets are and whether we can access formal and informal financial services.

Capabilities

Developing and using our gifts and skills to make a living, serve others and bring about positive change in our lives. This spoke considers whether we have the ambition and vision to know what we hope to achieve in our lives. In turn, it explores whether we have or can develop the skills required to achieve our vision and even share our skills with others.

Care of the environment

Looking after and enjoying the natural world, easing the risks and protecting resources for future generations. This spoke is about our relationship with creation. It looks at whether we understand the risks posed by climate change, environment-related disasters and pollution, and take action to reduce them. It considers whether we have access to nature – not only for the resources we need, but also for our enjoyment – and whether the same will be true for future generations.

Additional resources

You can use these additional resources to develop your understanding of each of the nine aspects of wellbeing:

- A more detailed description of each aspect can be found in **Descriptions of the nine aspects** (Resource 3.1.3).
- Use the **Light Wheel Bible Studies** (Resource 3.1.7) to consider what the Bible teaches us about each aspect of wellbeing.
- Take the **Introduction to the Light Wheel e-learning course** to explore each aspect of wellbeing through fictional scenarios.[4]

[4] This course is available at: **learn.tearfund.org/LW-elearning**

1.2 The Light Wheel tools and how to use them

We're now going to introduce you to the Light Wheel tools and the different ways that you can use them to facilitate and measure holistic change.

An overview of the Light Wheel tools

The Light Wheel tools are based on the nine aspects of wellbeing. They help us gather data to build up a picture of different aspects of an individual's or a community's life: what's going well and where there are challenges.

When we use the tools for the first time, they give us a snapshot of the situation at a point in time. This helps us identify where we need to focus our attention as we take steps towards holistic transformation. When we use the tools on a regular basis, we can start to track holistic change over time and see whether our actions are having a positive impact.

Light Wheel group discussions

A group discussion brings people together to reflect and answer questions about their current situation, looking at each aspect of wellbeing in turn. They're invited to talk about their dreams for the future too. A key part of this tool is asking the group to score how they feel they are doing in each of the nine aspects of wellbeing, using a five-point scale that we call the **maturity model**.

The Light Wheel survey

In the Light Wheel survey, you ask a sample of individuals the same set of questions about each of the nine aspects of wellbeing. When all the surveys are gathered in, you will be able to see how many people responded in a certain way and explore variations between people's experiences.

Observation tools

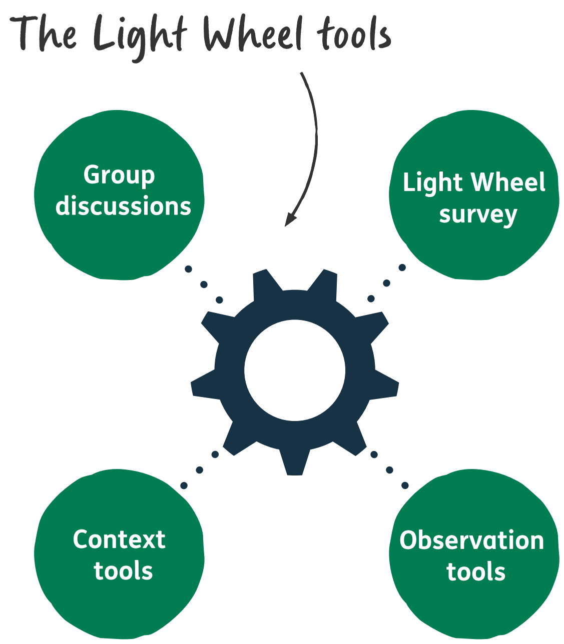
The three observation tools invite you to use the power of observation to provide an extra layer of information about the situation:

- reflection exercise
- transect walk
- community map

Context tools

The four context tools help you explore the external factors and players that may affect the situation, setting its story in the wider context:

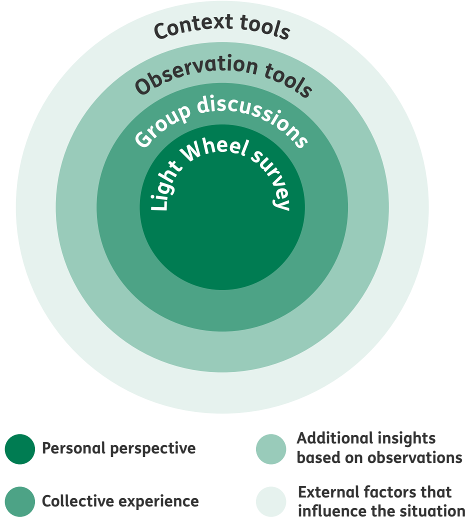
- history map
- force field analysis
- stakeholder analysis
- secondary data



Different sources of data

The Light Wheel tools draw on different sources of information. When we bring together these different perspectives, it helps us to build a rich picture of the situation and to have more confidence in our findings. This process is called **triangulation** (see Section 2.1.4).

- The **group discussions** are a chance for people to discuss and debate their experiences and perspectives collectively.
- The **Light Wheel survey** focuses on people's personal perspective.
- The **observation tools** provide additional insight to deepen our understanding of how things are.
- The **context tools** reveal external dynamics that are influencing the situation.



Qualitative or quantitative data

Most of the Light Wheel tools produce what we call **qualitative** data that reflects people's perceptions, opinions, emotions and observations. Your notes from the group discussion would be an example of this. Qualitative data can help you build an in-depth picture of the situation and understand the reasons why people feel, think or do certain things.

Some of the Light Wheel tools also provide us with **quantitative** data, which is data that is expressed as a percentage or number. For example, some of the questions in the Light Wheel survey are 'closed questions', where the respondent chooses from a set list of answers. This gives us quantitative data because we count the percentage or number of people who choose each answer.

When we combine both qualitative and quantitative data, we can interpret the 'why?' behind the numbers.

The table (see right) shows how the different tools provide different types of data. This will be useful when you come to select which Light Wheel tools you want to use.

What types of data do the tools give?

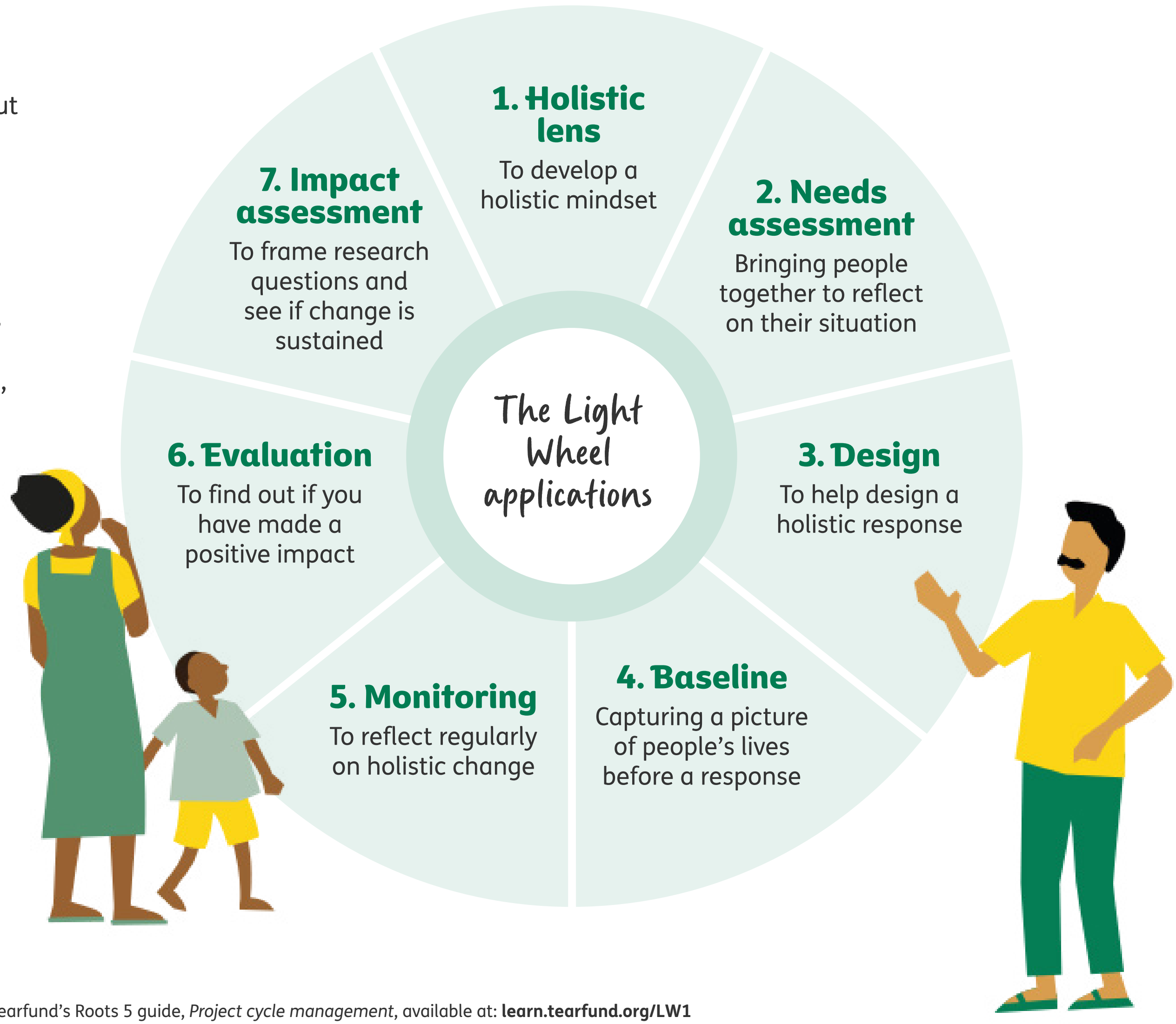
Tool	Qualitative data	Quantitative data
Group discussions		
Discussion notes	✓	
Maturity model scores		✓
Light Wheel survey		
Closed questions		✓
Open questions	✓	
Observation tools		
Reflection exercise	✓	
Transect walk	✓	✓
Community map	✓	
Context tools		
History map	✓	
Force field analysis	✓	
Stakeholder analysis	✓	
Secondary data	✓	✓

Deciding how to use the Light Wheel

We use the term 'applications' to describe the different ways that the Light Wheel can be used. We have suggested seven applications in this section but you may well find more!

The Light Wheel can be used once, to assess a community's situation at a point in time, but where possible it is used regularly, at different points throughout a process or project cycle (see diagram, right), to track and measure change.[5] For example, it could be used for a baseline at the start of a project and then again for an evaluation at its close.

One of the strengths of the Light Wheel is its flexibility. As you read the instructions for each of the applications, you will see that you can choose how light-touch or in-depth you want your methodology to be. For example, you could use just one of the Light Wheel tools, or several tools together. This section will show you how you can adapt your approach to suit your purpose and the time and resources available.



Find what you need

In **Part 2: Facilitate** you will find step-by-step guides explaining each of the tools, and **Part 3: Resources** has links to downloadable resources for facilitating these tools.

[5] For more information about the different stages of the project cycle, please see Tearfund's Roots 5 guide, *Project cycle management*, available at: **learn.tearfund.org/LW1**
This resource has information about other methods and tools you can use alongside the Light Wheel at each stage of the project cycle.

Application 1: A holistic lens

Purpose

Having conversations that help us think holistically about wellbeing

Tools & resources

- **Descriptions of the nine aspects** (Resource 3.1.3)
- **Light Wheel diagrams** (Resource 3.1.5)
- **Light Wheel Bible studies** (Resource 3.1.7)
- **Light Wheel story-gathering template** (Resource 3.1.9)

This first application is about having conversations that encourage us to think more holistically about our lives and our wellbeing. It uses the Light Wheel as a lens to help us reflect on how things are in relation to each aspect of wellbeing. This can help us to see our lives differently, and can inspire people to believe change is possible.

In this approach, we don't have to measure anything or collect data in a formal way. The goal is to become really familiar with the nine aspects of wellbeing so they become a mindset to see things in a more holistic way. This helps us be more aware of the interconnectedness of all areas of our lives.

> **'[Since using the Light Wheel] I have an expanded view of reality. I am noticing things that I didn't see before.'**
>
> **José Eduardo,** church facilitator, Bolivia

This is the foundation for all other Light Wheel applications. When people become familiar with the nine aspects of wellbeing, they feel more comfortable about measuring change using the Light Wheel tools.

Different approaches

We can use the Light Wheel as a lens whenever we want to think more holistically about wellbeing, or encourage other people to do the same. For example, you might use:

- the **Descriptions of the nine aspects** when you are encouraging church or community groups to take a holistic approach to their work or ministry; at Tearfund, we call this envisioning
- the **Light wheel diagrams** as a visual cue to have coaching conversations with colleagues or community facilitators, about where they are seeing change, what their dreams are and how they might achieve them
- the **Light Wheel Bible studies** in a Christian context to think about what the Bible says about each aspect of wellbeing, or you might use the nine aspects of wellbeing to bring a more holistic perspective to other Bible passages you are exploring
- the **Light Wheel story-gathering template** to help document all the different aspects of people's lives when they tell you their stories, so you can see the full picture.

Case study

Integrating a holistic lens into CCT

Tearfund's CCT work in West Africa is a great example of how using the Light Wheel as a lens has led to more holistic ways of thinking and working.

Firstly, the Light Wheel diagrams and Descriptions of the nine aspects are used in conversations with church leaders to inspire them about how the church can serve their community, beyond meeting just their spiritual needs. The nine aspects of wellbeing help them to see the range of areas that God calls us to care about.

Secondly, CCT facilitators are introduced to the Light Wheel during their training to teach them about all the areas of life that CCT should be aiming to transform.

Nigeria. Photo: Nanmet Anthony/Tearfund

Once the CCT process begins, facilitators use the Light Wheel in as many activities as possible, to help participants think holistically at every stage. For example, it challenges them to reconsider familiar Bible passages about living 'life to the full', and to think more holistically about their vision for different areas of church and community life.

> **'If you have a Light Wheel mindset, you implement CCT in a holistic way, and you get a more holistic result!'**
>
> **Isaac Danung,** CCT Officer, Tearfund, Nigeria

As the participants begin to assess the needs in their community, they base their discussions and analysis around all nine aspects of wellbeing. This helps them design more holistic projects. They also use a range of Light Wheel tools (eg **group discussions** with the maturity model) to reflect on how they are achieving change in different aspects of wellbeing over time. Thinking in a more holistic way from the outset helps them to achieve more holistic outcomes, which is the overall goal of CCT.[6]

Benefits of using a holistic lens in CCT

- encourages churches to take a holistic approach to ministry
- helps participants think holistically about how they can improve their situations
- encourages the church to build relationships with the wider community to achieve community-wide impact
- helps to prioritise often-neglected aspects of wellbeing, eg **Care of the environment**
- encourages regular reflection and measuring change across all aspects of wellbeing

[6] For more information on how the West Africa team have integrated the Light Wheel into their CCT work, please see their 'Guidelines for facilitators' resource, available at: **learn.tearfund.org/LW1**

Application 2: Needs assessment

Purpose

Bringing people together to reflect on their current situation and priorities for the future

Tools & resources

- Group discussion tool (**Section 2.2**)
- Observation tools (**Section 2.4**)
- Context tools (**Section 2.5**)

We can use the Light Wheel to help people explore their needs and to prioritise what should be addressed in our project design. As people come together to listen to each other's experiences, the Light Wheel can be used to ensure that the needs assessment covers all different areas of their lives. This helps participants become more self-aware, dream about they changes they want to see, and feel motivated to achieve these changes themselves.

1. **Firstly, decide your purpose** for your needs assessment and agree on any specific questions you want to answer. For example, you might be planning a project and want to understand the situation and priorities in the community. Or perhaps you are interested in hearing the perspectives of a certain group, or looking at a few specific aspects of wellbeing.

2. **Choose your Light Wheel tools** according to your purpose and the time and resources available. For example:
   - Use the **group discussion** to encourage people to reflect on their current situations and their dreams in relation to the nine aspects of wellbeing. Finish with scoring the maturity model.
   - Use one or more of the **observation tools** to provide different perspectives and help confirm or challenge your findings from the group discussion.
   - Use one or more of the **context tools** to understand the external factors influencing the situation. This will help you see the role you can play in bringing positive change.

Nigeria. Photo: Nanmet Anthony/Tearfund

3. **Create a data collection plan** where you decide on the communities and individuals you will include in your needs assessment. Outline the roles and responsibilities of your team and the resources you'll need for the tools you are using (see **Part 2: Facilitate**).

4. **Collect your data**, following the guidance in **Part 2: Facilitate** for the tools you plan to use.

5. **Analyse your data** using the instructions in **Part 4: Analyse**. Reflect on how your findings answer the questions you started with.

6. **Share your findings** with different stakeholders using the guidance in **Part 5: Communicate** so they can start to plan for how to bring about change and meet the needs that have been identified.

Case study

Discovering community priorities in Guatemala

In Guatemala, AMI San Lucas used the Light Wheel once one phase of their work was completed, to help the community reflect on its current situation and goals for the future. This also provided AMI San Lucas with data to inform the design of the next phase of their work.

They divided participants into groups of men, women and young people. Each group met weekly to discuss a different aspect of wellbeing, using creative and participatory methods to explore strengths and challenges in each area.

Participants said that the discussions helped them to see their needs and to have a vision for the future. Young people in particular said they appreciated the opportunity to voice their opinions. As a result of the assessment, AMI San Lucas pinpointed three main priorities as their future focus: **Physical health**, **Capabilities**, and **Participation and influence**.

> **‘The Light Wheel is like a mirror that helps us reflect on our lives from many angles. It gives us space to talk about our challenges and to get excited for what we can achieve.’**
>
> **Norman Molina,** Global Programme Effectiveness Lead, Tearfund, Honduras

Gengly Gutiérrez, a Light Wheel facilitator in Guatemala, leads a workshop.
Photo: Eduardo Say/Tearfund

Application 3: Designing a holistic response

Purpose

Using the Light Wheel to design a holistic response or make an existing response more holistic

Tools & resources

- Your findings from 'Application 2: Needs assessment'
- Context tools (**Section 2.5**)

We can use the Light Wheel when we are designing a new response, to ensure we are meeting people's needs in a holistic way. Alternatively, we can use it to assess the outcomes of an existing response, to see how we can make its impact more holistic.

Here, we are using the term 'response' to describe any way we might address an identified need or challenge, at a community, regional or national level. For example, this might be a community-based project or church-led process (such as CCT, see page 8) or a higher-level strategy.

Different approaches

1 Design a new response using the Light Wheel

The information we gather using the Light Wheel tools (eg 'Application 2: Needs assessment') helps us to understand people's needs and priorities. We can use this information to help us design a meaningful response that aims to meet these priorities.

In addition, the **context tools** help us understand what is happening in the wider environment, and what other factors and actors are driving positive or negative change. This is essential information because it enables us to consider how our response fits into the bigger picture, and how to collaborate with others to bring about change.

For example, when the Tearfund team in Nigeria created their new country strategy, they decided to use the Light Wheel as a framework. It helped them map how each area of work in their strategy (eg WASH, CCT, peacebuilding) would contribute to one or more aspects of wellbeing. This also helped them to see the value and impact of combining different specialist areas in one strategy.

2 Make an existing response more holistic using the Light Wheel

We can also use the Light Wheel as a lens to talk about which aspects of wellbeing people feel are already being impacted by the response we have been running. (This is similar to the approach we described in 'Application 1: A holistic lens'.) Or we might want to use some of the Light Wheel tools to reassess participants' needs and priorities more thoroughly (as seen in 'Application 2: Needs assessment').

You can then consider how to bring about change in areas identified as needing more focus. For example, you could start additional activities as part of your response, or collaborate with other stakeholders with different specialisms.

For example, in one of Tearfund's existing sexual and gender-based violence (SGBV) projects, the team used the Light Wheel to show that SGBV has emotional, material, spiritual and relational impacts, as well as physical ones. This helped participants talk about their experiences from different perspectives and helped Tearfund devise a more holistic response.

Case study

Making CCT work more holistic in Tanzania

Tearfund's team in Tanzania used the Light Wheel to evaluate their CCT work and to understand whether or not all nine aspects of wellbeing were being positively impacted.

They found a positive impact in **Material assets and resources**, as people were saving money through self-help groups. However, a consistent finding was that the environment had degraded since the process began. Participants had become so passionate about improving their **Material assets and resources** that they were chopping trees to make charcoal to sell, without considering how to replace the natural resources they were using.

The Light Wheel made Tearfund's team in Tanzania aware of this issue and as a result they added a new environmental and economic sustainability focus to their country strategy and delivered sustainable livelihoods training for all CCT groups.

> **'Using the Light Wheel can highlight unintended consequences of our work, good and bad, and these findings can be used to make an existing response more holistic in its outcomes.'**
>
> **Shannon Thomson,** consultant and Light Wheel practitioner, Tanzania

Aksa and her husband, Elia, outside their home in Tanzania.
Photo: Tom Price – Ecce Opus/Tearfund

Application 4: Baseline

Purpose

Capturing data to show what people's lives are like at the start of a response so we can measure if change has occurred at a later stage

Tools & resources

- Context tools (**Section 2.5**)
- Group discussion tool (**Section 2.2**)
- Light Wheel survey tool (**Section 2.3**)
- Observation tools (**Section 2.4**)

Establishing a baseline means presenting a picture of the situation at the beginning of our response. We can use the Light Wheel to capture data on each of the nine aspects of wellbeing. This information can be used as a point of comparison when we come to monitor or evaluate the situation later on (eg in a midline or endline evaluation), to see what change has taken place and why.

1. **Firstly, identify key questions** that you want your baseline to answer. You might want to capture information from a range of people in the community, about all nine aspects of wellbeing. Or perhaps you want to collect data from a certain group, or about a few specific aspects of wellbeing.

2. **Choose your Light Wheel tools**, based on the type of data you want to collect, the questions you want to answer, how rigorous your data needs to be, and the time and resources available. Check back to page 19 for a reminder of what kind of data each tool offers. For example:
   - We recommend starting with some of the **context tools**. These will help you understand more about the setting you are in and think about which factors are causing positive or negative change.
   - Then, you can select one or more of the other Light Wheel tools. For example, if you are interested in gathering numerical data, you might use the **Light Wheel survey**.
   - To understand people's feelings and experiences in depth, you might use the **group discussion** and score the maturity model.
   - To make sure your findings are validated and rigorous, you could also include some of the **observation tools**.

3. **Create a data collection plan** where you decide on the communities and individuals you will include in your baseline, outline the roles and responsibilities of your team, and gather the resources you'll need. See **Part 2: Facilitate** for instructions for all the tools you plan to use.

   Keep a record of your baseline methodology so that you can repeat the same steps when you conduct an evaluation later on.

4. **Collect your data**, following the guidance in **Part 2: Facilitate**, for the tools you plan to use in your baseline methodology.

5. **Analyse your data** using the instructions in **Part 4: Analyse** and see what it tells you about the situation in each of the nine aspects of wellbeing. These findings will form your baseline report.

6. **Share your findings** with different stakeholders using the guidance in **Part 5: Communicate** and discuss what the data tells you about the situation at the start of your response and how this might inform your approach/activities.

> **'The Light Wheel has given us a holistic understanding of the real situations that people face.'**
>
> **Timoth Pallangyo,** CCT practitioner, Tanzania

Case study

Bangladesh baseline study

In Bangladesh, Tearfund wanted to establish a baseline for 83 churches doing CCT, across 18 districts. So they used the **Light Wheel survey** and then scored the maturity model using the **group discussion** process. The purpose was to understand the churches' starting points, in relation to the nine aspects of their wellbeing, and to measure future changes against this.

Church leaders took part in the data collection, which helped them to understand more about the lives of their congregation. To have confidence in their findings, the enumerators compared their findings with their own observations and reflections (see **observation tools** in Section 2.4) during the community visits. The results from this large dataset were very informative.

They are being used to help CCT groups mobilise local resources, and in advocacy and action planning. The same process will be repeated in a few years' time (as a midline study) to see if any change has taken place.

> **'Through this [Light Wheel] training we learnt how to strengthen our church. Now we can think about the overall change for the community.'**
>
> **Arobindi Barman,** Lutheran church leader, Bangladesh

Participants of a Light Wheel discussion in Bangladesh scoring the maturity model.
Photo: Amit Rudro/Tearfund

Application 5: Monitoring

Purpose

Using the Light Wheel to reflect regularly on how we are doing in all nine aspects of wellbeing

Tools & resources

- **Descriptions of the nine aspects** (Resource 3.1.3)
- **Light Wheel diagrams** (Resource 3.1.5)
- **Light Wheel Bible studies** (Resource 3.1.7)
- Group discussion tool (**Section 2.2**)

Monitoring is about checking in regularly during our response to see if things are moving in the right direction. It helps us to learn what is working and make changes if anything needs to be improved. Using the nine aspects of wellbeing in our monitoring activities can help us ensure our response is having a holistic impact.

1. **Firstly, consider how often you want to create touch points** for learning and reflection during your response. Then think about how much depth you want to go into each time. You could have regular, quick discussions about any change you're seeing in the nine aspects of wellbeing, or where you would like to see more change and how. For example, a Tearfund partner in India discussed a couple of aspects every few months, covering all of them over the course of a year.

2. **Create a monitoring plan** where you decide on the communities and individuals you will speak to, and when. Project participants, facilitators and project staff will all have different perspectives on change and what can be improved, so try to include a range of voices in your monitoring activities. Think about how different audiences might want to engage in different ways. For example:

   - Project participants might like to see one of the **Light Wheel diagrams** to prompt conversation around the nine aspects of wellbeing.
   - Church members might engage well if you use the **Light Wheel Bible studies** to introduce the topic and lead on to a discussion.
   - Project staff might want to go into more detail by using the **Descriptions of the nine aspects**.

Bright idea

Using the Light Wheel for monitoring is particularly effective if you have used it with participants already, for example in conversations about wellbeing or to conduct a baseline. When participants are familiar with the Light Wheel, it feels more natural for them to use it for regular reflection.

3. **Think how you will capture and use the information shared** to help you improve your response and learn for the future. You might find that you need to make some changes in order to have a more holistic impact. Comparing monitoring data with your baseline can give you real insight into signs of change and provide important information to include in your endline evaluation.

Case study

Light Wheel monitoring for CCT

Tearfund's CCT team in West Africa developed a monitoring and reflection template (see example you could copy, right) that facilitators use to reflect regularly on changes taking place during each stage of the CCT process. It is designed to be used on a monthly basis when CCT facilitators meet with the people who are training them.

The template covers the core activities for the month and what participants have learnt. It has space to reflect on changes that have been seen and asks people to reflect on change using the nine aspects of the Light Wheel.

The information generated can be summarised across churches or regions, to see broader trends or challenges. It can also help highlight aspects of wellbeing that might need more focus to ensure CCT is achieving its goal of whole-life transformation.

'The motivation for using the Light Wheel was to help facilitators and trainers have more in-depth and holistic conversations about the areas of progress and challenge.'

Esther McMillan, CCT Coordinator, Tearfund, UK

CCT monitoring template

Date	Activities completed this month	What did the group learn through this activity?	What change in behaviours or attitudes have you seen as a result of your activities? (Reflect using the Light Wheel diagram)
1st September	*Church members have developed a vision for their church and community*	*They learnt how the nine aspects of wellbeing can be used to develop a fully holistic vision*	***Participation and influence** was impacted, because different types of people were included in setting the vision*

Burkina Faso. Photo: Jonas Yameogo/Tearfund

Application 6: Evaluation

Purpose

Assessing if and how change has taken place over time, and what our contribution has been

Tools & resources

- Context tools (**Section 2.5**)
- Group discussion tool (**Section 2.2**)
- Light Wheel survey tool (**Section 2.3**)
- Observation tools (**Section 2.4**)

'The Light Wheel is the most complete and holistic framework for an evaluation that I have come across.'

Independent evaluation consultant, Nigeria

Evaluations give us valuable insight into whether our response has had the impact we intended. They are usually conducted at the end of a response, to help us assess what has changed since we started work and why. Evaluations can also be conducted at a midpoint (which we call a midline evaluation) to see if things are progressing in the right direction. Establishing a baseline at the start of our response (see 'Application 4: Baseline') as a point of comparison is therefore very important to a successful evaluation.

Using the Light Wheel in an evaluation enables us to see impacts across all dimensions of people's lives, not just in the areas we might expect. If we see positive change in all nine aspects of wellbeing, we can confidently assume that whole-life transformation is taking place.

Rwanda. Photo: Esther McMillan/Tearfund

1. **Firstly, identify key questions** that you want your evaluation to answer. You will probably want to find out what has changed, and why, in each of the nine aspects of wellbeing, but there may be other, more specific questions you want to explore too.
2. **Revisit your baseline methodology** and repeat the same approach (eg using the same Light Wheel tools, questions and sampling methods). This will ensure that the data you collect can be directly compared with your baseline data.
3. **Or, if you have not done a baseline, choose your Light Wheel tools** based on the type of data you want to collect, how rigorous you want to be and the time and resources available. Check back to page 19 for a reminder of what kind of data each tool offers. For example:
   - We recommend starting your evaluation using some of the **context tools**. These will help you understand what has been going on in the wider setting during your response. This will help you better assess which external factors have caused positive (or negative) change, and what your contribution has been.

- Then, you can select one or more of the other Light Wheel tools. For example, if you are interested in gathering numerical data, you might use the **Light Wheel survey**.
- If you want to understand people's feelings and experiences in depth, you might choose to use the **group discussion**, and score the maturity model.
- To make sure your conclusions about what has changed and why are validated and rigorous, you could also include some of the **observation tools**.

Bright idea

If you haven't conducted a baseline, we recommend that you add some retrospective questions to your group discussion to help participants reflect on how things used to be, before you discuss how things are today. For example: 'What was your life like in this aspect of wellbeing three years ago? Why was that?' This data will not be as reliable as data collected in an actual baseline, but it will give you some idea of change or progress.

4. **Create a data collection plan** where you decide on the communities and individuals you will include in your evaluation, outline the roles and responsibilities of your team and gather the resources you'll need. See **Part 2: Facilitate** for instructions for all the tools you plan to use.
5. **Collect your data**, following the guidance in **Part 2: Facilitate**, for the tools you plan to use.
6. **Analyse your data** using the instructions in **Part 4: Analyse** and compare the findings with your baseline data to assess what change has taken place, and why. These findings will form your evaluation report.
7. **Share your findings** with different stakeholders using the guidance in **Part 5: Communicate** so you can celebrate the changes that have taken place, capture learning for future responses and think about new priorities for the future.

> **'The Light Wheel truly helps us to learn from, rather than impose ourselves on, the people we have been called to serve.'**
>
> **Harrison Manyumwa,** DME Advisor, Tearfund, Southern and East Africa

Keep asking 'why?'

In your evaluation you are not only trying to assess the situation and what has changed, but also find out what is driving that change. To do this, it is important to keep asking your participants 'why?' when using the Light Wheel tools, particularly in the **group discussion**.

For example, 'Why do you think your score on the maturity model has increased?', 'What was the reason for that change?' Make a note of people's answers, so that when it comes to analysing your data you can draw conclusions about what has changed and why.

Case study

Learning from a Light Wheel evaluation in Nicaragua

Tearfund's partner in Nicaragua, PRODAD, used the Light Wheel to evaluate a project that was promoting food security and **Care of the environment** among churches and their communities. They wanted to understand people's experiences of the project and people's priorities for the future across all the different aspects of the Light Wheel.

PRODAD gathered information across six communities through **group discussions**, making sure they had enough facilitators to hold separate discussions with men, women and young people in each community. They also conducted **Light Wheel surveys**, sometimes using mobile phones due to restrictions on movement at the time.

> **'We often assume what people need or want, but the findings from our evaluation help us to know more about what the community really needs.'**
>
> **Omar Herrera,** Director of PRODAD, Nicaragua

The data collection team made sure the questions were adjusted to be sensitive to the context, and local political leaders were also involved so they supported what was happening. One important piece of learning was to have female enumerators working with women's groups so that the women felt comfortable to answer more personal questions.

They found people really valued the opportunity to speak about their experiences and analyse their community. The team at PRODAD hoped that sharing their findings with the community members would help shift people's perception of the work the local church was doing.

Other ways to use the Light Wheel in an evaluation

There are other creative ways to use the Light Wheel in your evaluations. For example, in Rwanda, a research team integrated some **Light Wheel survey** questions into an existing survey they were conducting for a livelihoods project. This meant they could measure their technical economic indicators, while also measuring the social and personal impacts of the project. They could also have used the **group discussion** if they had wanted more qualitative information.

Another option is to analyse findings you gather from other evaluative approaches (eg notes, stories or interview transcripts) through the lens of the Light Wheel, to see how different aspects of wellbeing have been impacted. See **Section 4.2** for guidance on how to 'code' (or categorise) your data to help illuminate each aspect of wellbeing.

Nicaragua. Photo: PRODAD

Application 7: Impact assessment and research

Purpose

Using the Light Wheel to frame research topics and questions, and understand what drives and sustains holistic change

Tools & resources

- **Descriptions of the nine aspects** (Resource 3.1.3)
- **Group discussion questions** (Resource 3.2.1)
- **Light Wheel survey template** (Resource 3.3.1)

An impact assessment, or piece of research, is usually conducted after a response has ended or some way into a long-term response. While an evaluation looks at the results of the response, an impact assessment or research piece goes into more depth to investigate what drives and sustains change over time.

Over the years, the Light Wheel has been integrated into impact assessments and research in different ways. Any of the Light Wheel tools can be used alongside other tools and methodologies for assessing change (eg Tearfund's Qualitative Impact Assessment Protocol, known as QuIP),[7] especially when a more rigorous approach is needed. The Light Wheel provides a tried-and-tested framework for talking about and evaluating holistic wellbeing.[8]

The case studies that follow give examples of some of the more rigorous methodologies that you, researchers or consultants might use, and how incorporating the Light Wheel can help bring greater depth and insight.

> **'Integrating the Light Wheel into other research methodologies helps us to talk about and measure holistic wellbeing in a consistent way across different areas of our work.'**
>
> **Charlotte Flowers,** CCT Coordinator, Tearfund, UK

Case study

CCT impact study

In 2022 Tearfund conducted a large-scale research study to assess the holistic impact of CCT work in Rwanda, Sierra Leone, Tanzania and Zimbabwe. Differences in participants' wellbeing were assessed using 23 questions relating to the Light Wheel's aspects of wellbeing (see Descriptions of the nine aspects). The data was compared with communities where CCT was not yet taking place. The results found that CCT communities scored higher in all 23 questions and every aspect of wellbeing covered in the survey. The findings also showed that every £1 invested in CCT unlocks £7 worth of community resources, which together create up to £211 worth of 'social value' in terms of increased wellbeing.[9]

Rwanda. Photo: Marcus Perkins/Tearfund

[7] Read more in-depth findings from Tearfund's QuIP research studies by visiting: **learn.tearfund.org/LW1**

[8] If you are planning to conduct an impact assessment or a piece of research, you might find Tearfund's 'Research terms of reference' helpful for guidance on areas to consider in your planning. See: **learn.tearfund.org/LW1**

[9] The full research study findings can be found at: **learn.tearfund.org/LW1**
'Social value' is an approach that gives monetary value to benefits that are not typically quantified.

Case study

Outcome Harvesting in Mozambique

When one of Tearfund's sustainable livelihoods projects in Mozambique came to be evaluated, they used an approach called Outcome Harvesting to understand the changes in behaviour and attitudes that had taken place.[10] The emerging outcomes were then mapped against the Light Wheel, using the Descriptions of the nine aspects, to reveal the areas of most and least transformation.

There was a clear trend showing that improvements in WASH, agricultural practices and livelihoods training had led to improved **Physical health**, **Capabilities** and **Material assets** within the community. There was less mention of changes related to **Social connections** and **Personal relationships**, despite these being intended outcomes of the project, and so these were identified as areas for further focus.

Mozambique.
Photo: Ricardo Franco/Tearfund

Case study

Ageing in Rwanda study

Tearfund's team in Rwanda commissioned a piece of research to understand how the local church can better address vulnerability in old age.

Rwanda.
Photo: Tumuheirwe Jesus/Tearfund

As part of the broader research methodology, the Light Wheel **transect walk** tool was used to help the research team observe with their own eyes some of the challenges faced by elderly people, eg accessibility and inclusion in public spaces, adequacy of care and support, and the role of the church.

Overall, they found that CCT processes were not always inclusive of older people; they also saw gaps in social protection, health services and mental health provision. The report guided Tearfund's team in Rwanda to improve their strategy to support elderly people. It was also shared with local churches, the Rwandan Government and NGOs, to inspire them to better prioritise the needs of elderly people.[11]

[10] To find out more about Tearfund's approach to Outcome Harvesting, see our toolkit *Change inside and out*, available at: **learn.tearfund.org/LW1**

[11] Read the full findings from this research, the *Ageing in Rwanda* report, available at: **learn.tearfund.org/LW1**

Next steps

By now, you should have a better understanding of what the Light Wheel is and the different ways you can apply it. You should also have a good idea of how you plan to use it in your work!

Next, in **Part 2: Facilitate**, we're going to explore in more depth how to use the different Light Wheel tools that we've introduced in this part.

If you have any questions about what you have read so far, or if you would like to share feedback or stories of what you are doing with the Light Wheel, please contact **lightwheel.support@tearfund.org**

For more Tearfund resources, visit **learn.tearfund.org**

Top: Bangladesh. Photo: Amit Rudro/Tearfund
Bottom: Guatemala. Photo: Eduardo Say/Tearfund

Tearfund

Part 2

Facilitate

This part offers all the practical advice and instructions you will need to facilitate each of the Light Wheel tools. You will find guidance on how to make people feel included in your Light Wheel activities, and how to ensure that your data gives you a reliable picture of the situation. Are you ready to get started?

If this is your first time using the Light Wheel, you should read the guidance for each tool you want to use. If you have used the tools before, this can serve as a reminder and may give you new ideas. Experienced users may want to jump straight to the resources in **Part 3: Resources**.

In Part 2, you will find:

- guidance on inclusion, safeguarding and informed consent
- advice about contextualising the tools and triangulating your findings
- information on how to use each of the Light Wheel tools

Contents: Part 2

Use the links below to move to the sections that are most relevant to you.

2.1 Key principles before we start

In all our Light Wheel activities, we need to make sure that everyone feels included, safe and respected. We also want to ensure that our findings give an accurate picture of the situation. So let's look at some key principles to help us to achieve these things.

The key principles of the Light Wheel are:

Inclusion

Taking steps to help everyone participate equally and meaningfully in our Light Wheel activities, so that everyone's voice is heard and reflected in our findings.

Safeguarding

Creating spaces where people are kept safe from judgement, harm or distress. This is particularly important when discussing sensitive topics.

Informed consent

Ensuring participants understand fully, and give permission for, how their information will be used. The data we gather belongs to them, and we need their consent to use it.

Triangulation

Making our findings as rigorous and accurate as possible by comparing data from different perspectives. We can do this by using two or more of the Light Wheel tools together.

Contextualisation

Adapting different elements of the Light Wheel toolkit to make them suitable and meaningful for our context. This can take time and needs to be planned in advance.

