The Light Wheel
essentials pack

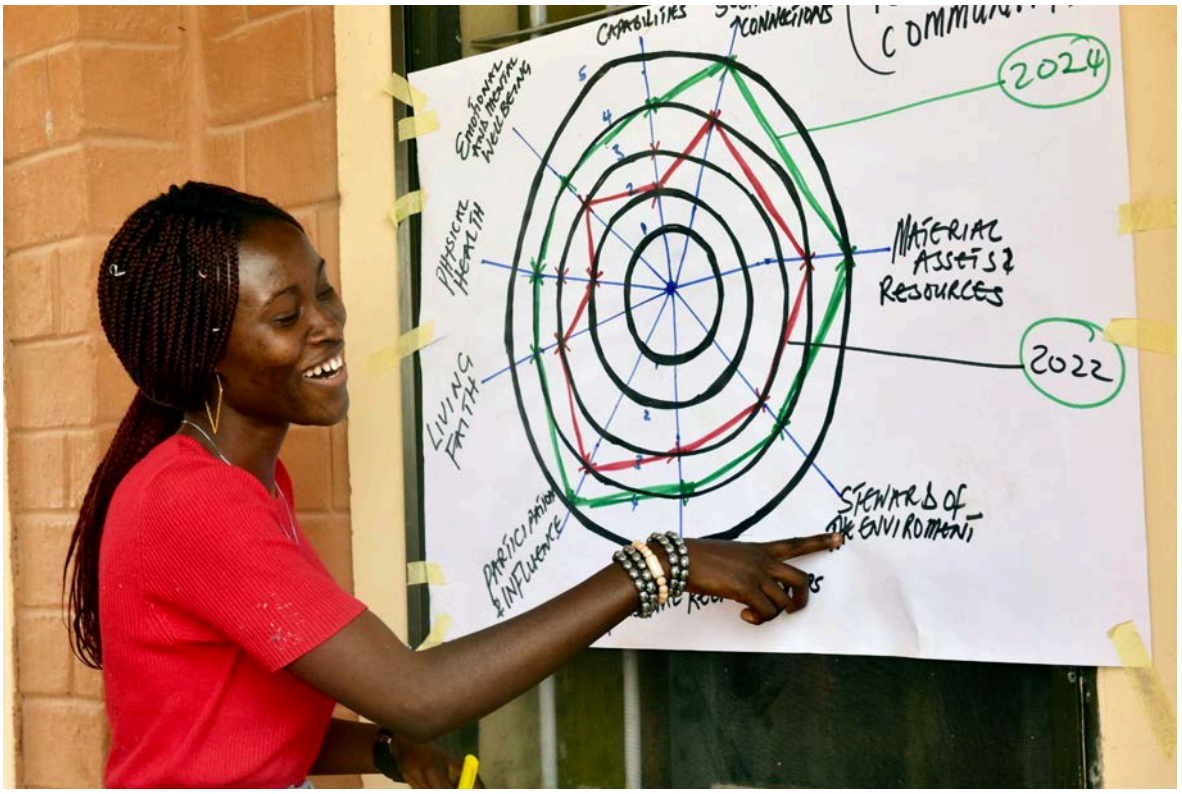
Part 2:
Facilitate



tearfund

Part 2: Facilitate the Light Wheel tools

If you want to facilitate the Light Wheel tools, this part is for you! You will find practical advice and instructions to facilitate each of the Light Wheel tools that we introduced in Part 1. So let's get ready to start data collection!



Scoring the Light Wheel at a training session in Nigeria. Photo: Nanmet Anthony/Tearfund

Part 2 contents:

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- **2.2 Light Wheel group discussions.....11**
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- **2.5 Context tools.....54**

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**, available at: **learn.tearfund.org/LW-essentials**

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 best practices 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 to make it suitable and meaningful for each specific context. This can take time and needs to be planned in advance.



Find what you need

On the next few pages you'll find information about the practical steps you can take to follow these key principles when using the Light Wheel. The Key principles icon (left) appears throughout the Light Wheel essentials pack to give you useful reminders. To explore these principles further, see Tearfund's guide *Doing research ethically*, at: **learn.tearfund.org/LW-essentials**

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. 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.[1]

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.[2]

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

Language. Ensure that facilitators are comfortable working in the local language and consider alternative ways other than reading and writing that people with low literacy can participate.

Careful facilitation. Think about who should facilitate each group, eg in terms of gender, age, language, background, in order to help participants feel as comfortable as possible to participate. Look out for quieter participants and encourage them to share their views, or speak to them individually.

[1] 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/LW-essentials**

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

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 adults at risk (see footnote 1 on the previous page).

The first step is to be familiar with your organisation's safeguarding procedures and what to do if someone shares something that makes you concerned for them. We recommend discussing concerns with someone trained in safeguarding, before reporting to the authorities, to ensure those involved are kept safe. You may need to ask the person's permission to disclose personal information.[3]



For more information on Tearfund's approach to safeguarding, or if you'd like to discuss anything related to safeguarding, contact **safeguarding@tearfund.org**[4]

Things to consider

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

Anonymity. Keep your participants anonymous or 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**).

Careful facilitation. Think about who should facilitate each group, eg in terms of gender, age, language and background, in order to help participants feel as comfortable as possible to participate and talk about sensitive areas of their lives.

Sensitive questions. Think about how to ask questions sensitively and remove any questions that feel inappropriate or insensitive. Reassure participants they don't have to answer if they feel uncomfortable.

Private feedback. Set up a way for people to provide feedback confidentially too. For example, you might set up a phone number or feedback box or organise one-to-one interviews.[5]

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.

[3] 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.
[4] For Tearfund's statement on our commitment and approach to safeguarding, see: **learn.tearfund.org/LW-essentials**
[5] For more advice and ideas about feedback mechanisms, see Tearfund's article 'How to get genuine feedback', available at: **learn.tearfund.org/LW-essentials**

2.1.3 Informed consent

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, but you should have the option for people to give verbal consent instead in case they feel more comfortable with this.

Protecting people from pressure. Make sure participants do not feel any pressure to give their consent, for example from people with power or influence. Give people a chance to ask any questions they may have, and let them know 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 anyone under the age of 18, you need consent from a parent or guardian. Likewise, it may be necessary to visit older people, or those with disabilities, in their own home and to involve caregivers in the consent process.

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

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** in the Light Wheel toolkit (available at: **learn.tearfund.org/LW5**) for practical guidance on how to do this.

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.

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.

