

Conducting Participatory Research



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Conducting Participatory Research

Background

Conducting Card Sorts

Conducting Photovoice Studies

Analyzing Findings

What is participatory research (PR)?

- “Encompasses research designs, methods, frameworks that use systematic inquiry in **direct collaboration with those affected by an issue** being studied for the purpose of **action or change**” (Vaughn and Jacquez)
- Leverages research methods or tools that encourage users’ **genuine and meaningful participation** in the research process
- Studies are guided primarily by the **experiences and expertise of the user/participant** rather than the researchers’ areas of interest

Vaughn, L. M., & Jacquez, F. (2020). Participatory Research Methods – Choice Points in the Research Process. *Journal of Participatory Research Methods*, 1(1). <https://doi.org/10.35844/001c.13244>

What are PR studies good for?

- **Learning directly from users** about their lived experiences or interactions with a service, space, program
- Developing **actions or recommendations** with direct input from users or members of your community
 - Participatory research is a “**research-to-action**” approach
- Fostering **partnerships** with users so that decision-making is shared at every stage of the assessment

What are PR studies *not* good for?

- Getting quantitative results
- Gathering evidence quickly
- Answering detailed questions about online interfaces
- Not a good method when researchers are not able to work directly with users
 - For the study to be participatory, users **MUST** have some power in decision-making and implementation



Types of participatory studies

User-Centered Design Research

- Iterative design that involves users in designing interfaces, services, or spaces intended for them
- Includes design thinking, participatory design research, human-centered design
- Examples: card sorts, charrettes, design thinking workshops

Community-Based Participatory Research

- Equitably includes all partners, including researchers and users/community members
- Often focused on health-related or other social issues
- Example: photovoice

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Framing your participatory study

- Choose method based on **what you want to know**
 - *Example:* Students' study habits, patterns, preferences for a new space = **Design workshop or charrette**
 - *Example:* Participants' use of and feelings about campus services = **PhotoVoice, photo diary**
 - *Example:* Participants' understanding and use of website links and menus = **Card sort**
- Nearly all research methods can be participatory if **co-designed and co-facilitated** with community members

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Card sorts

- Useful for learning more about how users engage with websites, including their **expectations and understanding**
 - Does the way the library site is structured make sense to users?
- Two basic types:
 - Open card sort
 - Closed card sort
- May include **physical cards** or **online tools**
- May take place **one-on-one** or in **groups**, **in person** or **online**, or in a **hybrid** setting (i.e., use an online platform but conduct the test in person)

Card sort types

- **Open card sorts**

- Participants organize content into categories
- Participants label categories themselves

- **Closed card sort**

- Participants sort content into categories defined before the test
- Participants share reactions to labels and groups developed by library staff — or other users (again, this is meant to be fully participatory!)



Card sort methods and tools

- **Low-tech**

- Sticky notes, index cards
- Hand-written or typed labels
- Blank cards for participants to fill out themselves individually or in groups

- **Online (fee-based, some include free trial tests)**

- Optimal Workshop's OptimalSort, www.optimalworkshop.com/optimalsort/
- Userlytics, www.userlytics.com/methodologies/
- UserZoom, www.userzoom.com/card-sorting/

Tips for a successful card sort

- Identify the topics and pages to test
 - Consider **heavily used content** or pages you or your users consider problematic
- Limit your study to 30–40 topics or pages — these become your “cards”
 - Don’t forget to include **blank cards** for your participants to fill out
- Run a **pilot test** to be sure technology and set-up work well
- Encourage thinking aloud — remember that your **participants are the experts!**
- Involve participants in designing the type and format of the study (open, closed, combination; online, in-person, hybrid)

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Photovoice

- Qualitative **community-based** participatory research method that originated in global public health
- Participants take **photos** and **write short captions** in response to a series of prompts provided in advance
- Group views photos together at a scheduled time (60–90 minutes)
- Conversation is **driven by photo content**, not a script directed by a moderator

Sample photovoice prompts

- What makes you feel supported, safe, or like you belong on **campus**?
 - In the **library**?
- What makes you feel unsafe and unsupported on **campus**?
 - In the **library**?
- When you think about using the **library**, what comes to mind?
- What **microaggressions or bias** do you experience because of your race in the library, on campus, in our community?

Tips for a successful photovoice study

- Provide 1–3 weeks for participants to take and submit their pictures with short captions
 - Develop a simple online submission form, or use email
- Create a slideshow with each prompt and corresponding pictures and captions
 - Do not include participants' names (participants may identify pictures they took during the discussion session if they wish)
- **Recruit moderators and note takers from the same community / identity group as the participants — and compensate them for their time**
- Audio record discussion sessions
 - Obtain consent to record the session and use photos for research purposes
- Provide incentives and snacks for participants