> **'Conducting research ethically is about being orientated towards the good of others and having their dignity and wellbeing in mind.'**
>
> ***Doing research ethically,*** Tearfund

Nigeria. Photo: Nanmet Anthony/Tearfund

On the next few pages you'll find information about the practical steps you can take to follow these key principles in your activities.

To explore these principles further, please see Tearfund's guide *Doing research ethically*, available at: **learn.tearfund.org/LW2**

This Key principles icon (left) appears throughout the toolkit to give you advice on how to uphold these principles in your work.

2.1.1 **Inclusion**

To make sure that our Light Wheel activities are fully participatory, we need to make sure that everyone feels able to take part equally and everyone's voice is heard.

The first step is to think about who might not be included and why they are not there. We need to consider the barriers that might prevent certain people from joining in, and take active steps to remove them. Typically these barriers fall into two categories and we need to recognise both:

- Some barriers are common to many different contexts: sex, age and disability. This means we need to give special consideration to women, people living with disabilities, youth and elderly people.
- Each context also has its own specific barriers: eg ethnicity, class or wealth, religion, migration status and language.

Take a moment to think about what factors can cause people to be excluded or marginalised in your context.[12]

Things to consider

Representation. Make sure that people from marginalised or excluded groups are included in your sample of participants. There is more information on sampling coming up in Section 2.3.

Venue. Make transport arrangements to help people attend. If possible, go to the community in advance to plan where you will meet. Consider access requirements for people with disabilities.[13]

Time of day. Think about people's daily and seasonal schedules. Try to plan your activities around people's other commitments such as farming, childcare or school, so as many different people as possible can attend.

Language. Ensure that facilitators are comfortable working in the local language to avoid using an interpreter. Think about alternative ways other than reading and writing that people with low literacy can participate.

Bangladesh. Photo: Amit Rudro/Tearfund

Careful facilitation. Be aware of individuals with stronger opinions (eg community leaders) who might dominate in group situations. Encourage quieter participants to share their views too. You could take more vocal participants to the side for a one-to-one interview, or put them in their own group.

Think carefully about who you choose as facilitators: for example, if you are having single-sex groups then your facilitators should ideally be of the same sex. You should also think about how to represent people from different backgrounds within your facilitation team.

[12] For more insights into who might be potentially excluded and/or vulnerable, see section 4.1 'Research with children and adults who are vulnerable' in Tearfund's *Doing research ethically* guide, available at: **learn.tearfund.org/LW2**

[13] For more guidance on disability-inclusive development principles, see CBM's guide *Inclusion made easy*, available at: **learn.tearfund.org/LW2**

2.1.2 Safeguarding

The Light Wheel covers sensitive topics so we need to know how to raise these issues carefully, and how to respond if we have cause for concern.

It is our responsibility to create a safe and supportive space where people can talk openly, and feel protected from judgement or harm. We need to take special care around children and vulnerable adults to keep them safe (see footnote 12 on page 40).

The first step is getting to know your organisation's safeguarding procedures and what to do if someone shares something that makes you concerned for them. You may need to ask their permission to disclose personal information: otherwise you could not use their name.[14] We recommend discussing concerns with someone trained in safeguarding, before reporting to the authorities, to ensure those involved are kept safe.

For more information on Tearfund's approach to safeguarding, or if you'd like to discuss anything related to safeguarding, contact **safeguarding@tearfund.org**[15]

Things to consider

Sensitive questions. Think about how to ask particularly personal questions in a sensitive way, and remove any questions that feel inappropriate or insensitive in your context. Reassure participants they don't have to answer if they feel uncomfortable. If questions are making people feel uneasy, move on to a different topic.

Venue. Consider meeting in a private place where conversations cannot be overhead. This will help participants feel more comfortable sharing about personal topics.

Anonymity. If you are keeping participants anonymous, explain that in your introduction. If you want to collect some identifying information, such as first names, make this clear so participants can give their consent (see **Section 2.1.3**). When working with a group, make it clear that anything that is shared should not be spoken about outside the group.

Private feedback. It is a good idea to set up a way for people to provide feedback confidentially if they have something private they want to share. For example, you might set up a phone number or feedback box or organise one-to-one interviews for anyone who does not feel comfortable in a group.[16]

Impartiality. As a facilitator, try to build trust and rapport so that participants feel confident they can share without judgement. Think carefully about who you choose as facilitators. Participants may be wary if, for example, their facilitator is in a leadership role, or of a different sex from them. Avoid leading participants by implying that one answer is better than another.

Follow-up. As facilitator, it is not your responsibility to solve challenges that people share, but you may want to find out in advance about other local services or contacts that you can refer them to for further support.

[14] You do not need to seek permission to share a safeguarding concern regarding a child with the relevant authorities, but it is good practice to tell the child if you intend to share information.

[15] For Tearfund's statement on our commitment and approach to safeguarding, see: **learn.tearfund.org/LW2**

[16] For more advice and ideas about feedback mechanisms, see Tearfund's article 'How to get genuine feedback', available at: **learn.tearfund.org/LW2**

2.1.3 **Informed consent**

We need to make sure that our participants fully understand what our Light Wheel activities are for and give their consent to be involved.

The data we collect belongs first and foremost to our participants: they need to know how their data will be used, stored and shared, and give permission for it to be used. We call this giving informed consent.

Before you start, introduce yourself (see **Introduction checklist** (Resource 3.1.1)) and explain the purpose of your activities. Let participants know how and with whom you will share their data, and give them the chance to ask questions. Be clear that you will only use their data in ways they have agreed to.

You then need to gain participants' written or verbal consent. The **Consent form template** (Resource 3.1.2) can be adapted to your activities, your context and different literacy levels.

In some contexts, it can be important to explain your activities to local leaders, so they can give their support and encourage the community to join in. They may even want to participate themselves or learn from the data you gather.

Things to consider

Mechanisms. Usually people give consent by signing a printed or digital consent form. Some people might not feel comfortable with this, for example if they are illiterate, and so it may be more appropriate to gain verbal consent instead.

Protecting people from pressure. Make sure participants do not feel any pressure to give their consent, for example if people with power and influence are part of the facilitation team. Give people a chance to ask any questions they may have, and make them aware they can stop participating at any time.

Children and people with impairments. Some people are not able to give informed consent because of their age or incapacity. Legally, if you are speaking to children (anyone under the age of 18), you need consent from a parent or guardian, where possible. Likewise, it may be necessary to visit older people, or those with disabilities, in their own home and to involve relatives or caregivers in the consent process.

Sharing your findings. Any data you gather belongs primarily to those who provided it. So it is vital you share your findings with participants so that they can use the data for their own benefit, eg advocacy to decision-makers. See **Part 5: Communicate** for practical guidance on how to do this.

When plans change

If the purpose of your Light Wheel activities changes at any point, you may need to gain new consent from your participants. For instance, if you have only gained consent to share findings with staff within your organisation, and then you decide to share data more widely, eg with external donors, you may need to gain new consent.

2.1.4 **Triangulation**

Comparing data from different sources and perspectives helps us paint a more in-depth picture of the situation and have more confidence in our findings. We call this triangulation.

One way to triangulate our findings is to use two or more of the Light Wheel tools together, to look at each of the nine aspects of wellbeing from different perspectives. For example, we can compare what people say in the group discussion with their answers to the Light Wheel survey.

The seven applications in **Section 1.2** offer guidance on which tools work well together in order to gather complementary sources of information.

You would hope that your data from different tools tells a consistent story. However, if there are contradictions, you might want to ask participants further questions to understand why there are discrepancies.

> **'Triangulation comes from "triangle" and refers to the need to compare different data sources and perspectives, ideally three.'**
>
> **Rachel Paton,** Research Analyst, Tearfund, UK

Using themes to triangulate

Going deeper, each of the nine aspects of wellbeing has within it four to six defining themes that help us to talk in more depth about the kind of issues each aspect covers.

For example, some of the defining themes within **Social connections** are: group membership, collaboration and support networks. And some of the themes within **Physical health** are: access to safe water, hygiene and balanced diet.

The defining themes for each of the nine aspects of wellbeing recur across the Light Wheel tools. This means that, for example, the themes within **Social connections** will also be found in the survey questions, the group discussion questions and the maturity model descriptions. This means that you can compare findings for a specific theme if you want to analyse the aspects of wellbeing in more depth.

For more information about each aspect of wellbeing and its defining themes, see **Themes and indicators** (Resource 3.1.4).

Bangladesh. Photo: Amit Rudro/Tearfund

Triangulation in action

An example of triangulating your findings would be to compare what people said individually in the Light Wheel survey about their physical health with what they said about it collectively in a group discussion. You could compare theme by theme for really in-depth analysis. Then you could use the transect walk to gather observations that might confirm or challenge your findings, eg looking at whether people are collecting their water from a safe source, or looking at what health services are available in the community.

2.1.5 Contextualisation

One of the most important steps in preparing to use the Light Wheel is thinking about how we will make it suitable and relevant for our context.

The Light Wheel toolkit has been written so it can be used in a wide range of contexts and understood by people from different backgrounds. But it is not a rigid script: it is a starting point for you to think about how you can use the ideas and tools where you are, and how you might adapt them if necessary. This can take time and needs to be planned for.

Try to involve a range of people, such as facilitators, project staff or community representatives, in the contextualisation process. It works well to do this at the same time as you are training them to use the Light Wheel.

> **'The contextualisation process helps people to feel that the Light Wheel tools are their own.'**
>
> **Martin Uswege,** CCT Lead, Tearfund, Southern and East Africa

Throughout the toolkit, the Contextualise icon will help remind you of where you need to adapt things to your context.

What can be contextualised?

Things to keep the same

Some core elements of the Light Wheel should stay the same: you shouldn't add or take away any of the nine aspects. While you can contextualise how you define each aspect, their overall focus should not change.

Key words and phrases

Think about how you will explain important terms such as 'Light Wheel', 'whole-life transformation' and the 'aspects of wellbeing' in a way that is meaningful to your participants. Using real-life examples, as well as stories, songs or sayings, can help to explain new concepts.

Visuals

Consider what pictures, photos or symbols you could use to help participants understand key concepts. The **Light Wheel icons** (Resource 3.1.6) may help explain the nine aspects of wellbeing and the **Maturity model visuals** (Resource 3.2.2) may help people picture the maturity model levels.

Biblical basis

For some people, the Light Wheel becomes even more relevant when it is grounded in biblical teaching. You could start with the Bible verse John 10:10 as an introduction to holistic wellbeing, or use the **Light Wheel Bible studies** (Resource 3.1.7) to explore the biblical basis of each aspect of wellbeing. In mixed-faith settings you could ask participants to do the same using their religious text.

Nigeria. Photo: Nanmet Anthony/Tearfund

Defining the nine aspects

When introducing the aspects of wellbeing using the **Descriptions of the nine aspects** (Resource 3.1.3), think about what each one looks like in your context. Consider if you need to adjust the definitions or add/remove any of the defining themes within them.

Think carefully about how you want to define and measure **Living faith** in your context. You may want to focus specifically on Christian faith, or talk about faith more generally. In some circumstances, discussing **Living faith** may be more sensitive. You may consider asking very general questions about faith in the group discussion and Light Wheel survey, or removing any questions about faith altogether. You can still reflect as a project team on the theme of faith using some of the observation tools or context tools instead.

The Light Wheel tools

It is really important to review the tools before you use them and see if anything needs to be adapted for your setting, especially any cultural sensitivities. You will find detailed guidance on contextualising the group discussion questions and maturity model levels in **Section 2.2**, and advice on contextualising the Light Wheel survey in **Section 2.3**.

Translating the toolkit

Another element of contextualisation is translating the toolkit into local languages. Over time, different language versions will be made available on Tearfund Learn.[17] Here is some guidance if you are doing your own translations:

- Translate **Section 1.1** to introduce the nine aspects of wellbeing, and **Section 1.2** for guidance on how to apply the Light Wheel.
- **Part 2: Facilitate.** Translate the instructions for the relevant tools you will be using.
- **Part 3: Resources.** Translate the resources for the tools you will be using.
- **Part 4: Analyse** and **Part 5: Communicate.** Translate these if your facilitators will benefit from having these in their local languages.

Translations should be done by someone who is translating into their native language. Ideally, translated content should be reviewed by a second translator, and tested with a small group of people before being used more widely.

An editable template of the Light Wheel diagram is available online for inputting different translations. To access this, contact **lightwheel.support@tearfund.org**

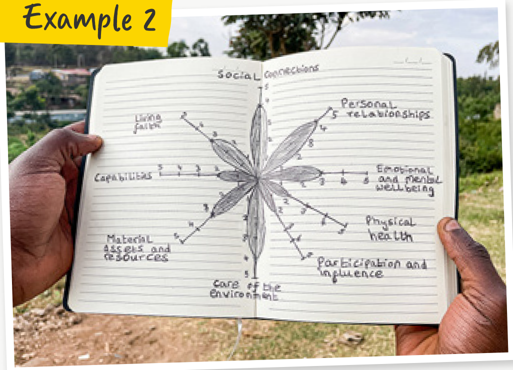
[17] All new translations of the Light Wheel will be uploaded at: **learn.teafund.org/lightwheel**

Examples of contextualisation

Example 1

Using the wheel of a bike to visualise the spokes of the Light Wheel. Photo: Nanmet Anthony/Tearfund

Example 2

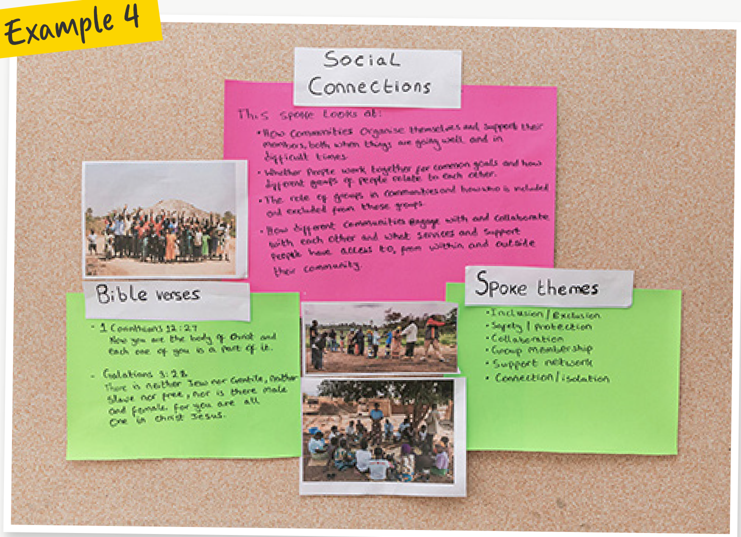


Visualising the nine aspects of wellbeing as a flower. Photo: Joseph Limo/Tearfund

Example 3

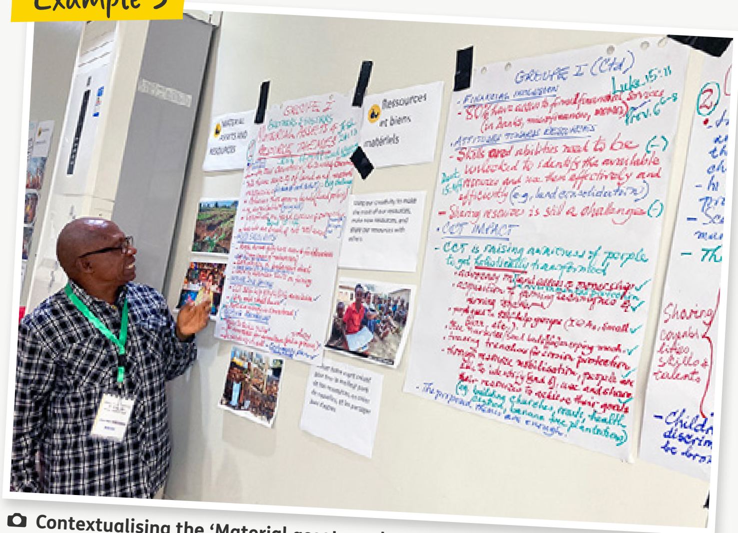
Using emoji faces to represent the different levels of the maturity model. Photo: Eduardo Say/Tearfund

Example 4



Participants have contextualised the 'Social connections' spoke using key themes and Bible verses. Photo: Joseph Limo/Tearfund

Example 5



Contextualising the 'Material assets and resources' spoke for the Burundi context. Photo: Lydia Powell/Tearfund

2.2 Light Wheel group discussions

In this section we'll go through the steps involved in running a Light Wheel group discussion, including scoring the maturity model.

How does a group discussion work?

In a Light Wheel group discussion, we invite community members to come together and share their perspectives on their situation in relation to each of the nine aspects of wellbeing. The role of the facilitator is to create an environment in which people feel comfortable to share openly. The discussion questions are designed to give participants the freedom to explain and explore their experiences, feelings and behaviours in detail.

The discussion often ends with participants using the Light Wheel's maturity model to score how they think they are doing in each aspect of wellbeing. This process allows people to reflect on their current situation and talk about their dreams for the future.

When the group discussions are repeated at regular intervals (eg annually), we can start to plot people's journeys in the nine aspects of wellbeing over time. For example, they could be used for a baseline and then repeated for a midline or endline evaluation.

Step by step

Before you start, you need to:

- Understand and contextualise the maturity model and its five levels
- Choose and contextualise your group discussion questions
- Decide how to structure your group discussion and who will be in your groups
- Create your data collection plan
- Consider your budget and what equipment you will need

During the discussion, you will:

- Introduce the nine aspects of wellbeing
- Ask discussion questions and take notes
- Introduce and score the maturity model
- Repeat for each aspect of wellbeing
- Reflect on what you've heard

Bangladesh.
Photo: Amit Rudro/Tearfund

In **Part 3: Resources** you will find all the practical resources mentioned in this section, to run your Light Wheel group discussions.

The maturity model

Light Wheel group discussions often involve participants scoring themselves using the maturity model's five-point scale, so let's start by explaining what it is.

The maturity model is based on a psychological model of behaviour change, which looks at how individuals and communities move through change in stages. Each level in the maturity model describes changes in attitudes and behaviour that we might expect to see as individuals and groups experience change in different areas of their lives, moving from level 1 (lowest score) to level 5 (highest score).

After a discussion about an aspect of wellbeing, you can introduce the maturity model and lead the group to debate and score their situation. This is an effective means to bring your group discussion to a conclusion in a participatory and visual way. It helps participants describe their current situations, while also motivating them to bring about change in the future.

The diagram, right, shows an example of a completed maturity model diagram: you can find a template for this in **Light Wheel diagrams** (Resource 3.1.5). The scores should be driven by the group's perception of their own situation. However, facilitators or project staff can also think about what score they would give.

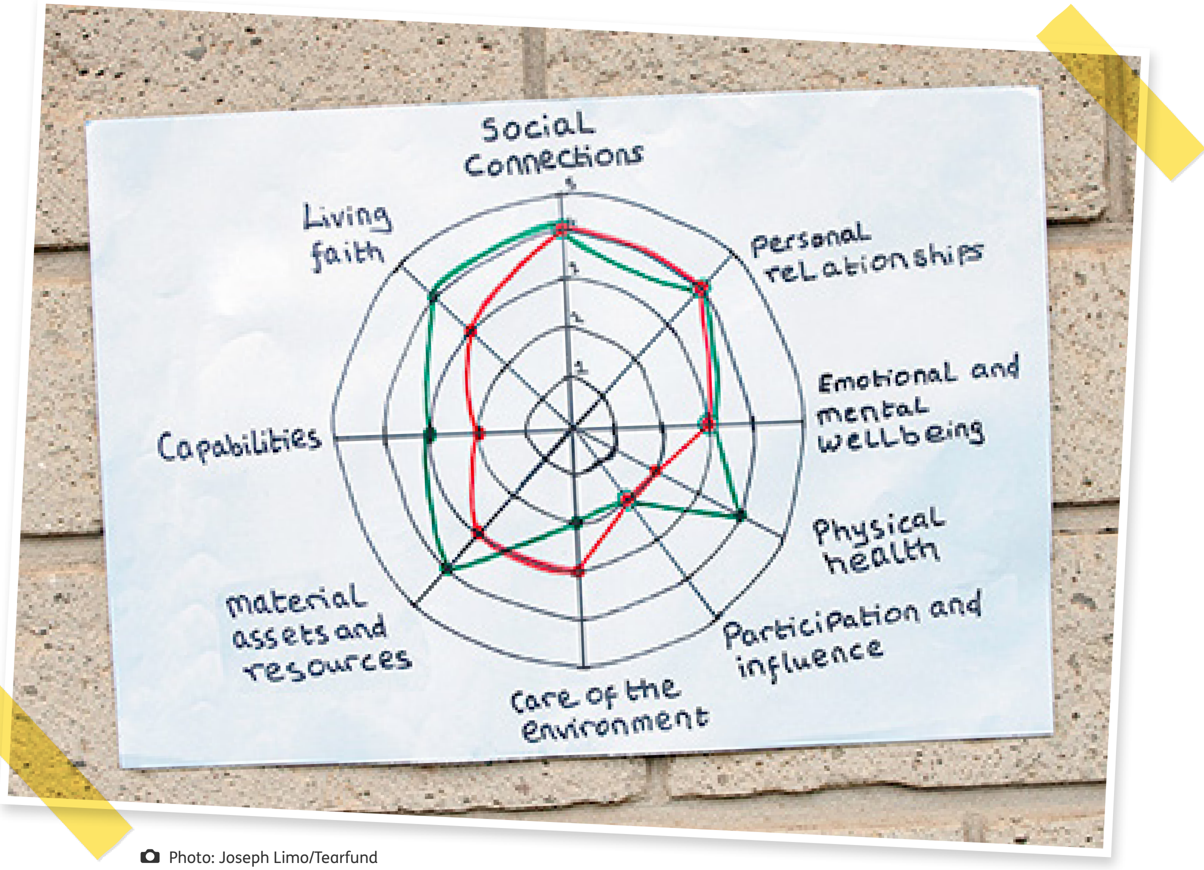


Photo: Joseph Limo/Tearfund

'The maturity model is like taking a photo of where we're at.'

Rose Wade, Light Wheel practitioner, AMI San Lucas, Guatemala

Describing the five levels of the maturity model

An important step in preparing for your group discussion is familiarising yourself with the five levels of the maturity model and to think about how you will explain it to your participants. Here are some resources to help you:

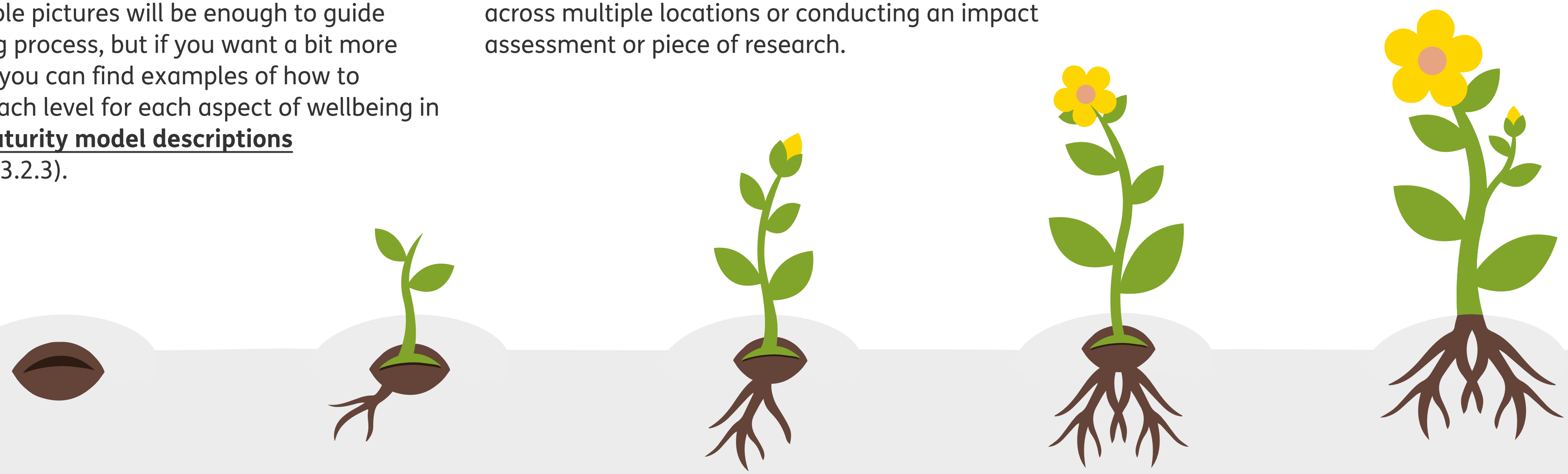
Simple descriptions

The different levels of the maturity model are pictured in the diagram (below). Progress in each of the levels is defined by people's growing awareness of the issues they face, their willingness to change and whether or not transformation is taking place. You can access this visual, and others like it, in **Maturity model visuals** (Resource 3.2.2). In some instances these simple pictures will be enough to guide the scoring process, but if you want a bit more guidance, you can find examples of how to describe each level for each aspect of wellbeing in **Simple maturity model descriptions** (Resource 3.2.3).

In-depth descriptions

If you want to understand and score the maturity model in even more detail, you can use the **In-depth maturity model descriptions** (Resource 3.2.4). This resource has a maturity model description for each aspect of wellbeing, broken down into its defining themes. This is useful when you need your maturity model scores to be as rigorous as possible, for example if you are scoring across multiple locations or conducting an impact assessment or piece of research.

Take a moment to read through these resources and familiarise yourself with the maturity model. Understanding the different levels is an important first step in your preparation.



Level 1: Avoid
Individuals and communities have not identified issues and there is no sense of action or desire to change

Level 2: Aware
Individuals and communities have identified issues and have a desire to change but have not yet been able to take action

Level 3: Active
Individuals and communities are taking small actions with some signs of change on the issues they have identified

Level 4: Achieving
Issues are being worked on individually and collectively, and more results or changes are being seen

Level 5: Advancing
Everyone is committed to resolving identified issues and many impacts are seen

The group discussion questions

Another important step in preparing for your group discussions is to familiarise yourself with each aspect of wellbeing and the group discussion questions associated with it.

You can find detailed definitions of each of the Light Wheel spokes in **Descriptions of the nine aspects** (Resource 3.1.3). You can use this resource to introduce each aspect of wellbeing at the start of your group discussion. Each aspect is described by between four and six defining themes, which can help you introduce and explain the spoke in detail. These themes recur across the Light Wheel tools (see page 43).

You'll find group discussion questions for each of the nine aspects of wellbeing in **Group discussion questions** (Resource 3.2.1). The questions are organised by the defining themes for each aspect (see example, right). You can use these questions to start generating a discussion about each aspect of wellbeing.

We recommend choosing between three and four questions that you definitely want to ask, and having a few more ready in case time allows.

If you are interested in seeing how the group discussion questions align with the Light Wheel survey questions, you can see this laid out in **Themes and indicators** (Resource 3.1.4).

Example discussion questions for Social connections spoke

Social connections

Theme	Discussion questions
Exclusion/inclusion	*Are all members of the community treated equally?*
Collaboration	*How common is it for the community to come together as a group to help people in need?*
Support network	*When people in the community in general face difficulty, who do they rely on for support?*
Safety/protection	*Do you feel safe living in this community? Would other groups of people in the community feel the same way?*

Contextualisation checklist

The next step in our preparation is to make sure that the questions and definitions we will use in our group discussion are relevant and sensitive to our setting. Here's a list of what we need to contextualise:

Group discussion questions

The group discussion questions are not a rigid script, but should be taken as inspiration and be adapted to the context you are using them in. Read through the **Group discussion questions** (Resource 3.2.1) and reword or take out any questions that might be considered inappropriate or irrelevant in the context you're asking them in.

For example, in some contexts, income is a very private topic and so you might remove the questions around household income. In other places, handwashing is a sensitive issue, and so that question might need to be changed or deleted.

Think carefully about the questions you ask in relation to the area of **Living faith**, as discussed on page 45. The toolkit includes some questions specifically for Christian groups. In other contexts you may ask more general questions or remove questions about faith altogether.

Maturity model levels

It's also important to make sure that the way we describe each of the maturity model levels accurately reflects the context we're using it in. While the premise of each level will stay the same (ie Avoid, Aware, Active, Achieving, Advancing), we can adapt the way we explain each level to make it more specific to our context. This will help people to score themselves as accurately as possible. Review either the **Simple maturity model descriptions** (Resource 3.2.3) or the **In-depth maturity model descriptions** (Resource 3.2.4), and make any contextualisations that you feel are necessary.

For example, for the descriptions of maturity model levels 1 and 2, you might want to highlight some of the key needs or challenges in your context in relation to each aspect of wellbeing. Then for the descriptions of levels 3, 4 and 5, you can describe what the situation might look like as those challenges are resolved and the situation improves.

For each aspect of wellbeing, ask yourself:

- *How would you describe the differences between the five levels in your context?*
- *What are some of the key challenges in your context?*
- *What would signs of positive change look like in your context?*

Bright idea

If possible, it is a great idea to test your contextualised group discussion questions, and any changes you have made to the definitions of the maturity model levels, on a sample of people before using them more widely.

How to structure your group discussion

The next step is to think about how you will conduct your Light Wheel group discussion. There are different ways you can structure it, depending on what you want to get out of it and the time available.

Option A:

Group discussion and maturity model scores

This is the most common way to structure a Light Wheel group discussion. It involves firstly having an in-depth discussion on one aspect of wellbeing, before scoring the maturity model. The diagram (right) shows the steps to follow.

This works well if you want participants to get a good understanding of the Light Wheel, and you want to gain insight into their situation and priorities. Experience tells us that you should spend at least 30 minutes on each aspect to have a meaningful discussion and score accurately. Depending on the time available, you can cover all nine aspects at once or look at one or two per discussion.

If you are looking at a few aspects at a time, consider which ones you will group into one discussion. You might group aspects that relate to each other, eg **Social connections** and **Participation and influence.** Alternatively, you might prefer to group aspects that are more distinct from each other to help differentiate between topics.

Option A process

1. **Introduce the aspect of wellbeing**
2. **Use group discussion questions to facilitate a discussion on that aspect**
3. **Explain and score the maturity model for that aspect**
4. **Capture discussion notes and plot scores on Light Wheel diagram**
5. **Repeat with the next aspect of wellbeing**

Option B:

Focus on the maturity model

If you have limited time, you can focus your group discussion around scoring the maturity model, rather than using the questions first.

This works best when participants already have some familiarity with the nine aspects of wellbeing and you don't need to spend so much time explaining them. Instead you can focus most time on generating a score for the maturity model and understanding the reason for that score. That said, it can still be helpful to have one or two discussion questions in mind to start the conversation.

You can do the scoring for all nine aspects of wellbeing within one session, but you probably need to allow at least 15 minutes per aspect, so it could take two hours overall. It's a good idea to allow time for a break and refreshments during the discussion.

Option C:

Group discussions without maturity model scoring

In this option, you use the discussion questions to generate conversations around each of the nine aspects, but don't score the maturity model.

This works well if you want participants to think holistically about their experiences and dreams in each of the nine aspects of wellbeing, and if you are more interested in gathering rich qualitative data than getting a maturity model score. This can help to speed up the group discussion process because you don't have to spend time agreeing on a score.

Option C process

1. **Introduce the aspect of wellbeing**
2. **Use group discussion questions to generate discussion on that aspect**
3. **Make notes on the discussion**
4. **Repeat for each aspect of wellbeing**

Case study

Alternative ways to use the Light Wheel in a group discussion

It is possible to run a group discussion that covers all nine aspects of the Light Wheel, without looking at each one separately.

For example, in Bolivia, one of Tearfund's partners used just a few questions from each of the aspects to facilitate a general discussion about wellbeing. The participants were guided to discuss all nine aspects, but the facilitators used the discussion questions as subtle prompts, rather than introducing each aspect separately. They were able to quickly map a picture of life in the community prior to starting CCT work there.

Similarly, in Rwanda, one of Tearfund's partners conducted a midline evaluation using the Light Wheel survey and wanted to gather some qualitative data by conducting additional group discussions. As they only had an hour with each group, the facilitators started the conversation by asking, 'What has changed in your life as a result of CCT?'

The facilitators used the Light Wheel spokes to prompt people to explain further and talk about different areas of their lives, steering the conversation around all aspects of wellbeing.

> **'We were mindful of time, so we picked key questions to discuss across the nine spokes.'**
>
> **Efraín Piuca,** CCT practitioner, Tearfund, Bolivia

Rwanda. Photo: Lydia Powell/Tearfund

Who will be in your groups?

Another key planning step is to decide who will participate in your discussions and how many groups you will run.

You need to choose your participants intentionally to help get a representative range of perspectives as well as to create a safe environment in which everyone can share honestly. See the guidance on inclusion in Section 2.1.1 for more information on how to make everyone feel welcome.

Usually the best way to do this is to **have separate groups for different categories of people**. They can then generate their own scores on the maturity model.

You know your context best: you are best placed to decide which people will be most comfortable sharing with each other, and which groups to include in order to reflect the diversity of the community and achieve your goals. You might, for example, feel that it will be fine for men and women to discuss together, but you want church members to have their own discussion about wellbeing within the church. How many groups you are able to run will also depend on your budget and time available (see page 57).

You might have some of the following groups:

- adult men
- adult women
- youth (male and female, or separate)
- older people (male and female, or separate)
- leadership (eg faith, community, government leaders)
- church members (male and female, or separate)

Each discussion group should have between eight and 12 people. More than 12 people can make it hard for everyone to have a turn to speak and some participants may remain quiet. To find your participants, you could ask community or religious leaders to help you identify people, or use a project register or church membership list.

We recommend that people with disabilities are included within groups of the same age and/or sex so that they are not separated from others.

Bright idea

Ideally every group type should cover all nine aspects of wellbeing, because the groups might score quite differently from each other. So, for example, you can't assume that the scores the women's group gives will represent the scores the men's group would give about the same aspect of wellbeing.

Guatemala. Photo: AMI San Lucas

How many of each type of group will you facilitate?

In most cases, you will probably facilitate one of each type of group for each community or setting you are in (eg one men's group, one women's group, one young people's group). However, if you need to collect very rigorous data you may want to explore the variations within each group depending on what you want to understand through your discussions. For example, you might want to speak to married and unmarried women separately.

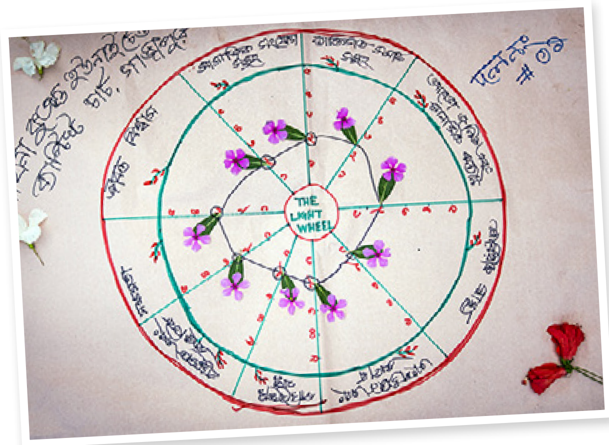
The principle of saturation

A useful principle for qualitative data collection is saturation. This is when you begin to hear similar responses repeatedly from participants. For example, when you are facilitating a group discussion about a particular aspect of wellbeing, if you start to hear similar points being raised then it probably means you have got enough information on that topic. Or if you are conducting multiple groups with women and begin to hear similar examples being mentioned between groups, you can confidently assume that you have facilitated enough groups to gain a good understanding of women's perspectives.

Preparing participants

Try to let participants know in advance that you would like them to take part in a group discussion, eg via phone calls or community/church leaders. Let them know where and when you will meet. This will increase the likelihood of people turning up.

You should also consider whether you will offer incentives to encourage attendance or thank people for taking part. You are best placed to decide this based on cultural norms, organisational practices and budget. It could be something small and practical such as travel expenses or refreshments. Make sure everyone is treated equally and remember that it could set a precedent for the future.



Bangladesh. Photo: Amit Rudro/Tearfund

Create a data collection plan

Once you have decided how many groups you're going to facilitate, you can create a data collection plan to outline the schedule and location for each discussion, and assign responsibilities.

The number of discussions you conduct per day will depend on the number of facilitators you have, how long you want to take per aspect of wellbeing, and participants' availability. You should take all of these things into consideration when you plan your schedule (see example, right).

Conduct Light Wheel surveys before group discussions

If you are going to use the Light Wheel survey as well facilitating group discussions, you can use the same participants for both, but we recommend conducting the survey first. This is because the group discussions will expose participants to the opinions of others, and this may impact the answers people give during the survey. This is known as 'group effect' or 'group bias'. We can avoid the risk of this by talking to people individually first in the survey, and then bringing them together for the group discussions.

Example group discussion schedule

The group discussions will take place in Hope village, over three days.
Participants will be divided into three groups, and each group will cover all nine spokes.

Date	Time	Location	Group types	Spokes	Facilitator	Notetaker
19/04	9:00 - 11:00	Hope village	Women	CoE, PH, MA&R	Peninah	Charlotte
			Men	CoE, PH, MA&R	Harrison	Andy
			Youth	CoE, PH, MA&R	Matt	Lydia
26/04	9:00 - 11:00	Hope village	Women	CAP, E&MW, LF	Peninah	Charlotte
			Men	CAP, E&MW, LF	Harrison	Andy
			Youth	CAP, E&MW, LF	Matt	Lydia
03/05	9:00 - 11:00	Hope village	Women	SC, PR, P&I	Peninah	Charlotte
			Men	SC, PR, P&I	Harrison	Andy
			Youth	CAP, E&MW, LF	Matt	Lydia

Group discussion equipment and budget

Here are some examples of the equipment and expenses you need to factor in to run your Light Wheel group discussions.

Equipment list

Available in **Part 3: Resources**

- [x] **Descriptions of the nine aspects** (Resource 3.1.3)
- [x] **Maturity model visuals** (Resource 3.2.2)
- [x] **Simple maturity model descriptions** (Resource 3.2.3)
- [x] **In-depth maturity model descriptions** (Resource 3.2.4)
- [x] **Group discussion questions** (Resource 3.2.1)
- [x] **Discussion conclusions template** (Resource 3.2.5)

Also helpful:

- [x] A blank Light Wheel diagram drawn on paper for scoring (see page 65)
- [x] Stones, seeds, beads for scoring
- [x] Paper and pens for note-taking

Example template for your group discussion budget

No.	Cost area	Unit measure	No. of units	Unit cost	Total cost	Notes
1	Venue hire	Hours	24	$12	$288	24 hours = 3 x 8-hour days
2	Costs of translating discussion questions, descriptions of the nine aspects and maturity model levels	Pages of text	45	$10	$450	If not conducted by project staff (in-house)

Potential expenses

You will need to budget for:

- Staff costs and training expenses, eg one facilitator and one note-taker per group
- Translating questions and maturity model descriptions
- Printing resources
- Data collection costs (eg travel, venue hire, refreshments)
- Data analysis costs (eg staff time, computers, venue hire)
- Communication costs (eg report writing, visual products, feedback to communities)

Now you've finished your preparation, you're ready to begin your group discussion. Next, we'll talk you through how to start.

How to facilitate a good discussion

Now you're ready to begin your discussion! Here are a few important things to remember to ensure you facilitate successfully.