Things to consider

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. For more information about each aspect of wellbeing and its defining themes, see **Themes and indicators** (Resource 3.1.4), available at: **learn.tearfund.org/LW3-1**

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 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.**

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 tools have been written to be used in a wide range of contexts and understood by people from different backgrounds. But they are not a rigid script: they are a starting point for you to review and 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 Light Wheel essentials pack, the Contextualise icon will help remind you of where you need to adapt things to your context.

Things to consider

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, available at: **learn.tearfund.org/LW3-1**) 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.

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**.



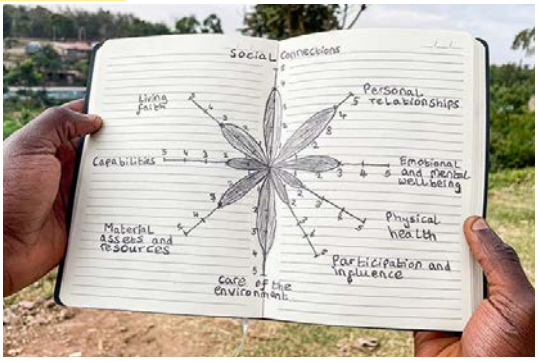
A Light Wheel contextualisation exercise in Nigeria. Photo: Nanmet Anthony/Tearfund

Examples of contextualisation

Example 1



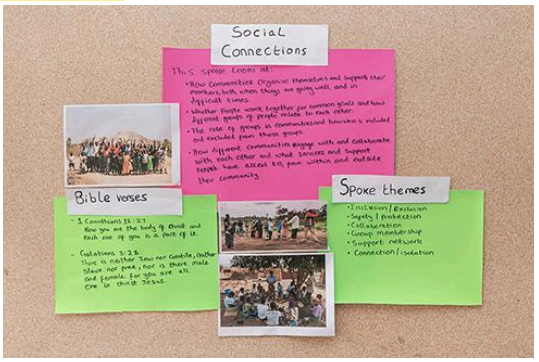
Example 2



Example 3



Example 4



Example 5



Example 6



📷 (1) **Using the wheel of a bike to visualise the spokes of the Light Wheel.**
Photo: Nanmet Anthony/Tearfund

📷 (2) **Visualising the nine aspects of wellbeing as a flower.**
Photo: Joseph Limo/Tearfund

📷 (3) **Using emoji faces to represent the different levels of the maturity model.**
Photo: Eduardo Say/Tearfund

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

📷 (5) **Contextualising the 'Material assets and resources' spoke for the Burundi context.** Photo: Lydia Powell/Tearfund

📷 (6) **Using a real plant to demonstrate growth in the maturity model, Bangladesh.**
Photo: Amit Rudro/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 people 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, 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.



A Light Wheel group discussion taking place in Bangladesh. Photo: Amit Rudro/Tearfund

Group discussion step by step

Before you start, you need to:

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

During the discussion, you will:

- ☐ Introduce yourself, the purpose of the discussion and give an overview of the Light Wheel
- ☐ Introduce one of the aspects of wellbeing
- ☐ Ask discussion questions about that aspect of wellbeing
- ☐ Introduce and score the maturity model for that aspect
- ☐ Repeat these steps for each aspect of wellbeing
- ☐ Analyse what you have heard



Find what you need

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

Generating a discussion

The first step to facilitate a Light Wheel group discussion is to introduce each aspect of wellbeing and prompt conversation by using the group discussion questions.

As a facilitator, you need to have an in-depth knowledge of the nine aspects of wellbeing so that you can generate deep and meaningful discussion. You can use the **Descriptions of the nine aspects** (Resource 3.1.3) and the **Light Wheel diagrams** (Resource 3.1.5) 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.

Next, 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, below). You can use these questions to generate 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.

Example group discussion questions

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

Make sure that the definitions of each spoke and the group discussion questions you use are relevant and sensitive to your setting. They should not be taken as a rigid script but as inspiration and adapted to the context you are using them in.

Think about what each of the nine aspects looks like in your context and adjust the definitions to make them more relevant and understandable. Think about creative ways that you can introduce each aspect of wellbeing, eg local examples, stories, pictures or Bible verses.

Then review, select and adjust the discussion questions so that they are appropriate and relevant. For example, in some contexts, handwashing is a sensitive issue, and so that question might need to be changed or deleted. You should think carefully about the questions you ask in relation to the area of **Living faith**. The questions will also need to be translated into the appropriate local language.

The maturity model

Once you have discussed an aspect of wellbeing, participants will then score themselves using the maturity model's five-point scale. Let's start by explaining what it is.

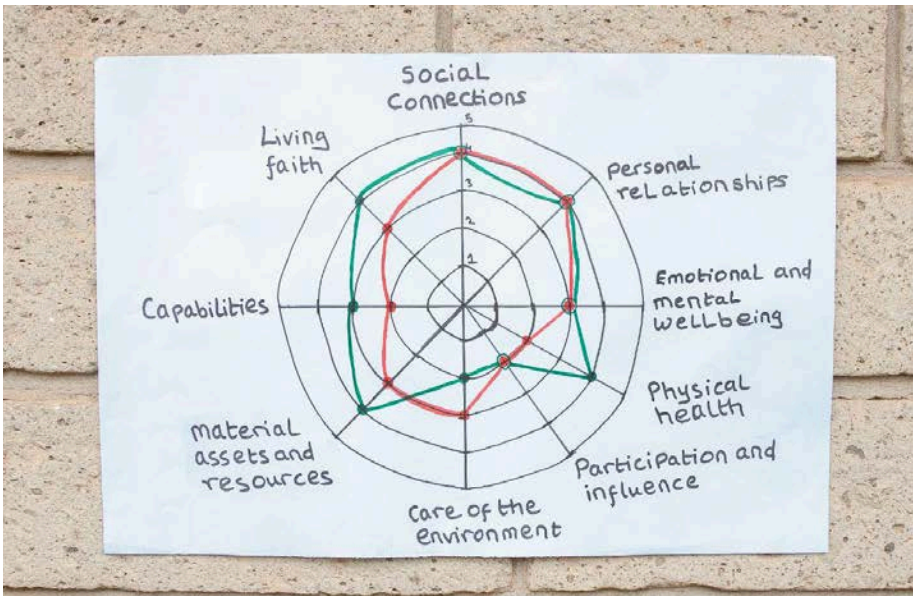
The maturity model is based on a psychological model of behaviour change, which looks at how individuals and communities move through change in stages. Each level in the maturity model describes changes in attitudes and behaviour that we might expect to see as individuals and groups experience change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

Progress in each of the levels is defined by people's growing awareness of the issues they face, their willingness to change and the level of transformation taking place.

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. More guidance on how to score the maturity model during a Light Wheel group discussion is coming up.

The diagram, below, shows an example of a completed maturity model diagram. 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.