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Analyzing card sort data

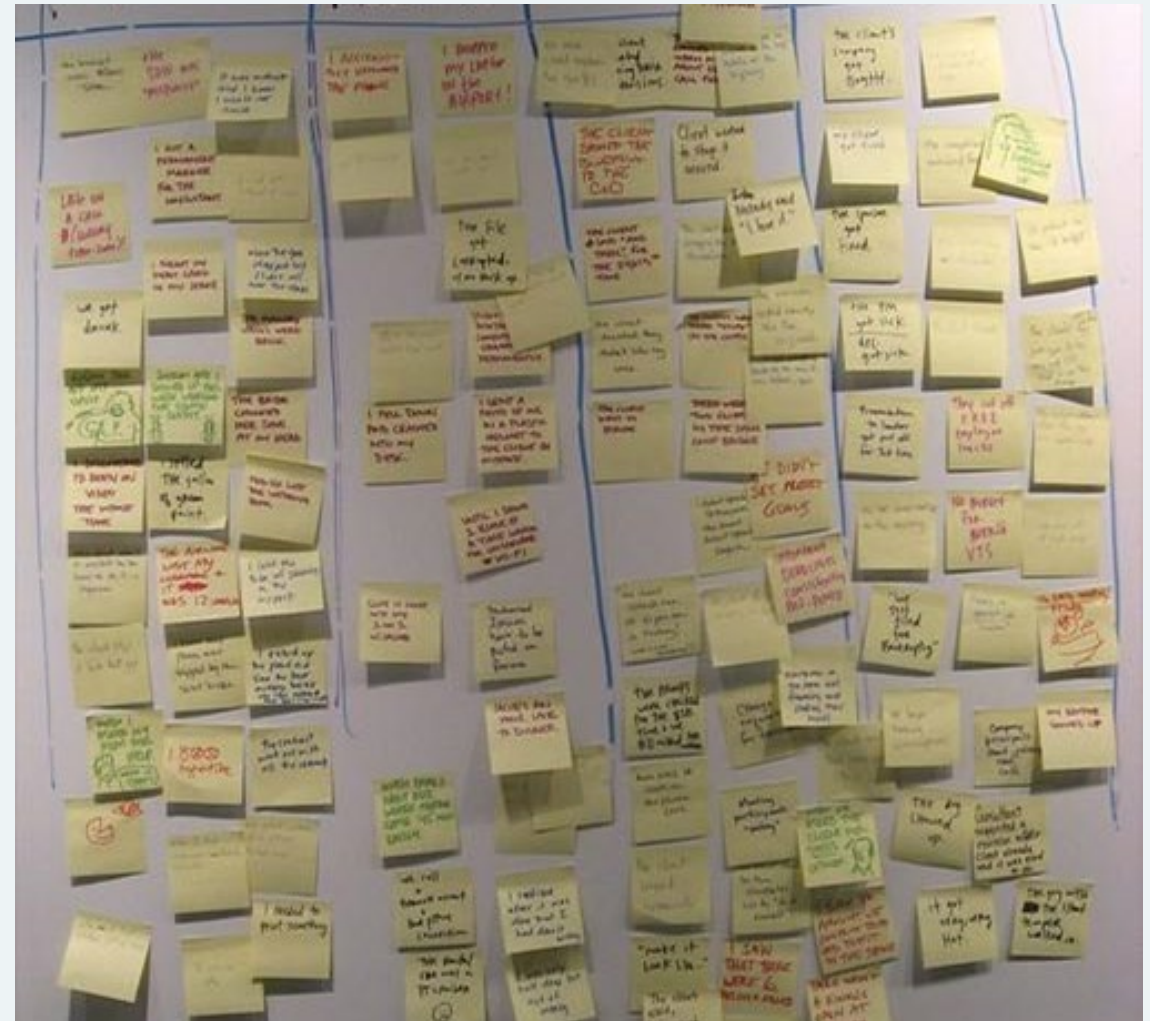
- Prepare data for analysis after each test session
 - Photograph each card sort, or record numbers of cards after each test
- Record and analyze participant demographics
- Code and analyze participant comments during and following testing
- Pay close attention to the cards group together most frequently and the categories users developed for their groupings
- Involve participants in analysis or discussion of findings; work **together to develop recommendations for improvement**

Analyzing photovoice data

- Transcribe discussion sessions
- Closely read and tag interesting quotes in the transcripts
 - More than one person should do this if possible, and ideally, at least one participant would review and tag transcripts
- Consider using affinity diagramming to group quotes and topics
- Develop takeaways and recommendations based on themes
- Identify topics that require further consideration or research

Affinity diagrams

- Also known as affinity mapping
- A design thinking analysis technique used to synthesize and group data
- Process:
 - Write each finding on a sticky note
 - Group sticky notes by theme
 - Rank themes by importance
 - Record takeaways and recommendations for improvement



Following up on what you learned

- Record your findings in writing to **share with all stakeholders**
 - Doesn't have to be a formal report
 - Include photos and quotations
- Develop **recommendations for improvement or follow-up**, and commit to fixing what you can
- Wherever possible, **involve participants** in decision-making and implementation
 - Collaborate to prioritize recommendations
 - Co-author reports, co-lead presentations, co-plan implementation
 - Celebrate successful implementations together

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