Roles and responsibilities

Every group should ideally be run by two people: **a facilitator**, who encourages conversation, and a **note-taker**, who records what people are saying. Think carefully about who will facilitate and take notes for each group to ensure participants feel as comfortable as possible, for example having female facilitators working with the women's groups.

Introductions and consent

Before starting your discussion, make sure that your participants fully understand the activity, what their information will be used for, and give their consent to take part. Please see the guidance in **Section 2.1.3** on how to introduce yourself and gain informed consent. You can use the **Introduction checklist** (Resource 3.1.1) to make sure you cover all the important information in your introduction, and the **Consent form template** (Resource 3.1.2) for gaining participants' consent.

Introducing the nine aspects

Think about creative ways that you can introduce each aspect of wellbeing and make it seem relevant and interesting. For example, you can use local examples, stories, pictures or Bible verses to bring each aspect to life (see page 44). Make sure you are familiar with the **Descriptions of the nine aspects** (Resource 3.1.3), so that you don't have to rely on your notes too heavily when describing each aspect. You can also use the **Light Wheel diagrams** (Resource 3.1.5) and the **Light Wheel icons** (Resource 3.1.6) as a visual way to help people remember each aspect.

You should also consider the order in which you introduce the aspects of wellbeing. Avoid starting with a particularly sensitive or personal topic, such as **Living faith** or **Emotional and mental wellbeing**. Try to start with a spoke where there is already interest or one linked to a current event.

> **'We printed nine banners (one for each of the spokes) to get people's attention and help them understand the nine aspects of the Light Wheel.'**
>
> **Efraín Piuca,** CCT practitioner, Tearfund, Bolivia

Selecting group discussion questions

We have already spoken about contextualising your group discussion questions (page 51). This is a final opportunity to select questions that feel most relevant to each group. We recommend choosing three to four questions for each aspect that are most relevant to your purpose, context and the time available.

Bright idea

Before asking any of the group discussion questions, you might like to start by asking people to introduce themselves and to explain their involvement in the CCT process or project that you're evaluating. This will help ease them into the discussion, as well as giving you more information about the people you're talking to.

Tips for the facilitator

The role of the facilitator is to encourage conversation and create an inclusive space for everyone.

Familiarity with the Light Wheel. As a facilitator, you need to be well trained and have an in-depth knowledge of the nine aspects of wellbeing so that you can generate deep and meaningful discussion.

Inclusion and safeguarding. Follow the guidance in Section 2.1 to ensure your group discussion is a safe and welcoming place for participants to share openly.

No such thing as a 'right answer'. As you facilitate, it is important to respond without judgement to the ideas that people share and allow them to be honest.

Consider language needs. Think about which language participants will feel most comfortable with. If possible, the facilitator should speak this language, and any materials used should be translated. If you need to use an interpreter, make sure they give you a full account of what is being said, not a summary.

Probing for more information. To understand more about the factors driving change, keep asking your participants 'why?' For example, 'Why do you think living faith has improved in your community?', or 'Why do you think your maturity model score has increased since last year?

Encouraging participation. Not everyone will speak freely and you may need to encourage quieter members to contribute. You can ask questions such as: 'Does everyone see it that way?' or 'Are there any other views on this?'

Keeping things moving. You want the group to explore ideas freely, but try to avoid spending too much time on one question. You could move the conversation on with phrases such as 'Let's come back to this idea of…' or 'Thank you for those thoughts. Now let's explore some other issues.'

Honduras.
Photo: None Guevara/Tearfund

Tips for the note-taker

Note-taking is an essential part of facilitating group discussions as it provides the qualitative data you'll then need to analyse to understand the situation.

Level of detail. If you are the note-taker, you can use the **Discussion conclusions template** (Resource 3.2.5) to capture notes from the discussion. Include as much detail as possible, such as defining themes, ideas and direct quotations. It can be helpful to number participants as a way to keep people anonymous but also to keep track of who is saying what. You can also write down observations about people's body language as this might tell you something about whether they agree with what others are saying.

Audio recordings. You can make audio recordings of group discussions so that you can refer back to them later, but make sure participants have given their consent to be recorded by including this in the **Consent form template** (Resource 3.1.2).

Note down your approach. Make a note of how you conducted the group discussion if you plan to repeat the process at a later stage. Record things such as how many groups you ran, who the participants were, and the discussion questions used. Write down any learning or adaptations you made so that you can improve for next time.

Maturity model scores. You should also document the maturity model scores and take a photo of the completed diagrams with the scores plotted on. The **Discussion digital input sheet** (Resource 3.2.6) will automatically create a digital maturity model diagram from the scores. It is important to write down people's perspectives and reasons for their scores.

Discussion conclusions template: example entry

Spoke	Discussion notes	Maturity model score and justification
Social connections	Participant 1 said that many people are members of savings-and-loans groups. Participant 2 said that they feel close to their friends and neighbours – 'We support each other', 'We take care of each other when things get hard', 'I know that I can rely on the people in my community'. 'When we have meetings, we encourage elderly people to participate and share their views.'	**Score = 4** **Justification:** People feel supported by friends and neighbours. Participants report welcoming everyone to community meetings and activities – actively trying to encourage them to share their views. But not all participants are members of savings-and-loans groups yet.

How to score the maturity model

Now we've started our discussion, let's look at how we can use the maturity model to help participants score the nine aspects of wellbeing.

Explain the levels

In order for participants to decide how to score their situation, you need first to describe the different levels of the maturity model for each aspect of wellbeing. See page 49 for a reminder of the different resources you can use to do this in simple visual or in-depth ways. Remember what we said on page 51 about making sure the descriptions and visuals are suitable for your setting.

Using visuals is an effective way to help participants understand the levels of maturity and the idea of growth over time. It's really important to think about how to include participants who don't read and write. For example, in some places, the maturity model is described as a seed (level 1) that grows into a new plant (level 5), as you can see on page 49.

In these photos (right) you can see how the levels have also been visualised as rungs on a ladder, batteries, and glasses of water. You can find printable graphics in **Maturity model visuals** (Resource 3.2.2) or you can come up with your own creative ways to bring the maturity model to life.

Photos: Joseph Limo/Tearfund

Generate a score

Once you have described the levels, there are a number of ways to come up with a score for the maturity model. Think about which approach will be the most straightforward and culturally appropriate:

Voting: Ask everyone to vote, for instance by raising their hand or placing their vote with a stone or bead (see photos, right). The score with the most votes is taken as the score for the group.

Consensus: Ask the group to reach a consensus, so they have to keep discussing and debating with each other until they all agree on a score. This can take a while, but can reveal a lot about people's perspectives and justifications.

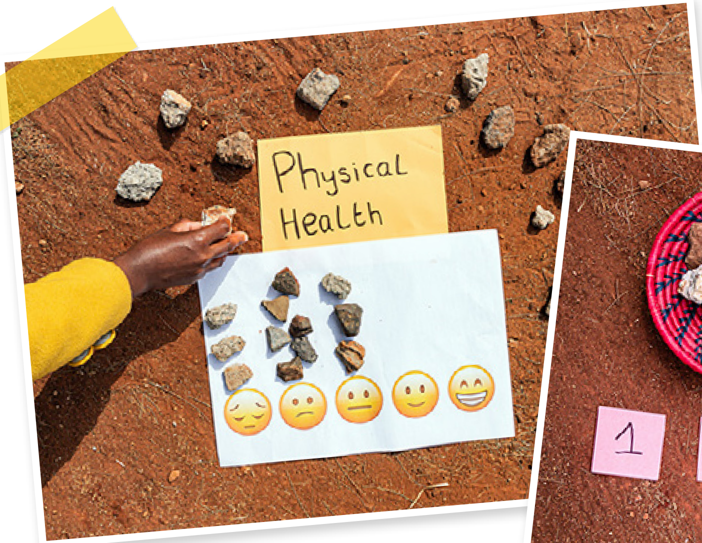
Average: If you think it will be difficult for the group to agree on one score, or you don't have much time, you can get everyone to cast a vote and then calculate the average of all the scores.

> **'[The maturity model] is a simple tool that the local church and community can use to assess themselves and dream for the future.'**
>
> **Peninah Kayitesi,** CCT Lead, Tearfund, East and Central Africa

Make sure that everyone has a chance to participate equally in scoring. Even if you divide men, women, youth etc into different discussion groups, there may still be power differences that can prevent people from giving the score they want to. If you notice that some people are dominating the scoring exercise, you might want to directly ask quieter participants if they agree or disagree with the score given. Another option is to ask people to submit their scores in private and then calculate an average.

Using half-scores

Where it is difficult to find consensus within a group, or where an average results in a half-score, these can be used. However, these are not usually recommended as we don't have definitions for them in the maturity model and this can lead to confusion about what a half-score means. We recommend you encourage participants to choose one of the five maturity model levels if possible.



Photos: Joseph Limo/Tearfund

Case study

Creative maturity model scoring

AMI San Lucas in Guatemala has been using the Light Wheel in their community development work for many years. They integrated the Light Wheel as part of their regular project activities with men, women and youth groups. Each time they met, they would discuss a different aspect of wellbeing, to give participants a chance to share their experiences and dreams.

To make the discussions interactive and fun for everyone, the facilitators developed creative ways of scoring the maturity model depending on which aspect was being discussed.

For example, for **Physical health** they used the image of a thermometer to represent levels 1 to 5. For **Emotional and mental wellbeing** they used different emoji faces, and for **Material assets and resources** they used a battery with different levels of charge. This kept all participants engaged and was a great way for everyone to participate, regardless of literacy levels.

> **'Everything was creative and interactive! Each spoke had a different way of being scored and this helped participants understand the topic even more.'**
>
> **Rose Wade,** Light Wheel practitioner, AMI San Lucas, Guatemala

Guatemala.
Photo: Eduardo Say/Tearfund

Guatemala.
Photo: Eduardo Say/Tearfund

Guatemala.
Photo: AMI San Lucas

Justifying the score

Once people have placed their scores it can be interesting to ask them to justify their choice. This can provide useful insights into what people see as important and what factors are driving the situation positively or negatively. This discussion may also cause some people to adjust their votes or to move towards an agreed group score. Your role as facilitator is to ask prompting questions without being directive or influencing them.

What's contributing to change?

Asking 'why?' will also encourage the group to think about how and why change is taking place. This is particularly important when you are conducting a midline or endline assessment and comparing current maturity model scores with a baseline. If people are scoring differently from how they did at an earlier point, you can ask questions such as 'Why have you scored better or worse in this area?' or 'How did this change happen?' It can be helpful to use some of the context tools in Section 2.5 to better understand the factors that are affecting change.

> **'It is wondrous to see communities moving along all stages of the maturity model.'**
>
> **Habtamu Hailegiorgis,** DME Advisor, Tearfund, East and Central Africa

Retrospective scores

If you want to understand how change has taken place over time but haven't conducted a baseline, you can ask participants if and how the situation has changed in each aspect of wellbeing over time, and what score they would have given in the past, eg one year ago, or at the start of the project or process. You could ask questions such as 'What was the situation like in this aspect of wellbeing one year ago and why?' and 'What score would you have given then and why?' Then ask them what score they would give now, and why, so that you can compare. This will give you an idea of how change has happened over time.

Bangladesh.
Photo: Amit Rudro/Tearfund

Case study

Debating scores in Nicaragua

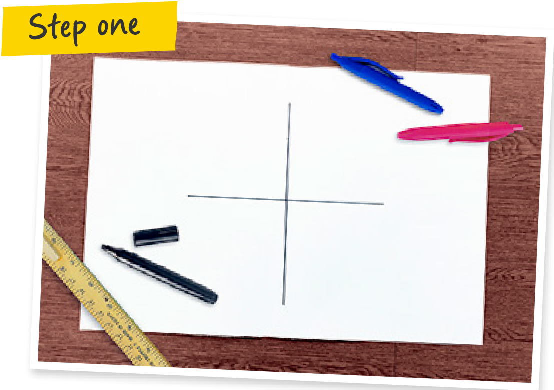
When facilitating group discussions in Nicaragua, Tearfund's partner PRODAD had each group (men, women, youth and elders) work separately to discuss and score each of the nine aspects of wellbeing. Then each group nominated a representative to present and justify their score back to the other groups.

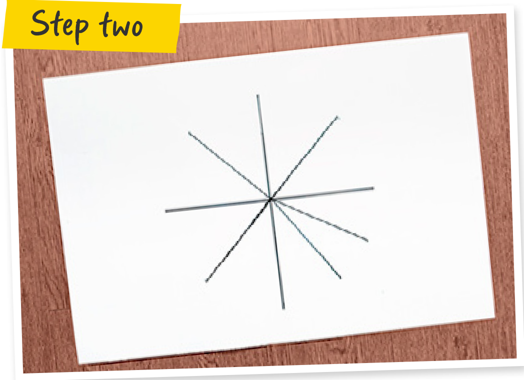
Next, the facilitator led a discussion for everyone to debate each area of wellbeing again to get an overall consensus score across all the groups for each aspect of wellbeing. This worked well in an environment in which people felt comfortable about sharing their scores and in the end there was broad consensus across all groups on the final scores.

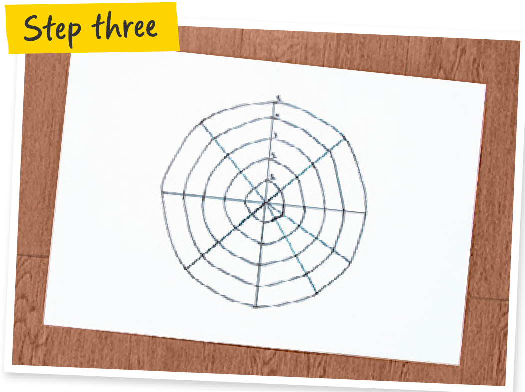
> **'This was such an enriching process. People came who had never had space to analyse their own community in this way before.'**
>
> **Omar Herrera,** Director of PRODAD, Nicaragua

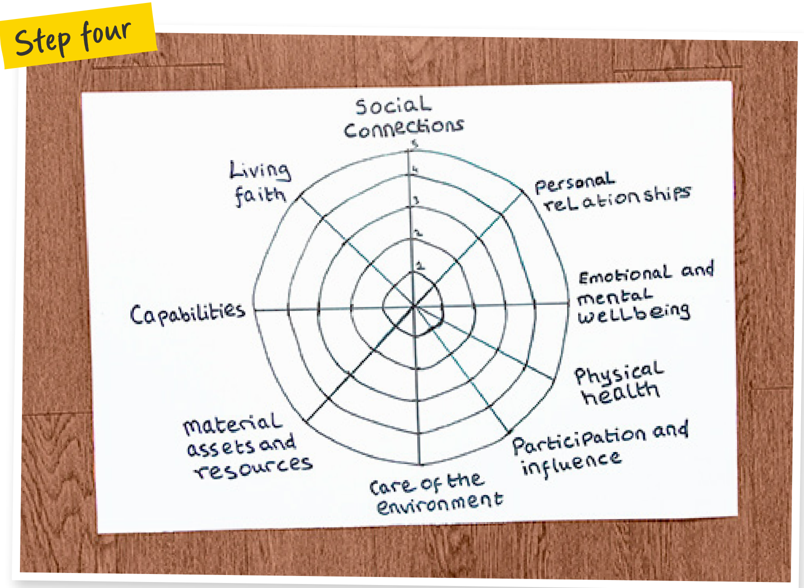
How to capture the scores

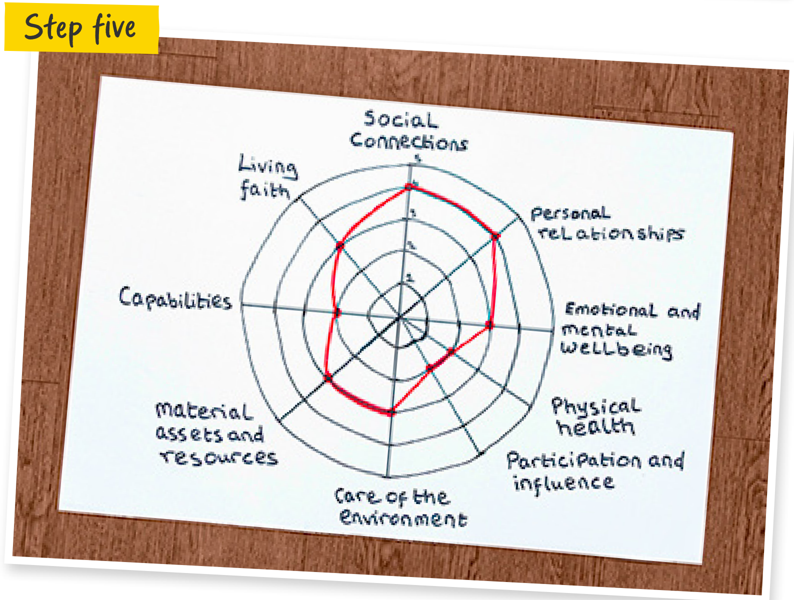
Maturity model scores can be drawn on a large piece of paper as shown below. Alternatively, you can find a printable version in **Light Wheel diagrams** (Resource 3.1.5) or you can input your scores digitally using the **Discussion digital input sheet** (Resource 3.2.6).











Photos: Joseph Limo/Tearfund

What does success look like?

The maturity model helps to remind us that change is not always linear: it often happens in stages and can be positive or negative.

It can be tempting to think that scoring a level 5 is the only measure of success, but this is not the case. Individuals or communities should decide what success means to them. Some users of the Light Wheel have said that the most significant change is between level 2 and level 3, which is the point where awareness turns into action.

> **'We don't have to wait till we reach level 5 to celebrate positive change.'**
>
> **Lahai Amara,** CCT practitioner, Tearfund, Sierra Leone

Bangladesh.
Photo: Amit Rudro/Tearfund

Don't panic if scores go down

The maturity model helps us to recognise the interconnectedness of all aspects of wellbeing and sometimes change in one aspect can have a negative impact on another. Maturity model scores might also go down due to changes in the wider context, or because participants are becoming more self-reflective. The context tools in Section 2.5 can provide insight into what may have impacted the community's scores.

For example, in one Asian country, the churches' midline scores were lower than their baseline scores. After exploring the situation further, the Tearfund team found the CCT process had made people more ambitious for the future, which led them to score their situation more critically than they had done at the start. So seeing scores decline does not mean failure: it is an interesting discussion point and can help identify areas for future focus. What is important is that scores are not decreasing due to any actions that are directly in your control.

Comparing scores between contexts

Because the maturity model scores are based on people's own self-assessment of what level they feel they are at, we have to be careful when comparing scores directly between different contexts. The maturity model descriptions provide some standardisation, but there is still room for contextualisation. So we can't say, for instance, that a level 2 score in one community will represent exactly the same situation (ie same needs, challenges and successes) as a score of level 2 in another community. What we can look for is how groups select and justify their scores, and how people perceive their situations to be changing. We hope to see a positive trajectory in how groups score themselves over time.

Nigeria.
Photo: Nanmet Anthony/Tearfund

Sharing and using the scores

In these images (right) you can see how participants have plotted their maturity model scores. It can be helpful for participants to have their own record, and often groups will choose to display their maturity models in communal spaces, like within their churches.

You can choose either to have a diagram for each group (eg men, women, youth), or you can plot all the scores onto one diagram and use different colours for each group. You might also want to calculate the average score across all the groups.

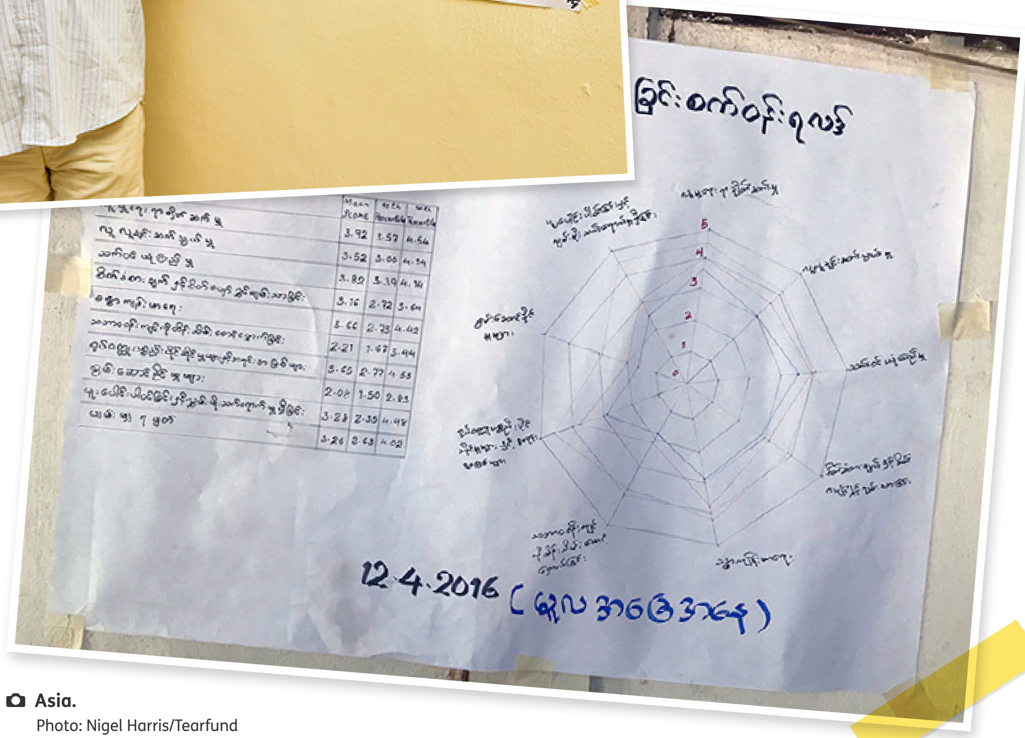
This visual diagram can be a powerful tool to:

- remind participants of the discussion and the current situation
- identify where they want to focus their efforts to bring about change
- help people reflect on their journey of change over time and celebrate growth
- see how the different aspects of wellbeing influence one another and make sure that growth in one area is not having an unexpected negative impact in another area

‘This experience has woken me up to the reality of how things really are.’

Group discussion participant, Guatemala

Nigeria.
Photo: Nanmet Anthony/Tearfund



Asia.
Photo: Nigel Harris/Tearfund

Reflecting on what you have heard

As you conduct your group discussions, you will naturally observe things about the setting you are in, eg what life is like there, what resources are available, and how people behave. These observations will give you extra information about the situation in the community, and can be used to validate (or challenge) the scores the participants have given themselves in each aspect of wellbeing.

We recommend capturing some of your initial thoughts immediately after the group discussions, for example as you chat as a facilitation team on your way home. You can use the questions (right) as prompts to help you reflect, and the **Observation checklist and summary** (Resource 3.4.1) to capture your thoughts. For more information on this approach, see the reflection exercise in **Section 2.4**.

> **'When analysing the notes from our group discussions, we added in our own observations to compare what people said with what we saw.'**
>
> **Rose Wade,** Light Wheel practitioner, AMI San Lucas, Guatemala

Here are some reflection questions you can use:

- *What stood out to you today as you visited this community? What things did you notice that relate to the different aspects of wellbeing?*
- *In which aspects do you think the community is strongest/weakest? Where do you see opportunities for change?*
- *How does what you observed compare with what you heard in the discussions? If there are differences, why do you think that might be?*
- *Do you agree with the maturity model scores that the participants gave themselves in each of the nine aspects of wellbeing? What scores would you give and why?*

Bangladesh.
Photo: Amit Rudro/Tearfund

If you are ready to facilitate group discussions, jump straight to **Part 3: Resources** to find all the resources you need. Or you can carry on reading to find guidance on the Light Wheel survey, observation tools and context tools.

In **Part 4: Analyse** we'll show you how to make sense of the findings from your group discussions and guide you through a simple qualitative data analysis process. We'll also explain how to use your group discussion findings alongside data you might have gathered using other Light Wheel tools.

2.3 The Light Wheel survey

In this section we will look at how to conduct a Light Wheel survey, including selecting a representative sample, adapting the survey for your context, and creating your data collection plan.

How does the Light Wheel survey work?

In a Light Wheel survey, we ask the same set of questions to different individuals, to find out about their situation in relation to the nine aspects of wellbeing. The survey helps give us an in-depth picture of people's personal perspectives and helps us compare the differences in their experiences.

The survey can give us a large amount of quantitative data, to complement the qualitative data we gather using the group discussions. We call the people who administer the survey 'enumerators', and they generally use a digital data collection application called KoBoToolbox.

The Light Wheel survey takes dedicated resources and time: each survey typically takes 40–60 minutes per person, although it gets quicker once enumerators are familiar with the questions. But it is a very effective tool for assessing change over time when it is used for a needs assessment or baseline, and then repeated for a midline or endline evaluation.

Step by step

- Decide if you will use paper or digital surveys
- Contextualise the survey questions
- Select your survey sample
- Make your data collection plan
- Think how much time and resource you have available and create your budget
- Train your enumerators and pilot test the survey
- Facilitate the survey

In **Part 3: Resources** you will find all the practical resources mentioned in this section that you'll need to run your Light Wheel survey.

Bangladesh.
Photo: Rachel Paton/Tearfund

How the survey has been designed

The Light Wheel survey has been carefully and expertly designed, through consultation and piloting with Tearfund staff and partners globally. It is also informed by guidance from quantitative data experts and thematic specialists in the wider sector. The questions are designed to provide meaningful and actionable data that will help you understand more about the situation and make better decisions about what to do next.

Light Wheel indicators

The Light Wheel survey is designed around the nine aspects of wellbeing. The survey has between four and six questions for each aspect, based on the defining themes used to describe that aspect (see page 43 to learn more about themes). These defining themes also appear in the group discussion and maturity model, enabling us to compare our data for a specific theme across different tools.

Each question in the survey also provides information about what we call a Light Wheel indicator – something we measure to see whether change is taking place. In **Themes and indicators** (Resource 3.1.4) you can find a useful table showing all the survey questions for each aspect of wellbeing, organised by theme and indicator. This is a really good resource to help you get familiar with the survey.

What the survey tells us

The survey has mostly closed quantitative questions, which means that the person responding has a set list of answers to choose from. These questions will help you to calculate the percentage or number of people who respond in a certain way to each indicator. The survey also includes some open, qualitative questions, which provide more details, eg 'please explain your answer' or 'please give examples'. These questions will help you to understand some of the details behind people's answers.

When you use the survey at regular intervals, you will be able to assess how change is taking place over time by comparing the indicators at the start, middle and end of your response. The survey results can be analysed by age, sex, disability and religion, so you can understand how change impacts different people in different ways.

Conduct Light Wheel surveys before group discussions

If you are using the Light Wheel group discussions alongside the survey, we recommend conducting the survey first. This is because group discussions expose participants to other people's thoughts and opinions, which may result in them considering new ideas or tending towards a shared group response (see also page 56).

Example survey question

Spoke	Theme	Indicator	Example question	
Physical health	Health status	The percentage of people who have suffered from an illness in the last month	Have you suffered from an illness in the last month?	☐ Yes ☐ No ☐ Prefer not to answer

How will you collect your data?

There are two different ways to carry out the Light Wheel survey: digitally or using paper forms. Let's look at the benefits and drawbacks of each so you can choose which suits you.

Digital data collection

You can carry out the survey on mobile phones or tablets using a digital application for data collection called KoBoToolbox (known as KoBo). The survey is uploaded to KoBo through an Excel spreadsheet which can be found in **Digital survey form (XLS format)** (Resource 3.3.5). More instructions on how to set up the survey in KoBo can be found through our online e-learning videos (see box, right).

Benefits	Drawbacks
Helps reduce human error on the part of data collectors (known as enumerators) by alerting them if they miss a question or input a response incorrectly.	Enumerators will need to have or be provided with a smartphone or tablet to collect data.
Data is available for analysis as soon as surveys are uploaded, increasing the speed with which the data can be tracked and checked during data collection and then analysed.	Enumerators will need additional training and support for setting up and using the app for data collection.
The application is available offline for data collection, which is very useful when there is limited internet connectivity.	Enumerators will need some sort of back-up power supply if collecting data in rural areas.

Watch modules 0, 1, 2 and 3 in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, for an introduction to the Light Wheel survey and how to set up your technology. Available at: **learn.tearfund.org/LW-KoBo**

Getting started in KoBoToolbox

Tearfund has collaborated with Humanitarian Data Solutions to develop a series of e-learning videos called **Getting started with the Light Wheel in KoBoToolbox**, which you can watch for free. They cover all stages of implementing the Light Wheel survey in KoBo, including: setting up your account, uploading the survey, understanding and contextualising the questions, collecting data, and basic data analysis. Over the next few pages you will see references to the relevant videos you can watch to explain each topic. This highly recommended course is available at: **learn.tearfund.org/LW-KoBo**

You can also find written instructions of the same content in **Instructions for the Light Wheel survey in KoBoToolbox** (Resource 3.3.4).

Paper forms

If you don't want to take a digital approach, you can print copies of the survey and record answers manually using paper and pen. You will need to print off one copy per participant. The printable version of the survey is available in the **Light Wheel survey template** (Resource 3.3.1).

Benefits	Drawbacks
It is simple for enumerators to record information using pen and paper.	It requires a lot of paper to be carried around for each community.
It doesn't require mobile devices or training on the use of technology.	Paper forms have to be entered manually into Microsoft Excel or another database to be analysed. This is time-consuming and leaves room for human error, eg missing questions.

'The Light Wheel survey helps us gather data which is immediately relevant to the project needs and answers specific DME questions.'

Sonny DCosta, DME Coordinator, Tearfund, Bangladesh

How to handle paper surveys

If you are collecting surveys on paper, you need to practise good data storage to ensure the surveys are not damaged or lost. Be clear with enumerators about who will collect all the paper surveys at the end of the day. We recommend storing them in a waterproof folder, which should be clearly marked with the location name and kept in a locked cupboard for security.

In order to analyse your paper surveys, you will first need to input them into a digital format. You can enter them into a Google Sheet or Excel template, or see **Instructions for the Light Wheel survey in KoBoToolbox** (Resource 3.3.4) for guidance on how to use KoBo to input them.

Contextualising the survey

The next step is to make sure all the survey questions are relevant to the setting you are in. Some parts of the survey need to stay the same and other parts can be adapted.

What should stay the same?

You should think carefully about making changes in the following areas because the Light Wheel survey has been carefully and expertly designed.

Survey questions

Think carefully before you remove any questions. One programme tried to shorten the survey to only a couple of questions per each aspect of wellbeing for their baseline and struggled to get meaningful results they could act on. Although the full survey takes longer, you'll be rewarded by the quality of data you'll get.

Nine aspects

A complete Light Wheel survey includes all nine aspects of wellbeing. A survey with questions from just some of the aspects can still provide interesting information, but it cannot be called a full Light Wheel survey. We recognise that in some contexts **Living faith** questions may need to be adapted or removed.

Open-ended questions

The closed questions that provide quantitative data will help you measure the Light Wheel indicators. The open-ended questions that provide qualitative data (eg 'please explain your answer') will tell you more about people's specific situations and help you make appropriate decisions in response to the data. For this reason, enumerators should enter as much detail as possible when recording answers to the open-ended questions.

'The Light Wheel survey has been tested in many different contexts but before using it, you should read it in detail and make any necessary adjustments for your setting.'

Lydia Powell, Impact Lead,
Tearfund, UK

Bangladesh.
Photo: Rachel Paton/Tearfund

What can be contextualised?

You should review the following areas of the survey to make sure it is appropriate for the context you're working in.

The order of spokes

The current order of the aspects and questions is designed to flow as naturally as possible. It begins with **Physical health** questions which are simple to understand, less personal and often easy to use as ice-breaker questions. From there the survey flows through the other aspects, linking related topics. However, you can change the order of the spokes or questions in order to facilitate the survey in the easiest way in your context.

Location options

At the start of the survey, you will record the location where the participant lives. If you're using a paper survey, you will just write down the exact location you are in. However, if you're using a digital survey, you'll need to update the choice-list for country, region, town etc beforehand to have all the relevant options for your context.

Programme involvement

There is a series of questions in the first section of the survey about 'Programme involvement' such as:

- *Have you been involved with this church and community transformation (CCT) process in the last 6 months?*
- *What has been the most significant impact of the CCT process in your life?*

These questions assume that you are evaluating a CCT process. If that is not the case, change these questions to refer to your programme or project name.

Survey questions

Check that all the survey questions are appropriate in your context and cover all the themes that you want explore. There may be instances where you need to remove, add or reword a question or answer choice.

For example, in a country where political activism was leading to tensions with the government, the survey team decided to modify some of the questions related to **Participation and influence**, to avoid causing suspicion.

Translating the survey

Translate the survey into the local language so that enumerators do not need to translate on the spot. We recommend practising the survey on a small sample of people first to make sure the questions can be easily understood and have been well translated (see 'Pilot testing' on page 90).

Watch module 4 'Make it your own (contextualise)' in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, for guidance on how to modify the digital survey. Available at: **learn.tearfund.org/LW-KoBo**

Make a note of any changes you make to the survey in the **Contextualisation decisions worksheet** (Resource 3.3.2).

A boy crosses a railway line in Tanzania.
Photo: Tom Price – Ecce Opus/Tearfund

Case study

Contextualising surveys in Tanzania

Tearfund's team in Tanzania hosted a workshop for their partner organisations to work together to contextualise the Light Wheel survey. They wanted to use it to conduct a baseline evaluation of all new churches beginning CCT. To make sure the survey was meaningful to their context, the partners looked at each Light Wheel indicator to check it would provide useful and relevant information. They also checked the wording of each question and translated them into Swahili.

The partners decided to work together to administer the surveys, with staff from the different organisations joining forces to work as enumerators. This way, there were more people to administer the surveys across a large population, and they were able to see the survey in action in different contexts and take learning back to share with their own organisations.

> **'The Light Wheel survey was a very effective way to understand the churches' situations as they started to implement CCT.'**
>
> **Martin Uswege,** CCT Lead, Tearfund, Southern and East Africa

Choosing who to survey

There's not usually enough time to interview everyone, so you'll have to choose a smaller group of people to survey – known as a 'sample'. Here are some alternative approaches to sampling.

Do you need your findings to be representative?

Yes

If your survey findings are representative, it means that you can be confident that the answers that your sample provides accurately reflect the situation of the wider community. In other words, your findings from surveying a sample group of people will be close to the real results you would have had if you had surveyed everyone you want to evaluate.

In order for this to happen, we have to use a representative sampling method. Coming up, you will find instructions on a representative sample method called **simple random sampling**.

No

Survey findings that are not representative are still useful, but you can only draw conclusions about the people you have actually surveyed, not the wider group. This is a simpler approach because you can select specific people to talk to according to your purpose, and you do not use simple random sampling.

For example, if you are running a CCT process, you could survey a selection of people from the church (eg men, women, youth) to understand their views. This might give you an idea of what some people think, but the findings do not represent the whole CCT group.

If you do not need a representative sample, you can jump to page 83 onwards for additional tips on sampling and your data collection plan.

Bright idea

This information about sampling might be new to you and there is a lot to take in. A technique such as reading this section to someone else may help you process the information. If you want any extra support with sampling, please email **lightwheel.support@tearfund.org**

Watch lessons 1 and 2, in module 5 'Plan your data collection', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, for more guidance around sampling. Available at: **learn.tearfund.org/LW-KoBo**

How to select a representative sample

One approach to selecting a representative sample is simple random sampling. These next pages will explain how it works.

Simple random sampling involves choosing people to survey at random so that your data has the best chance of representing the experiences of everyone you are evaluating. A simple random sample involves a few key steps:

1. **Define who your 'population' is and the total population size**
2. **Decide how much confidence you need in your findings to work out your sample size**
3. **Choose names to survey at random to create your sample**

This might sound complicated, so let's break it down.

Who is your 'population'?

In order to know how many people to sample, we have to know what our total population size is.

When we talk about our 'population' in sampling terms, we are talking about the group of people we want our findings to represent, ie the group of people we are interested in evaluating. **For example, if we want our survey to find out what percentage of households in a neighbourhood drink clean water, our 'population' is all the households in the neighbourhood.**

Keep an eye out for this example coming up again

Think about who it is that you want to evaluate, as well as what is realistic. It's unlikely that the population for your Light Wheel survey will be an entire community, and we definitely don't mean a national population.

We recommend that you consider your 'population' to be the people who are directly involved in, or benefiting from, your response. For example, in CCT work these may be church members, plus additional community members who participate in CCT activities.

You may have attendance sheets, WhatsApp groups, church registers or other contact lists that can help you determine the total number of people in your population. If these aren't available, you may need to ask facilitators or staff members to provide a list of names of the people involved.

Take a moment to consider who the population for your survey would be, by thinking about who you would want your survey findings to represent.

Working across multiple sites

If you are working across multiple sites (eg multiple churches), you will need to calculate the population size for each site and then add them up into one total population size. Here is an example:

Location name	No. of participants
Church 1	250
Church 2	52
Church 3	89
Church 4	180
Church 5	35
Total population size	**606**

Having confidence in your findings

Once you have defined who your population is, you need to randomly select your sample (a smaller group of people) who are representative of this population. Making a random selection of people means that every single person in your population has an equal chance of being selected.

As we've seen, a good random sample allows us to generalise our findings:

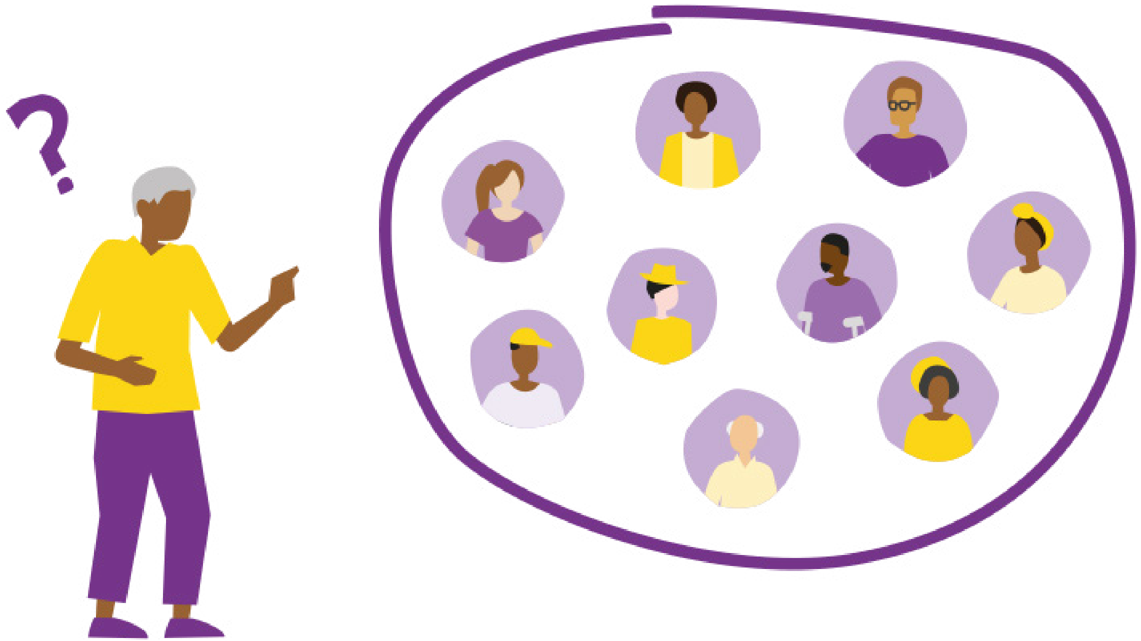
If your survey shows that 50 per cent of your sample group has access to clean water, then it means that approximately 50 per cent of your entire population also has access to clean water.