> **'The maturity model is like taking a photo of where we're at.'**
>
> **Rose Wade,** Light Wheel practitioner, AMI San Lucas, Guatemala



Example of maturity model scoring in Kenya. Photo: Joseph Limo/Tearfund

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:

Maturity model visuals

In its simplest form, the maturity model can be described using different practical examples and visualisations that people can relate to. For example, the different levels of the maturity model are pictured below as a flower growing from a seed (level one) to a blossoming plant (level five). Try to find a picture that helps people think about growth or progress, such as moving up a ladder or charging a battery from low to fully charged (as in the images below). You can find printable copies of the visuals below in **Maturity model visuals** (Resource 3.2.2).





Photos: Joseph Limo/Tearfund

Key words

Another quick and simple way to start describing each level is to use the defining words below:

Level 1: Avoid
Individuals and communities have not identified issues; there is no sense of action or there is a lack of willingness to take action

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

Simple descriptions

If you want to go into even more detail, you can find examples of how to describe the five levels of the maturity model for each aspect of wellbeing in **Simple maturity model descriptions** (Resource 3.2.3). Once the group has selected their score for a particular spoke, it is a good idea to read the description of that level back to them to see if they think that accurately describes their situation, and if they are happy with their score or want to think again.

Contextualisation

It's important to make sure that the way you define each of the five maturity model levels accurately reflects the context you're using it in. While the premise of each level will stay the same, you can adapt the way you visualise or explain each level to make it more specific to your context. This will help people to score themselves as accurately as possible. 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, and for the descriptions of levels 3, 4 and 5, you can give some examples of what the situation might look like as it improves.



Take a moment to look at maturity model resources and familiarise yourself with them. Make any contextualisations that you feel are necessary by thinking how you would describe the differences between the five levels in your context.

How to score the maturity model

Once you've introduced the maturity model and described the five levels, there are a number of ways to come up with a score. 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, below). 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.

Half scores

If it is difficult to find consensus within a group, or where an average results in a half-score, these can be used, eg level 2.5. However, half scores are not usually recommended as we don't have standardised definitions for them and it can lead to confusion about what situation a half-score actually represents.

Make sure that everyone has a chance to participate equally in scoring. There can be power differences within groups 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.



Examples of scoring the maturity model from Kenya. 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



Above top and above right, Guatemala. Photos: Eduardo Say/Tearfund
Above left, Guatemala. Photo: AMI San Lucas

Justifying the score

Once people have placed their scores it is important 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.

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.



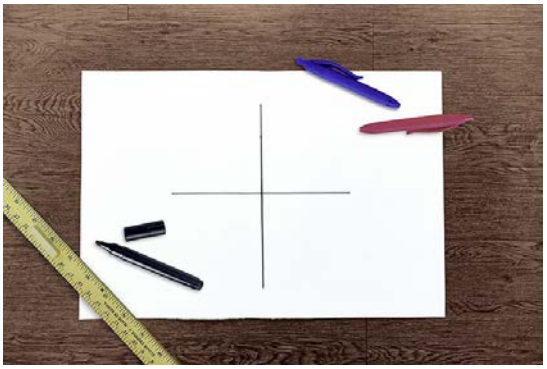
A Light Wheel training workshop in Bangladesh. Photo: Amit Rudro/Tearfund

How to capture the scores

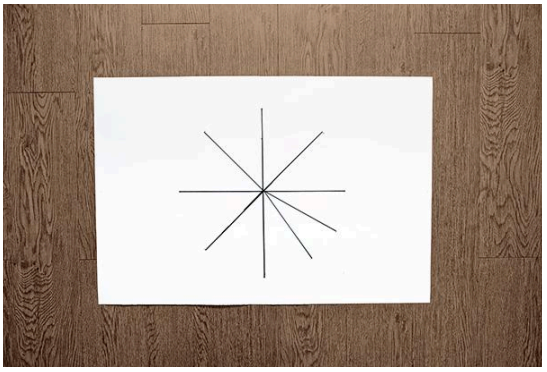
Maturity model scores can be drawn on a large piece of paper as shown below. Alternatively, you can find a printable version in **Light Wheel diagrams** (Resource 3.1.5) or you can input your scores digitally using the **Discussion digital input sheet** (Resource 3.2.6), available at: **learn.tearfund.org/LW3-2**

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.

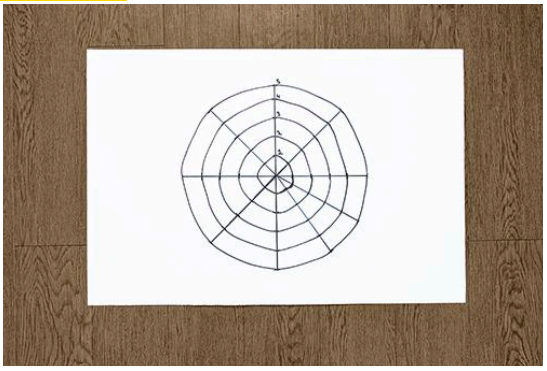
Step one



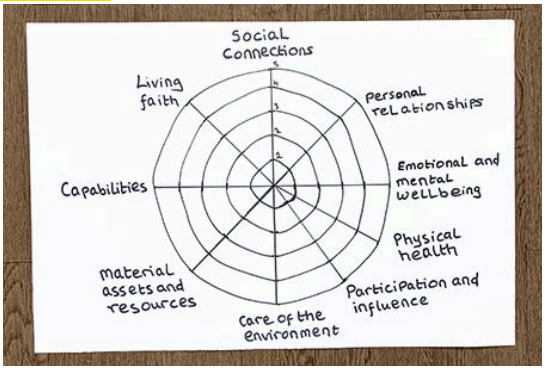
Step two



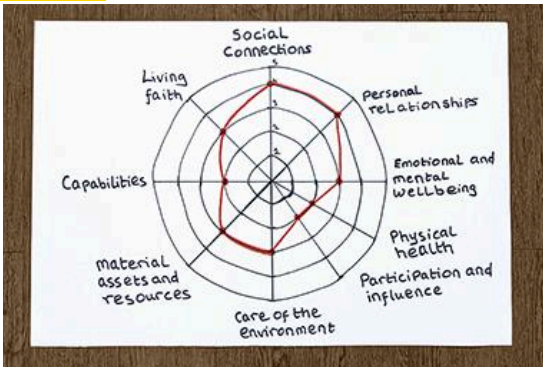
Step three



Step four



Step five



How to structure your group discussion

The structure and timing of your group discussions will depend on how much time you have and how much detail you want to go into. Below are some examples of how your group discussion could flow; however, you have flexibility to decide what will work best for you.

