The Analysis Canvas

Project name: _____ Designed by: _____ Date: _____ Version: _____

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1.Who is going to use the output(s), for what, when and how?

Understand primary audience and reflect on the human context in which you will deliver your analysis. Anticipate their needs and concerns, tailor your analysis to suit their challenges and goals.

Understand your primary audience: Who are they, how big is the group? What is their role and position? To whom are they accountable? Will some end user's goals conflict with others? At which level are they working, local, global, regional?

Relate to them: How well do they know you? Do you need to prove your expertise and credibility? Do they require information on strategic, programmatic or operational level? How will you keep them engaged? What might distract them?

Understand the decision: What are key decisions that need to be informed? Does the end-user have the power and authority to significantly influence the development of an identified problem? Will the results of the analysis require action, and how is this action supposed to change the situation? What is the implications if no actions are taken? Should the focus of the analysis also be on what actions could be taken to prevent or mitigate any further harm?

Understand the decision-making process: Is answering the question meant to inform a meeting or specific event? How and when are decisions made? Who is involved? What are the implications if no action is taken? Do they need high level of detail, only critical details, or both?

Identify your end user's values, experience and skills: What are their background, professional experiences, attitudes, beliefs, reputation, biases, values, goals? Are they familiar with the terminology and technical language used? Do they have the expertise to interpret your analysis? What is their numeracy level? How familiar are they with the metrics you will present?

Put yourself in their shoes: Which policy or practical issues are they struggling with? What do they care about and need to get from the analysis? What motivates them? What keep them up at night? What kind of biases does your audience have that might make them resist your message? What are they likely to assume? Which of those assumptions are correct and which are incorrect?

Identify alternative sources of information they use: Which other sources of information does your end users use? What information do they already have available? How can the analysis provide unique, significant insights and go beyond what was already said by others?

2.What are the real questions?

Clarify and refine main questions as precisely as possible and focus the objectives of your analysis so as to provide the most relevant and timely information for decision making.

Refine or rephrase the original question(s) as necessary: What are the key questions that need to be answered and what information is needed to answer the question? Does the customer ask the right question(s)? Is the question phrased too broadly or narrowly (sectors, geographic areas and population groups to be investigated)? Would the question be framed in a different way by other stakeholders? Is the topic still relevant? Have recent events resulted in new challenges or opportunities? Can you reduce the scope of the problem, differentiating between what is important and what is of no value to the decision makers? Do terms, locations, duration or concepts within the question need clarification?

Check timeframes: Which time period will be taken into account? Do we need to talk about the past or also the future? Is there a critical time frame outside of which the issue loses relevance? Is there an inflexible, set deadline for the analysis? Does the end user need to know something specific before a meeting or policy decision? Can you expect a situation which warrants alerting the end users to an issue before the deadline?

Explore response options: What are all possible answers to the question? Can the question be answered by a range of possible hypotheses or just by a yes-or-no response? Is the question posed in such a way that the answer has more than one credible alternative or course of action? Are there any hidden assumptions that might result in the end user taking misinformed action following our analysis? Are there key uncertainties that could greatly affect the outcome?

3.What is the broader context of analysis?

Be aware of broader contexts and ethical issues that can impact you, your issue, participants and audience so as to make your work more relevant and less susceptible to error or arm

Scope your issue: What has prompted the need for this analysis? What are the drivers, factors, and who are the actors that can influence the way the future may unfold? How are they linked? Which ones are more dynamic and changing? Are there historical analogies to the current situation? What are the similarities and differences?

Understand your role: How does your analysis fit within the broader mandate or role of your organisation? How has this issue been covered before you started in this role? What has your organisation produced previously? What are the analytic competencies you are expected to exhibit in your work? What are the standards and other guidelines by which the quality of your work will be judged? How can you fill a gap and add value? Is somebody else better placed for this work?

Know your secondary audience: Is the issue only important to your end users or to a broader audience? Has this question, or a similar one been answered before, and what was said or has changed since then? Who else is currently writing on this topic? What is their perspective? Do your end users read their work?

Consider ethical issues: What agreements with stakeholder should be in place? How much time, resources and effort will be required from them? Is the analysis worth doing? Will it contribute in some significant way to current information gaps? Are you and your colleagues competent for doing the analysis? Do the people you are investigating or asking support from have full information about what the analysis will involve? What are the risks to harm people's life? How likely is it that such harm will occur? Is there concerns about the sensitivity of the information and how it might be used? How identifiable are the individuals, events and organizations studied? Which level of confidentiality is appropriate? What do you do when you see harmful, illegal, or wrongful behaviour on the part of others during the research? Is your study being conducted carefully, thoughtfully, and correctly in terms of some reasonable set of analytical standards or established practices? Who owns your work and analysis? And, once your reports are written, who controls their distribution? Do you have an obligation to help your findings to be used appropriately? What if they are used harmfully or wrongly?

4.What is the best analytical approach?

Think about the analysis framework, the information, methods, tools and techniques you will use to guide and organize your investigation and draw trustworthy conclusions Define the needs of your audience.

Identify appropriate level of analyses: What level of analysis is the end user looking for? Does the analysis need to go beyond description and be explanatory, interpretive, predictive or prescriptive?

Develop an analysis framework: Is there an existing conceptual framework that can support data collection and analysis, e.g., the i.e. MIRA framework or livelihood framework? Do you need to adapt or create one?