But how much confidence can we have when we are generalising the findings from our sample group to a wider population? Is there a chance that your sample results won't accurately represent the situation in the wider population?

The answer is: yes, there is room for error. Your sample may be somewhat unreliable, and produce a result that is slightly different from the real result you would get if you actually spoke to every person in your population.

But there is a way to work out how much confidence you can have when generalising the findings from your sample to the wider population. For this we need to understand two more concepts: **confidence interval** and **confidence level**. These concepts are a very important part of sampling because they will tell you how many surveys you need to conduct in order to have a certain amount of confidence in generalising the findings from your sample to the wider population.

Take a moment to think about what you are going to use your survey findings for and how rigorous you need them to be. This will help you decide what confidence interval and confidence level to choose. The higher the level of confidence, the more surveys you will have to conduct. The more surveys you conduct, the higher the cost. **So it is important to consider your budget and resources, as you decide your confidence level.**



Confidence interval

The confidence interval tells us how close to the 'real value' our sample results are likely to come (ie the answer we would get if we surveyed everyone in our population). The confidence interval is given as a percentage. A five per cent confidence interval would mean that the real value for the population falls somewhere in the range of five per cent below and five per cent above the result your sample has given. This is sometimes also known as the 'margin of error'.

Say that in your total population, 50 per cent of people have access to safe water. Now imagine that the result from your sample tells you that 52 per cent of people have access to safe water. Pretend we don't already know that the real value is 50 per cent: how will we know how accurate the answer from our sample is?

A sample size based on a five per cent confidence interval means the actual percentage of people with access to safe water is 52 per cent plus or minus five per cent, ie somewhere between 47 and 57 per cent. This is good, because the real value of 50 per cent falls within range.

A sample size with a ten per cent confidence interval means the actual percentage of people in the population with clean water is 52 per cent plus or minus ten per cent, ie somewhere between 42 and 62 per cent. This is still good, as our real value of 50 per cent still falls within that range.

But sometimes the sample might give you a skewed result that doesn't land within the confidence interval. For example, if your sample returned a value of 44 per cent of people having access to clean water. Using a confidence interval of plus or minus five per cent would give a range of 39 to 49 per cent, which doesn't include the real value of 50 per cent. This is where the confidence level comes in.

Confidence level

The confidence level tells you how often you can expect the results from your sample to fall within the range of the confidence interval. This is also shown as a percentage. For example:

- **A 95 per cent confidence level means:** If you ran the survey 100 times (each time with a different sample group), then 95 times out of 100 the results would be within the confidence interval (which means they are really close to the actual number).

A five per cent confidence interval and a 90 per cent confidence level would mean: we have 90 per cent confidence that, in our example, between 47 and 57 per cent of people have access to clean water.

You will need to choose both a confidence level and a confidence interval in calculating your sample size (see box, right).

Which options shall I choose?

Typically surveys in the development sector use a five per cent confidence interval and a 95 per cent confidence level. This means: 'We're 95 per cent confident that the real number lands within five per cent of the sample result.' You can express this as: 95% ± 5% (where ± represents 'plus or minus').

The confidence interval and level will determine how many surveys you need to conduct. Having a higher level of confidence in your findings means more surveys, which requires more resources. So if your population (and your budget) is relatively small, and depending on how rigorous you need your results to be, you might want to select a sample that gives you a confidence level of 95% ± 10%.

Your data will be less accurate when you use broader confidence intervals, so it's good to choose the smallest confidence interval you can, depending on time and resources available.

How to determine your sample size

You now need to work out how many surveys you need to conduct (ie how big your sample size needs to be) to reach your chosen confidence interval and confidence level.

To determine your sample size, you will use:

- your population size (the number of people in your selected population)
- your chosen confidence interval (probably five or ten per cent)
- your chosen confidence level (probably 95 per cent)

Once you know these three things, you will then use an automated 'sample size calculator' to tell you your sample size.

Do an online search for a 'sample size calculator'[18] and then put in this information:

- Enter your exact population size.
- Choose a 95 per cent confidence level.
- Enter your confidence interval of five or ten per cent.
- If the sample size calculator asks you to enter a population proportion, you can enter 50 per cent.
- Press 'calculate' and the calculator will tell you how many people you need to include in your survey sample.

This table shows some example results from a sample size calculator:

Number of people in your population	Sample size to have confidence of 95% ± 5%	Sample size to have confidence of 95% ± 10%
100	80	50
250	152	70
500	218	81

Allowing for non-responders

You may find some people in your sample aren't available or choose not to participate. This means you need to add some additional people into your sample size so that you will still conduct the right number of surveys. It is reasonable to assume that 15 per cent of people will not be available. So, if you multiply your original sample size by 15 per cent and add those two numbers together, you will have a total sample size that accounts for non-responders. Here's an example based on a total population size of 500 people:

Population size = 500 people	95% ± 5%	95% ± 10%
1. Calculate sample size (with sample size calculator)	218	81
2. Calculate 15% of non-responders	218 x 15% = 33	81 x 15% = 12
3. Add sample size plus 15%	218 + 33	81 + 12
4. Total sample size	**251**	**93**

[18] You can find an example sample size calculator at: **learn.tearfund.org/LW2**

Are you sampling across multiple locations?

If you are conducting your survey across multiple sites, you need to calculate how many people to survey in each location. Let's return to the example of working in multiple locations on page 77, where **the total population size was 606 people.**

1 First, follow the steps on the previous page to calculate the overall sample size based on the total population size (eg 606) and your chosen confidence interval and confidence level. Then, calculate 15 per cent of non-responders (also shown on the previous page) and add that to your sample size. This will tell you the number of people you need to survey in total across all your locations. For example:

Population size = 606 people	95% ± 5%
1. Calculate sample size	236
2. Calculate 15% of non-responders	236 x 15% = 35
3. Add sample size and non-responders	236 + 35
4. Total sample size	**271**

2 Next, calculate what percentage of the total population size (eg 606) each location represents. To do this, divide the population size for each location by the total population size of all the locations added together, and multiply the result by 100 to get a percentage. You should round the percentages up to the nearest whole number (which means the total percentage might slightly exceed 100). For example:

Location	Population size	% of total
Church 1	250	250 / 606 x 100 = **41%**
Church 2	52	52 / 606 x 100 = **9%**
Church 3	89	89 / 606 x 100 = **15%**
Church 4	180	180 / 606 x 100 = **30%**
Church 5	35	35 / 606 x 100 = **6%**
Total	**606**	**≈ 100%**

So here the population size of 'Church 1' (250 people) is 41 per cent of the total population and 'Church 2' (52 people) is nine per cent of the total population size, and so on.

3 Now, work out how many people to survey in each location to reach your total sample size (eg 271). The sample size for each location should be the same percentage of the total sample size as the population for each location is of the total population size. In other words, if the population of 'Church 1' is 41 per cent of the total population size, then the sample from 'Church 1' should be 41 per cent of the total sample size.

To calculate this for each location, multiply the total sample size (eg 271) by the percentage of the total population that the location represents (as calculated in Step 2). So for 'Church 1', multiply 271 by 41 per cent (or 271 x 0.41), which equals 111 people to survey in that location.

Location	% of total population size	Number of people to survey
Church 1	41%	271 x 41% = **111**
Church 2	9%	271 x 9% = **24**
Church 3	15%	271 x 15% = **41**
Church 4	30%	271 x 30% = **81**
Church 5	6%	271 x 6% = **16**
Total	**≈ 100%**	**273***

*The total number of people to survey here might be slightly more than the total sample size you calculated in Step 1.
This is due to rounding up. This is not a problem: for your sample in Step 3 to be representative, you need to equal or exceed your total sample size in Step 1.

Time to select your sample group

Once you know how many people you need to survey, you need to randomly select people from your population to make up that sample size.

1 **Compile a list of the people in your total population.** You will probably have started doing this when you were calculating the total population size on page 77. This list can be digital (eg in Excel or Google Sheets) or on paper. Make sure you store this data securely to maintain confidentiality and give people the option not to be included on the list, if they don't want to be.

2 **Check your list.** Each entry must be a single individual. So, 'Mr and Mrs Temfwe' need to be two separate entries on your list. Then you should give every name a number. If you are running a survey across multiple sites, you should have a separate numbered list for each location. For example, 'Church 1', with a population size of 250 participants, will create a list of all 250 names, numbered from one to 250.

3 **Randomly select participants.** If your list of names is in Excel or Google Sheets, you can use a random-number-generating formula to randomly select people to survey.

The **Light Wheel survey planning workbook** (Resource 3.3.3) also has space for you to create your list of names and a built-in random-number-generating formula to select participants at random.

If you have a paper list, then you can use a random-number-generating app to generate numbers at random.[19] Highlight the names in your list that sit beside those randomly generated numbers to create your final survey sample list.

When working across multiple sites, you should generate the numbers for each location separately and make sure you select the right number of participants for each location, according to your calculations on page 81.

If you want your sample to be representative, it's really important that you use these methods to select people from the list at random, rather than just choosing people yourself.

4 **Survey every person on your final interview list.** Once you've created your list of randomly selected names, it is important that this list doesn't change.

You should have added some additional names to your sample size to account for non-responders (page 80). Even if everyone is available, you should still talk to the additional people on your list. It doesn't matter if you end up talking to slightly more people than your original sample size. You can depend on this method to ensure the results from your survey are representative of the wider population.

Bolivia. Photo: Efraín Piuca/Tearfund

[19] You can find an example random-number generator at: **learn.tearfund.org/LW2**

A non-representative sample

If you don't need your sample to be representative of a wider group (see page 76), then you need to be intentional in selecting specific people to survey. Carefully consider what types of people you want to talk to in order to hear a range of perspectives. You can use attendance sheets, WhatsApp groups, church registers or other contact lists to identify names for your non-representative sample. Remember that you cannot generalise the findings to people outside your sample using this approach.

Malawi.
Photo: Harrison Manyumwa/Tearfund

Some additional sampling tips

Can the same people take part in group discussions and the survey?

Yes, it's okay to speak to the same participants in the Light Wheel survey and the group discussions. But as explained on page 70, ideally people should participate in the survey before the discussions. It's also okay to speak to different people from the same 'population' group in your survey and your group discussion. For example, if your population is CCT participants, you might choose participants who were not selected for the survey sample to take part in the group discussions instead.

Phoning ahead

It can be helpful to call ahead and let the people in your sample know when and where you would like to survey them. Or you can ask local community leaders to help you let people know. This will increase the likelihood of people being available and reduce the number of people who don't take part.

Record your sampling method

Keep a note of your sampling method (including your chosen confidence level and confidence interval). This will be helpful if you are repeating the Light Wheel survey at a midline or endline. You'll also need this information about your sampling approach when you come to present your findings.

Incentives

Each organisation has their own practices around giving (or not giving) incentives to encourage or thank people for taking part. You are best placed to decide this based on cultural norms, organisational practices and budget. It could be something small and practical such as travel expenses or refreshments. Make sure everyone is treated equally and remember that if you give people incentives on this occasion, they may expect the same next time.

Create a data collection plan

Your data collection plan holds key logistical information such as where and when you'll hold your surveys and who is responsible for what. Let's look now at what to include.

Where to conduct your surveys

Normally the Light Wheel survey is conducted in person. One option is to have a **central location** (eg a church or school) where participants come to be surveyed at a specified time. This can cut down on travel costs and time for your enumerators. To make this work well, think about:

- a venue that is easy for everyone to get to and accessible for people with disabilities
- how to give people privacy, so they don't feel overheard
- a place where other participants can wait comfortably until it's their turn
- whether to reimburse people for any travel expenses

Another option is to visit people **at their homes**. This is usually more convenient for participants and it can also be useful to see their living environment to give more context to their answers. This approach does involve more time and travel costs for enumerators and people might not feel able to speak openly if other members of their household are listening.

You can also do surveys **over the phone** as a last resort when physical access is limited (see case study, right). It's not ideal because the survey is quite long and enumerators can't use their body language to make participants feel comfortable. It is important to remember that not everyone has a phone and some people won't answer. So you may need to add up to 50 per cent to your sample size to account for non-responders. If you are using a so-called 'remote' approach, you will also need to collect people's phone numbers and add them to your participant list.

Watch lessons 3, 4 and 5, in module 5 'Plan your data collection', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, for guidance on creating your data collection plan. Available at: **learn.tearfund.org/LW-KoBo**

Nicaragua. Photo: PRODAD

Case study

Remote data collection

One of Tearfund's partners in Nicaragua, PRODAD, was planning to conduct an evaluation using the Light Wheel just as the Covid-19 pandemic hit. Rather than cancelling their plans, they decided to adapt their approach. Where they could still access communities, they conducted surveys in person but with social distancing. In one community, access was fully prohibited, so they conducted the surveys over the phone instead. They said that the data collected was still very informative and it was a great learning experience for PRODAD and the community.

How many surveys per day?

Another decision is how many surveys to conduct each day. Each survey takes 40–60 minutes. So if a typical work day is about seven or eight hours, depending on travel time and time in between surveys, each enumerator can probably expect to get about five to eight surveys done per day.

Enumerators will get faster at conducting the survey as they become familiar with the questions and how to fill in the answers. So as you plan your survey schedule, you might want to allow more time for the first few surveys.

Roles and responsibilities

There are different roles involved in running a Light Wheel survey. Some of these roles can be done by the same person, but it is important to be clear about who is responsible for what:

- **Project manager:** Responsible for organising and outworking all elements of the data collection plan. They are on call to clarify anything your team needs during the survey.
- **Data lead:** Responsible for leading sampling, data collection, technology support and data analysis. This person should be checking in with enumerators, or data collection supervisors, to see how data collection is going and supporting them if any issues occur.

  If you are using KoBo for gathering data, this person will probably be the KoBo 'project owner'. This may or may not be the same person as the project manager.
- **Enumerators:** These are your data collectors who will conduct the surveys. The number of enumerators you have will determine how long the overall survey process will take.
- **Data collection supervisors:** If surveys are being conducted in multiple locations, you might appoint a data collection supervisor in each location. They would be responsible for coordinating and supporting enumerators and it is a good idea for them to gather enumerators at the end of the day for debriefing, collecting paper surveys or submitting survey data to KoBo.
- **Data advisors:** In some cases you may want additional support from Tearfund's monitoring and evaluation specialists. For more information, email **lightwheel.support@tearfund.org**

Considerations for selecting your enumerators

- → Having enumerators working alone is more resource-efficient, but it can sometimes be a good idea to pair one male and one female enumerator together, so that females can survey female participants and males can survey male participants.
- → Consider the reading and writing skills of enumerators and their capacity to use mobile phones (if you have decided on digital data collection).
- → You may want to recruit enumerators outside your organisation to support you. Sometimes local university students are available for this sort of work.
- → In some cases, community members can be recruited as enumerators, but they should collect data in communities other than their own so they don't introduce bias.

See page 88 for more information about training your enumerators.

Survey schedule

Once the surveying begins, there will be a lot of activity, and so having everything well planned and properly scheduled is really important so everyone knows what they're doing. Here (right) you can see an example of a schedule for surveying 48 people.

In this example, surveys will be held over three days, in three different locations, with two teams of enumerators. Due to non-responders, eight of those people to be surveyed probably won't be available, so the two teams will have interviewed 40 people by the end of Day 3.

Daily survey schedule: example entry

This table shows a schedule for surveys taking place over three days, in three different locations, with two teams of enumerators.

Enumerators	Date 1: Location 1		Date 2: Location 2		Date 3: Location 3	
	AM	PM	AM	PM	AM	PM
Team 1: Name 1 Name 2	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
Team 2: Name 1 Name 2	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee
	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee	Interviewee

Rwanda. Photo: Lydia Powell/Tearfund

In the **Light Wheel survey planning workbook** (Resource 3.3.3), you will find space to create your own survey schedule. There's also space to document your data collection plan, which will help you keep track of all your decisions and ensure everyone involved in carrying out the survey is well informed.

Survey equipment and budget

It's important to think about how much time and resource you have available for conducting your survey, as this will inform your survey sample size and data collection plan.

Potential costs associated with the Light Wheel survey include:

- Translation of the survey
- Printing paper copies of the survey or purchasing mobiles or tablets
- Airtime/mobile data packages
- Paying enumerators
- Data collection costs, eg travel, venue hire, accommodation, refreshments
- Incentives/gifts (to thank participants)
- Data analysis costs, eg staff time, computers, venue hire
- Communication costs, eg report writing, visual products, feedback to communities

Survey budget: example entry

No.	Cost area	No. of units	Unit measure	Unit cost	Total cost	Notes
1	*Translation of the survey into local language*	*40*	*Pages*	*$10*	*$400*	*Cost of an external translator if not done in-house by staff*
2	*Printing paper copies of the survey*	*606*	*Surveys*	*$1.75*	*$1,061*	*Cost if not using digital data collection*

A survey budget template can be found in the **Light Wheel survey planning workbook** (Resource 3.3.3).

Training enumerators

Once you have selected your enumerators, they need to be trained to be able to gather good-quality data. Here are some areas to include in your training.

Familiarity with the Light Wheel

Before you train them on the survey itself, it is important that enumerators have a good understanding of the Light Wheel and the nine aspects of wellbeing. This will help them understand how the survey has been designed and what the questions are asking.

Part 1: Prepare is good introductory reading for anyone new to the Light Wheel, as is the **Introduction to the Light Wheel e-learning course**.[20]

Familiarity with the survey

If enumerators will be using paper surveys, they will need to familiarise themselves with the survey questions and answer options (see **Light Wheel survey template** (Resource 3.3.1)). If they are collecting digitally, you will also need to train them on KoBoToolbox. For this, you can use the videos in module 3 'Explore the survey in detail' in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

Logistical information

Give enumerators a sense of ownership over the survey process, by sharing key logistical information with them. For example:

- Share the data collection plan, outlining key decisions, such as locations and the survey schedule.
- Explain the sampling method and how you created the sample list. If you are using simple random sampling, emphasise the importance of only surveying people from the list.
- If you are using paper forms, talk about where to store and submit them at the end of each day (see page 72).
- If you are using KoBoToolbox in offline mode, you need to agree when to connect to an internet signal and upload all the surveys from that day. If you are using KoBo online, the surveys will be uploaded in real time.
- Give enumerators the details of who they can contact if any issues arise and if there is a plan to debrief at the end of each day.

Case study

Virtual training

It can sometimes be hard to gather all your enumerators in person at one time, so you could consider running an online training instead. This is dependent on enumerators having access to computers or smartphones. For example, one Tearfund partner ran a CCT programme across seven countries. So when it came to conducting the baseline study, the easiest approach was to gather enumerators from all countries for a joint training on the survey online. They ran one session for English speakers and one for French speakers. It was a good way to save time and money. However, in general we would say face-to-face training is the most effective.

[20] This course is available in English, French, Spanish and Portuguese at: **learn.tearfund.org/LW-elearning**

Nigeria. Photo: Isaac Danung/Tearfund

How to conduct a survey well

The Light Wheel survey asks some personal questions so it's important that the enumerators know how to make participants feel comfortable to share openly. Here are a few key recommendations for survey enumerators, while more general advice about key principles can be found in **Section 2.1**.

'Think about how to make the survey experience positive for participants and remember it is a privilege to listen to them.'

Sonny DCosta, DME Coordinator, Tearfund, Bangladesh

Nicaragua.
Photo: PRODAD

- **Introduce yourself.** Explain who you are and why you are conducting this survey, as well as what the data will be used for. Give participants a chance to ask questions and make sure they understand that they can choose not to participate without any negative consequences. See **Introduction checklist** (Resource 3.1.1) to help you cover all the important points.
- **Gain consent.** The survey will guide you to ask participants if they are happy to proceed with the survey and if they give consent for their data to be used in different ways. You can use the **Consent form template** (Resource 3.1.2) to record their consent. Explain what level of anonymity you will be using (eg whether you are recording names in the survey template or not).
- **Be aware of time.** Tell participants how long (approximately) it will take to complete the survey before you start and ask if they can give that amount of time. If not, you might be able to offer them another time to complete the survey.
- **Be aware of sensitive questions.** Let participants know that some questions involve issues that are sensitive, so they don't have to answer anything they don't wish to. See **Section 2.1.2** for guidance on what to do if a participant does raise a safeguarding concern.
- **Think about who else is around.** There are some situations in which it will help to have someone the participant trusts present. However, be aware of how having other people (eg family members) present might impact people's ability to answer freely.
- **Use a non-judgemental approach.** Enumerators should ensure that they do not give any sign about how they feel questions should be answered. They should allow participants to answer openly, without judgement, interference or answering for them.
- **Appreciate their contribution.** Finally, always thank participants for the time they have given to answer the survey. Remind them of the purpose of the survey and tell them when and how the results will be shared with them.

Pilot testing

It's a good idea to have a pilot exercise where your enumerators can try out the survey, ideally for a full day. This is the chance to practise asking the questions and handing over the data, before the real data collection takes place. You can test if your survey questions are well contextualised and translated, and correct any misunderstandings or errors. This is the time when enumerators can ask questions and clarify any doubts, to help them feel more confident about conducting the real survey, particularly if they have never done so before.

How to organise your pilot exercise

- Ideally you will do the practice in a church or community setting, but if not, enumerators can practise on each other or other colleagues.
- Make sure you practise on people who are not part of the random sample list: you don't want people being surveyed twice. Make it clear to participants that their data will not be included in the analysis or final report.
- All enumerators should try filling in the survey multiple times during the pilot, so that they become really familiar with it.
- During this day it's important to have the project manager and data lead on hand (or on the phone) to deal with any questions or issues that arise.
- At the end of the pilot, hold a debrief to see if there are any questions or improvements needed. For example, there might have been a misunderstanding on how to answer a particular question or a translation that wasn't well understood.
- After the debrief, you should update the survey or the data collection plan as necessary using information and feedback given during the pilot test.

'Having time to practise the survey first helped me to feel much more confident when it came to asking the questions to the real participants.'

Light Wheel survey enumerator, Rwanda

Rwanda.
Photo: Lydia Powell/Tearfund

Reflecting on the experience

While you are conducting the survey in the community, your team will be observing things about community life that will help you understand the situation.

We recommend taking some time with enumerators straight after your data collection is finished, to reflect on what you observed. You might like to use the following observation questions as prompts, and you can record your answers in the **Observation checklist and summary** (Resource 3.4.1).

- *What stood out to you today as you visited the community?*
- *What things did you notice that relate to the nine aspects of wellbeing?*
- *In which spoke do you think the community is strongest/weakest?*
- *How does what you heard in the survey compare with what you observed more generally during data collection?*

'During data collection, keep your eyes and ears open to notice additional information that will add to your understanding of the situation.'

Charlotte Flowers, CCT Coordinator, Tearfund, UK

If you are ready to facilitate your Light Wheel survey, you can jump straight to **Part 3: Resources** to find all the resources you need. Or you can carry on reading to find guidance on the Light Wheel observation tools and context tools.

You can turn to **Part 4: Analyse** for guidance on how to analyse your survey data. It's a good idea to have a look at this before conducting your survey, so that you can plan how you will analyse the data and who will be responsible.

The Light Wheel 'Digital survey form' (Resource 3.3.5).

Case study

Baseline survey in Asia

One of our partners in Asia used the Light Wheel survey to conduct a baseline assessment of communities where they were about to start CCT work.

Their aim was to understand the situation in communities at the start of the CCT process, and to be able to track changes over time.

One group of facilitators conducted the survey using KoBoToolbox, and the other led group discussions.

Once the data was analysed, it helped them to see weaknesses or gaps in the community that CCT could help improve, and helped shape their response.

2.4 Observation tools

Let's look now at a set of tools that use the power of observation to give us useful, additional information about a community's situation in each of the nine aspects of wellbeing.

How do the observation tools work?

The observation tools can be used on their own as a quick way to assess a community's situation according to the nine aspects of wellbeing. Alternatively, they can be used alongside the group discussions and/or the Light Wheel survey to build a more detailed picture of the situation.

The observation tools play an important role in helping us triangulate our findings. As we've discussed in **Section 2.1.4**, when we use multiple Light Wheel tools together, we can compare and contrast different types of data. If we find similar results emerging from different tools, it gives us confidence in our findings.

If different tools present contradictory data, this might challenge our assumptions and we might want to have further conversations about why that is, and potentially gather more data to understand things better.

How many observation tools you use will depend on how rigorous you want your conclusions to be. The observation tools are:

→ **Reflection exercise**
Making time to reflect on what you have seen and heard as you conduct community visits

→ **Transect walk**
Conducting a walk around the local area to observe the situation through the lens of the nine aspects of wellbeing

→ **Community map**
Understanding more about the nine aspects by creating a map of the local area

Guatemala.
Photo: Lydia Powell/Tearfund

> **'The observation tools help to deepen our understanding of the community and to increase the confidence we have in our findings.'**
>
> **Rachel Paton,** Research Analyst, Tearfund, UK

In **Part 3: Resources** you can find all the resources you need for facilitating the Light Wheel observation tools.

Reflection exercise

A simple and effective way to understand a situation better is to observe things for yourself. As you use the Light Wheel tools (eg group discussions or Light Wheel survey), you will naturally observe things about the setting you are in, eg what life is like there, what resources are available, and how people behave. The reflection exercise encourages you to intentionally make time to document and analyse the things you see.

In the group discussion and Light Wheel survey instructions sections, we have already spoken about making time to reflect on whether your findings confirm or contradict what you observed while you were in the community. Your observations can help to build a deeper picture of why things are the way they are.

For example, if the survey data suggests the community has poor physical health, you could reflect on what you observed about people's health and hygiene practices. Or if you hear in the group discussion that the community treats all people equally, you might reflect on the different people you saw being included in group activities.

Step by step

1 Think ahead about what you want to look out for. Before you head out into the community, think about what you are interested in seeing to build up a picture of the situation across the nine aspects of wellbeing. You can use the **Observation checklist and summary** (Resource 3.4.1) to compile a list.

Example questions from the observation checklist:

- **Capabilities:** *How many schools are in the community?*
- **Social connections:** *Do you notice any ways that the community is working together?*
- **Physical health:** *What health facilities do you see?*
- **Material assets and resources:** *What are people's homes made from?*

2 Make time to reflect after your activities. It is a good habit to make time to reflect individually, or as a team, about what you have seen and experienced during your time with the community soon after leaving. Here are some reflection questions you can use:

- *What stood out to you most as you spent time in the community?*
- *Consider each of the nine aspects of wellbeing. What did you observe about each aspect?*
- *Why do you see things in this way? Do others agree or do they see things differently?*
- *In which aspects of wellbeing does the community seem strongest/weakest?*
- *Are there any differences between what you have observed and what you have heard using other Light Wheel tools?*
- *Which areas might you want to explore further to improve your understanding?*

3 **Record your observations.** Keep track of your observations using the **Observation checklist and summary** (Resource 3.4.1), as shown in the example (below). Your notes should include:

- your observations in relation to the nine aspects of wellbeing
- your reflections on whether your observations support or contradict what you have found using other Light Wheel tools
- any areas or issues you want to understand more fully

Be aware of your own cultural perspective. The Light Wheel observation tools require you to reflect on what you see. It is important to be cautious with your observations. If you're observing a group or community that you are not a part of, you may see things differently, because we all have our own cultural perspectives and biases. For this reason, try not to draw direct conclusions from your observations, but instead share your observations sensitively with other people who can confirm if they see things the same way and why.

Observation checklist: example entry

Spoke	Elements to observe	Notes
Living faith	• *How many places of worship are there in the community?* • *Can you see any ways that the church is serving the wider community?*	• There are two churches and one mosque in the community. • The church has started a CCT process and small projects in the community, such as savings groups.
Physical health	• *Which water sources are people using? How far away are they?*	• The nearest borehole is a 35-minute walk away. Sometimes people resort to using water from the lake, but this is dirty and is causing sickness.

Capturing stories

Another way to understand people's lives, and any changes that have taken place, is to ask them to tell you their story. This should be a one-to-one conversation in which you can explore their personal experiences. This could be with someone who has been suggested to you, or someone you have met and found particularly interesting. Try to hear the stories of people who represent different groups. You can use the **Light Wheel story-gathering template** (Resource 3.1.9) as a guide to capture a story that touches on all aspects of the person's life. You should plan to spend at least half an hour per person to give time to hear their full story.

'When spending time with the community, tune your senses in to see what sounds and sights might be relevant to your analysis of the nine aspects.'

Harrison Manyumwa, DME Advisor, Tearfund, Southern and East Africa

Transect walk

A transect walk is a structured observation process that involves taking a walk around a community or area to observe the situation. You can conduct the transect walk using the lens of the Light Wheel to help you notice things you might not usually pay attention to.

This tool can give you a good picture of the local context and you can plan the route beforehand so that it covers all relevant areas you want to see. You may have made observations in previous visits that you now want to explore further.

There are different opportunities for using the transect walk: for example, after conducting the Light Wheel survey or group discussion to see what supporting, contradicting or additional information you can find. Or you could use it before you use any other Light Wheel tools in order to get more familiar with the context (see case study, right). For example, if you do a transect walk before conducting group discussions, you can use what you saw to contextualise your discussion questions.

Case study

Using a transect walk as an envisioning tool

In Bolivia, the transect walk was used to help church leaders become more familiar with their local neighbourhood.

Beforehand, the facilitator introduced the church leaders to the Light Wheel and they discussed what they wanted to observe in relation to each of the nine aspects. They then walked around different parts of the community, making observations and having conversations with people they met.

Afterwards, they reflected on what they had seen. They said that the exercise had opened their eyes to new things in the community and they used their findings as the basis for Light Wheel group discussions to find out more about the community's experiences and perspectives.

Perhaps, most importantly, this was a way for the church to make contact with the community, and community members said that they were really impressed by how much the church seemed to care about the community.

Bolivia. Photo: Tom Price – Ecce Opus/Tearfund

'This experience has taught me that I can be proactive in building social connections with others rather than waiting for them to come to me.'

Church leader from transect walk group, Bolivia

Step by step

1 Gather participants. Try to involve people who might have different perspectives and notice different things as you walk. If you are from outside the community, you might want to involve community members, as it can be a powerful experience for them to see the place they live in a different way. It can also help the people you are observing feel more at ease and less likely to change their behaviour.

2 Identify focus areas. You might want to do a general walk looking at the overall situation or you might have key issues, or aspects of wellbeing, that you want to observe in more depth. You can use the **Observation checklist and summary** (Resource 3.4.1) to give you ideas of what to observe on your walk in relation to each aspect of wellbeing.

3 Plan your route. Make sure your walk will allow you to observe the focus areas you have identified, and try to include places that you might not normally be shown. Use your judgement as to whether you need to ask permission to go to certain places.

4 Go on your walk. As well as observing and listening, take opportunities to talk to community members and ask them if there is anything they feel you should see. Ask questions if anything seems unusual or different to you.

It's important to remember that your presence in the community may affect people's behaviour. Explain to people what you are doing and why, to help put them at ease.

5 Make notes as you walk. Take notes of whatever seems relevant; photographs, video or drawings are also useful ways to record what you see. The **Observation checklist and summary** (Resource 3.4.1) has space for you to record your notes as you walk, and your reflections once the walk is complete.

You can turn to **Part 4: Analyse** for guidance on how to analyse the data from your observation tools.

Burundi.
Photo: Paul Mbonankira/Tearfund

6 Discuss what you've seen. After your walk, use these questions to reflect on each of the nine aspects, and make notes on your discussion:

- *What stood out to you most about each of the aspects of wellbeing?*
- *Was there anything that surprised you?*
- *In which aspects of wellbeing did the community seem to be doing well? Which aspects have the most challenges?*
- *Are there any differences between what you observed in the walk and your findings from other Light Wheel tools?*
- *Is there anything you will explore further?*

Community map

In a community map exercise, you bring people together to draw a map of the neighbourhood so that you can identify key features and resources in the community that relate to each of the nine aspects of wellbeing. This is a particularly effective tool to use after a transect walk, to document what you have observed. It is also a good way to find out what other people feel are the most important defining features of the community.

The finished map can be analysed through the lens of the Light Wheel. For example, which resources, buildings, services or natural features relate to each of the nine aspects of wellbeing?

The process of creating the map, and discussing it afterwards, is a chance to generate in-depth conversations and understand more about why things are the way they are.

One key thing to consider is: what is your definition of 'community' or 'neighbourhood'? You may be able to think of an obvious boundary around the community, or you may need to discuss which streets and districts you want your map to focus on.

> **'I enjoyed making a map of my local community because it helped me to identify what resources we already have around us.'**
>
> **Light Wheel training participant,** Guatemala

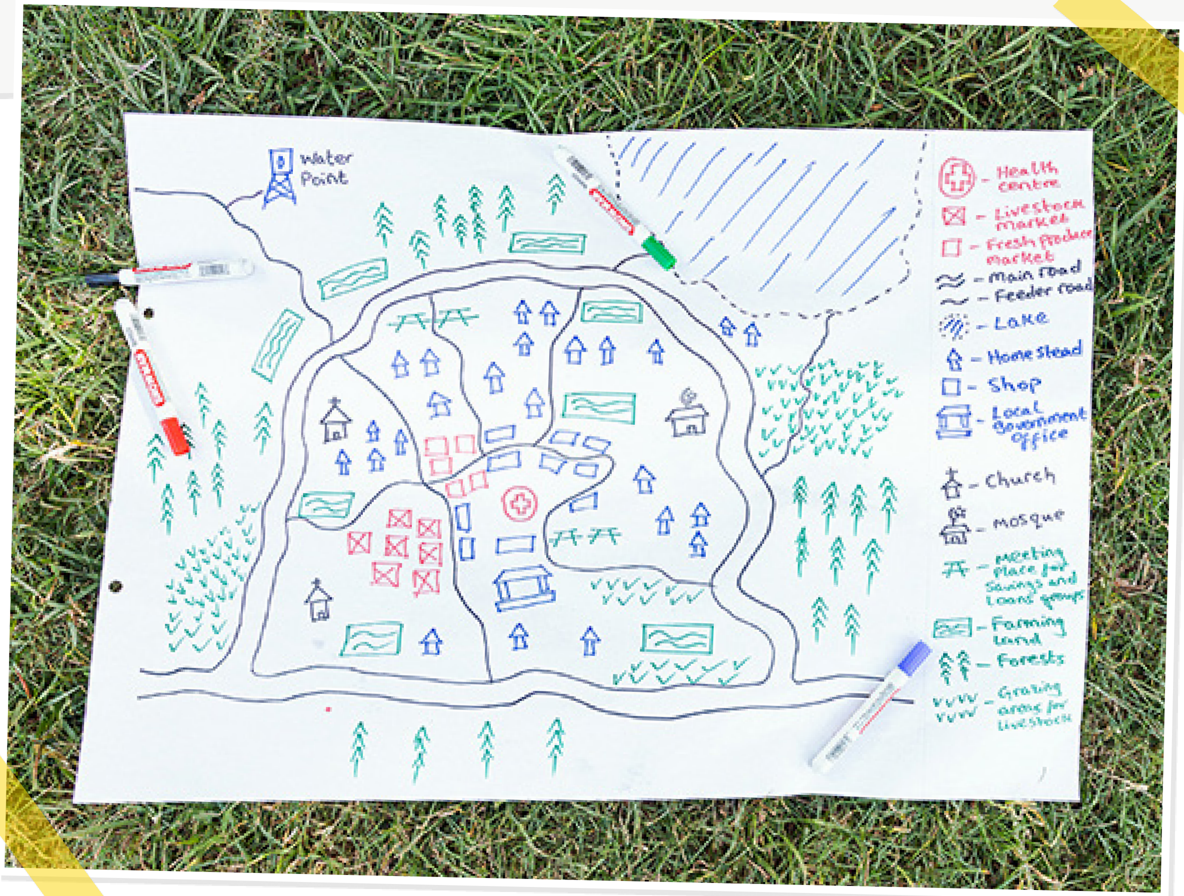


Photo: Joseph Limo/Tearfund

Step by step

1 Set up your equipment. Gather materials such as large pieces of paper, different coloured pens and sticky notes. You can work on tables or the floor. Alternatively, you can draw the map in the earth or sand.

2 Gather participants. Involve people who might have different perspectives and add a range of different things to your map. Getting people to draw their impression of their community is a great technique for including people who have low literacy or when there are language barriers.

If you're concerned that some people may not feel comfortable participating in a big group, you can divide into smaller teams and feed back to each other.

3 Create your map. Ask participants to imagine their community and start with mapping out significant roads, buildings, landmarks and natural forms to get the initial shape of the map. From there, more detailed elements can be added in.

If you've already conducted a transect walk, you can use your notes to add more details to your map. You can also use the questions in the **Community map checklist and summary** (Resource 3.4.2) as prompts for what to include.

Example questions from the community map checklist:

- **Participation and influence:** *Where do community meetings take place?*
- **Capabilities:** *Are there schools in this community?*
- **Care of the environment:** *What are the main natural resources in this community? How are these cared for?*
- **Social connections:** *What features are there in the community that make people feel safe?*

Case study

Community mapping in Guatemala

In Antigua, Guatemala, the community map was used to understand more about the strengths and weaknesses of the area. The team divided into pairs and firstly did a transect walk, covering two or three streets each. They noted down their observations in relation to the nine aspects of wellbeing. Next, they spent time as a group creating a large map of what they had seen. They found that the map showed certain areas that were well kept for tourism, and other (residential) areas that were more neglected.

Guatemala. Photo: AMI San Lucas

4 Discuss your map. Once you have completed the map, use these questions as prompts to discuss what people notice:

- *What positive things do you notice about the map? (Which aspects of wellbeing are strongest?)*
- *What challenges do you notice? (Which aspects of wellbeing are weakest?)*
- *What resources are available in the community? Are they being used well?*
- *What areas of the map do you think are the highest priority for improvement? How can these areas be improved?*

5 Record your conclusions. Take time to reflect on what you heard and, if relevant, how the findings confirm or contradict what you have heard using other Light Wheel tools. You can use the **Community map checklist and summary** (Resource 3.4.2) to record your notes. It is also a good idea to take a photo of the map so you can keep referring back to it or include it in your report.

Community map checklist: example entry

Spoke	What is going well in this aspect of wellbeing?	What are the challenges in this aspect of wellbeing?	Does this confirm or contradict what you heard using other tools?
Physical health	• Local health centre is close to the village. • People are able to grow a mix of crops to support a balanced diet.	• Water point is far from the village. • The local clinic is not open every day. People have to travel long distances for additional health services.	In the Light Wheel survey, 78% of respondents said that they were satisfied or very satisfied with the local clinic. This seems to contradict the fact that the clinic is not open every day. We need to find out more.

You will find detailed advice on how to analyse your observation tools in **Part 4: Analyse**.

2.5 Context tools

The context tools help us to understand the factors and actors that are driving change in the nine aspects of wellbeing. They will help you assess why change is happening, and what your contribution has been.

How do the context tools work?

When we use the Light Wheel tools (eg group discussion, survey, observation tools), we are trying to uncover information about each of the nine aspects of wellbeing and to understand more about the situations that people are living in. But in order to know *why* things are the way they are, we need to look at the wider contextual factors that are having positive or negative influence. We call this 'putting our findings into context'.