Option A:

Group discussion followed by maturity model scores

This is the most common way to structure a Light Wheel group discussion. First you have an in-depth discussion about one aspect of wellbeing and then you score the maturity model. This works well if you have time for discussion and you want to gain in-depth information about people's experiences.

You should try to spend at least 30 minutes per aspect to have a meaningful discussion and score accurately. Depending on the time available, you can cover all nine aspects at once or break them down over several meetings.

Introduce the aspect of wellbeing

↓

Use group discussion questions to facilitate a discussion on that aspect

↓

Explain and score the maturity model for that aspect

↓

Capture discussion notes and plot scores on Light Wheel diagram

↓

Repeat with the next aspect of wellbeing

Option B:

Focus on the maturity model

If you have limited time, you can focus your time on 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.

Introduce the aspect of wellbeing

Use group discussion questions to generate discussion on that aspect

Make notes on the discussion

Repeat for each aspect of wellbeing

Case study

Alternative ways to use the Light Wheel in a group discussion

It is also 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 the discussion questions as subtle prompts during a general discussion about people's lives, rather than introducing each aspect separately. Similarly, in Rwanda, one of Tearfund's partners started the conversation with participants by asking: 'What has changed in your life as a result of CCT?' After letting people discuss for some time, they then 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.

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. 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. How many groups you are able to run will also depend on your budget and time available.

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.



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.

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 conduct more group discussions to explore the variations within each group type. For example, you might want to speak to married and unmarried women separately or have separate groups for women from different religious backgrounds.

A useful principle for qualitative data collection is **saturation**. This is when you begin to hear similar responses repeatedly from participants, which means you have probably got enough information on that topic. For example, 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.



A Light Wheel group discussion in Rwanda. Photo: Lydia Powell/Tearfund

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, below).

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	SC, PR, P&I	Matt	Lydia



Conduct Light Wheel surveys before group discussions

If you are going to use the Light Wheel survey as well as 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.

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

Resources available in **Part 3: Resources**

- ☐ **Descriptions of the nine aspects** (Resource 3.1.3)
- ☐ **Maturity model visuals** (Resource 3.2.2)
- ☐ **Simple maturity model descriptions** (Resource 3.2.3)
- ☐ **Group discussion questions** (Resource 3.2.1)
- ☐ **Discussion conclusions template** (Resource 3.2.5)

Also helpful:

- ☐ A blank Light Wheel diagram for recording scores
- ☐ Stones, seeds, beads for scoring
- ☐ Paper and pens for note-taking

Potential expenses

- ➜ 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)

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)

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. Here are some useful tips:

Who should facilitate?

Think carefully about who will facilitate and take notes for each group to ensure participants feel as comfortable as possible. For example, try to have female facilitators working with the women's groups. You should also think about how to represent people from different backgrounds within your facilitation team, and speak the relevant language.

Introductions and consent

Before starting your discussion, make sure you introduce yourself and explain the group discussion activity so that participants can give their consent to take part. 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.

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. Sharing a bit of information about yourself and the Light Wheel might also help put people at ease.

Sensitive questions

The role of the facilitator is to encourage conversation and create an inclusive space for everyone. Remember that the Light Wheel covers some very sensitive topics that need to be handled with care. 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.

As you facilitate, it is important to respond without judgement to the ideas that people share and allow them to be honest. Follow the guidance in **Section 2.1** to ensure your group discussion is a safe and welcoming place for participants to share openly.

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 that people feel comfortable to talk about.



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.

Hearing from everyone

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?' Be aware of individuals with stronger opinions (eg community leaders) who might dominate in group situations. If needed, you could take more vocal participants to the side for a one-to-one interview, or put them in their own group.

Keep 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.'

Keep asking 'Why?'

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?'

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. If you are the note-taker, you can use the **Discussion conclusions template** (Resource 3.2.5) to capture notes from the discussion. You can also 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 first.

Include as much detail as possible in your notes, including why people scored as they did. 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.

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, available at: **learn.tearfund.org/LW3-2**) will automatically create a digital maturity model diagram from the scores.

Make a note of how the group discussion was conducted, eg how many groups you ran, who the participants were, and the discussion questions used, so that if you repeat the process at a later stage you can follow the same process. Write down any learning so that you can improve for next time.

Interpreting your findings

After the group discussions it is time for everyone to reflect on the information and insights that have been generated. Below are some things to consider, and you can find more information on how to analyse your group discussion data in the Light Wheel toolkit (Part 4: Analyse, available at: learn.tearfund.org/LW4).

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

Comparing scores between points in time

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 consider why any changes have taken place. Remember that any progress on the maturity model is to be celebrated, not only level 5.

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, which will need to be addressed. 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, it turned out that 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.

Sharing and using the scores

In the images below you can see how participants have plotted their maturity model scores and used them in different beneficial ways. It can be helpful for participants to have their own record of the discussion and often groups will choose to display their maturity models in communal spaces, like the church or community centre. 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



Above left, Nigeria. Photo: Nanmet Anthony/Tearfund
Above right, Asia. Photo: Nigel Harris/Tearfund

Reflecting on the experience

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.



As you make your way home, ask the other facilitators what stood out to them during your time in the community. Here are some reflection questions to prompt discussion:

- ➜ *What did you notice in the community in relation to the different aspects of wellbeing?*
- ➜ *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?*

You can use the **Observation checklist and summary** (Resource 3.4.1) to capture your thoughts. For more information on using an observational approach to complement the group discussions, see **Section 2.4.**

Where next?



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



A survey taking place in Bangladesh. Photo: Rachel Paton/Tearfund

Light Wheel survey step by step

Before you start, you need to:

- ☐ 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



Find what you need

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.

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.

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 **Section 2.1.4** 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, available at: **learn.tearfund.org/LW3-1**) 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. 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.

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 six months	Have you suffered from an illness in the last six months?	Yes No Prefer not to answer
Capabilities	Ambition	The percentage of people who have goals and ambitions for the future	Do you feel that you have goals and ambitions for the future?	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, available at: **learn.tearfund.org/LW3-3**). More instructions on how to set up the survey in Kobo can be found through our video series, **Getting started with the Light Wheel in KoboToolbox** (see below).

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.

Getting started with the Light Wheel in KoboToolbox

Tearfund has collaborated with Humanitarian Data Solutions to develop a series of videos called **Getting started with the Light Wheel in KoboToolbox**, which you can watch for free. The videos 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. You can also find written instructions of the same content in **Instructions for the Light Wheel survey in KoboToolbox** (Resource 3.3.4), available at: **learn.tearfund.org/LW3-3**



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

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, available at: **learn.tearfund.org/LW3-3**) 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.