Identify main comparisons types: What categories of analysis are relevant or important? What kind of comparisons are required - over time, between sectors or population groups, rural vs. urban, etc.?

Identify the best research approach for your analysis: Does the analysis require a qualitative, quantitative or mixed approach? Are numbers more or just as much important as understanding the range and diversity of impact? How much does the affected population need to be voiced?

Select appropriate safeguards and structured analytical techniques: How will you limit and control for bias during your analysis? Would the analysis benefit from the use of Structured Analytic Techniques (SATs)? For example, Delphi, key assumption checklist, pre-mortem analysis, scenario building, etc. How much expert judgment can you use vs. data or concept driven explanations? What bias control measures, quality check procedures or safeguards will you embed in your analysis process?

Identify information requirements: What data will you need to provide an appropriate answer to the main questions or to investigate the topics included into your analysis framework? What level of precision do you need? What degree of quantification is possible in the given timeframe and with the available resources? How representative of the entire population do you need your data to be?

Select best sources for obtaining the data: Is data already partially or entirely available? If not, where will you find the data? What sources will provide the most accurate and precise information? What are the best and most available sources for the data?

Identify best way to obtain the data: Can you access data safely and freely within the given timeframe? Do you need to request officially for information? Do you need to visit specialized institutions for example, ministry of statistics, NGOs, etc.? Can you access data on line? Will you need to collect data yourself? If yes, what unit of analysis and reporting (household, community, or geographical area) will best support your analysis? What data collection technique will you use to collect this information (Direct Observation, Key informant interview, Focus Group Discussion, Community group Discussion, Phone Interview, etc.)?

5.Can collaboration contribute to better answers?

Establish if and how collaboration can improve your analysis and provide with more robust and credible results

Determine if collaboration can improve the quality of your analysis: Does the end user expect you to reach out to other subject matter experts for assistance in answering the questions? Where should you reach out for expertise? Is there information or assistance available within your organization or outside? Who has already been working or is currently working on those questions?

Identify key partners and subject experts: What are the resources and expertise, e.g., staff, background, data, etc., you will require from partners? Who should you contact before and during product development to obtain the required input? Should you convene an initial brainstorming session to identify and challenge key assumptions, examine information, explore alternative explanations and generate alternative hypothesis? How should roles and responsibilities be divided? How and when analysis will be shared? How will communication take place between partners, and who will be responsible for it?

Decide on ownership: Who will own the final product and the data? Who will authorize the final release of the data and the documents? Who will validate the conclusions of the analysis? Who will later answer questions about the results or the data?

6.How should I conceptualise my product?

Think about your dissemination and sharing strategy and the format(s) or measures that will most efficiently and memorably communicate your findings.

Consider the information processing capacity of your audience: How does the audience take in and absorb information? How much time does your primary audience have to digest your product? Should the output be a short, focused article for a senior decision maker or a longer piece with more detail that will serve a more operational audience? Is there more than one primary customer? Is there a need to develop different products in different formats? What is the appropriate language and vocabulary?

List your outputs: How many and what types of products do you need to plan for? What exactly will be available to your end user's? Do your audience need the raw data? Where and how will you store them after they are released?

Identify the format of the key messages: What is the likely format of the main message and its storyline? How can you adapt your narrative into a format or structure the end users are accustomed to, e.g., i.e. Power Point, briefs, large reports, etc.)? Will the message be clearest through a map, a briefing or a report? Is the customer more likely to use a hard or soft copy of a product? Should it be colour or black and white? Should the product be short or long, in paragraphs or bullets, with few or many visuals? Is it possible to capture the essence of your message in one or a few graphics? Should your findings be summarized in an executive summary?

Determine the best way to communicate uncertainty: How will you communicate uncertainty in your graphics and your narrative? What is the best way to report and communicate on the limitations of your analysis? Is your audience accustomed to statistical terms or do you need to use more qualitative terms to reflect on confidence and probability levels? How will you differentiate between facts and assumptions?

Clarify your dissemination strategy: How your end user's will access your outputs? How will you share and document data and methods to ensure transparency and the possibility to verify s or reproduce result? Do you need to attach raw data, reference documents and other supporting evidence to your document and presentation? What are the protective measures you need to implement and communicate in case of sensitive information? Who needs to receive the final output? Who else needs to be aware it exists?

Identify the branding strategy: How the final product will be branded? Will names or logos be included in the end-product? How do you want the document to be further quoted? How will you acknowledge external support from specific organisation or people?

7.What activities are required?

Identify the activities required to be implemented to ensure a high quality, timely and relevant product. Plan for quality and credible analysis.

Define timeframe and milestones: What is the estimated timeframe for delivering the final results? Are there any intermediary findings to be delivered? What are key milestones and products or outputs associated with them?

Define activities: What are the key activities required to deliver quality, timely and relevant products? How will you ensure credible and verifiable results? What quality control procedures do you need to set up in addition?

8.What resources are required?

Establish the resources necessary to achieve on time your information gathering, analysis and writing. Account for possible contingencies.

Define resources and costs: What key resources do our information gathering, analysis and product require? What expertise, skills and resources do you need to plan for? Is there specific software, ICT material or data to purchase? Are there enough resources available, do you need to ask for more or does the outputs or timeframe need to be reviewed or negotiated?

9.Planning