We are going to look at four different context tools. These tools will help you paint a picture of the factors and actors that are impacting the community and driving change in the nine aspects of wellbeing. With this information you will be able to plan a more effective, contextually appropriate response, as well as more accurately assess the contribution you have played in bringing about change.

Each tool offers a different way of putting your findings into context:

→ **History map**
A participatory process looking back at the history of a community to understand how past events have shaped the way things are today

→ **Force field analysis**
A visual way of mapping the positive and negative forces in the context that are impacting different aspects of wellbeing

→ **Stakeholder analysis**
Identifying the different actors who are exerting a positive or negative influence over a situation and planning how to engage with them

→ **Secondary data**
Using data collected from other sources to better understand the context

Bangladesh.
Photo: Amit Rudro/Tearfund

In **Part 3: Resources** you can find all the resources you need for facilitating the context tools.

Why is it important to understand the context?

As you use the Light Wheel tools (eg group discussion, survey, observation tools) participants will discuss and assess their situation in each of the nine aspects of wellbeing. As the diagram (right) reminds us, each Light Wheel tool uncovers different types of information about people's personal and collective experiences.

But we don't just want to know *what* things are like, we want to know *why* they are the way they are. The context tools help us identify different factors and actors that are driving change in the nine aspects of wellbeing.

Understanding the context is vital if you are thinking about how to bring change. It can help you think about the role you play in the bigger picture and identify opportunities to engage with other stakeholders. It can also highlight potentially negative influences that might prevent change happening in the way you want.

Awareness of the context will also help you assess the role you have played in creating change, alongside other factors, so that you don't overstate or under-play your contribution. This is a really crucial part of the data analysis process.

How do we define 'context'?

As the diagram (right) shows, you can think of contextual factors as external influences that are outside your control, or beyond the scope of your work, eg societal or cultural norms, institutions and laws, the natural environment, politics, the economy, technology, conflict etc (see page 103 for more details).

Contextual factors can be things happening today, or things in the past that still have an impact today. You might want to focus on understanding the context at a local or regional level, or you might take a broader focus and look at a national or global level.

It is important to keep regularly assessing the context, because if one factor changes – for example, an environment-related disaster takes place – it can impact people's outcomes in one or more aspects of wellbeing. Helping people become more resilient is about minimising the negative impact that changes in the external context have on people's holistic wellbeing.

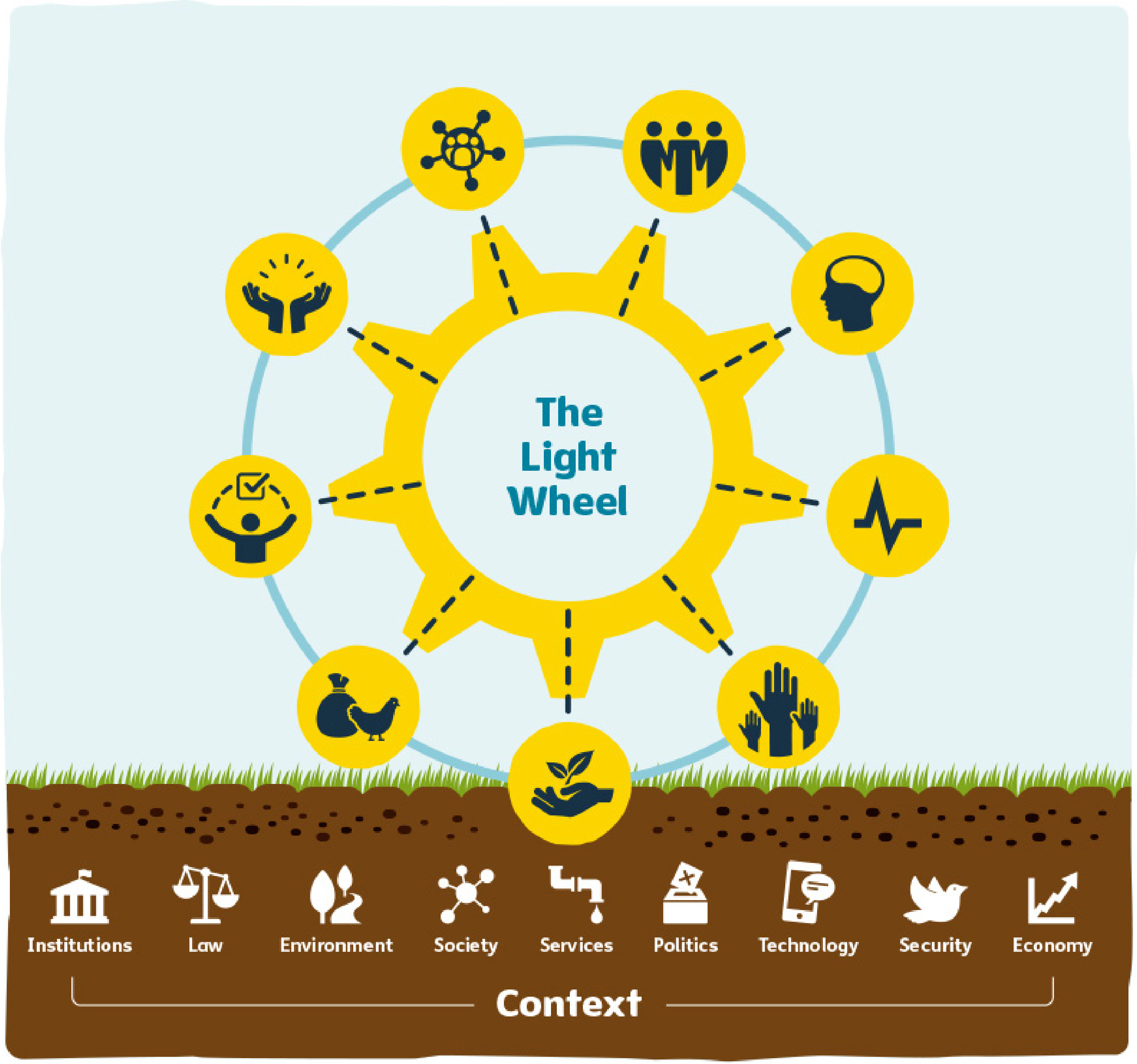
Uncovering different layers of information

The metaphor of the wheel and the road

We've already discussed how the image of the wheel is a visual reminder that all the aspects of our wellbeing are interconnected. Let's take the metaphor further. Imagine the wheel of a bicycle rolling on the ground. The direction that the wheel travels in, and how smooth the journey is, will be impacted by the type of ground the wheel is travelling on. A wheel rolling on a flat surface will have a quicker and smoother journey than a wheel rolling on bumpy rocks.

As shown in the diagram (right), we can think of context as being like the road the wheel is rolling on: it shapes the journey and the destination. In the same way, an individual or community's journey of change will be impacted by the context they live in. Like a smooth road, there might be contextual factors that help their journey towards full transformation. Or, just like when there are bumps in the road, there might be contextual factors that prevent positive change or make the situation worse. We need to understand how the wider context is impacting outcomes in the nine aspects of wellbeing.

On the next page you will find an explanation of all the contextual factors you can see in the diagram.



Contextual factors

Here is an explanation of the contextual factors in the diagram on the previous page. These are the sorts of topics you might want to discuss when using the context tools, but you can think of your own too.

Institutions

Organisations and structures through which society is ordered and administered. This includes local and national government structures, NGOs, religious groups, trade unions and businesses. **Think about how institutions play a role in setting the rules and guidelines for how society operates.**

Law

The rules and regulations that govern society and how laws are implemented, for example through the judicial system, courts and police, or through more informal mechanisms. **Think about which laws help or hinder positive change.**

Politics

The way power is exercised, how decisions are made and the impact of political events and decisions on people's lives. **Think about who makes decisions, who can express their views, and how politics impacts people's daily lives.**

Society

The make-up of society, including population demographics, family size and structure, tribal and ethnic groups, distribution of wealth, religious beliefs and cultural norms. **Think about the social and cultural norms that affect things such as relationships, inclusion/exclusion, roles and responsibilities, and levels of power.**

Services

The availability of essential public services, such as clean water, education, health facilities, electricity, transport. **Think about how access to these services impacts people's ability to bring about change and live life to the full.**

Technology

Access to, and the impact of, technology in people's lives (eg livelihoods, banking, accessing new ideas, communications, energy). **Think about both the positive and negative impact of technology in people's lives.**

Security

The safety of the community and how levels of crime, violence and conflict impact people's wellbeing. The mechanisms in place to keep people safe and create or maintain peace. **Think about the impact of perceived insecurity and threats, as well as actual incidents.**

Economy

The cost of living, levels of trade and the strength of local businesses. People's access to markets, financial services and employment opportunities. **Think about how these economic issues impact different groups of people in different ways.**

Environment

The natural environment and climatic conditions that impact people's lives, eg environment-related disasters, environmental degradation, availability of natural resources, ease of movement, the fertility of the earth and the crops that can be grown. **Think about which environmental conditions would enable or prevent positive change.**

A rural community in Sierra Leone.
Photo: Joshua Eaves/Tearfund

Case study

Context mapping in Sierra Leone

In 2018 Tearfund decided to do a study of its CCT work in Sierra Leone to explore its impact on people's wellbeing. The findings were surprising: 79 per cent of CCT participants said that their **Material assets and resources** had decreased over the three years that they had participated in CCT.

When reviewing the context, the study identified that there had been significant changes in the national economy, which helped explain these results. Largely due to the Ebola outbreak, the country was experiencing high rates of unemployment, high inflation and rising food and commodity prices.

When participants in the study were asked why their assets had decreased, 71 per cent said the economic conditions in the country were to blame. Reviewing the context was critical to understanding the findings. When comparing households who had participated in CCT with those who had not, CCT households were found to be more resilient.

History map

When we look back in time, we can see how our present day is shaped (positively and negatively) by our past. Reflecting back on historical events can help to put our current situation in context.

A history map is a participatory tool that you can use to create a timeline and explore the major events in the past that have contributed to making the community what it is today. The contextual factors (page 103) are there to give you inspiration about the sorts of topics you can include on your map.

Once you have created the map, you can discuss how these events have impacted the present day, and which aspects of wellbeing have been most affected.

> Sometimes it can be difficult for us to talk about things that have happened in the past. Story-telling can be a powerful part of the healing process. You can find guidance on inclusion and safeguarding in **Section 2.1**.

> **'The history map is a very effective tool that helps us recognise how the past has shaped the present situation in each of the nine aspects of wellbeing.'**
>
> **Kyle Hanna,** Head of Impact and Effectiveness, Tearfund, UK

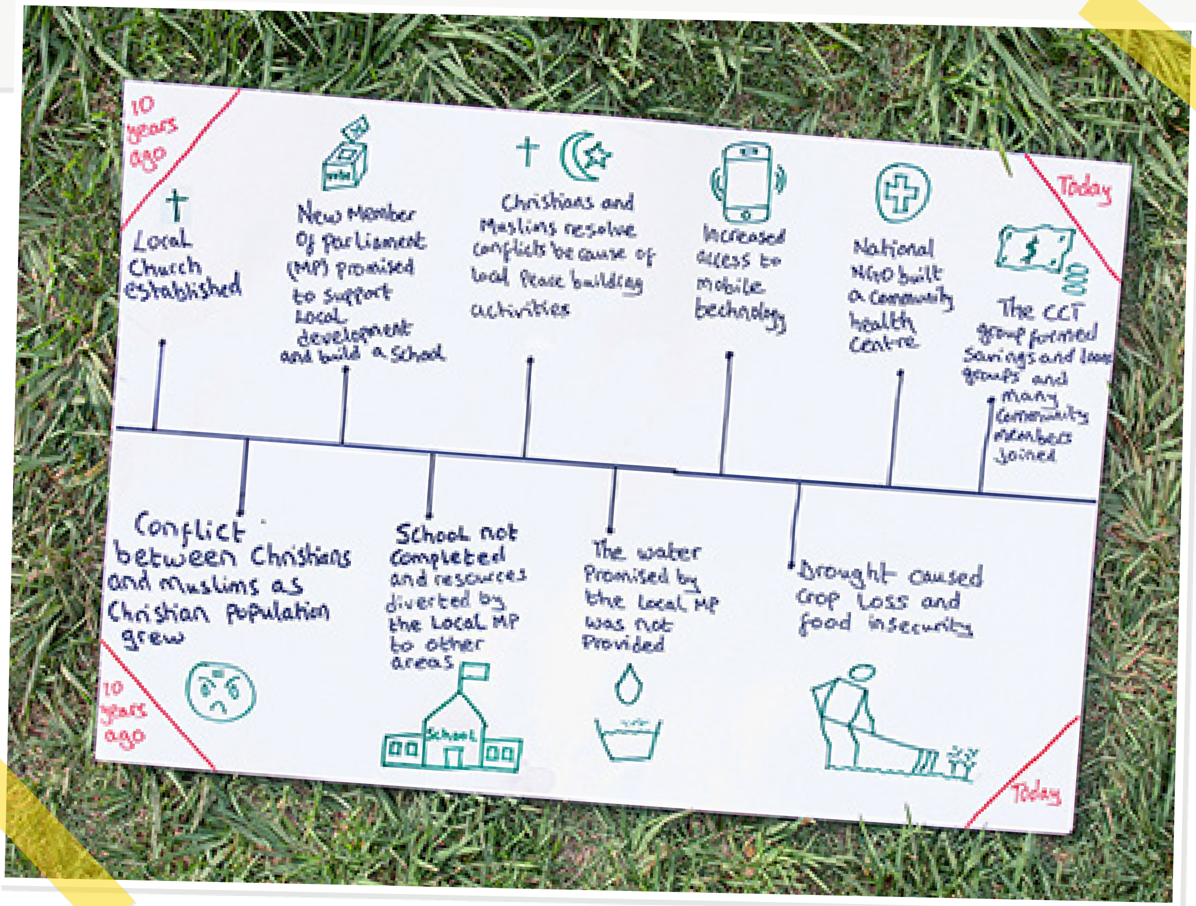


Photo: Joseph Limo/Tearfund

Step by step

1 Set up your equipment. You will need some big pieces of paper, different coloured pens and sticky notes if you have them. You can work on tables or the floor. Alternatively, you can draw the map in the earth or sand.

2 Gather participants. Involve people who might have different perspectives and add different things to your map. Getting people to draw is a great way to include people who have low literacy or when there are language barriers. You could ask people to draw symbols to represent different events, rather than writing descriptions.

If you're concerned that some people may not feel comfortable participating in a big group, you can divide into smaller teams and feed back to each other.

3 Create your history map. First, agree on a point in time (maybe ten to 15 years ago) from which to start listing key events. It is helpful to go back at least a couple of years but not so far back that younger participants can't contribute. Next, ask the group to draw a line that goes from one end of a piece of paper to the other.

At the start of the line, describe what life was like at the beginning of your timeline, using the contextual factors (page 103) as prompts. Then move to the other end of the timeline, which represents the present day. Ask participants to describe what life is like now.

Between the two points, mark the events that impacted the community in some way. You can ask the group to discuss the events most significant in their memory, or see the **History map checklist and summary** (Resource 3.5.1) for prompting questions related to the different contextual factors. Make sure you tailor the questions to suit the group you're working with and focus on the contextual factors you think will be most relevant and familiar to them, and that they will be comfortable talking about.

Example questions from the history map checklist:

→ **Technology**
How has access to communication technology changed over this time period, and what impact has that had?

→ **Environment**
Have you seen changes in the environment over time?

→ **Security**
Have there been any incidents of insecurity or violence at a local, regional or national level?

→ **Economy**
Have there been times when it has been harder or easier to afford essential items with your income?

4 Discuss your history map. Talk about how people found the exercise and what events or themes stood out to them.

- *What are the most significant events on your history map?*
- *How have these events shaped the situation today?*
- *How have specific events impacted different aspects of wellbeing and do you still feel those impacts today?*
- *What are your hopes and dreams for how the issues on your history map will be resolved or developed in the future?*

5 Record your conclusions. Once the exercise is complete, make a note of key events on the timeline and key points from your discussion. You can use the **History map checklist and summary** (Resource 3.5.1) to document your findings. It is also a good idea to take a photo of the history map so that you can refer back to it.

> **'Remembering our past can help us to remember how we got to where we are today.'**
>
> **Lydia Powell,** Impact Lead, Tearfund, UK

History map checklist: example entry

Contextual factors	What are the main events related to this contextual factor?	Which aspects of wellbeing have these historical events impacted?
Institutions	Over the years there has been tension and conflict between Christians and Muslims, but peacebuilding activities have helped bring mutual understanding and respect in more recent years.	This has had a positive impact on **Social connections** and **Emotional and mental wellbeing** because people from different faith groups live in harmony. However, participants hope that in the future there will be even more interaction between people of different faiths.
Technology	Access to communication technology has improved over the last five years. Most people now have mobile phones.	This has had a positive impact on **Social connections**, as well as **Material assets and resources,** because people use their phones for mobile banking and sending money to family members.

You'll find guidance on how to analyse your findings from the context tools in **Part 4: Analyse**.

Force field analysis

A force field analysis is a way of identifying and visualising contextual factors that are exerting a positive or negative influence on a situation.

You will create a visual diagram to show these different influences (or 'forces') at work. Positive forces push a situation in the direction you want it to go: these can be represented with a positive arrow (+). Negative forces take a situation away from your desired goal and create obstacles to positive change: these are shown with a negative arrow (–).

This exercise will help you think about which factors need to be increased or minimised in order to bring about the change you want to see. You may find that factors identified in the history map are present in your force field diagram because they are still exerting a positive or negative influence over the present.

Using a force field diagram is also a great way to understand your contribution to change, because you can see where you fit alongside all the other contextual factors that have an influence.

> **'I love how visual and participatory this tool is. It is very effective.'**
>
> **Norman Molina,** Global Programme Effectiveness Lead, Tearfund, Honduras

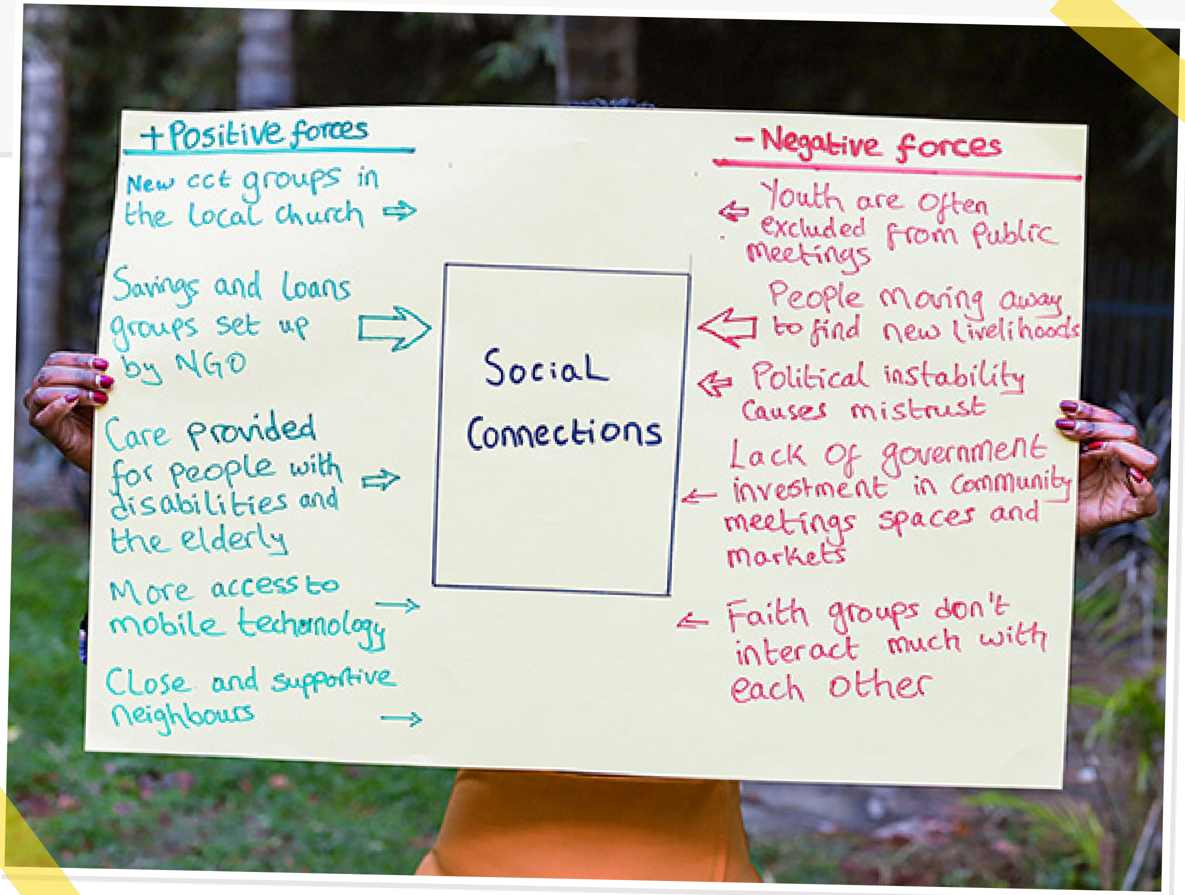


Photo: Joseph Limo/Tearfund

Step by step

1 Set up your equipment. You can draw your force field diagram on a big piece of paper, using different coloured pens and sticky notes. Or you can mark your diagram in the earth or sand.

2 Gather participants. You can use this tool on your own, with colleagues or with community members to get their perspectives on the major factors influencing their lives.

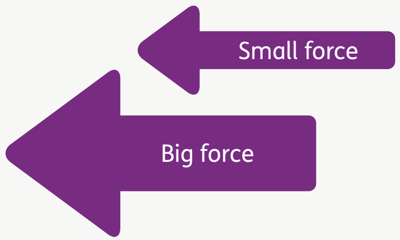
3 Choose the focus of your analysis. It can work well to analyse one aspect of wellbeing at a time. Or you can take a more generic approach and think about the community's wellbeing in general. Start by writing the focus of your analysis (eg one aspect of wellbeing) in the centre of a large piece of paper.

4 Map positive and negative forces. Think about the positive forces that are helping move the situation in the right direction, and map those factors on the left-hand side of the diagram. Then consider the negative forces blocking change, or driving the situation in the wrong direction, and map them on the right-hand side. The diagram on page 103 will help you consider what to include.

If you have participants with limited literacy, you could ask people to draw symbols rather than writing words.

You can include people as forces in your force field diagram, but the stakeholder analysis (see next page) will also cover this.

You can use different-sized arrows to indicate the strength of each force: the bigger the arrow, the stronger the force. You could get people to vote on which influences they think are the most significant.



Repeat this process with as many aspects of wellbeing as you want to. Ideally you can do it with all nine aspects, to get a full picture of the situation.

5 Discuss and document your findings. The questions below might help to stimulate an interesting discussion about the forces you have identified in your diagram. You can document your findings in the **Force field analysis summary** (Resource 3.5.2).

- Look at the positive forces you have identified: *Which of these could you work with to increase their positive impact?*
- Look at the negative forces you have identified: *How could you minimise their negative impact?*
- *Do any of the forces on your diagram have an impact on more than one aspect of wellbeing?*
- *How would you like these forces to look in three, five or ten years' time?*

You will find guidance on how to analyse your context tools in **Part 4: Analyse**.

Stakeholder analysis

Stakeholders are any individuals or groups that have an influence or interest in what you are doing. They can be people you are aiming to impact or people who can help you achieve your goals. They might also be people who prevent or hinder you from bringing about change. Stakeholders can be local, regional, national or international.

Identifying stakeholders and their roles is a key way to understand more about the context you are in. It will help you decide how you can engage with them to maximise their positive influence or to minimise their negative influence. It will also help you to analyse which actors have contributed to change, and what your part has been in the bigger picture.

We are going to look at a stakeholder analysis method that is similar to a force field analysis: it involves mapping how different people exert a positive or negative force over different aspects of wellbeing. The diagram on page 108 shows you what your stakeholder map will look like too.

Step by step

1. **Set up your equipment.** You can draw your stakeholder diagram on a big piece of paper, using different coloured pens and sticky notes. Or you can mark your diagram in the earth or sand.

2. **Gather participants.** You can do this stakeholder analysis on your own or with your colleagues. Alternatively, you can involve community members to get their perspectives.

3. **Identify stakeholders and their roles.** Use the contextual factors (page 103) as prompts to help you make a list of key actors in your context, eg participants, decision-makers, organisations and groups. Discuss what their roles are and what their interests might be.

4. **Assess stakeholder influence.** We recommend focusing on one aspect of wellbeing at a time, but if time is limited you could think about people's wellbeing more generally. Write the aspect of wellbeing you are going to be analysing in the centre of a large piece of paper. Go through your list of stakeholders and think about whether they have, or could have, a positive or negative influence over that aspect of wellbeing and why. Not all stakeholders will be relevant to every aspect and you may think of other stakeholders to include as you go.

   Write the names of stakeholders who have a positive influence on the left side of your diagram, and stakeholders who have a negative influence on the right. As with the force field diagram, use different-sized arrows to indicate the strength of the influence of each stakeholder. The bolder the line, the stronger the influence.

Bangladesh.
Photo: Amit Rudro/Tearfund

5 **Decide how to engage different stakeholders.** It's time to think about how to engage with the different stakeholders you have identified. Think about the following questions:

- *Which stakeholders are exerting a positive influence on the situation, or have similar interests to you?*
- *How might you engage or collaborate with them to bring about shared goals?*
- *Which stakeholders are exerting a negative influence on the situation or are against what you are trying to achieve? How could you mitigate or manage that risk?*

6 **Record your conclusions.** In the Stakeholder analysis summary (Resource 3.5.3), you'll find a template for keeping track of the information you have gathered about your stakeholders and your thoughts about how you might engage them. Make a record of how each actor relates to the different aspects of wellbeing.

Extract from stakeholder analysis summary

Spoke	Positive actors	Opportunities to engage	Negative actors	Actions to mitigate risk
Capabilities	NGO supporting savings-and-loans groups in the church	Opportunity to integrate training on business skills and entrepreneurship into the savings-and-loans group curriculum	Local MP who is diverting funds away from plans for a promised local school	Lobbying the MP to follow through on commitments to fund the local school. Working with community and faith leaders to advocate collectively
Participation and influence	Local church leaders who have been mobilised through CCT	Opportunity for the local church to work with the local government to hold more community meetings – for people to share their views and create action plans for how to move forward with development	Local MP who is not demonstrating commitment to the development of the village	Taking action in the next local election to try to elect a new MP

'When we identify the different actors who are also working to bring about positive change, we can think about how to collaborate with them.'

Madhu Thapa, DME Advisor, Tearfund, Asia

You will find guidance on how to analyse your context tools in **Part 4: Analyse**.

Secondary data

Secondary data is information that is already available: in other words, it has been collected by someone else and not by you directly. You can use secondary data to fill any gaps in your understanding of the context, and to gain new information and insights.

It can also help you to think about how the community's situation compares with the typical situation at the regional, national or international level. This can help when it comes to thinking about how the community is doing and how significant certain changes are. You can use the contextual factors (page 103) to guide your secondary data analysis, and then link that information back to the nine aspects of wellbeing.

You might want to include secondary data within other tools, such as the force field analysis and stakeholder analysis tools. Secondary data can also help you prepare for conducting other Light Wheel tools by giving you insight into the context before you visit the community.

Step by step

1 Identify available data sources. Secondary data can sometimes be available at a local level, but there are usually more secondary sources at a regional and country level. The first thing to do when you begin gathering secondary data is to identify what sources of information are available to you. Here are some examples:

Local-level data	Country-level data
• District or regional government reports • Health facility reports • Local schools • Colleges, universities or other academic institutions • Faith group data (churches, mosques etc) • Other NGO reports/evaluations/research • Local courts • Newspapers, radio, TV • Local community groups, business networks, savings groups etc • Service providers – mobile phone companies, water or power providers	• National government reports • International statistics on a particular country (CIA Factbook, *Human Development Report*, World Bank development indicators, Sustainable Development Goals, Multidimensional Poverty Index) • UN agency reports • Other NGO reports/evaluations • Legal frameworks/policies • Newspapers, radio, TV • National business networks • Sectoral working groups, networks, coalitions

2 Identify your key questions. The **Secondary data checklist and summary** (Resource 3.5.4) will provide guidance on the sorts of questions you can answer using secondary data, according to each of the different contextual factors. Select the questions that seem most interesting or relevant to you, or come up with your own.

Example secondary data questions:

- **Politics:** *What percentage of people participate in national/regional/local elections?*
- **Security:** *How many instances of violence/crime were reported to the police in the last year?*
- **Economy:** *What is the Human Development Index (HDI) score for this country? Gross Domestic Product (GDP)?*
- **Institutions:** *What other institutions operate in this area? (NGOs, community-based organisations etc)*

3 Gather the data. Look at the list of available data sources you identified (in Step 1), and think about which sources might hold the answers to your key questions (in Step 2). Some sources will be easy to find online, but for others you may have to make phone calls or visit places such as government offices, public buildings (eg schools, places of worship) or archives. The number of questions and the accessibility of sources will determine how long your secondary data collection will take.

4 Reflect on the data. As you gather your secondary data, start to think about what that information tells you about different aspects of wellbeing. It may help you to understand more about why things are going well or badly in a particular aspect, or you may find a difference between regional and national averages compared with the local situation.

For example, if you find out that the country has an average unemployment rate of 65 per cent, it may help you understand more about why people are struggling in their **Material assets and resources**. Or if you find that 50 per cent of married women report experiencing some form of abuse by their intimate partner, this may tell you more about the challenges women are facing, but not talking about, in the area of **Personal relationships**.

5 Record your conclusions. Use the **Secondary data checklist and summary** (Resource 3.5.4) to record your secondary data findings in relation to each aspect of wellbeing. Think about how you will use this information to prepare you for your community visits, or how it confirms or contradicts your findings from other Light Wheel tools.

> **‘Secondary research is a fast and effective way to build your understanding of the context using data that already exists.’**
>
> **Bethany Sikes,** Evidence and Communications Officer, Tearfund, UK

You will find guidance on how to analyse your context tools in **Part 4: Analyse**.

Next steps

You've made it to the end of Part 2! You should now have all the information you need to facilitate each of the Light Wheel tools with confidence. You should know how the tools can be contextualised, and what practical considerations such as time, resource and people you will need for each tool.

Next, in **Part 3: Resources**, you will find links to all of the practical tools and templates you need to facilitate each of the Light Wheel tools. Let's head to Part 3!

If you have any questions about what you have read so far, or if you would like to share feedback or stories of what you are doing with the Light Wheel, please contact **lightwheel.support@tearfund.org**

For more Tearfund resources, visit **learn.tearfund.org**

Top: Tanzania. Photo: Lydia Powell/Tearfund
Bottom: Bangladesh. Photo: Amit Rudro/Tearfund

Tearfund

Part 3

Resources

If you are ready to put the Light Wheel into action, this part is for you. Here you will find links to all the practical resources that will help you facilitate each of the Light Wheel tools successfully.

This part is essential for all Light Wheel users who are ready to facilitate the Light Wheel tools. If you are new to the Light Wheel, make sure you've already covered **Part 1: Prepare** and **Part 2: Facilitate** for all the background guidance you need to understand the resources that follow.

In Part 3, you will find:

- information about all the practical resources you will need to facilitate the Light Wheel tools
- digital links to our online learning platform, Tearfund Learn, where you can view, download, edit and print these resources

Contents: Part 3

Use the links below to move to the sections that are most relevant to you.

Where to find resources

All the resources in Part 3 can be viewed, downloaded, edited or printed via Tearfund Learn.

If you are accessing the toolkit on a computer or mobile phone, click the button next to each resource or at the bottom of each page. Both will take you to the same page on Tearfund Learn, where the resources are located.

If you are using a print version of the toolkit, you can type **learn.tearfund.org/LW3** into your internet browser to find all the Part 3 resources located on Tearfund Learn.

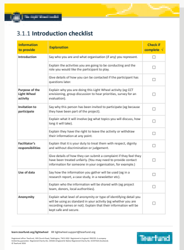
3.1 General resources

The resources in this section are relevant across different Light Wheel activities. In this section you will find:

- links to resources to help you introduce and gain consent for your activities
- resources to visualise and explain the nine aspects of wellbeing
- a report template which you can use to present your findings

A printout of one of the 'Light Wheel diagrams' (Resource 3.1.5).

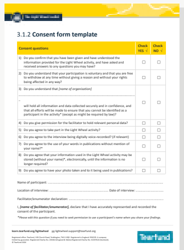
3.1.1 Introduction checklist



This resource is a summary of the information that you should provide participants with, before gathering information using any of the Light Wheel tools.

It can also be helpful to share this information with community leaders or other people in positions of influence, especially if they act as community gatekeepers and need to understand what you are doing with the Light Wheel in the community.

3.1.2 Consent form template



Once you've fully explained to participants the purpose of your Light Wheel activities, and what you will do with any information you gather, you need to obtain their consent to participate, and their consent for the type of information about them you will store (eg photos).

The consent form template can be edited to suit your context, approach and purpose for the Light Wheel. Here are some things you might want to edit:

Delete questions that are not relevant, eg question 6 about digitally recording discussions, if you are not doing so.

You might want to be more specific about the nature of your activities and replace 'Light Wheel activity' with 'Light Wheel survey' or 'group discussion'.

You may want to ask permission to use participants' names: you will need to edit questions 3, 7 and 8 on the consent form accordingly.

The context and the literacy level of your participants may mean you need to be flexible in how you obtain people's consent. Instead of asking them to read and sign a form, you may, for example, need to explain the consent form verbally and ask if they are willing to take part. They could then indicate their consent by, for example:

- using their fingerprint instead of a signature
- giving consent verbally. You could record their response if that feels appropriate and helpful to have on record.

In the case of vulnerable people such as people with disabilities, you may need to involve their caregivers in the consent process (see 'Informed consent' in **Section 2.1.3**)

To download these resources, go to: learn.tearfund.org/LW3-1

3.1.3 Descriptions of the nine aspects

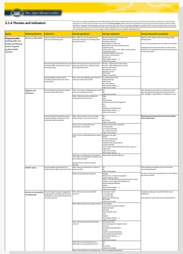
Before any Light Wheel activity, you will need to explain each of the nine aspects of wellbeing in a way that everyone can easily understand. This resource provides an example description for each of the nine spokes, as well as the defining themes that help describe each spoke.

The descriptions of the nine aspects of wellbeing are examples, not scripts to follow. It is very important that you reflect on what each of the aspects looks like in your specific context so that you can easily explain it and help participants to understand it. See the information about contextualisation in **Section 2.1.5** to learn more about how to adapt the descriptions of the nine aspects to your context.

The Light Wheel touches on sensitive topics: some are more personal than others. Throughout this resource, you will find guidance specific to each of the spokes to help you create a safe space for participants to discuss different topics. You can also refer to the content on inclusion in **Section 2.1.1** and safeguarding in **Section 2.1.2**, to help you prepare for leading these conversations.

> **'The first step is to think about how the nine aspects of wellbeing look in your context and what your vision for change is in each area.'**
>
> **Harrison Manyumwa,** DME Advisor, Tearfund, Southern and East Africa

3.1.4 Themes and indicators

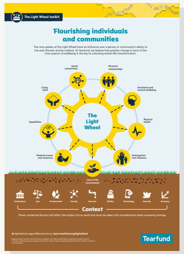


Each of the nine aspects of wellbeing has several defining themes which help us describe that aspect in detail. The themes for each spoke recur across the Light Wheel tools. This means that, for example, the themes in the **Social connections** spoke are found in the Light Wheel survey, the group discussion questions and the maturity model levels. Having the same key themes recurring in each of the tools means that you can compare findings for a specific theme if you want to compare data in more depth.

This resource will show you how the themes for each spoke map across the Light Wheel indicators, Light Wheel survey questions and group discussion questions.

To download these resources, go to: learn.tearfund.org/LW3-1

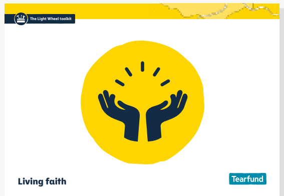
3.1.5 Light Wheel diagrams



Using the Light Wheel diagram as a visual when facilitating any Light Wheel activity helps your participants understand the nine aspects of wellbeing and see how they interconnect. In this resource, you will find several versions of the Light Wheel diagram, including landscape, portrait, colour, and black and white versions. You might like to turn the Light Wheel diagram into a large poster or banner.

An editable template of the Light Wheel diagram is available online so that you can input different language translations. To access this template, please contact **lightwheel.support@tearfund.org**

3.1.6 Light Wheel icons

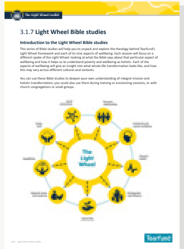


This resource gives you all the icons that we use to represent the nine aspects of wellbeing. These visuals can be helpful when facilitating Light Wheel activities, eg group discussions, to make sure everyone feels included and able to participate, especially people with low levels of literacy.

In Bolivia, the team using the Light Wheel printed each of the icons onto big banners which they displayed during each of the group discussions.

Bolivia. Photo: Efraín Piuca/Tearfund

3.1.7 Light Wheel Bible studies



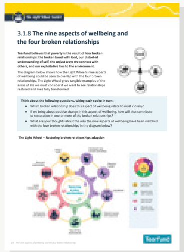
This series of Bible studies is designed to help you unpack and explore the theology behind each of the Light Wheel's nine aspects of wellbeing. There is one Bible study for each aspect, as well as an introductory study about restoring broken relationships.

You can use these Bible studies to deepen your own understanding of integral mission and holistic transformation, with church congregations or small groups.

Each Bible study has a set of 'Leader's notes' at the end of the guide, where you will find prompts to help you encourage more conversation or clarify what the question is asking.

To download these resources, go to: learn.tearfund.org/LW3-1

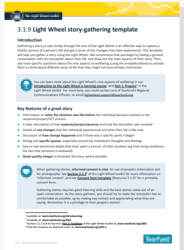
3.1.8 The nine aspects of wellbeing and the four broken relationships



Tearfund's theory of poverty is based on the idea that poverty is caused by broken relationships in an imperfect world. The Light Wheel's nine aspects of wellbeing give us tangible examples of the areas of life we should care about if we want to see relationships restored and lives fully transformed.

This resource shows the interconnection between the Light Wheel and Tearfund's theory of poverty, and has a series of reflection questions that can be used as the basis for personal or group reflection on broken relationships and whole-life transformation.

3.1.9 Light Wheel story-gathering template



Gathering a story through the lens of the Light Wheel is an effective way to capture a holistic picture of a person's life. Story-gathering is also a useful, informal way to listen to other perspectives, which can help validate findings you have gathered using other tools.

Including a few personal stories in your Light Wheel report will make it more engaging and help illustrate what life is like in the community. You can also look for repeating themes that occur across multiple people's stories to suggest trends or common experiences.

This template will help you gather fully rounded stories, by suggesting what kind of information you may want to record and providing sample questions for each of the nine aspects. It also offers general advice about what makes a good story.

3.1.10 Light Wheel report template

It is important to keep a record of your key findings from the Light Wheel tools and to share these with your key stakeholders and participants. You can use this template to create a report of your findings. You can remove or add sections depending on what you want to include in your report.