A survey taking place in 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. You can make a note of any changes you make to the survey in the Contextualisation decisions worksheet (Resource 3.3.2), available at: learn.tearfund.org/LW3-3

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 to 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' in 'What makes a good enumerator?', coming up).



Watch module 4 'Make it your own' in our **Getting started with the Light Wheel in KoboToolbox video series**, for guidance on how to modify the digital survey. Available at: **learn.tearfund.org/LW-Kobo**

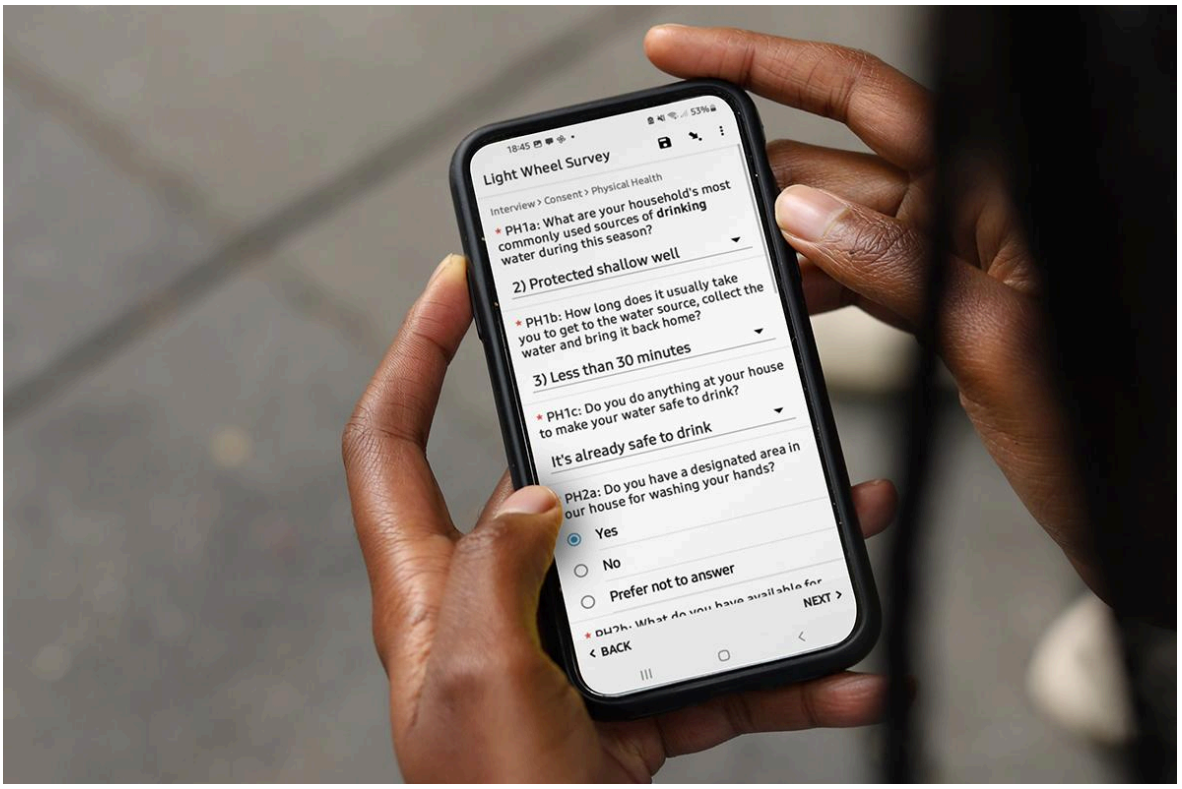
Case study

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



Someone filling out the Light Wheel survey using KoboToolbox.

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'. In order to choose the best sampling approach for your survey, you have to consider whether or not you want your findings to represent a larger group of people.

Do you need your findings to be representative?

Yes, I want my findings to be representative

If your survey findings are representative, it means that you can be confident that the answers from your sample 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. When a representative sampling method has been used, you can feel confident to generalise the findings to a wider group of people beyond the survey sample. In order for this to happen, we have to use a representative sampling method. We recommend a method called **simple random sampling.**



You can find detailed instructions about how to do simple random sampling in the Light Wheel toolkit: see 'Choosing who to survey' within **Section 2.3** (available at: **learn.tearfund.org/LW2**). You might like to take time to read through that content now or you can come back to it later once you are at the point of calculating your sample.

No, I do not need my findings to be representative

Survey findings that are not representative are still useful, but you can only draw conclusions about the people you have actually surveyed, and you cannot generalise to 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.

You will 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.

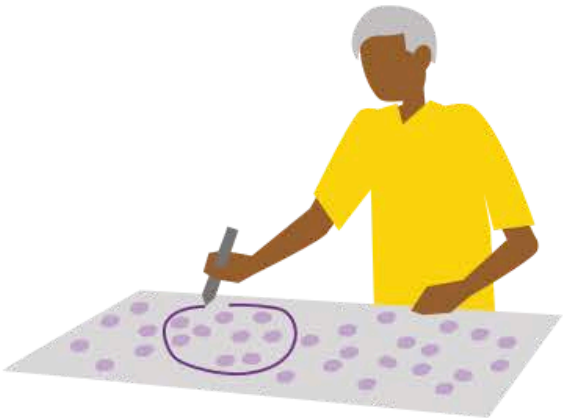
Some additional sampling tips

Conduct Light Wheel surveys before group discussions

If you are going to use the Light Wheel survey as well as 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. It's also okay to speak to different people 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.

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 requires 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. It's not ideal because it can take a long time and enumerators can't use their body language to help participants feel comfortable. Not everyone has a phone and some people won't pick up. So you may need to add up to 50 per cent to your sample size to account for non-responders. You will 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 video series**, for guidance on creating your data collection plan. Available at: **learn.tearfund.org/LW-Kobo**

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.

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. In the table below, 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

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



In the **Light Wheel survey planning workbook** (Resource 3.3.3, available at: **learn.tearfund.org/LW3-3**), 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 expenses:

- ☐ 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), available at: **learn.tearfund.org/LW3-3**

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.

Who should be involved?



- **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 recruiting enumerators

- If possible, have a mix of male and female enumerators 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, eg local university students.
- 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.

What makes a good enumerator?

- **Familiarity with the Light Wheel:** Enumerators must 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**.[6]

- **Familiarity with the survey:** Enumerators must be familiar with the survey questions, as well as how to administer the survey, eg in KoboToolbox. It can sometimes be hard to gather all your enumerators in person at one time, so you could consider running an online training instead. For more information on how to train enumerators, see 'Training enumerators' in **Section 2.3** of the Light Wheel toolkit, available at: **learn.tearfund.org/LW2**

- **Pilot testing:** A pilot exercise gives enumerators the chance to practise and ask any questions 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. For more information see 'Pilot testing' in **Section 2.3** of the Light Wheel toolkit, available at: **learn.tearfund.org/LW2**

- **Clear introductions:** Enumerators should introduce themselves to each participant, explain the purpose of the survey and gain consent from the participant to proceed with the questions. They should make sure the participant is aware of how long it will take to complete, and that they don't have to answer any questions they don't wish to.

- **Create a safe space:** The Light Wheel survey asks some personal questions so it's important that the enumerators know how to make participants feel comfortable and safe. They should listen without judgement. See **Section 2.1** for more guidance on creating safe spaces or what to do if a participant raises a safeguarding concern.

- **Appreciate their contribution:** Finally, enumerators should 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.

> **'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

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

Analysing your survey findings

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.

Some simple analysis work can be done within KoboToolbox itself. It has some automated functions to help you quickly clean and check your data and create basic graphs and charts. Alternatively, you can also download your data from Kobo and use your preferred platform (eg Excel or Google Sheets) for more complex analysis work.

You can refer to the Light Wheel toolkit (**Part 4: Analyse,** available at: **learn.tearfund.org/LW4**) for detailed guidance on how to analyse your survey data in KoboToolbox. You can also contact **lightwheel.support@tearfund.org** for more information about the support that Tearfund can provide with data analysis work.

Light Wheel indicators

Each survey question provides an answer to a Light Wheel indicator (see **Section 2.1.4**). Your analysis process is about interpreting the data in order to find answers to those Light Wheel indicators. 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, ie 'What are your household's most commonly used sources of drinking water?' and calculate how many people responded with an example of a safe water source.

Comparing points in time

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 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. External factors can sometimes impact survey results in unexpected ways. We can understand more about the factors causing change when we bring the context tools (see **Section 2.5**) into our analysis.

Triangulate your findings

If you have also carried out Light Wheel group discussions and maturity model scoring, you can compare your findings with the Light Wheel survey data to see whether they are telling you the same story. Consider these questions:

- ➜ *Are you seeing the same aspects of wellbeing emerging as areas of strength and challenge in the data from different Light Wheel tools? Are there any contradictions or surprises?*
- ➜ *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?*

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 further.

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:

- *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?*

You can use the **Observation checklist and summary** (Resource 3.4.1) to capture your thoughts. For more information on using an observational approach to complement the Light Wheel survey, see **Section 2.4.**

'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

Where next?

If you are ready to facilitate your Light Wheel survey, you can go 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.

2.4 Observation tools

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

How do the observation tools work?

A simple and effective way to understand a situation better is to use the power of observation. As you spend time with a community, 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 observation tools simply guide you to document and analyse the things you see, in order to build a deeper picture of why things are the way they are.

The observation tools can be used on their own as a quick way to assess a community's situation across 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 the tools present contradictory data, we will need to explore 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

The Light Wheel toolkit contains information about all the observation tools listed above (see Section 2.4, available at: learn.tearfund.org/LW2). In this Light Wheel essentials pack we are going to look specifically at an observation tool called a transect walk.



In **Part 3: Resources** you can find all the resources you need for facilitating the Light Wheel transect walk tool.

Transect walk

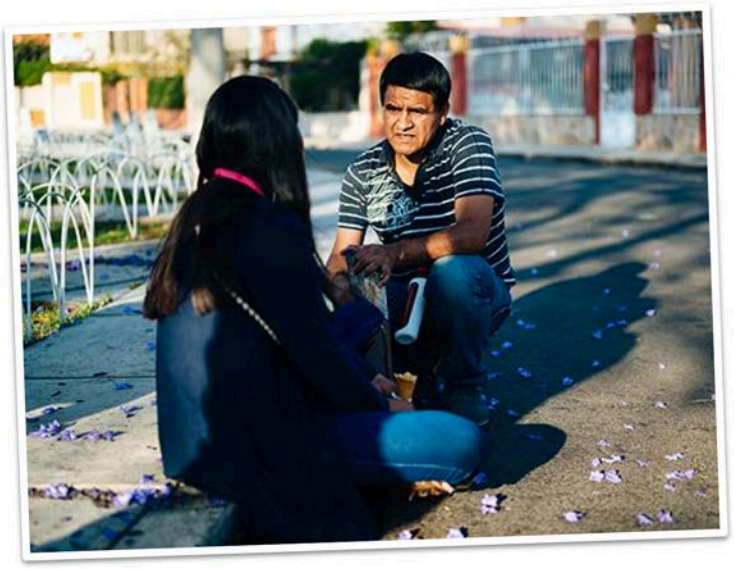
A transect walk is a structured observation exercise that involves taking a walk around a community or specific area to observe the situation. You can conduct the transect walk using the lens of the Light Wheel to help you notice things you might not usually pay attention to.

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. For example, if you do a transect walk before conducting group discussions, you can use what you saw to contextualise your discussion questions and dig deeper into things you want to know more about.

In Bolivia, church leaders used the Light Wheel transect walk tool to open their eyes to new things in the community. In return, the community members said that they were really impressed by how much the church seemed to care about the community.

> **'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



Bolivia. Photo: Tom Price – Ecce Opus/Tearfund

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.

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 similarities between what you observed in the walk and your findings from other Light Wheel tools?*
   - *Are there any differences between what you observed in the walk and your findings from other Light Wheel tools? What might be the reason for these differences?*
   - *Is there anything you will explore further?*

7. **Create a community map.** After your transect walk, you may want to use your notes to draw a map as a visual way to summarise what you have seen and discuss what people feel are the defining features of the community (see examples, on the next page). This is an optional step.

Observation checklist and summary: 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.