The template has an introductory section to record your methodology and a section to note down your findings and results in relation to each aspect of wellbeing. It also has space for your conclusions, recommendations and future actions.

If you are interested in other creative ways to share your findings, see **Part 5: Communicate**.

To download these resources, go to: learn.tearfund.org/LW3-1

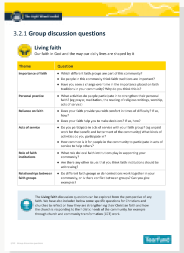
3.2 Group discussion resources

This section provides links to all the resources you will need to carry out your Light Wheel group discussions, including:

- group discussion questions for each of the nine aspects of wellbeing
- resources to help you visualise and explain the maturity model
- resources for recording the findings and scores

The 'Group discussion questions' (Resource 3.2.1) accessed digitally on a tablet.

3.2.1 Group discussion questions

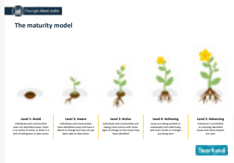


Here is a set of questions you can use when facilitating Light Wheel group discussions. There are questions for each of the nine spokes, and although you do not need to use every question, we recommend choosing three to four questions for each spoke that are most relevant to your work, context and the time you have available.

Make sure you choose the most relevant questions for your context, and feel free to change the wording or add your own questions to the list.

You should also think about the order in which you introduce the nine aspects. For example, it's probably best to avoid starting with aspects that are particularly sensitive, and instead start with a topic that seems relevant in your context, or in which people have already shown an interest.

3.2.2 Maturity model visuals

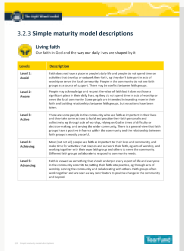


After you have generated a discussion about an aspect of wellbeing, you can introduce the maturity model and lead the group to debate and score their situation.

The simplest and most friendly way to introduce the maturity model is through visual examples, which help explain the idea of change over time. This resource has different visuals that you can use, such as rungs on a ladder, a growing flower and batteries being charged up.

Chad. Photo: Paul Djerabe/Tearfund

3.2.3 Simple maturity model descriptions



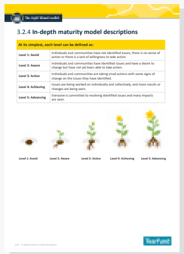
Sometimes the pictures in **Maturity model visuals** (Resource 3.2.2) will be enough to guide the scoring process during your group discussion. At other times, you might want a bit more guidance to help you describe each level.

This resource gives you some simple descriptions of what the situation might look like in each aspect of wellbeing, as the community progresses from level one to level five.

The examples given should be adapted to suit your local context and its specific issues. Add your own contextual examples to help bring the descriptions to life for your participants.

To download these resources, go to: learn.tearfund.org/LW3-2

3.2.4 In-depth maturity model descriptions

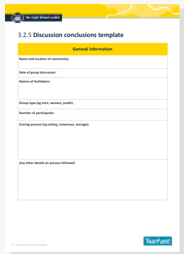


There will be times when you want to understand and score the maturity model in as much detail as possible. This might be, for example: when you want your scores to be rigorous and well evidenced; if you are scoring across multiple locations; or if you are conducting an impact assessment or piece of research.

In these instances, this resource will provide you with an in-depth description of the maturity model for each aspect of wellbeing, broken down by its defining themes. This means you can think about how growth happens within each theme of each aspect, to conduct a deeper level of analysis and score more accurately.

Before using these definitions, you should review how relevant they are to your context and make any necessary changes or additions. Make sure the amendments are reflected in the maturity model description too.

3.2.5 Discussion conclusions template

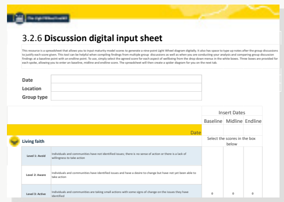


It is important to record key points in the group discussion and the maturity model scores. Taking good notes is a key part of facilitating a group discussion as it provides the data to develop your findings when you come to the analysis part of your Light Wheel work (see **Section 2.2** for more tips on note-taking).

You can use this resource to write your notes during a group discussion. You can also plot your scores on the maturity model diagram.

> **'Having the maturity model broken down by defining themes allows us to easily describe and compare the differences between the five levels.'**
>
> **Rose Wade,** Light Wheel practitioner, AMI San Lucas, Guatemala

3.2.6 Discussion digital input sheet



This resource is a spreadsheet that allows you to input maturity model scores to generate a nine-point Light Wheel diagram digitally. It also has space to type up notes after the group discussions to justify each score given.

This tool can be helpful when compiling findings from multiple group discussions as well as when you are conducting your analysis and comparing group discussion findings at a baseline point with an endline point.

To download these resources, go to: learn.tearfund.org/LW3-2

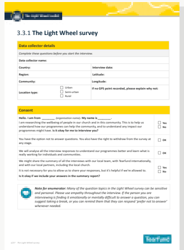
3.3 Light Wheel survey resources

This section contains links to all the resources you will need to conduct your Light Wheel survey, whether you are doing it digitally or on paper. In this section you will find:

- a printable version of the Light Wheel survey
- instructions for conducting the survey in KoBoToolbox
- a workbook for keeping track of your survey data collection plan

The Light Wheel 'Digital survey form' (Resource 3.3.5) accessed on a mobile phone.

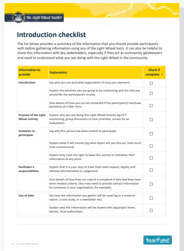
3.3.1 Light Wheel survey template


3.3.1 The Light Wheel survey

This resource is a printable version of the Light Wheel survey template that you can use to record answers manually using pen and paper. You will need to print one copy of the survey for each participant in your sample.

Before starting your survey, we recommend that you check all the questions are appropriate to your context and purpose. For more information on how the survey can be contextualised, see **Section 2.3**.

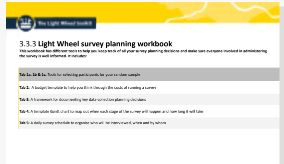
3.3.2 Contextualisation decisions worksheet


Introduction checklist

As you make changes to the survey and adapt it to your context, we recommend using this template to keep track of all your changes. This is relevant whether you are doing the survey on paper or digitally in KoBoToolbox. In recording your changes, everyone facilitating the survey will understand your local version of the questions, and you can refer to it when it comes to analysing your data.

Nigeria. Photo: Nanmet Anthony/Tearfund

3.3.3 Light Wheel survey planning workbook

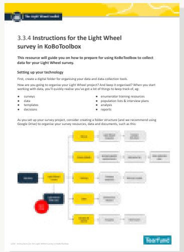

3.3.3 Light Wheel survey planning workbook

This workbook has different tools to help you keep track of all your survey planning decisions and make sure everyone involved in administering the survey is well informed. It includes:

- a budget template to help you think through the costs of running a survey
- tools for selecting participants for your random sample
- a daily survey schedule to organise who will be interviewed, when, and by whom
- a survey project plan template to help you map out when each stage of the survey will happen and how long it will take (eg planning, training, implementing, analysis).

To download these resources, go to: learn.tearfund.org/LW3-3

3.3.4 Instructions for the Light Wheel survey in KoBoToolbox

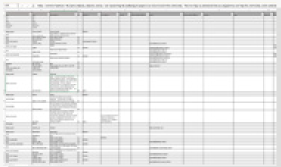


Where possible we recommend using KoBoToolbox to carry out your survey digitally. This resource provides step-by-step instructions for how to set up and use the Light Wheel survey in KoBoToolbox.

You can also watch short video tutorials to accompany these instructions in our online **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

If you are doing your survey using pen and paper, you can input the forms into KoBoToolbox to convert them into a digital format for data analysis. This resource will explain more about how to do this.

3.3.5 Digital survey form (XLS format)



In order to administer the Light Wheel survey in KoBoToolbox, you need to upload this XLS version of the survey questions (provided in English, French, Portuguese and Spanish) into the application.

The **Instructions for the Light Wheel survey in KoBoToolbox** (Resource 3.3.4) will walk you through how to upload the XLSForm in KoBo, and you will also find a video tutorial (lesson 2, in module 2 'Publish your Light Wheel survey') in our online **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

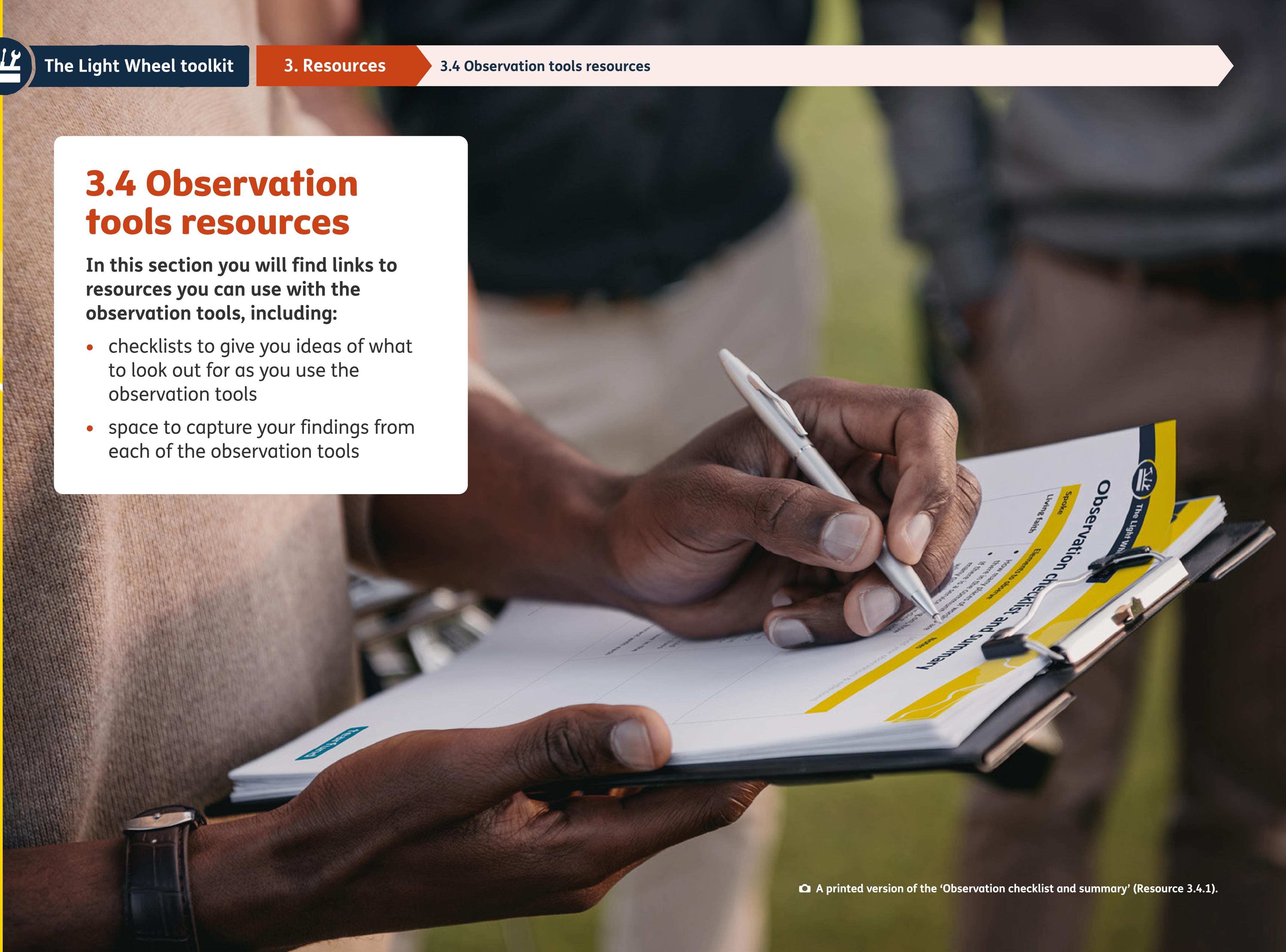
> **'The Light Wheel opens the church's eyes to see where they are and, where there are challenges, they become more motivated to want to do something about it.'**
>
> **Daouda Yalcouye,** CCT practitioner, Tearfund, Mali

To download these resources, go to: learn.tearfund.org/LW3-3

3.4 Observation tools resources

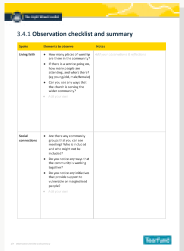
In this section you will find links to resources you can use with the observation tools, including:

- checklists to give you ideas of what to look out for as you use the observation tools
- space to capture your findings from each of the observation tools



A printed version of the 'Observation checklist and summary' (Resource 3.4.1).

3.4.1 Observation checklist and summary

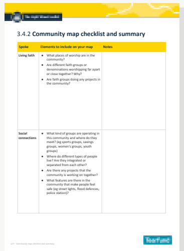


As you use the Light Wheel tools (eg running group discussions or the Light Wheel survey), you will naturally observe things about the community you are in, eg what life is like there, what resources are available, and how people behave. This resource provides a list of things you might want to try and specifically look out for in relation to the nine aspects of wellbeing.

This resource is also relevant if you are preparing to conduct a transect walk, which is a more structured way of looking at what the community's life is like in relation to the nine aspects. It will give you prompts about what to look out for as you do your transect walk.

In this resource, you will also find a template to capture your reflections about each aspect, ready to compare with findings from other Light Wheel tools.

3.4.2 Community map checklist and summary



This resource provides examples of the elements that could be included in your community map in relation to each aspect of wellbeing. You will also find a template that can be used to summarise the findings from your community map. It will help you keep track of the discussion that emerges after the mapping is complete.

> **'The Light Wheel gave us an entry point and a connection with the community. It started to build a desire to change.'**
>
> **Efraín Piuca,** CCT practitioner, Tearfund, Bolivia

To download these resources, go to: learn.tearfund.org/LW3-4

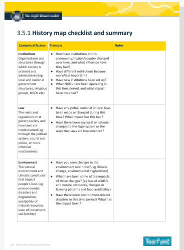
3.5 Context tools resources

In this section you will find information about resources to accompany the context tools, including:

- a checklist and summary template for the history map
- a summary template for the force field analysis
- a summary template for the stakeholder analysis
- a checklist and summary template for gathering secondary data

Working through the force field analysis tool (Resource 3.5.2).

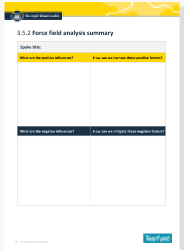
3.5.1 History map checklist and summary



In this resource you'll find examples and definitions of some of the contextual factors that you might want to consider during your history map exercise. You will also find templates to record your findings and reflections.

In this exercise, remember to be sensitive to people's feelings when discussing historical events that may bring up difficult memories.

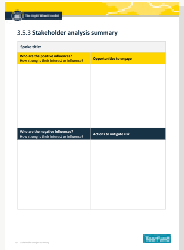
3.5.2 Force field analysis summary



This resource is designed to help you summarise the findings from your force field analysis activity. It will guide you to reflect on the forces that are having a positive or negative influence on the situation, and how you can maximise or minimise these accordingly. You should use one template for each aspect of wellbeing that you analyse.

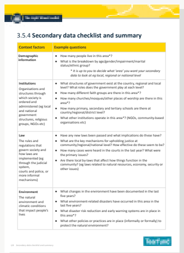
Guatemala. Photo: Eduardo Say/Tearfund

3.5.3 Stakeholder analysis summary



This resource is organised by aspect of wellbeing and provides space for you to summarise the negative and positive actors who may have an influence on your work. It also prompts you to begin to think about how you might engage these stakeholders and to prioritise initial actions to move forward with this.

3.5.4 Secondary data checklist and summary



This resource provides a list of questions that have been organised according to the different contextual factors that can help guide your secondary data collection. You should review these questions and decide which are most relevant for your work. You will also find a table with space for you to summarise the findings from your secondary data collection exercise.

To download these resources, go to: learn.tearfund.org/LW3-5

Next steps

Now, you should have all the practical resources you need to facilitate the Light Wheel tools with churches and communities.

Next, in **Part 4: Analyse**, you will find step-by-step guidance on how to analyse the data you gather from the Light Wheel tools, bring different datasets together to create a holistic picture of the community, and decide on your recommendations and next steps.

If you have any questions about what you have read so far, or if you would like to share feedback or stories of what you are doing with the Light Wheel, please contact **lightwheel.support@tearfund.org**

For more Tearfund resources, visit **learn.tearfund.org**

Top: Rwanda. Photo: Lydia Powell/Tearfund
Bottom: Bangladesh. Photo: Amit Rudro/Tearfund

Tearfund

Part 4

Analyse

In this part, you will find guidance on how to analyse the data you have collected using the Light Wheel tools. This involves interpreting and comparing your data to build a holistic picture of the situation. You can then use what you've learnt to help shape your next steps. Are you ready?

This part is useful for all Light Wheel users, but it is particularly important for those who are new to data analysis.

In Part 4, you will learn:

- how to analyse qualitative and quantitative data you've generated using the Light Wheel
- how to bring datasets together and have confidence in your findings
- how to use data to help shape your decisions and response

Contents: Part 4

Use the links below to move to the sections that are most relevant to you.

Left: Nigeria. Photo: Nanmet Anthony/Tearfund
Right: Bangladesh. Photo: Amit Rudro/Tearfund

4.1 Introducing data analysis

To make our data collection activities worthwhile, we need to think carefully about how to make sense of the data we've gathered and what we will do with this information.

When you decided how and why you wanted to use the Light Wheel (back in **Section 1.2**), you probably had some questions in mind that you wanted to answer. You can think of these as your **analysis questions**. Data analysis is about interpreting the data you have gathered, in order to turn it into useful information that answers your analysis questions.

Your analysis questions may be broad and general, eg: 'Which aspects of wellbeing are the community doing well in?' and 'Which aspects are the community wanting to improve in?' Or they may be more specific, such as comparing baseline data with evaluation data to see what has changed and why, or looking at how a specific element of your programme, eg savings groups, has made a difference to the lives of participants.

Example analysis questions

- **In Honduras,** Light Wheel users asked: What are the needs and priorities of women in the community? And how are these perspectives different from men's?
- **In Tanzania,** the Tearfund country team asked: What are the community's strengths and weaknesses in each aspect of wellbeing before we start our CCT work there with the church?
- **In Guatemala,** a Tearfund partner, planning the next phase of their work, asked: What change has happened in each aspect of wellbeing since our baseline? What has caused that change?

'There are so many things we can learn from data generated by the Light Wheel.'

Norman Molina, Global Programme Effectiveness Lead, Tearfund, Honduras

Rwanda. Photo: Lydia Powell/Tearfund

What questions do you want to answer?

Take a moment to think about the questions you want to answer with your Light Wheel data. These analysis questions will help focus your data analysis.

Overarching principles for data analysis

Before we look at how to analyse data from the Light Wheel tools, here are a few general points to consider.

Analysing different types of data

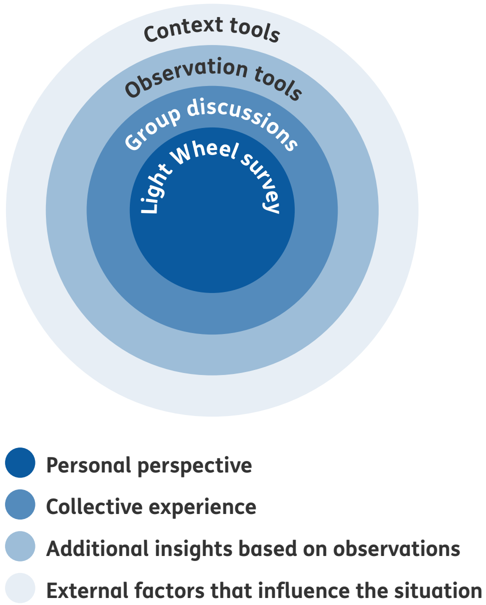
Depending on which Light Wheel tools you have used, you will have different types of data to analyse. As outlined on page 19, most of the Light Wheel tools produce **qualitative** data (eg people's perceptions, opinions, emotions and observations). Your notes from the group discussion are an example of this. Some of the tools also produce **quantitative** data (which is expressed as percentages or numbers), including the Light Wheel survey questions.

When analysing qualitative data, we look for common themes or repeating patterns which indicate significant findings in the data. When analysing quantitative data, we use statistics and percentages to understand how many people responded in a certain way. In this part, we will look at how to do both types of analysis.

Triangulating your data

The Light Wheel tools draw on different sources of information (see diagram, right). When we bring these different perspectives together during data analysis, it helps us to build a rich picture of the situation. When we see similar results emerging across the different tools, we can have more confidence in our findings. This process is called **triangulation**.

So when we conduct our data analysis we should be thinking about how one set of data compares to another. For example, do the group discussion findings tell the same story as the survey results? In **Section 4.6** we will talk more about how to bring different datasets together to triangulate the findings and look for common themes.



In which order should you analyse your data?

There is no right or wrong order in which to analyse your data from the different Light Wheel tools, but there are advantages to each approach:

- If you analyse the context tools data first, this can help you understand the setting before you use the other Light Wheel tools.
- If you analyse the Light Wheel survey data before conducting the group discussions, you can use the findings to help shape your group discussion questions.
- After analysing your Light Wheel survey and/or group discussion, you can then compare your findings with data from the observation tools to see if it's all telling a consistent story.
- It's a good idea to come back to your context tools data again, after you have analysed the other Light Wheel tools, to assess which other external factors have contributed to change.

Exploring the experiences of different groups

When you conduct your data analysis, it is important to think about how the results differ between different groups of people (eg comparing the data between men and women, or between people living in different locations). This will help you to understand more about how different people experience life differently, and whether or not changes taking place are impacting everyone in the same way. The data from the Light Wheel group discussions is already disaggregated because you are talking to different groups of people when you gather the data The survey data on the other hand will need to be filtered at the analysis stage so that you can see how the data differs between groups.

Who should be involved in data analysis?

Even if you do not consider yourself to be a data expert, everyone can play a role in interpreting data. Ideally, it's a good idea to conduct data analysis activities as a group of two or more people. This means you can share the workload, hear different perspectives, and have discussions about what the findings mean. You might want to involve project staff, your Light Wheel facilitators or enumerators, and even church and community members at different stages.

Measuring change over time

If you have collected baseline, midline and/or endline data using the Light Wheel tools, you will now be able to compare your current data with the findings from your previous Light Wheel activities, in order to analyse people's journeys of change over time. To do this, you should make sure you have your baseline findings available when you are analysing each Light Wheel tool. Once you have analysed your current data, you can then compare the 'before and after' situations to identify areas of change.

Thinking about the causes of change

As you start to see key findings emerging from your data, or if you see evidence that change has taken place from the baseline to the current situation, you will be asking: How has this change taken place? This is where you can bring in the findings from your context tools (see **Section 4.5**) to look at the key events and actors that have been influencing the situation. With this broader view of the context, you can better assess your own role in bringing about change.

Practical actions and next steps

Analysis work is not only about seeing what the data is telling you: it is also about using the findings to make evidence-informed decisions and recommendations that will make a positive difference. So as you conduct your data analysis, keep thinking: 'So what? What will I do differently as a result of this information?' In **Section 4.6** we'll look in more depth at how to turn your findings into actions and recommendations.

Documenting your findings and recommendations

Make sure you follow good data storage protocols as you conduct your data analysis, to ensure your raw data is only accessible to your data analysis team. Think too about how you will keep a record of your findings and results (eg a shared folder of notes and spreadsheets) as you analyse all of the data.

You can use the **Light Wheel report template** (Resource 3.1.10) to help you present the findings from your analysis work in a structured way. This will form the basis of the different presentations and products you'll create in **Part 5: Communicate** as you prepare to share your findings.

4.2 Analysing data from group discussions

Let's first take a look at how you can analyse the findings from your Light Wheel group discussions, including both your discussion notes and the maturity model scores.

Analysing the maturity model scores

The group discussions produce rich qualitative information, from the stories, experiences and feelings that participants share. If you finish your discussion by scoring the maturity model, you will also have some quantitative information about each aspect of wellbeing.

It is important to analyse the notes you have made during the group discussion, as well as looking at the maturity model scores. The qualitative information can help you understand the 'why?' behind their scores. It is interesting to consider whether the maturity model scores align with what people have said in the group discussion and, if they don't, why that might be.

If you have repeated the group discussions at regular intervals, this is an opportunity to compare the findings from different points in time to see if and how change has taken place.

Different ways to analyse the maturity model scores

Have in front of you any photos or drawings of the maturity model scores you have documented, eg in the **Discussion conclusions template** (Resource 3.2.5) or the **Discussion digital input sheet** (Resource 3.2.6).

→ **Review the scores that each group has given themselves,** taking one group (eg women, men, youth) at a time. Think about why they have scored themselves this way in each aspect of wellbeing, and what this tells you. You may also want to skim-read your group discussion notes and think about what scores you would have given each group yourself, based on what you have seen and heard.

Bangladesh.
Photo: Amit Rudro/Tearfund

The following questions might be helpful:

- *Which aspects does this group feel they are doing best in?*
- *Which aspects does this group have challenges with?*
- *What reasons or examples did the group give to justify their scores?*
- *Do you agree with their scores, based on what you have heard or seen during the group discussion? Are there any surprises?*

- **Compare the scores between different groups.** You could plot all the scores from different groups onto one Light Wheel diagram using different colours so you can clearly see any similarities or differences in the way groups have scored.

  If you see any noticeable differences in how the groups have scored, take time to think about why that might be. Or you might see some groups have scored similarly to each other. Again, take time to consider why this is.

- **Calculate the community's average score for each aspect of wellbeing.** To do this, add up all the scores the different groups (eg women, men, youth) have given for one aspect, and then divide the total by the number of groups (see calculation, below, and table on page 141). Repeat for each aspect of wellbeing. You might want to plot these average scores on a new Light Wheel diagram representing the community as a whole. This will provide a useful reference point if you want to compare each group's score with the community average.

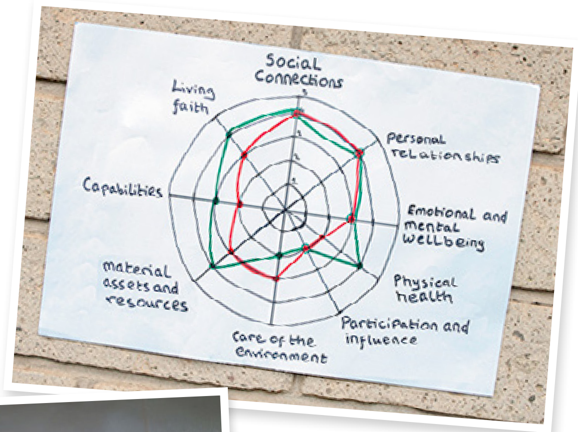
$3+4+3+2 = 12$ (adding scores from each group)
$12 \div 4 = 3$ (total score ÷ no. of groups)

- **Compare the scores between different locations.** For example, you may want to compare how groups of women in different communities scored themselves in each aspect of wellbeing. What successes or challenges did they share and which were different? Think about why this might be.

- **Compare these most recent scores with those from previous group discussions.** If you have been scoring the maturity model with the same groups of people over a period of time, it will be very interesting to compare their latest scores with previous (eg baseline) scores. You will be able to track people's journeys of change in each aspect of wellbeing over time, and see how people are perceiving their progress.

  Remember that any progress on the maturity model is to be celebrated, not only level 5 (see page 66). And sometimes external events can cause scores to go down, something that using the context tools can help you understand (see **Section 4.5**).

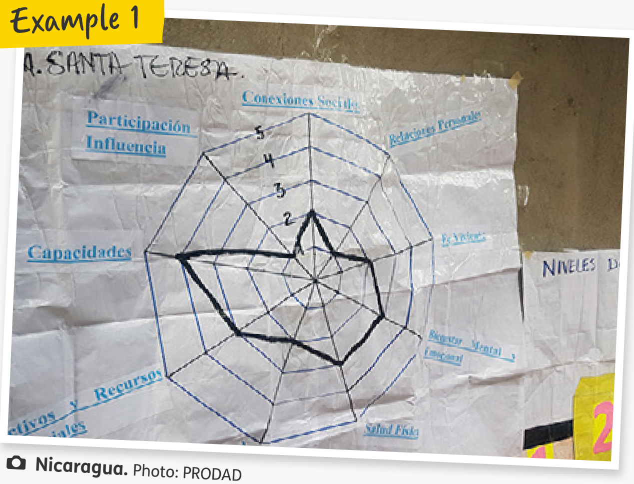
Take a moment to think about the significant findings that seem to be emerging from your analysis of the maturity model scores. Are there any questions that you'd like to find answers to in your group discussion notes?



Top: Photo: Joseph Limo/Tearfund
Bottom: Bangladesh.
Photo: Amit Rudro/Tearfund

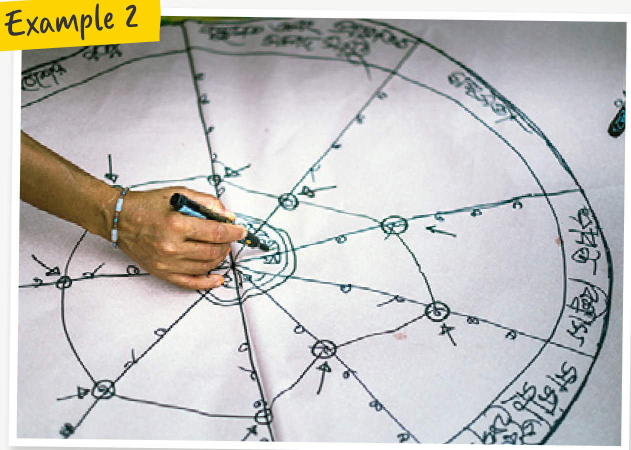
Different examples of the maturity model scores being analysed

Example 1



Nicaragua. Photo: PRODAD

Example 2

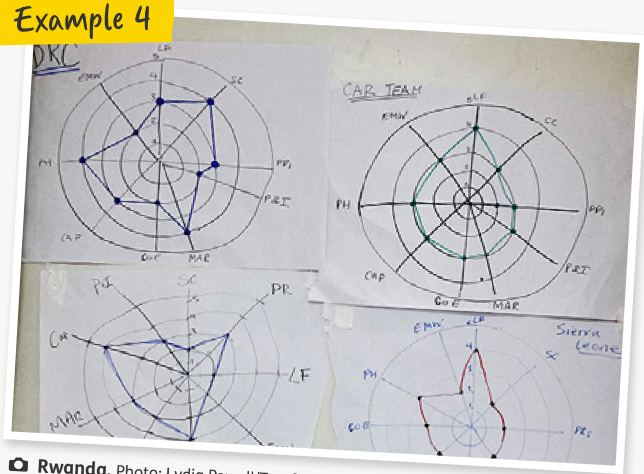


Bangladesh. Photo: Amit Rudro/Tearfund

Example 3

Bangladesh. Photo: Amit Rudro/Tearfund

Example 4



Rwanda. Photo: Lydia Powell/Tearfund

Calculating average scores from group discussion groups

Spokes	Women	Men	Youth	Average score *
SC	3	2	3	3
PR	2	3	2	2
P&I	1	3	1	2
LF	4	4	3	4
PH	1	1	1	1
E&MW	2	2	2	2
CAP	2	3	2	2
MAR	2	3	1	2
CoE	1	1	1	1

* Rounded up/down to create whole numbers

Questions to ask about the maturity model scores

1 *Which aspects of wellbeing scored highest and lowest for each group and why?*

2 *Do you agree with the maturity model scores and if not, what scores would you have given each group?*

3 *What similarities or differences do you notice between the scores of different groups and why?*

4 *What similarities or differences do you notice between the scores from different locations and why?*

5 *What changes (if any) are you seeing in people's scores over time?*

Analysing your group discussion notes

It's important to make time to properly review your group discussion notes, because this information will give you in-depth insight into the reasons behind people's maturity model scores. There may be some specific questions that have arisen from your analysis of the maturity model scores that you want to look for answers to in your group discussion notes.

Keep in mind too your broader analysis questions (see page 135), because you will want to look out for answers to these in your group discussion notes too.

One way to analyse qualitative information is by using a process called **coding**. This involves creating a system that helps you identify, label and log repeating themes and patterns in what people are saying. We do this by assigning labels to words or phrases that represent important (and recurring) ideas. We call these labels **codes**. Coding enables us to see recurring themes and common concerns and to identify relationships between them.

If you have to code large amounts of information, you might consider using specialist software (eg Dedoose, NVivo) but you usually have to pay for this.

A simple coding method

1. **Keep your notes in good order.** After each group discussion you should label your notes according to location and group type (eg Jubilee Church, women's group). If you have written your notes by hand, then you may want to type them up. If you have made an audio recording, you can listen back and add extra information to your notes.

2. **Create your codes.** The easiest way to approach coding is to decide on a list of codes in advance, so you know what you are looking for in your notes. We call this list of codes a **codebook**. We recommend basing your codes on the defining themes within the nine aspects of wellbeing (see page 43), as a starting point. You will find these themes in Themes and indicators (Resource 3.1.4). Before you start coding, it's a good idea to familiarise yourself properly with all the codes.

So within the **Physical health** aspect of wellbeing, your codes would be:

- safe water
- hygiene & sanitation
- health status
- access to healthcare
- balanced diet

Your first code on this theme could be written as 'Safe water - PH', where 'PH' represents **Physical health**.

For each defining theme, you will want to specify in your code if someone is talking about it in a positive or negative way. We can do this by adding a (positive) or (negative) in brackets next to the defining theme (see example on page 144). You may also need to create a few extra codes of your own for topics and concerns that recurred in your group discussions but are not among the defining themes.

3 Consider your analysis questions.
Coding is an iterative process and you may well conduct several rounds of coding as you look out for different things. For example, you might do one round of coding looking for information about the defining themes of each aspect of wellbeing, but it is also important to ensure that your coding exercise answers your key analysis questions.

So for each major analysis question you have identified, we recommend doing a separate round of coding in which you let the analysis question determine what kind of content you apply your codes to.

For example, if your question is to do with the needs and priorities of the community, then you will want to look for and code any negative mentions of a particular theme or anywhere the participants say they want to see an improvement. Or, if your question is to do with the impact of savings groups, you will want to look for and code anywhere the participants describe a change in their lives since joining a savings group. As well as specifying what code you are relating it to, you will want to make clear whether the change is positive or negative.

'The Light Wheel helps us have a more holistic, integrated approach to our work and the different ways we respond to people through our ministry.'

Pastor Mónica, Cochabamba, Bolivia

Nigeria. Photo: Nanmet Anthony/Tearfund

4 **Code your data.** Working through your group discussion notes, identify the key points that relate to the nine aspects, and to your analysis questions. As mentioned, you may conduct several rounds of coding, looking for different things each time.

Highlight the sections of text (what we call **segments**) and label them with the most relevant code (see example, right). It can be helpful to use different colours for each code. It is possible for a segment to link to more than one code at once. You can do this using pen and paper, or on a computer.

Bright idea

If you find one code appearing repeatedly, you can break it down into what we call 'parent' and 'child' codes. Parent codes are an umbrella that cover a number of child codes. Eg: a parent code might be 'Access to healthcare' and the child codes might be 'new health clinic' and 'health insurance'.

Coding group discussion notes

Example of coding based on the analysis question: *'What has been the impact of savings groups on women in this community?'*

Facilitator [to savings group members]: Do you feel you have access to the resources you need to fulfil your plans and goals?

Participant 5: Before joining the savings group, I didn't have any money to spend, I could not achieve much. But now, with my savings, I have started a small tailoring business. I am living in a better house and wearing nicer clothes. I now feel equal with my neighbours.

Income and savings (positive change) – MA&R

Sense of self-worth (positive change) – E&MW

Participant 8: Yes, I was a woman who was powerless. But I took a loan from my savings group, and now I have my business. When I am sick, I can now go to the health service. I take better care of my children and of myself.

Financial inclusion (positive change) – MA&R

Access to healthcare (positive change) – PH

Participant 1: We give each other a lot of support in the group. We are getting involved in community meetings and sharing ideas for how to improve things here. We feel hopeful that we can bring about change.

Have a voice (positive change) – P&I

5 **Prepare to analyse the coded data.** As you are doing your coding, we recommend putting all the segments of coded text into a spreadsheet for analysis. You could have a column in which you list all of the segments, a column in which you specify which group discussion each segment is from (location and group type), and then further columns to show which code(s) you applied.

6 **Analyse the coded data.** One way of analysing your coded data is to look at how often you have used each code (the frequency). You could calculate this in a separate sheet of your spreadsheet, and also break it down for the different group discussions (see example, right).

Bright idea

You can use this coding method for any qualitative data you gather, not just group discussion notes, to illuminate where holistic impact is taking place.

Coding sheet extract – example

Code*	Frequency (women)	Frequency (men)	Frequency (youth)	Frequency (total)
Income and savings (positive) - MA&R	12	6	5	23
Sense of self-worth (positive) - E&MW	8	2	5	15
Financial inclusion (positive) - MA&R	4	3	3	10
Access to healthcare (positive) - PH	2	0	3	5
Have a voice (positive) - P&I	10	7	3	20

The codes seem to show that the areas of greatest change are in relation to people's income and savings and their sense of having a voice. The women's group scored most highly in these areas. It would be interesting to now go back to the segments of coded text and read more about the conversation these codes appeared in. The segments of text will tell us more about how much people attributed the changes to their participation in the savings group.

*We don't have space to show it in the table, but you can also include the negative codes (eg Income and savings (negative)) in your frequency table. Even if they have scored zero it is still important to recognise that they have not been mentioned.

7 **Consider what the findings tell you about your analysis questions.** Now you have organised and analysed the codes, you can think about how they provide answers to your analysis questions and draw some conclusions. For example, if you are wanting to know more about the needs and priorities of the community, you will be looking for the priorities and hopes that were mentioned most frequently. Or, if you are interested in assessing the impact your project has had in people's lives, you will be looking for the positive changes that people mentioned the most.

Bright idea

You can also look for connections between codes. For example, you might find that people often seem to mention the code 'Income and savings (positive)' with the code 'Access to healthcare (positive)', suggesting a positive relationship between the two. This will help you to see relationships between different aspects of wellbeing.

8 **Consider if there are any other insights you can draw from your findings.** Once you have answered your analysis questions, there may be other insights that stand out to you from your coding.

Here are some helpful reflection questions:

- *Which aspects of wellbeing are people doing well in and why?*
- *Which aspects of wellbeing are people struggling in and why?*
- *Was there anything unexpected or surprising about the results?*
- *Did participants mention any actions that need to be taken or hopes about how things might improve in the future?*
- *How are people doing now compared with how they were doing at your baseline?*

9 **Compare with baseline or midline data.** If you have held group discussions with the same groups over a period of time (eg annually), it will also be interesting to compare your codes with previous coding activity (eg at your baseline).

10 **Triangulate your findings.** One way to do this is to compare your findings from your discussion notes with the maturity model scores to see if they seem to align. Based on your coding exercise, do you agree with the scores that the groups have given themselves in each aspect of wellbeing?

If you have used more than one Light Wheel tool, you'll have other datasets to compare too. Section 4.6 will help you compare data from different Light Wheel tools and previous Light Wheel activities so you can be confident in your conclusions and recommendations.

11 **Summarise your findings** in the Light Wheel report template (Resource 3.1.10). This information will be key when you come to deciding your recommendations and next steps in Section 4.6.

4.3 Analysing data from the Light Wheel survey

Let's look at some simple ways that you can start to analyse your Light Wheel survey data using the digital application, KoBoToolbox.

The Light Wheel survey generates a large amount of quantitative data. It's important to plan how you will analyse your findings, to draw accurate conclusions and use the information in meaningful ways.

The survey questions are based on Light Wheel **indicators**, which measure how things are going in each aspect of wellbeing (see page 70). You can see these in **Themes and indicators** (Resource 3.1.4). An example might be 'the percentage of people who can access safe water within 30 minutes of their home'. Our goal in analysing the survey data is to generate an answer for each Light Wheel indicator.

This section will explain how to do this in a simple way using KoBoToolbox, which has some automated functions to help you quickly check your data and create graphs and charts. But if you are already confident with data analysis, and want to do more with your data than KoBo allows, you can download the data and conduct your analysis in your preferred platform (eg Excel or Google Sheets).

Preparing to analyse your survey data

- **If you conducted your survey in KoBoToolbox** (as explained in **Section 2.3**), then open up your account again to get ready to look at the data you have collected. We recommend doing this on your computer or laptop, rather than on your mobile device or tablet, as this will make it easier for you to view the data.
- **Or if you have conducted your survey on paper, you can input your data into KoBo** in order to analyse it digitally. See **Instructions for the Light Wheel survey in KoBoToolbox** (Resource 3.3.4) for guidance on how to do this.
- **Review and clean your data.** Check each survey entry to make sure no errors have been introduced during data collection. You will find instructions on how to do this on the next page.

Rwanda. Photo: Lydia Powell/Tearfund

The guidance in this section is also described in module 6 'Report your results' in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

Cleaning your data

Our first step in data analysis is data cleaning: reviewing each entry to make sure we haven't introduced any errors during data collection.

When enumerators are doing the survey, they might accidentally miss a question or put in the wrong information. This can happen to even the most experienced enumerator. Data cleaning just means reviewing each survey that has been entered, and fixing any errors before you start your analysis work. It takes a bit of time and patience, but it is a very important step.

When does data cleaning happen?

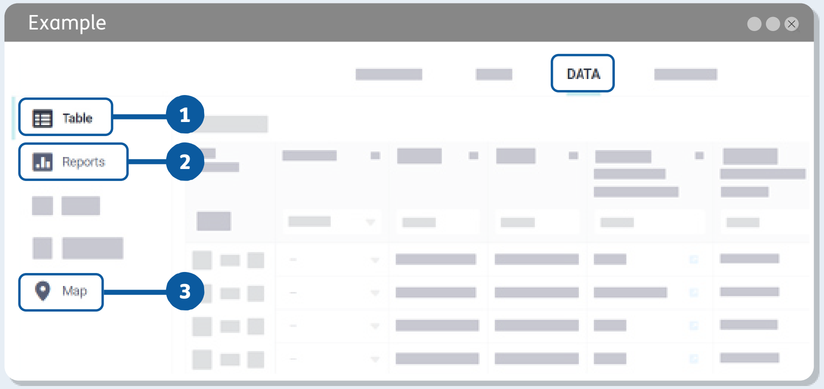
Ideally the data will be reviewed and corrected at the end of each day of data collection – or as soon as possible. This is so that errors can be found and amended quickly, while the enumerators are still available. It will also feel more manageable to review the data bit by bit. However, you should do another thorough review of the data once you have finished data collection too.

Who will clean the data?

Whoever is conducting the data analysis is responsible for making sure the data has been cleaned first. Sometimes the survey team is made up of several people (see page 85) who can help with data cleaning. At other times enumerators might correct their own data (eg if they are aware they have made a mistake). Make sure your enumerators know who to contact in the survey team in order to correct any mistakes. If they don't know what the correct answer was, they can either call the participant to clarify or ask for that incorrect data to be removed from the analysis.

How to clean data in KoBoToolbox

The first thing you need to do is view all your data in KoBoToolbox, and there are three viewing options to choose from. Go to the 'Data' tab at the top of the page, and select one of the options on the left-hand side: 'Table', 'Reports' or 'Map' (see example, right).



1. **Table:** the data is shown in a spreadsheet-style format (recommended)
2. **Reports:** the data is automatically turned into charts and graphs
3. **Map:** GPS is used to show where data has been collected

How to use the screenshots

Throughout this section, you will see screenshots from KoBoToolbox to help you understand the instructions. The numbers in blue circles are explained where you see the same numbers repeated elsewhere on the page.

We recommend 'Table' view.

This will show you all the data entered for each survey so that you can check for any errors.

Click the **eyeball** icon beside each row to see all the data entered for that survey. The survey will appear in a window called 'Submission Record' and here you can scroll through all the responses (see example, right).

Review each survey entry and look for any changes you need to make, such as:

- questions that have been missed
- spelling mistakes
- answers that seem confusing or that don't align with the question or answers given to previous questions
- whether you need to translate open-text responses to questions that generate qualitative answers, eg 'Please give an example' or 'Please explain your answer'

Now, edit the responses to correct any errors.

1 At the top of the 'Submission Record' select the blue button that says 'Edit' (see example, right). The survey will appear in a new window as an editable form. Change only responses that are incorrect.

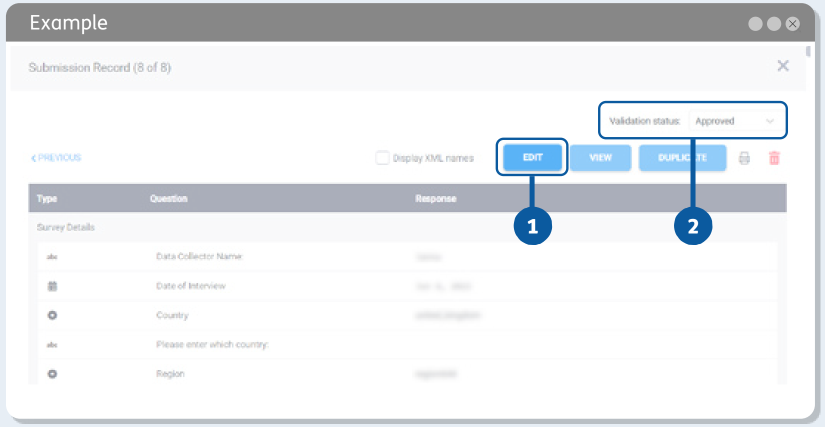
If you have any surveys that you want to delete (eg surveys that have not been fully completed), press the **trash** icon.

To be thorough, you can check your data in different views (eg 'Reports' or 'Map') to see if you find any other errors. For example, if there is a GPS entry in the UK, when you conducted the survey in Tanzania, this would need to be corrected or deleted.

Approve the 'Submission Record'.

When you have edited a survey, you can click 'Submit' at the bottom of the survey. Then you will be redirected back to the 'Submission Record'. Select 'Refresh submission' at the top of the page, and it will load the new data with your changes.

2 Set 'Validation status' to 'Approved' to indicate when each survey submission has been reviewed (see example, right). Or you can leave it as 'Not approved' or 'On hold' to indicate that you still have more work to do.



If you already have strong data analysis skills, you can do more advanced data cleaning outside KoBo by downloading the data and using an external platform of your choice (eg Excel).

For more guidance on data cleaning, watch lessons 1 and 2, in module 6 'Report your results', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

Creating data visualisations in KoBoToolbox

The simplest way to analyse your survey data is by using the automated functions in KoBoToolbox, which can generate graphs and other data visualisations for you.

Creating custom reports

A custom report tells KoBoToolbox how you want it to organise and present the survey data. We recommend creating a custom report for each of the nine aspects of wellbeing. **Here's how:**

1. Go to the 'Data' tab, and select 'Reports' from the options menu on the left (see Example A, right).

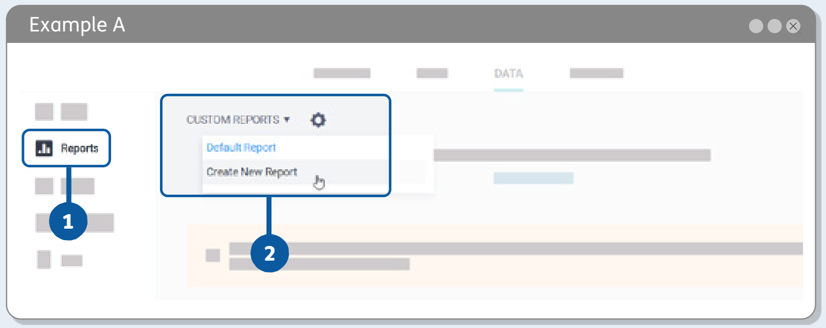
2. On the left, you will see a drop-down menu that says 'Custom Reports'. Select 'Create New Report' (see Example B, right).

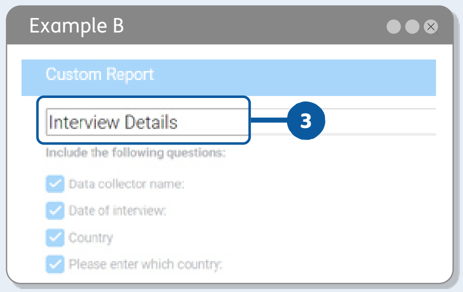
3. The first custom report to create is 'Interview Details' (see Example B, right). Give the report this name in the 'Untitled Report' box, and then select all the introductory questions that you want to be shown in this report (eg date, location and consent questions). Then select 'Save' at the bottom of the window and you will see graphs created for those questions.

Then follow these same steps to create all your other custom reports, eg:

- a 'Demographics' report, which will include questions related to things such as the sex, age, health and religion of the participant
- a 'Programme involvement' report, which will cover questions about the participant's involvement in the project being evaluated, and any impacts they have seen
- separate reports for each of the nine aspects of wellbeing, by selecting all the questions related to that aspect and then pressing 'Save'

Once you have created all your custom reports, you can use the drop-down menu called 'Custom Reports' to filter and look at all the answers for the different parts of the survey.

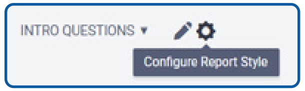




Watch lesson 3, in module 6 'Report your results', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

Editing your custom reports

Once you have set up your custom reports you can customise them further, by editing the colour and layout of each graph.



Next to the 'Custom Reports' drop-down menu, you will see an icon that looks like a **wheel**. If you hover your cursor over it, you will see it says 'Configure Report Style': select this.

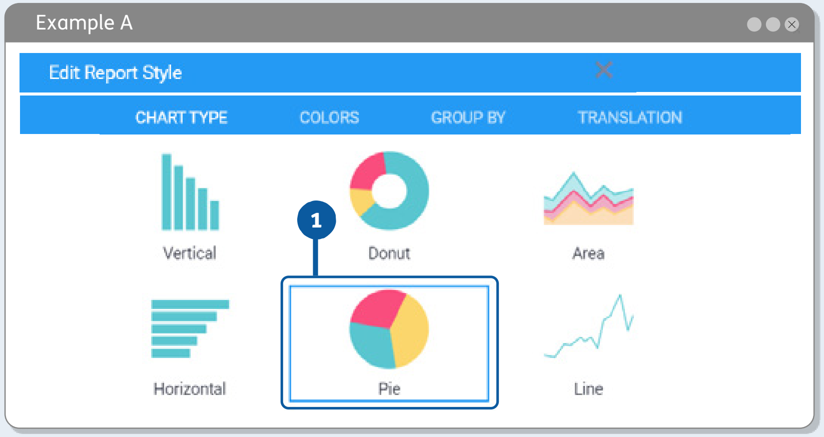
1 You will be taken to a window called 'Edit Report Style' (see Example A, right) where you will be able to choose the colour of your graph and its style (eg bar chart, pie chart, line graph).

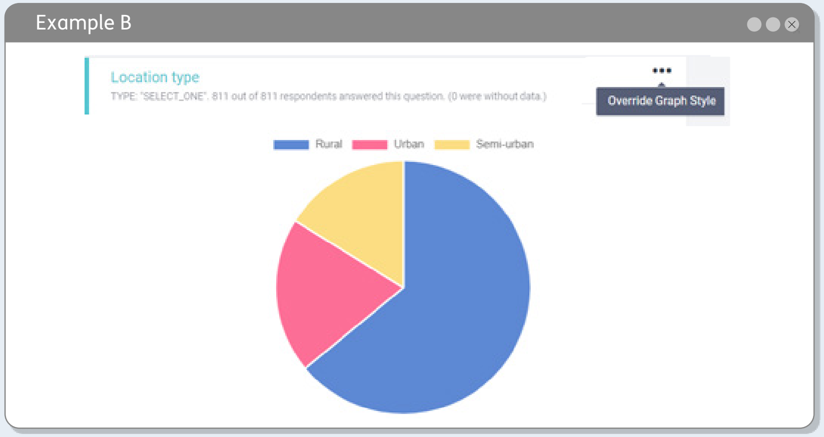
Certain types of data look better in certain types of graphs:

- Any question that has just a few answer options (such as sex, yes/no questions etc) works well with pie or donut charts (see Example B, right).
- Questions involving dates, locations, demographics and multiple-choice questions work best as bar charts.

If you want to edit any of the questions included in your custom reports, just select the **pencil** icon at the top left of the page. There you can also delete your report and start again if you need to.

Each custom report can be exported as a PDF. Just select the **printer** icon in the right-hand corner of the screen and choose 'Save as PDF' when you are asked to select a printing device. Alternatively, you can take a screenshot of any particular graph or chart to include in your report or presentation.





Filtering your results

Once you've organised your results into different custom reports, it's time to take a closer look to see what the results are telling you. Firstly, you can filter (or disaggregate) the results so you can see how different groups of people responded to each question. For example, you might want to examine and compare the answers of different groups of people, such as men and women, different locations, age groups, or people living with disabilities.

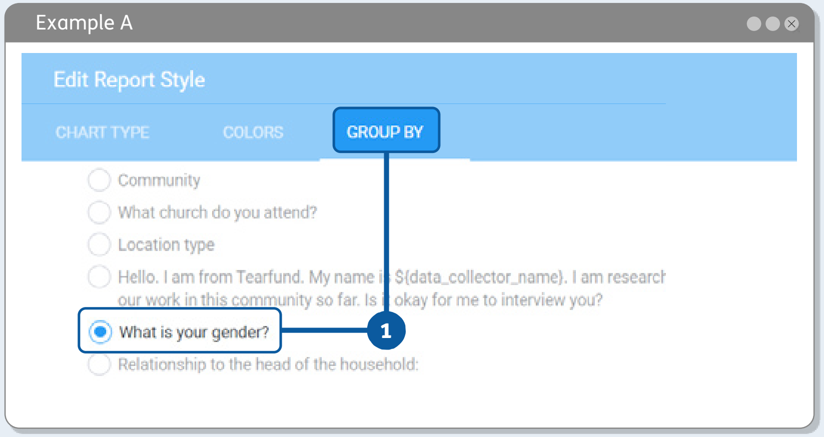
To disaggregate your data according to sex, for example, open one of your custom reports, and select 'Configure Report Style' (using the **wheel** icon).

1 The 'Edit Report Style' tab will open and you should select the tab called 'Group By'. Then select the factor by which you want to filter the answers (see Example A, right). Note that the factor will be listed as a question (eg select 'What is your sex?' if you want to filter the answers by sex). Then select 'Save'.

When you go back to your custom report, you will now be able to see how women answered the question, in comparison to men (see Example B, showing a survey answer grouped according to sex, right).

You can repeat these steps for each custom report and experiment with grouping the data by different factors.

Take time to think about what the disaggregated results are showing you. What are the similarities and differences between the results for different groups of people?



Watch lesson 4, in module 6 'Report your results', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, available at: **learn.tearfund.org/LW-KoBo**

Interpreting your results

As you present and disaggregate your survey data, you'll want to see what it says about the nine aspects of wellbeing.

The Light Wheel indicators

As we have said, each survey question provides an answer to a Light Wheel indicator and each aspect of wellbeing has between four and six indicators. You can see a list of all the survey questions and related indicators in **Themes and indicators** (Resource 3.1.4).

An effective way to analyse your data is to look through your custom reports to find the data that answers each indicator. You could create a spreadsheet (see example, right) to summarise the findings in relation to each indicator.

For example, if you're looking at the indicator, 'the percentage of people who have a safe source of drinking water', you would find the related survey question within your **Physical health** report (ie 'What are your household's most commonly used sources of drinking water during this season?') and make a note of how many people responded with an example of a safe water source. You could then look at the differences between the answers of different people by splitting up the data by factors such as sex, age, disability etc.

Answers to the Light Wheel indicators

Light Wheel aspect/theme	Indicator	Survey question	Survey results (disaggregated by sex)	
			Women	Men
Physical health Access to safe water	The percentage of people who have a safe source of drinking water	What are your household's most commonly used sources of drinking water during this season?	**Safe source 65%**	**Safe source 52%**
Physical health Hygiene and sanitation	The percentage of people who regularly use soap to wash their hands	Do you have a designated area in your house for washing your hands?	**Yes 55%**	**Yes 45%**
Physical health Health status	The percentage of people who have suffered from an illness in the last month	Have you suffered from an illness in the last month?	**Yes 76%**	**Yes 65%**

Reflect on your findings

As you look at the survey data and the Light Wheel indicators, take time to reflect about what the results are showing you. Think back to your analysis questions (see page 135) and consider how well your findings answer them. The questions (right) will help you draw some conclusions.

The type of analysis we have done here is called **basic descriptive statistics**, which involves describing trends and themes in the data. What this type of analysis can’t tell you for sure is whether different factors are directly influencing each other in a statistically significant way. (We call this correlation.) To make these sorts of claims, you’ll need to do more advanced analysis (see page 156).

Open-ended questions

Some of the survey questions generate qualitative data, such as ‘Please give an example’. Don’t forget to analyse these questions too, by grouping people’s responses to see common answers. You could even do a similar coding process on this information, as we did in the group discussion section. The answers to these open-ended questions will help you understand more of the detail behind the quantitative data, and help you to make decisions about further action.

Questions to ask about your survey findings

Compare with baseline or midline data

If you have used the Light Wheel survey with the same participants at an earlier point in time, it will be very interesting to compare the current results you have analysed with the data from the baseline or midline point. This will help you track people's journeys of change in each aspect of wellbeing over time, and see which indicators are experiencing the most change.

Remember though: external factors and events in the wider context can sometimes cause survey results to get worse over time, and this is still really useful information. We can understand more about the factors causing change when we bring the context tools (see **Section 4.5**) into our data analysis work.

> **'The Light Wheel survey is all about local ownership of data collection. For many users, this is the very first time they have done data collection like this, and they are rightly very proud of the data they have gathered.'**
>
> **Janna Rous,** CEO, Humanitarian Data Solutions, UK

Triangulate your findings

It's important to take time to compare your survey results with other data that you have collected using other Light Wheel tools. Your survey data will tell you part of the story, but data from the other Light Wheel tools will help you build an even richer picture about what change is happening and why. We'll show you how to bring all your different datasets together in **Section 4.6**.

Here are some questions to help you compare your survey data:

- *Do your findings from the other tools tell you the same thing as your survey data? Are there any contradictions or surprises?*
- *Are you seeing the same aspects of wellbeing emerging as areas of strength and challenge in the data from different Light Wheel tools?*
- *Do the survey results seem to align with the maturity model scores that participants gave in each area of wellbeing? If not, what maturity model scores would you give, based on the survey data?*

Rwanda. Photo: Lydia Powell/Tearfund

Summarise your findings

The **Light Wheel report template** (Resource 3.1.10) has a ready-made structure for you to document and organise your findings in a report format. It has space for you to explain your survey methodology (eg sampling method and confidence levels), to present the data for each of the Light Wheel indicators and then to discuss what you think the data is telling you in relation to each aspect of wellbeing. You can also add screenshots of your custom reports and graphs from KoBoToolbox.

More advanced analysis

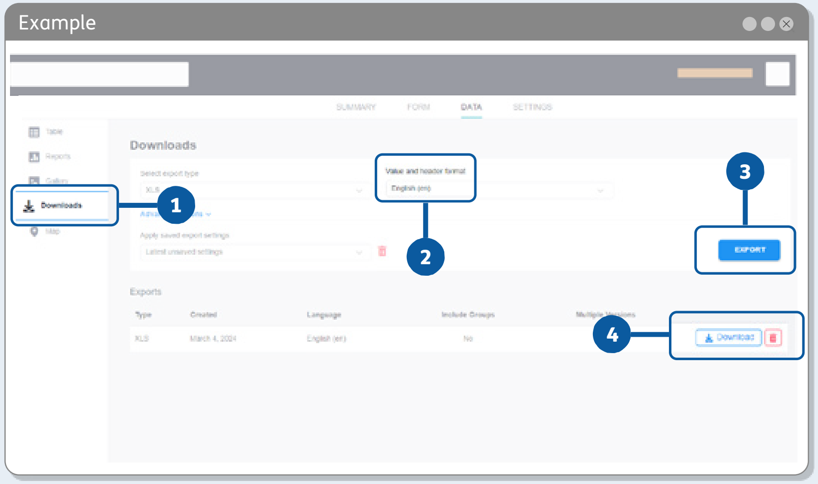
We have looked at how to analyse your data in KoBoToolbox, but what if you want to do more complex analysis with your data?

As we have seen, KoBoToolbox has some great features and it can be really handy to use for quick visualisations and checking how things are going during data collection. However, it is limited in the types of analysis it can do, so you may want to download the data into an external platform, such as Excel, and conduct more advanced data cleaning and analysis there. We only recommend this if you have the necessary skills (or can find someone else who can help you!)

For example, if you want to be able to say that one factor is having a direct influence over another factor (correlation), you can use a method called **inferential statistics** to look for statistically significant relationships between different factors (eg gender and physical health outcomes may be linked in a statistically significant way).

Here's how to download your data to do more advanced analysis (see example, right).

1. In the 'Data' tab, choose 'Downloads' in the left-hand menu. You can then choose the format you want to export your data in.
2. Select the language that you want to download the data in.
3. Then select the 'Export' button.
4. You will see the survey in the 'Exports' list, and you can then click the blue and white 'Download' button. It will then open up in Excel for editing.



Keep in touch

If you come across any challenges during your analysis work, please contact **lightwheel.support@tearfund.org** We would also love to hear about the results of your Light Wheel survey!

Watch lesson 6, in module 6 'Report your results', in our **Getting started with the Light Wheel in KoBoToolbox e-learning course**, for more in-depth information about how to navigate the data in Excel. Available at: **learn.tearfund.org/LW-KoBo**

4.4 Analysing data from the observation tools

Now, let's look at how to analyse our findings from the observation tools and use this information to get a clearer picture of life in the community.

The observation tools are about consciously reflecting on what we have seen and experienced in a community, in order to gather additional information around the nine aspects of wellbeing:

- In the **reflection exercise**, we took time to consider and document what we observed during our time in the community.
- During the **transect walk**, we conducted an organised walk around the local area to observe more aspects of community life.
- In the **community map**, we recorded significant features of the community by drawing a map of the area.

These tools can be used on their own, but they are particularly useful when used alongside the Light Wheel group discussions and/or the survey, to help us compare or **triangulate** our findings.

We would hope all our data paints a consistent picture, giving us confidence in our findings. But if different datasets seem to show different trends, then you might have to gather more information before you finalise your conclusions and recommendations.

Consider your observations carefully

When we are observing a group or community that we are not a part of, we may see things differently, because we have our own cultural perspectives that shape our outlook. So we must be careful not to draw direct conclusions from our observations when we come to analyse our findings. Instead, it's better to share, discuss and analyse your observations sensitively with other people and ask them if they see things in the same way or not, and why.

'The observation tools open our eyes to be more aware of the richness of life around us.'

Charlotte Flowers, CCT Coordinator, Tearfund, UK

Guatemala. Photo: Eduardo Say/Tearfund

Chad. Photo: Paul Djerabe/Tearfund

How to analyse your observations

We will now look at how to bring the data from your observation tools into your data analysis process. **You can follow the same general steps for analysing your observations from the reflection exercise, the transect walk or the community mapping exercise.**

As you start this process, keep in mind your overall analysis questions (see page 135) so that you can consider how the findings emerging from your observation tools might answer them.

To prepare, make sure you have your notes and drawings from whichever observation tools you have used:

- If you have used the reflection exercise and/or the transect walk, you may have completed the Observation checklist and summary (Resource 3.4.1).
- If you have drawn a community map, you may have filled in the Community map checklist and summary (Resource 3.4.2) as well as having the maps (or photos of the maps).

Step by step

1. **Review your observation notes** and remind yourself of the things that stood out to you. For example:

- *In what ways do your observations help build your understanding of the situation in the nine aspects of wellbeing?*
- *In which aspects of wellbeing did the community seem to be strongest/weakest?*
- *What differences did you see between the experiences of different types of people (eg men, women, young, old etc)?*
- *Compare your observations with those from previous visits. Did you notice any changes over time, positive or negative?*

2. **Compare your observations with your other data** (eg group discussions or survey results) to see if they support each other. For example, did you see evidence on your transect walk to back up what participants said during the group discussions? Here are some prompts to help you:

- *In what ways do your observations support findings from the other tools you've used?*
- *Do the same aspects of wellbeing seem to be emerging as areas of strength or weakness?*
- *Are there any areas in which your observations differ from the findings from the other tools you have used? Why do you think this might be?*
- *Do your observations support or challenge the maturity model scores?*

3 **Discuss in more depth any differences** between your observations and the data from other Light Wheel tools, and why those differences exist.

Here are some questions you might want to think about:

- *Why might the findings from different Light Wheel tools appear contradictory?*
- *Why might the community perceive the situation differently from you? (Remember to consider how your own background might influence how you perceive things.)*
- *Were there any topics the community seemed uncomfortable sharing about?*
- *What more information might you need to find out and how?*

'Triangulation is bringing together what people say, with what you see, to see what the story is telling you.'

AMI San Lucas, Guatemala

4 **Test your reflections with others** to see if they see things in the same way. For example, did other colleagues observe the same things as you? Or perhaps there is something you observed that you are not sure how to interpret and you need to collect more data about.

5 **Summarise your findings** in the **Light Wheel report template** (Resource 3.1.10). This information will be key when you come to deciding your recommendations and next steps in **Section 4.6.**

Transect walk analysis – example

Spoke	Notes
Care of the environment	During the transect walk we saw that the community had started a tree-planting initiative to help reduce soil erosion. This aligns with the survey finding that 75% of participants are taking actions to help look after the natural environment.
Participation and influence	We saw young people standing around in their own groups and not mixing much with adults. In the group discussions, young people said they do not feel confident to advocate for their needs and share their opinions with people in positions of power. These two findings suggest that young people are not encouraged to participate in this community.
Capabilities	We observed several school-age children who were not in school at all. Yet in the group discussion, participants said most children attend school. We want to find out why this was, and why the community did not talk openly about this

4.5 Analysing data from the context tools

A key part of data analysis is thinking about *why* things are the way they are and *why* change is happening. Let's have a look at how the context tools can help us answer these questions.

The context tools provide important information about the external factors that influence change. You may find it helpful to look back at the Light Wheel diagram on page 102 to remind yourself of the different factors at play. The context tools are:

- **history map:** reflecting on how past events have shaped the situation today
- **force field analysis:** identifying positive and negative forces that impact different aspects of wellbeing
- **stakeholder analysis:** listing different people who have interest in and influence over the situation
- **secondary data:** learning about the situation from existing data

You can analyse the data from the context tools at the start of your Light Wheel activities, to get a sense of the bigger picture and inform further questions you may want to ask. But it's also a good idea to look at the context data after the other Light Wheel tools, to put your findings into context, design contextually appropriate projects, and to think about the contribution you have made.

Contribution versus attribution

As we analyse the context tools, and think about the causes of change, it's important to talk about our 'contribution' to change, and not attribute all of the success we see to our own work. Usually, there is a variety of factors causing change, and we can use the context tools to assess the significance of the role we have played. In your final report, it's important also to acknowledge the other factors and actors that may also have contributed to change.

> **'Using the force field analysis helped us to assess the contribution we made to bringing about positive change.'**
>
> **Light Wheel facilitator,** Tanzania

Questions to answer:

- *What factors and actors are causing the situation to be this way?*
- *What factors and actors are causing change to take place?*
- *What do your findings tell you about differences in the experiences of different groups?*
- *How do your findings answer your analysis questions (see page 135)?*
- *What has been your contribution to change?*
- *What contribution could you make towards change in the future?*
- *How can you work with other stakeholders to bring about change?*

How to analyse the history map

The history map exercise helps to reveal the ways in which events in the past are still having an impact on the present day. When we come to analyse these findings, we are looking to understand more about how past events have an impact on people's wellbeing today (either positively or negatively).

To begin your analysis, make sure you have your notes, drawings or photos of the history map in front of you. You may have added your notes to the **History map checklist and summary** (Resource 3.5.1).

> **'When we study the past, we have the chance to think about what memories, traditions and lessons we want to take with us into the future.'**
>
> **Lydia Powell,** Impact Lead, Tearfund, UK

Step by step

1. **Consider how historical events are connected to each of the nine aspects of wellbeing.** Look at the history map that participants have created and consider which aspects of wellbeing each event may have impacted (either positively or negatively). For example, if there has been conflict during the community's past, this might explain why people express a lack of hope for the future (**Emotional and mental wellbeing**) or why they are working hard to rebuild relations between different groups of people (**Social connections**).

2. **Assess if this contextual information explains findings from other Light Wheel tools.** For example, if there are certain aspects of wellbeing that are emerging particularly positively in group discussions, are there any historical events that might help to explain this result? Or if there are any aspects of wellbeing that seem to be scoring particularly low, are there any events in the community's past that might help explain why they are struggling in this area?

Bangladesh. Photo: Amit Rudro/Tearfund

3. **Look for any surprising or unexpected results,** because sometimes historical events can have a more or less significant impact on a situation than we might expect. Consider whether any of your other Light Wheel data surprises you in light of the events plotted on the timeline. Would you expect to see different outcomes in any aspects of wellbeing given what the community has been through?

4 **Consider what the map tells you about how change might occur in the future.** Are there any trends that seem to be repeating themselves? What might need to be different in the future in order for positive change to take place in the different aspects of wellbeing? What hopes and dreams do you have for how the map might look in the future? How might your answers to these questions shape your future response?

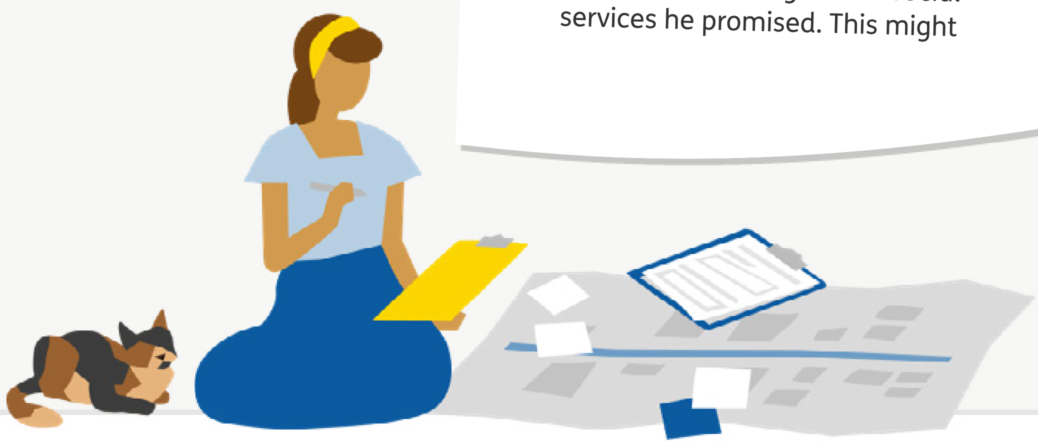
5 **Summarise your findings** in the **Light Wheel report template** (Resource 3.1.10). It can be helpful to start your report with the contextual information, to set the scene for findings from other tools. This information will be key when you come to deciding your recommendations and next steps in **Section 4.6**.

History map analysis – example

→ The history map shows that five years ago severe drought led to food insecurity, violence and theft between communities. In the group discussion, people said they don't tend to share their resources with others. This may be because they've experienced scarcity in the past. Could a future response focus on responding to the lack of trust and sharing between community members?

→ The history map shows that a new president was elected ten years ago and since then, people don't feel he has been delivering on the social services he promised. This might explain why participants in the group discussion said they don't advocate to the local government about their needs. It might be useful to do some more advocacy training as part of our response.

→ The history map shows that three years ago an NGO built a community health centre. It's remained open and served the community ever since. This could explain why **Physical health** has come out as an area of strength in findings from the other Light Wheel tools.



How to use your force field analysis

The force field analysis helps us to identify and visualise the different contextual factors that are influencing the nine aspects of wellbeing in a positive or negative way. It helps us to understand which factors are causing change, and helps us think about what contribution we can make (or have already made) to improve the situation.

To begin your analysis, look back at your force field analysis diagrams and the notes from your **Force field analysis summary** (Resource 3.5.2). You may have completed a separate force field diagram for each aspect of wellbeing, or thought about the community's wellbeing in general. Either way, you should analyse the findings by taking each aspect of wellbeing in turn.

> **'This is a really good way to listen to how people see things. Certain people express themselves better visually.'**
>
> **Norman Molina,** Global Programme Effectiveness Lead, Tearfund, Honduras

Step by step

1. **Look at the positive forces** and consider what they tell you about the situation in this aspect of wellbeing. Which forces have the biggest arrows, and are therefore having the most significant positive impact on the situation? How might these factors help explain your findings from the other Light Wheel tools?

2. **Look at the negative forces** and think about how these factors add to your understanding of what is happening in this aspect of wellbeing. Which forces have the biggest arrows, and are therefore having the most significant negative impact? Could these negative forces explain some of your findings from the other tools?

3. **Consider what contribution you could make** to bring about positive change. How could you work with or maximise the positive forces that are at play? How could you minimise or mitigate the negative factors? Think about how this might influence how you design your response.

4. **Or, think about the role you have already played** in bringing about change. If you are conducting an evaluation to see what has changed, has your work been mentioned as a positive force in the diagram? How significant do you think your role has been?

5. **Consider how the positive and negative forces have changed over time** if, for example, you are comparing a midline with a baseline. Does this have any implications for how you might design your response?

6. **Summarise your findings** in the **Light Wheel report template** (Resource 3.1.10), considering how different positive and negative forces help you understand the situation and what your contribution has been or could be in bringing change. This information will be key when you come to deciding your recommendations and next steps in **Section 4.6**.

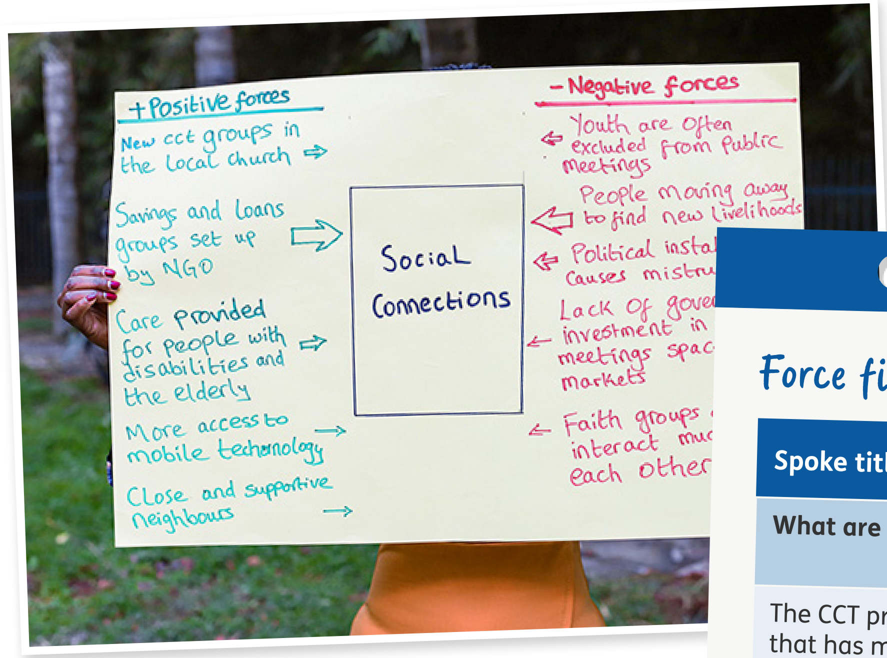


Photo: Joseph Limo/Tearfund

Force field analysis summary – example

Spoke title: Social connections	
What are the positive influences?	**How can we harness these positive factors?**
The CCT process is listed as a positive force that has made people feel more connected to each other. This aligns with what people said in the group discussion about having people to turn to in times of difficulty.	We can encourage more people from the community to join in with the CCT process, and encourage the church to conduct activities that reach out to people from different faith groups.
What are the negative influences?	**How can we mitigate these negative factors?**
Young people are moving away to find new livelihoods, which means they feel less invested in building strong relationships in their home community.	We could provide livelihoods training opportunities or access to apprenticeships for young people, so that they can play a part in building a better future for the community.

How to use your stakeholder analysis

The stakeholder analysis focuses specifically on mapping how different people and groups are encouraging, or hindering, change in the nine aspects of wellbeing. It helps us to understand who we might need to influence or work with as we design our response. It also helps us to assess the extent of our contribution, alongside the other actors who have been involved in bringing about change.

After using the stakeholder analysis tool, you may have summarised your thinking in the **Stakeholder analysis summary** (Resource 3.5.3). Here are some reflection questions that you can use to think about how you will engage with the stakeholders you have identified.

> **'By becoming aware of the other actors working in the region, you can consider opportunities to collaborate towards shared goals.'**
>
> **Habtamu Hailegiorgis,** DME Advisor, Tearfund, East and Central Africa

Step by step

Taking each aspect of wellbeing in turn, ask yourself the following questions:

1. **Who are the most influential stakeholders you identified in relation to this aspect of wellbeing?** These are the stakeholders with the most interest in your work and the greatest influence.
   - *Which stakeholders are having a positive influence over the situation? Why do you think this is? What is their agenda?*
   - *Which stakeholders are having a negative impact on the situation? Why do you think this is? What is their agenda?*
   - *Does this help explain any of the findings from the other Light Wheel tools? For example, is there a particular person or group whose influence may be at least partially responsible for the low score in* ***Care of the environment*** *you identified through the group discussion?*

2. **What relationship do you want to have with these stakeholders?** Think about how you might include them as part of the design of your response.
   - *How would you want to engage with them and what would you want them to do?*
   - *Do you want to build on their positive influence or try to reduce their negative impact? How could you do this?*
   - *What relationship do you already have with these stakeholders? If you don't have one, how could you create one?*

Sierra Leone. Photo: Lahai Amara/Tearfund

3. **What is your level of influence compared with these other stakeholders?** Looking at all of the other actors in the bigger picture, consider how much influence you think you have to bring about change.

- *How significant do you think your role could be to help improve the situation?*
- *What could you offer to the situation that other stakeholders are not already offering?*
- *Or, how significant do you think your contribution has already been? Would you do anything differently in the way you respond in future?*

4. **Has the context changed over time?** If you have repeated your stakeholder analysis multiple times (eg baseline and endline), you may want to think about how the influence or interest of different actors has changed over time and what the impact of this has been.