Community map example

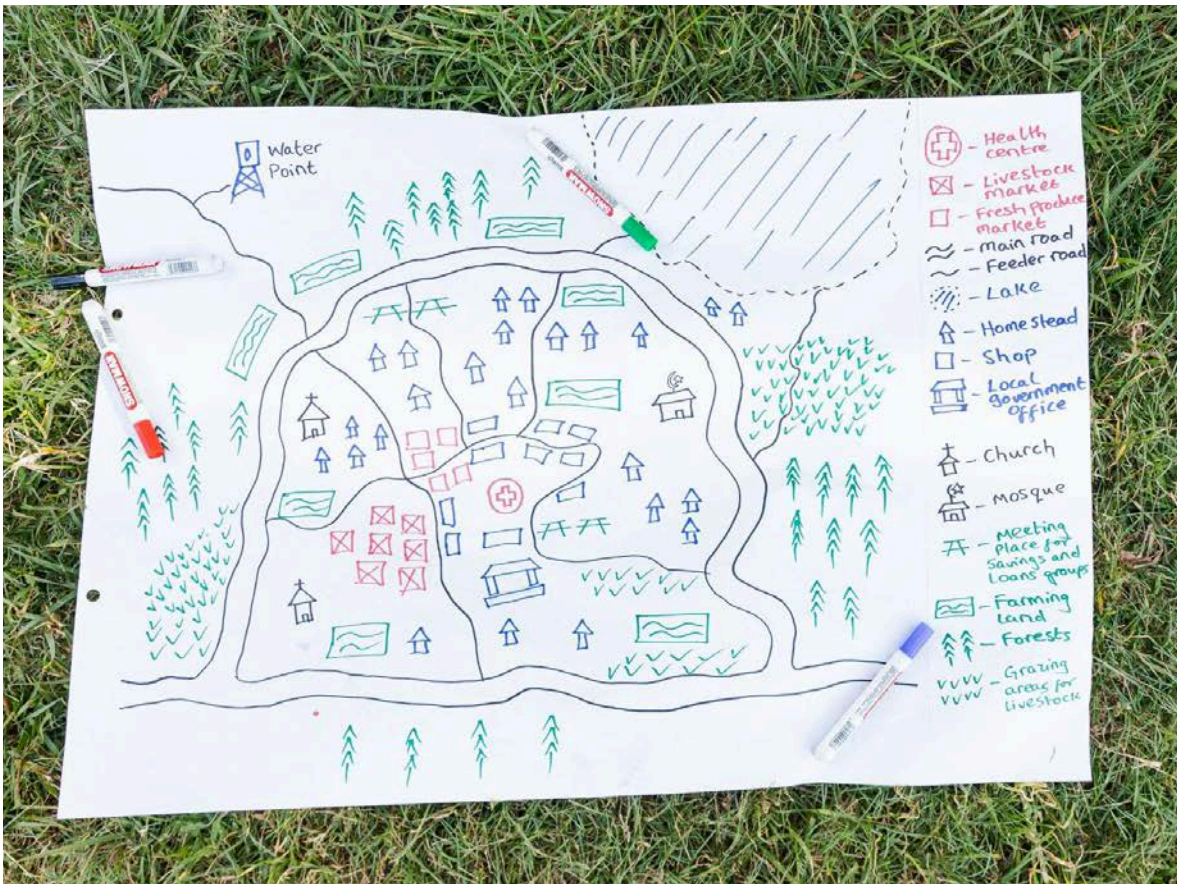


Photo: Joseph Limo/Tearfund

Things to consider

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, though. 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.

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, available at: **learn.tearfund.org/LW3-1**) 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



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'.

The context 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

The Light Wheel toolkit contains information about all the context tools listed above (see Section 2.5, available at: learn.tearfund.org/LW2). In this Light Wheel essentials pack we are going to look specifically at a context tool called a force field analysis.



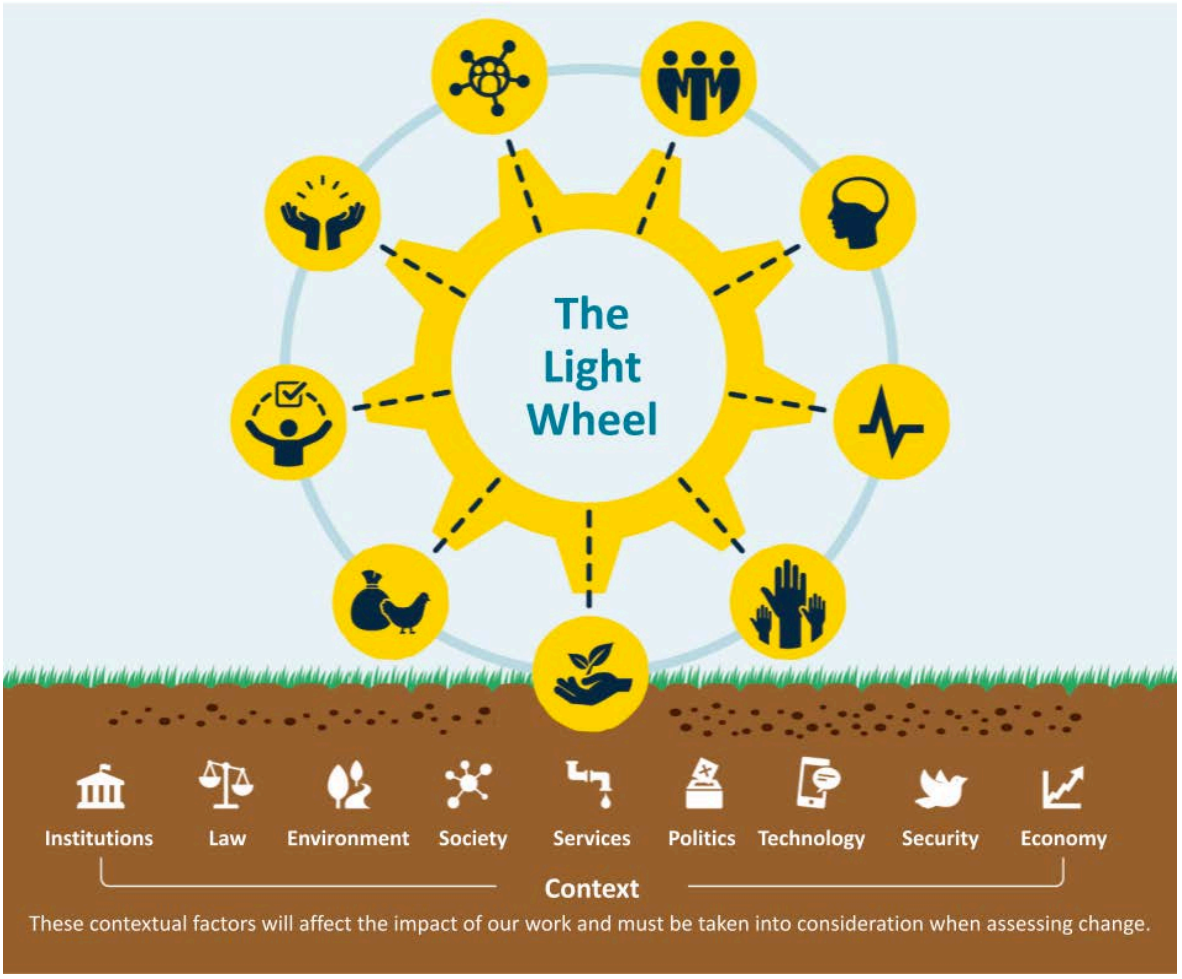
In **Part 3: Resources** you can find all the resources you need for facilitating the force field analysis tool

How do we define context?