5. **Summarise your findings** about stakeholders in the **Light Wheel report template** (Resource 3.1.10). It can be helpful to start your report with the contextual information to set the scene for findings from other tools. This information will be key when you come to deciding your recommendations and next steps in **Section 4.6**, whether you're designing a project or conducting an evaluation.

Bright idea

Part 5: Communicate will give you ideas about how to reach out to the different stakeholders you have identified and what they might be interested in knowing about your Light Wheel findings.

How to use your secondary data

When we analyse secondary data, we are examining data that already exists, to build up our understanding of the context. Secondary data gives us insights that we might not be able to collect ourselves, and can help us see how the community's situation compares with the regional, national or international picture. This can help us to build up a better understanding of the community's situation in relation to each of the nine aspects of wellbeing.

You may have compiled your secondary research in the **Secondary data checklist and summary** (Resource 3.5.4). It can be beneficial to analyse secondary data before you use the other Light Wheel tools, as it can give you prior insight into the context and help you decide what other questions you might want to ask the community. Alternatively, you might decide that after using the other Light Wheel tools there are additional questions to explore, or gaps to fill, using secondary information.

Step by step

1. **What does the secondary data tell you about the nine aspects of wellbeing?** Think about the connections between the secondary data you have collected and the nine aspects. How might this secondary information link positively or negatively to each aspect? For example, if you find that primary schools in the area have an 80 per cent attendance rate, this might tell you something positive about the area of **Capabilities**. Or if you find that the national elections had only a 30 per cent turnout, this might tell you about the challenges in the area of **Participation and influence**.

2. **Which data stands out the most?** Consider if there are any statistics that seem particularly significant or surprising (this could be in a positive or negative way). Are there any findings that you think would have a very positive or very negative impact on any of the nine aspects of wellbeing? Are there any findings that seem surprising or unexpected, given what you have observed already?

3. **How does the community's situation compare to the wider context?** When you look at data about the situation at a regional, national or even international level, how does this compare to the community's situation? For example, you might find that the community has a much higher rate of environment-related disasters than other areas in the country, and therefore **Care of the environment** is a particularly strong priority.

Chad. Photo: Peter Caton/Tearfund

4. **Does the data help explain any of your other Light Wheel findings?** Think about whether the secondary data is telling a similar story to your findings from other tools. Does the data help to explain any of your other findings? For example, if there are certain aspects of wellbeing that seem to be scoring particularly well or badly in the maturity model, are there any secondary statistics that might help explain this?

5. **How has your secondary data changed over time?** This kind of data doesn't need to be updated regularly, but it may be worth reviewing differences in data between baseline and endline points to see if any key statistics have changed.

6. **How will you use this information?** You can use your secondary data in different ways throughout your Light Wheel activities, eg:

- to inform the questions you want to ask in other Light Wheel tools
- to help you interpret the data you have gathered using other tools
- to shape your response and the areas you want to focus on

7. **Summarise your findings** from your secondary data in the Light Wheel report template (Resource 3.1.10). It can be helpful to start your report with the contextual information to set the scene for findings from other tools. This information will be key when you come to deciding your recommendations and next steps in Section 4.6.

'Secondary data is a great way to add more detail or more breadth to the data we can collect using the Light Wheel.'

Shannon Thomson, consultant and Light Wheel practitioner, Tanzania

4.6 Bringing your data together

Once you have analysed all your Light Wheel data, it's time to consider the overall trends and recommendations that have emerged from your findings.

Final checks and future plans

As we draw our analysis work to a close, it's helpful to do one final review of all the data, to look for common findings and confirm our conclusions, recommendations and next actions. In this section, we will walk you through some final checks.

It's also a good idea to remind yourself of your broader analysis questions (see page 135), so you can make sure you have answered them with your Light Wheel data.

Have your analysed Light Wheel data in front of you:

- the maturity model scores
- the coded group discussion notes
- data from the Light Wheel survey
- the observation tools you have used
- the context tools you have used

Look for common findings

Common findings are any results that have emerged from **more than one** of the Light Wheel tools. For instance, what are the common findings in terms of the strengths and challenges of each aspect of wellbeing? Or, what are the common findings in relation to your analysis questions?

You might want to look in more detail at the defining themes within each of the spokes too, to see which are coming out as common areas of strength or weakness. For example, if you found that most people reported positively on the questions related to the theme of 'access to safe water' in the Light Wheel survey, and you observed functioning water points during your transect walk, and you found that participants confirmed this in the **Physical health** group discussion, then this is a strong common finding.

Explore variations

The goal is not to explain away variations or solve contradictions between the data from different tools, but to understand why differences exist and what this tells you, eg:

- how different groups of people experience and see things differently
- what people are comfortable talking about in a collective space (group discussions) compared to a more private setting (Light Wheel survey)
- how people's perspective of their situation might differ from the national/international picture
- how your presence as an external facilitator may have influenced people's responses

> **'Using the Light Wheel tools for baseline, midline and endline evaluations has helped me to assess the transformative impact that CCT is having in different contexts.'**
>
> **Charlotte Flowers,** CCT Coordinator, Tearfund, UK

What has changed?

If you are conducting a midline or endline evaluation, another important part of your final analysis is to summarise what change has occurred over time, and why.

The best way to do this is to compare your current findings with your baseline or midline data, taking each aspect of wellbeing in turn. Hopefully you will have repeated the same methodology so that you have comparable datasets. Or you may have included some retrospective questions in your group discussions that invited people to think back to an earlier time.

Hopefully you will see positive change occurring over time across all nine aspects of wellbeing. But remember that people's journeys of change are not always linear and sometimes events in the external context can set people back.

How has change happened?

The next thing is to ask yourself *why* these changes have happened. This is where we can bring in the data from the context tools to understand what factors and actors have influenced the situation and helped to bring about change. It is important to recognise all the causes of change, in order to work out what changes we can attribute to our own work, and to plan what contribution we want to make in the future.

Recommendations and future plans

Now it's time to think about what you will do with all the information you've gathered and turn your findings into actions and recommendations. Depending on your analysis questions, and your reason for using the Light Wheel, you will be using your data for different things. For example:

- to design a response based on the community's priorities
- to describe the community's starting point before your response begins
- to analyse how the situation has changed as a result of your response, and explore how you and other factors are contributing to change

Writing up your findings

You can write up all your findings and recommendations in the **Light Wheel report template** (Resource 3.1.10). This has space to present your findings clearly for each aspect of wellbeing. It can be helpful to start with the contextual information first, to set the scene for presenting the results from the other Light Wheel tools.

Part 5: Communicate will give you lots of ideas about how you can present your findings effectively and creatively to different groups.

Here are some questions to help shape your recommendations and future plans:

- *What aspects of wellbeing need most focus?*
- *Where might you be best placed to respond and how will you do that?*
- *Which other stakeholders might you want to work with and how?*
- *Which contextual factors do you need to take into consideration?*
- *Who else might be interested in seeing the data you have gathered?*

Next steps

Now, you have analysed all your data from the different Light Wheel tools, and used your findings to help you decide on your recommendations and actions.

Next, in **Part 5: Communicate**, you will find helpful advice and guidance on presenting and sharing your findings with different audiences, from the participants in your data collection to potential donors.

If you have any questions about what you have read so far, or if you would like to share feedback or stories of what you are doing with the Light Wheel, please contact **lightwheel.support@tearfund.org**

For more Tearfund resources, visit **learn.tearfund.org**

Top: Bangladesh. Photo: Amit Rudro/Tearfund
Bottom: Nigeria. Photo: Nanmet Anthony/Tearfund

Tearfund

Part 5

Communicate

Once you have analysed your Light Wheel data, and feel confident in your conclusions and recommendations, it's time to think about how you will share your findings with your participants and other relevant stakeholders. So in this part, we're going to talk about ways to communicate your findings to different audiences, for different purposes.

This part is important for all Light Wheel users as it helps you think about the most relevant and effective methods to communicate your findings.

In Part 5, you will learn:

- different ways to present your Light Wheel findings
- how to plan for sharing your findings with different audiences
- how to use your findings to inspire positive change

Contents: Part 5

Use the links below to move to the sections that are most relevant to you.

Top: Guatemala. Photo: Eduardo Say/Tearfund
Bottom: Bangladesh. Photo: Amit Rudro/Tearfund

5.1 Why communicate your Light Wheel findings?

Communicating your findings effectively and ethically to different audiences means that many different people can benefit from the results of your Light Wheel activities. Let's have a look at some of these benefits.

Benefits of sharing your Light Wheel findings

- **Validating your findings:** You can invite different stakeholders to share their perspectives on your findings and give feedback. It's especially important to share with participants of your Light Wheel activities, to ensure your conclusions represent their experiences accurately and make any changes before you share your findings more widely.
- **Celebrating hard work:** Your Light Wheel activities will have involved time and effort from many people, and so communicating your findings is a way of honouring and thanking them. It is also a way of celebrating the change that has been achieved, especially if you have data from a baseline to demonstrate evidence of progress.
- **Opportunities to collaborate:** Your data may help open up dialogue and collaborations with other stakeholders (eg other NGOs, faith groups or local government) who have expertise or resources to share, and who may want to help bring about holistic change.
- **Building an evidence base:** Your data can help prove your contribution to change, show you and/or other stakeholders which kind of approaches are having a holistic impact, or make the case more generally for measuring whole-life transformation.
- **Promoting a holistic approach:** Your findings can help others (eg practitioners, NGOs and churches) to think more holistically about the impact and outcomes they want to see, and may inspire them to use the Light Wheel in their work too!
- **Turning findings into action:** By sharing what you've learnt, different stakeholders can make evidence-based decisions about how they want to respond and start to make plans.

Nigeria. Photo: Nanmet Anthony/Tearfund

Key principles for sharing your findings

The Light Wheel covers sensitive topics and participants have shared personal information about their experiences and hopes for the future. This information can be very helpful and inspiring to share with others. Yet, at the same time, this personal data can only be shared with external audiences if the correct permissions are in place.

Building on the guidance in Section 2.1, this page has some additional key principles for sharing your Light Wheel findings.

'Remember the data belongs to the community'

The information you are sharing is not yours: it belongs to the individuals and communities who provided it. It's up to them to decide where and how it is shared. You need to gain their informed consent for this, and offer them the chance to remain anonymous, as discussed in **Section 2.1.3**. You should have already gained their sharing permissions when you started your Light Wheel activities. If not, you can use the **Consent form template** (Resource 3.1.2) to do this.

'Tell the whole story'

People's stories need to be shared with dignity and respect. Giving only a snapshot of someone's situation, or being selective in the information you share about them, can be misleading. Try to present an unbiased account that shows different sides to the situation, including any contextual information you've gathered. Be careful not to misrepresent your own involvement in any positive change that has taken place.

'Use people's own words'

Stories are more powerful in the first person. Use direct quotes where possible to convey people's experiences accurately and authentically. You can also check with participants whether what you plan to share is accurate, and correct any misunderstandings.

'Include everyone'

Think about ways to make sure that everyone understands what you're communicating and is able to participate equally in giving their feedback. For example, using larger-size fonts and offering visual or verbal explanations of your findings can make your communications more accessible and inclusive (see page 185 for more detailed guidance on how to present your findings in an accessible way).

> **'We should always tell people's stories with respect and dignity.'**
>
> **Seren Boyd**, writer and editor, UK

5.2 Creating a communication plan

Your communication plan will help you map out who you will communicate your findings with, what you'll share, and how. Here are some key questions to ask yourself as you start to plan.

Who will you communicate with?

The first step in developing your communication plan is to identify the different audiences that you want to inform about your findings. These audiences might be at a local community, organisational or national level.

You might find it helpful to refer to the list of people and groups you identified as important to your work using the stakeholder analysis tool (see **Section 2.5**). If you've not used this tool already, you could use it now. Remember that you cannot share any data with other stakeholders without the permission of participants.

'The Light Wheel creates a sense of togetherness. Participants feel as though they are going to be part of the change.'

Efraín Piuca, CCT practitioner, Tearfund, Bolivia

Here are some stakeholders you may want to consider in your communication plan:

- **Light Wheel participants.** Sharing your findings with the participants of your Light Wheel activities should be your first priority. You can discuss how they might want to use the findings; for example, to celebrate progress, to prioritise what they want to work on in the future, or to lobby local government to respond to areas of need. As we've said, participants can also help ensure your findings are accurate.
- **Community stakeholders.** Other stakeholders in the wider community, such as local leaders, faith groups or local government representatives may benefit from understanding the findings of your Light Wheel activities. This information can help them have a more in-depth, holistic understanding of the community and local priorities. This may encourage them to see their role in bringing change and to work with the community to respond to areas of need.

Bangladesh. Photo: Amit Rudro/Tearfund

- **Colleagues and facilitators.** Sharing your Light Wheel findings with other staff members (eg facilitators, enumerators, project staff, leadership) helps build a shared understanding of the results. You can then collaborate as a team to use those findings effectively; for example, to celebrate the team's role in bringing about transformation or to inform a future response. Comparing the Light Wheel data with findings from other locations can help identify wider trends and help build a stronger case to advocate for change.

→ **Peer agencies and academics.** Other NGOs, community or religious groups, or researchers may be interested in learning from your work. They can use your Light Wheel data to learn more about the local context, or to explore more generally ways of measuring holistic wellbeing. It can help promote the work you are doing, and may lead to future collaboration opportunities.

→ **Donors and supporters.** Light Wheel data can be very inspiring for people and organisations who support your work. It can provide them with a holistic picture of the difference their contribution has made. Having this strong evidence of impact may well encourage new and existing donors to contribute more in the future too.

→ **Other Light Wheel users.** It is very encouraging and exciting for other people using the Light Wheel to hear about the findings of your activities. They can benefit from learning from your experiences of what went well and how you would improve your methodology in future. Users can problem-solve and come up with new ideas together!

Take a moment to think about the different stakeholder audiences you want to share your Light Wheel findings with. Which groups are your priority? Is there anyone to add to the list above?

The Light Wheel helps us to see how the love we can give to people can be shown in many different ways.’

Pastor Mónica, Light Wheel facilitator, Bolivia

Bangladesh. Photo: Magnet Jambil/LAMB

What will you communicate?

Different audiences will be interested in different parts of your Light Wheel findings, and they will want to receive this information in different ways. You don't have to share everything with every audience. Some will have more time and interest to engage in a lot of detail, and others will just want to know the headlines. So it's important to think about how to tailor your communication style to different audiences. First, let's look at the different elements of our Light Wheel findings, before we consider how we'll present them.

'The Light Wheel is a very deep tool that gives us a lot of information. I have been working with this community for a long time, but now I see it in a different way!'

Omar Herrera, Director of PRODAD, Nicaragua

- **Context analysis.** Your findings from the context tools can be used to present the wider situation the community is living in, and some of the key actors and factors that are driving change. This information will provide context as you explain the role you want to play (or have played) in bringing about change, and who you might want to work with.
- **Group discussion findings.** The maturity model scores are a great visual demonstration of how the community sees their situation and how change is taking place over time. It works well to share these visuals alongside the key points that emerged when you coded your group discussion notes to help explain the scores.
- **Key statistics from the Light Wheel survey.** For audiences who want more numeric (quantitative) data, you can provide percentages and key statistics from your analysis of the survey. You can show how your data answers the Light Wheel indicators for each of the nine aspects, and present your findings using tables and graphs (eg bar graph, pie chart). For more guidance on which kind of visual works well for presenting which kind of information, see **Section 4.3**.

Nigeria. Photo: Nanmet Anthony/Tearfund

- **Conclusions and recommendations.** Many audiences will be interested in the final results and conclusions that emerged when you brought together all your Light Wheel data, for each of the nine aspects of wellbeing (see **Section 4.6**). Presenting these overall findings enables you to outline how you have triangulated data from across the Light Wheel tools to arrive at your conclusions, and to discuss any recommendations or next steps you are planning to take.

→ **Stories and quotes.** Sharing personal stories that you have gathered will help to bring people's situations to life for your audience. The **Light Wheel story-gathering template** (Resource 3.1.9) is structured around the nine aspects, so it presents a holistic picture of the situation.

Remember, though, that a story on its own cannot be used to represent the wider situation. If you want to say a story is reflective of many people's experiences, you will need to provide supporting evidence. For example, you could share a story about how a particular woman saw changes in her **Material assets and resources** by joining a self-help group, and then provide other data (eg from your Light Wheel survey) to show how many other women experienced the same.

→ **Images and drawings.** Any photos taken during your Light Wheel activities (eg during the transect walk), or any drawings the community have made (eg community map, history map) can help others visualise the situation in the community, and make your findings look more engaging, especially for audiences with low literacy levels. Just make sure you have permission from the people in your photos before you share their images.

→ **Best-practice advice.** Sharing best-practice advice and lessons learnt from using the Light Wheel methodology can be very useful for others interested in using it themselves or learning more about its holistic approach. Explaining what went well and what didn't, and what you might change in the future, can be very instructive. You might also share how you are applying your Light Wheel findings, eg adapting your response for greater holistic impact.

Take a moment to think about the audience groups you want to communicate your Light Wheel findings with, and consider which type of findings you think they will be most interested in.

Bright idea

It can be really useful for other Light Wheel users if you share any advice or lessons you have learnt while using the Light Wheel methodology. Explaining what worked well, and what didn't, can help other users improve their Light Wheel activities. Sharing what you have enjoyed about the toolkit might inspire other users to pick it up and have a go!

How will you communicate?

Once you have decided who you want to communicate your findings with, and what you want to communicate, the next step is to decide how to share your findings in an engaging way.

On the next few pages, we'll look at some different ways that people have presented their Light Wheel data to different audiences, ranging from in-depth written reports to visual presentations and headlines. If you are planning to share your findings with different audiences, you can create a portfolio of different products.

A key piece of advice is to have one primary audience in mind for each communication product you create. If it ends up reaching another audience group, that's great, but you should focus each product on meeting the needs of one target audience.

You will also need to take into account how much money you have for communication in your budget, as this will also be a factor in deciding what products you create.

Here are some questions to help you decide what products to create:

- *What does this group of people want to know (eg key questions and interests)?*
- *How do you want to influence this group? What is the key message you want to get across?*
- *What kind of formats will this group find most engaging? What accessibility needs do they have?*

A full written report

It's a good idea to start by creating a report of all your Light Wheel findings, and this can be the basis from which to create all your other communication products. It may not be read as widely as other products, but it can be the foundation you refer back to if there are any questions about your findings. The **Light Wheel report template** (Resource 3.1.10) can help you structure your full written report in an effective way.

Great for:

People who want to understand your findings in detail so they can learn from and apply them in their own work, eg colleagues and facilitators, peer agencies and academics, donors, other Light Wheel users.

A summary report

A short document, leaflet or presentation is a good way to convey your key findings and recommendations. You could have a section on each aspect of wellbeing, alongside key findings for each one, or highlight one aspect of particular interest to your audience. Include images, personal stories and key statistics to make it engaging.

Great for:

Anyone who wants to understand the data but doesn't have much time to engage with the detail, eg community stakeholders, colleagues and facilitators, donors and supporters.

Poster or presentation

You could create a visual display of the key findings for each of the nine aspects of wellbeing in the form of a poster or presentation slides (eg PowerPoint). It should be simple, colourful and visually appealing and could include images, drawings, infographics and short impact statements.

Great for:

Audiences in different community settings, or different parts of your team or organisation, eg Light Wheel participants, community stakeholders, colleagues and facilitators.

Impact statements

Compelling one-line statements (eg for use in press releases or social media) are designed to present the most significant findings from your Light Wheel data in a thought-provoking way. Numbers and statistics can be particularly powerful, eg '75 per cent of participants experienced a positive change in all nine aspects of wellbeing'. It's a good idea to create a fact sheet to summarise the workings behind your impact statements, in case anyone asks you to explain the calculations or justify the numbers.

Great for:

Audiences whom you want to influence but who don't have time to engage with the full findings, eg community stakeholders, donors and supporters.

Infographics

Charts, graphs and diagrams with minimal text can all present key information and statistics in an engaging way (eg maturity model scores or data from the Light Wheel survey). Infographics help you to communicate your findings quickly and clearly, and they can be used within reports, presentations and posters, or even shared via social media and WhatsApp.

Make sure you pick the right kind of graph or chart for the type of information you are communicating. **Section 4.3** has information about creating graphs in KoBoToolbox and advice about which type of graph works well with which type of information. See also pages 183–184 for examples.

Great for:

Audiences who just want the headlines or those with lower literacy levels, eg Light Wheel participants, community stakeholders, donors and supporters.

'Using the Light Wheel can help us have a positive impact in many areas of people's lives and to assess how holistic change is taking place.'

Catriona Dejean, Chief Impact Officer, Tearfund, UK

Video or audio

Creating a short video can be a powerful tool for sharing learning and evidence of impact in a way that captures people's imagination. Audio recordings and podcasts are also great ways to grab attention. Both films and sound recordings are effective as 'teasers' to entice people to find out more.

Great for:

People with less time to engage with detailed findings or people with low literacy levels, eg Light Wheel participants, community stakeholders, donors and supporters.

Panel discussion

Inviting people to a more formal event such as a panel discussion can be a good way to set out your findings and invite debate and feedback. This is particularly appropriate if your goal is to raise awareness of your work, build your reputation, influence policymakers or attract funding.

Great for:

Audiences you want to influence or seek further collaboration with, eg policymakers, donors, peer agencies and academics.

Promoting your products

When you are creating your communications products, think about how you will promote them to maximise the reach. For example, you might want to get multiple people to share the same content on social media on the same day, or you might ask an influential figure or community member to publicise it for you. Think what will work best for the type of audiences you want to connect with.

> **'The Light Wheel has helped me to have a better understanding of the context, and I am seeing the community in different ways.'**
>
> **José Eduardo,** Tearfund partner, Bolivia

Infographic inspiration

Here are some examples of the types of visualisations that other Light Wheel users have created with their data. What will you create?

Key statistics from the Light Wheel survey

83%
of CCT participants saw their personal relationships strengthened in the past year

60%
of respondents said they feel more included and part of their community than a year ago

73%
of women involved in the project said they now feel able to share ideas and opinions

Comparing baseline and endline survey data

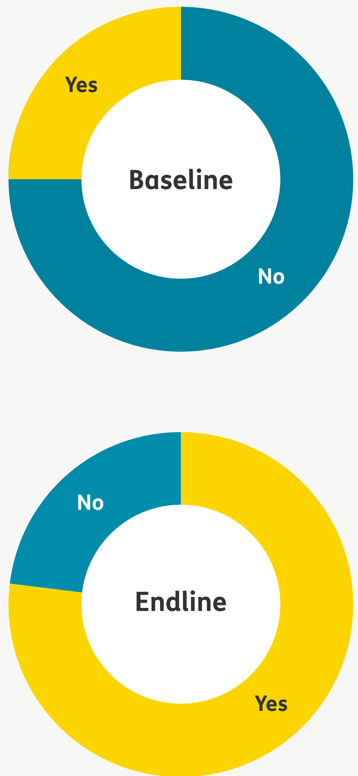
(endline)
95%
of respondents said they participate in acts of service with their faith community

(baseline)
45%
said the same at baseline

(endline)
89%
of respondents said they have someone they can talk to about their problems

(baseline)
57%
said the same at baseline

Percentage of people who believe they are able to change things in their own life

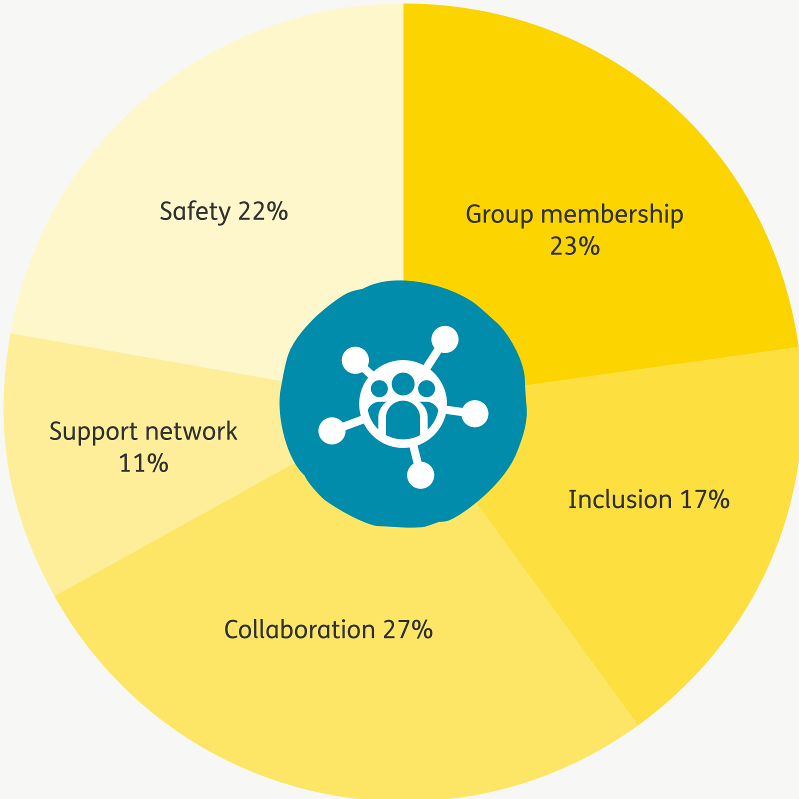


More infographic inspiration

Most significant changes as a result of CCT

The bubbles show the number of participants who mentioned these changes during group discussions

Relative frequency of themes mentioned in a group discussion about 'Social connections'



Making your content accessible

It's important to make sure everyone can understand the information you're sharing, especially your participants in the community. Here are some tips for presenting your findings in an accessible way:

'Cater for different literacy levels'

When you are sharing written content, think about the literacy levels of your audiences and tailor your writing style and length accordingly. Use plain language for maximum accessibility. Some audiences will want the technical details, while others will need simple language or visuals. Consider if you need to explain more technical concepts or translate your content into different languages.

'Pick the right presenters'

Think about who is best placed to share the findings with different audiences. For example, some people may be well connected with external audiences such as donors and academics: others may be skilled at helping community members feel safe and comfortable to provide honest feedback. If possible, it's good to have the same people who facilitated the group discussions and/or surveys sharing the findings with participants.

'Consider location and timing of events'

Think about when you hold your meeting: avoid disrupting people's other activities and ensure it's a time when most people are available. Consider especially how to include people who might easily be excluded, such as people with disabilities, women, elderly people and youth.

'Some people prefer smaller groups'

Think about whether you will present your findings in a large community meeting or to smaller groups. Some people may be happier sharing their feedback in smaller meetings. If you are sharing findings with representatives (not all of the participants), encourage them to discuss what they've learnt with fellow participants afterwards.

Inviting feedback

Receiving feedback after you've shared your findings is an important way to check their accuracy. It's also a great opportunity to engage people in coming up with ideas for next steps. Here are some examples of questions you may want to ask different audience groups:

Light Wheel participants

- *Do these findings accurately reflect your experience and your perspectives? If not, what would you change?*
- *Are you comfortable for these findings to be presented to other stakeholders?*
- *What are your hopes for the future? What actions will you take to move forwards?*

Facilitators and colleagues

- *Do these findings accurately reflect what you understand about this community? If not, what was unexpected?*
- *How do you think that these findings can be best used? What are the next steps?*

Other Light Wheel users

- *What feedback or questions do you have about the Light Wheel methodology?*
- *Do you have any of your own learning or recommendations to share?*

Community stakeholders

- *Do these findings accurately reflect what you understand about this community? If not, what was unexpected?*
- *How do you think that these findings can be best used? How would you like to collaborate on those actions?*

Donors and supporters

- *What questions do you have about the findings that have been presented?*
- *Were there any findings that surprised you?*
- *What stood out most to you about these findings? Would you like to support this work in the future?*

Peer agencies and academics

- *What feedback or questions do you have about the Light Wheel methodology?*
- *What feedback do you have on the findings we have presented?*
- *How would you advise us to use these findings?*
- *Are there areas that you are also working in and might be interested in collaborating on?*

Case studies

Sharing findings with participants in Uganda

Researchers used the QuIP methodology (see page 34) to conduct an impact assessment of Tearfund's CCT work in Uganda. Afterwards, they shared their findings back with people who had participated during a workshop, and asked them to vote on whether or not the findings were accurate in their opinion. This gave the researchers the opportunity to explore the results with participants more, and in doing so they gained further learning and a better understanding of the reasons behind some of the findings. They also encouraged the participants to use the findings to set goals and make plans for the future. The participants welcomed this opportunity and said that it renewed their sense of hope.

Turning findings into action in Bolivia

In Bolivia, a group of church leaders conducted a needs assessment using the Light Wheel. The close relationship they'd built with the local council helped the community to trust them when they began gathering data through Light Wheel activities. The church later shared a report of their findings with the mayor's office, to help the local council become more aware of the community's situation and needs, including the lack of shared community spaces. In response, the mayor decided to fund the construction of a new recreational area for the community.

Peer-to-peer learning in Central America

In Central America, several of Tearfund's partners have met online for peer-to-peer learning sessions where they have shared their experiences and advice from using the Light Wheel. They have felt supported and inspired by meeting with other organisations using the Light Wheel, and it has been particularly helpful for organisations with less experience to hear from others who have been using the Light Wheel for many years.

Bolivia.
Photo: Efraín Piuca/Tearfund

Tanzania.
Photo: Lydia Powell/Tearfund

A final thank you

Thank you for taking this journey through the Light Wheel with us! We hope you have found inspiration, guidance and support to apply it in your context. And we hope that you can make the most of your findings and work with others to bring change.

The Light Wheel is rooted in our belief that communities themselves have the skills, resources and capabilities to bring about change. We also believe in the power of the Light Wheel to help communities recognise and realise their potential, and to facilitate them as they move towards holistic transformation.

So thank you for your commitment to holistic change and for being a champion of the Light Wheel. We hope you'll continue to use it and encourage others to use it too. Together, as a global community of Light Wheel users, let's continue to believe that whole-life change is possible and to inspire others with this hope.

> **'With the Light Wheel, you have given us the seed and now we are going back to grow it. Together, we will make a forest.'**
>
> **Alemayehu Seyoum,** Light Wheel training participant, Ethiopia

If you have questions about the Light Wheel toolkit, or would like to share feedback or stories, we'd love to hear from you on **lightwheel.support@tearfund.org**

For more Tearfund resources, visit **learn.tearfund.org**

Glossary

Accessibility: making sure all participants can understand, use or participate in Light Wheel activities, eg by removing language barriers and physical obstructions

Aspect of wellbeing: an area of life that contributes to individuals and communities flourishing

Assessment: collecting and analysing information, using the Light Wheel, to guide the design and implementation of your response (eg CCT process or project), or to understand the results of your response

Baseline: data gathered at the beginning of a response, using the Light Wheel, so that change can be measured over time

Church and community transformation (CCT): Tearfund has helped develop a number of contextualised processes that support churches to work with their local community to bring about restoration and transformation using local resources

Contextualise/contextualisation: adapting the Light Wheel tools so that they are meaningful and relevant to the context in which they are being used (eg explaining key concepts and ideas in a way that participants will relate to)

Dataset: information gathered from one or more of the Light Wheel tools, ready to be analysed

Disaggregate: divide up data according to different criteria (eg age, religion, sex, ability or location) to reflect contrasting experiences, opinions and situations

Endline: data gathered at the end of a response, using the Light Wheel, to compare with baseline data and assess change over time

Enumerator: the person who asks the questions in a survey, also known as a 'data collector'

Ethically: acting in a way that ensures that our Light Wheel activities cause no harm to participants and have the potential to do good

Evaluation: an assessment that identifies, reflects upon and judges the impact and effectiveness of a response, and gives insight and learning about successes and challenges

Facilitator: someone who leads a group through an activity (eg a group discussion or Bible study) enabling everyone to participate and be heard

Holistic: involving every aspect of people's and communities' lives in combination, as set out in the Light Wheel

Inclusion: the extent to which different types of people feel safe, welcome and able to participate in an activity, group or community

Indicators: evidence, signs or questions used to monitor performance and determine whether change is taking place. Each Light Wheel spoke has a set of indicators for measuring change

Informed consent: a person agreeing to take part in a discussion or survey with full understanding of how data will be used

Integral mission: Christians and churches following God, living out their faith by serving others, and bringing about transformation in every aspect of people's and communities' lives

Interconnected: when two or more things are closely linked so they influence and affect each other (eg change in one aspect of wellbeing can have a positive or negative impact on another)

Lens: looking at something from a particular perspective

Light-touch: a less in-depth/detailed approach, where time and resources are limited

Maturity model: a five-point scale in which each new level describes positive changes that we might expect to see over time

Midline: data gathered halfway through a response, using the Light Wheel, to compare with baseline data so you can assess progress and change, and plan for the next stage

Glossary

Monitoring: using the Light Wheel to regularly assess progress being made towards objectives, and make adjustments where necessary

Needs assessment: using the Light Wheel to understand participants' priorities, and their areas of strength and weakness, as the basis for designing a response

Participatory: an activity, tool or process that all types of people can get involved in or use

Pilot testing: testing something on a small scale so improvements can be made before it is used more widely

Qualitative: data or analysis that cannot be counted, reflecting perceptions, opinions, emotions and observations

Quantitative: data or analysis that is numeric and can be counted, often presented as percentages, frequencies or rates

Resilient: being able to cope with change and recover from, or adapt to, difficult situations or shocks

Respondent: someone who has taken part in a Light Wheel survey

Response: any ways we might try to resolve challenges or meet identified needs, eg a programme, project or activity conducted by a church or organisation

Safeguarding: protecting children and vulnerable adults from all forms of harm and abuse

Sample: a subsection of people who represent the characteristics of the larger group you want to find out about

Spoke: the Light Wheel is made up of nine spokes that represent different aspects of wellbeing

Stakeholder: a person or group involved in, affected by or influencing a Light Wheel activity

Triangulate/triangulation: comparing data from two or more Light wheel tools to build a picture of the situation and test your findings and assumptions

WASH: water, sanitation and hygiene

Wellbeing: feeling healthy and content, flourishing and living a full life. Tearfund uses the Light Wheel to represent the areas of life that contribute to a person's and community's wellbeing

Whole-life transformation: for Tearfund, this is when individuals and communities live as God intended in every area of their lives, as represented by the nine spokes of the Light Wheel

Acknowledgements

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Editors: Sarah La Trobe and Matt Little
Project manager: Sara Baines
Design lead: Charlene Hayden
Designer: Helen Eldridge
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This second edition of the Light Wheel toolkit is a product of the collaboration, creativity and experience of many different contributors around the world. We are profoundly grateful to everyone who has been involved.

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This new toolkit builds on their work. It has been developed by Lydia Powell, who has led Tearfund's work on the Light Wheel as part of the Impact and Effectiveness Team. She has worked alongside Shannon Thomson, Seren Boyd and Helen Eldridge to bring together the voices of Light Wheel users worldwide in this refreshed best practice guide.

We thank and celebrate all of the Tearfund country teams and partners who have used the Light Wheel in their work and tested content for this new edition.

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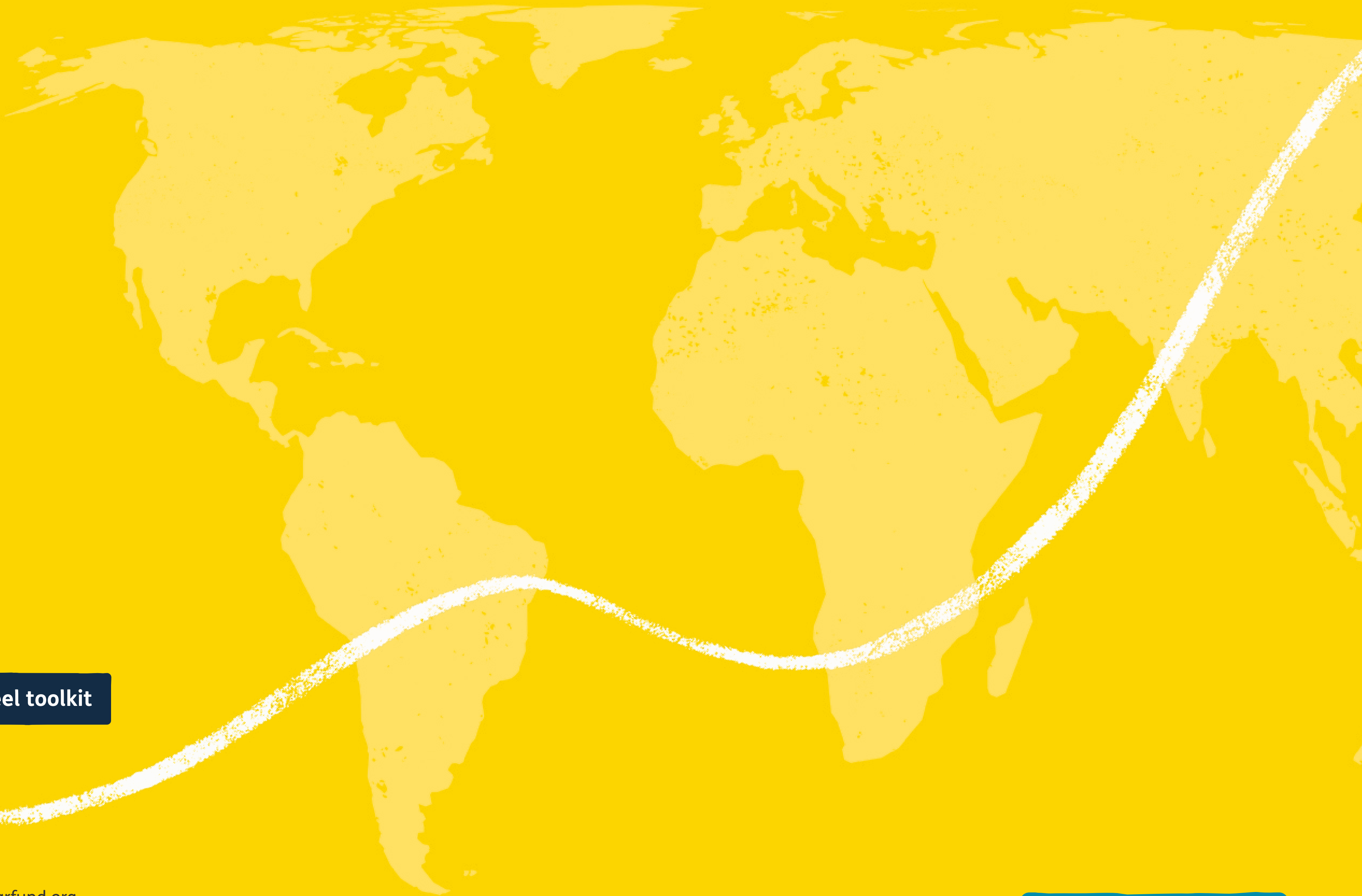
Our hope is that many more people around the world will use this Light Wheel toolkit to help transform lives, so thank you too for sharing it with your community.



The Light Wheel toolkit

learn.tearfund.org

lightwheel.support@tearfund.org
Tearfund, 100 Church Road, Teddington, TW11 8QE, United Kingdom

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01050-(0624)

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