Contextual factors are external influences that are outside your control, or beyond the scope of your work, but they have an impact on why things are the way they are. Contextual factors can be things happening today, eg the economy, the environment, cultural norms, or they can be things in the past that still have an impact today.

If we look at the image of the Light Wheel below, 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 in order to assess what factors and actors are causing change to take place.

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 wellbeing.



Contextual factors

Below is an explanation of all the context factors you can see in the Light Wheel 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.



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.



Politics

The way power is exercised, how decisions are made and the impact of political events and decisions on people's lives.



Society

The make-up of society, including social and cultural norms, population demographics, family size and structure, tribal and ethnic groups, distribution of wealth, and religious beliefs.



Services

The availability of essential public services, such as clean water, education, health facilities, electricity, transport.



Technology

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



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.



Economy

The cost of living, levels of trade and the strength of local businesses. People's access to markets, financial services and employment opportunities.



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.

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

Force field analysis example from Kenya

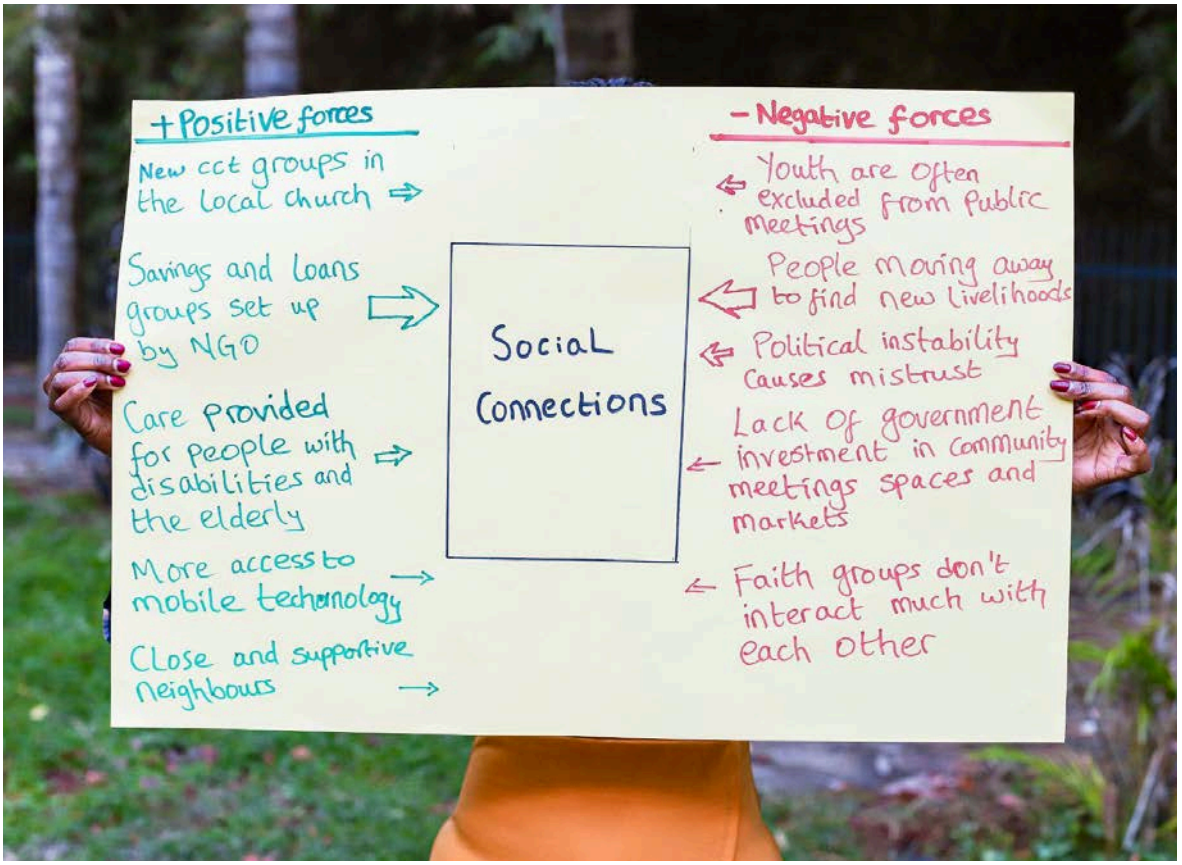


Photo: Joseph Limo/Tearfund

Step by step

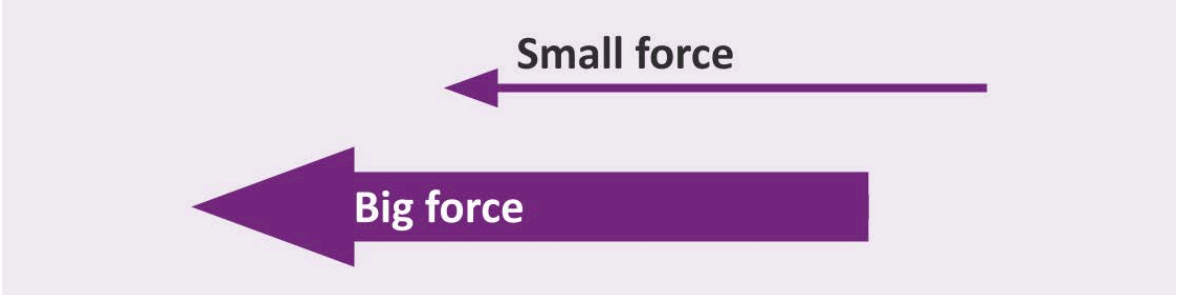
1. **Set up your equipment.** You can draw your force field diagram on a big piece of paper, using different coloured pens and sticky notes. Or you can mark your diagram in the earth or sand.

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 list given previously under 'Contextual factors' 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 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?*

Next steps

You've made it to the end of Part 2! You should now have all the information and instructions you need to facilitate each of the Light Wheel tools with confidence.

Next, in **Part 3: Resources**, you will find all of the practical tools and templates you need to facilitate each of the Light Wheel tools. If you haven't got Part 3 printed out already, you can find it by going to **learn.tearfund.org/LW-essentials**



You can also visit **learn.tearfund.org/lightwheel** to find the Light Wheel toolkit and a free, interactive Light Wheel e-learning course.

Feedback

We'd love to hear how this resource helped you. Your feedback helps us improve and share more of what matters.

learn.tearfund.org/feedback

Above, a Light Wheel group discussion in Tanzania. Photo: Lydia Powell/Tearfund

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