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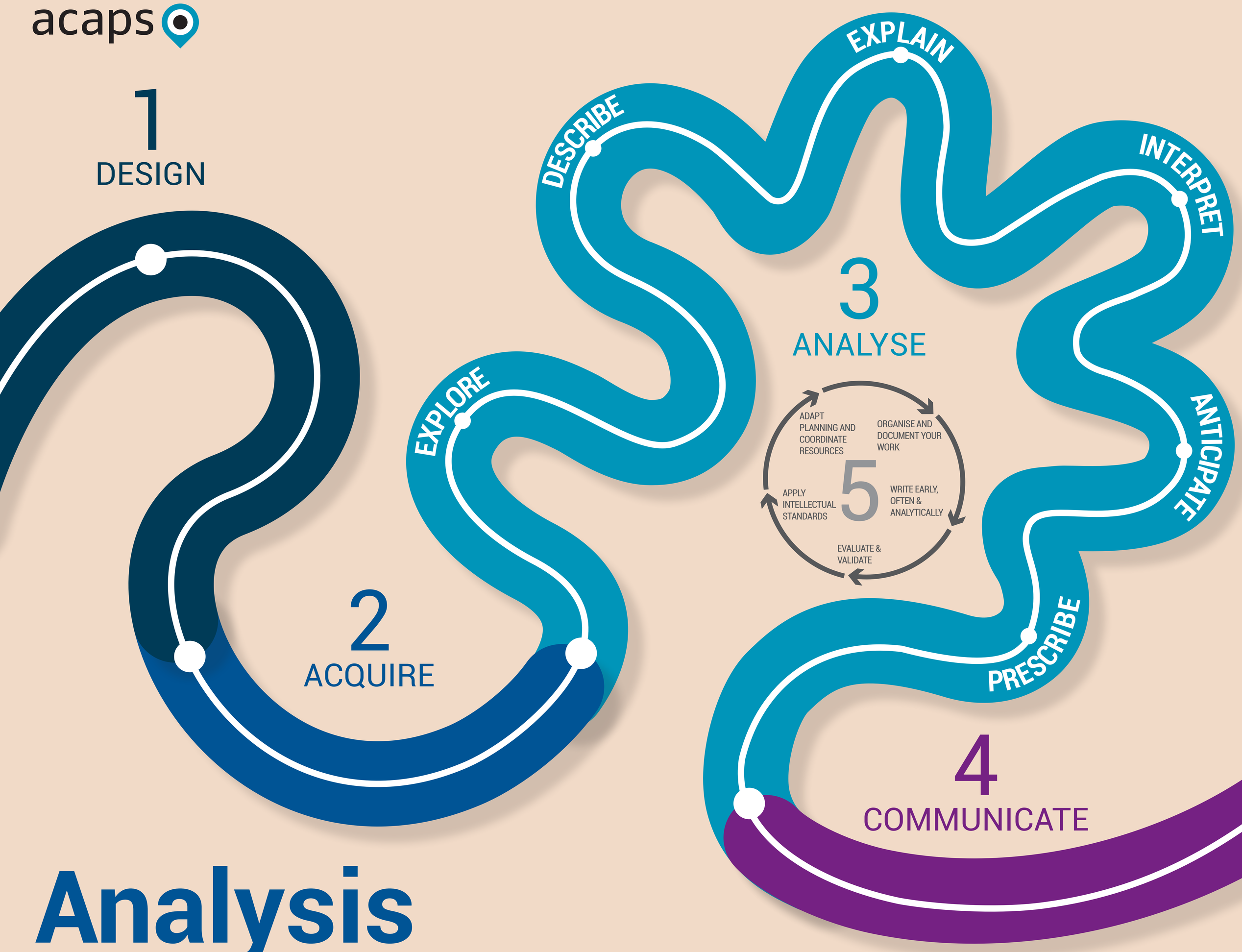


# Analysis workflow

## 1. DESIGN FOR ANALYSIS

**First, design and plan your project by defining and organising the analytical approaches you want to use. The main activities are:**

1— Review literature and synthetize the information, to learn what is known, what is uncertain, and what is unknown
2— Understand your primary audience and know what it needs and when
3— Clarify the main questions and the analytical objectives
4— Reflect on the context of your analysis and consider ethical issues, to understand what factors can influence or affect the analysis, the issue, the participants, or the audience
5— Break the issue down into component parts to better understand it and choose the best analytical approach
6— Select data requirements and target the source of your data collection
7— Find useful partners for collaboration and pool expertise
8— Frame end product(s) and draft outline(s)
9— Plan activities, contingencies, and budget resources

**At the end of the design phase, you should have:**

– **Terms of reference:** General and specific objectives of the analysis project, its scope (groups, geographical areas and sectors), final outputs (PPT presentation, report, database, SDR folder, etc.), timeframe, work plan of activities and key milestones, resources required and budget, organisations and individuals with whom to collaborate, dissemination plan.

– **Methodology (a theory of how your inquiry and investigation will proceed):** Analysis framework and plan, details on data collection techniques and sources of information, sampling plan, processing plan, main categories of analysis, definitions and thresholds.

– **Supporting documentation:** style guide, visual identity, security or data protection guidelines, data management and cleaning procedures, job descriptions, training materials, data collection instrument(s), enumerator instructions, branding, etc.

– **A draft outline of the final product(s)**

## 2. ACQUIRE THE INFORMATION YOU NEED

**The data acquisition phase involves collecting and managing information. This may be primary data acquired through field trips or surveys, phone interviews, etc., or secondary data, drawn from assessment reports, media, reports, etc. The main activities are:**

10— Review available secondary data
11— Identify information gaps, and plan how to obtain this information
12— Design reliable tools and collect unbiased data
13— Manage data and store documents

**At the end of the acquisition phase, you should have:**

– **A folder for secondary data,** that is organised according to the research objectives (e.g. per sector and geographical area) and contains all the documents and databases obtained through the secondary data review.

– **A database for secondary data,** where key information has been extracted from the documents and tagged according to sector of interest, geographical location, population group, time, etc.

– **A survey of surveys,** capturing the needs assessments carried out over a defined period of time, their location, their focus, and their depth.

– **One or several databases for primary data collection,** where all data captured at the field level has been stored including debriefing of the field teams.

## 3. ANALYSE YOUR DATA

### 3.1 EXPLORE Engage and discover

**Become familiar with your data and identify potential patterns, signals, and stories that are to be confirmed. Exploration helps understanding not just of what the data covers, but how it got there, what it represents, what seems wrong and what is missing. The main activities are:**

14— Familiarise yourself with the data and check its characteristics to gain an understanding of its relevance, completeness, and reliability
15— Diagnose, clean and enrich your data to ensure it is as accurate and complete as can be
16— Notice possible signals or stories in your data
17— Code and refine your data as you reflect growing understanding
18— Develop assertions and assess how well founded your assumptions are

**At the end of the exploration phase, you should have:**

– **Clean, reviewed databases,** including confidence levels for critical information and a change log.

– **List of codes used for refining data.**

– **List of critical information gaps.** Strategies to redirect or adapt the analysis in light of the gaps should be established, and any significant changes communicated to the end users.

– **Main assertions and propositions** about main patterns, trends, theories, explanations, messages and stories to be explored, confirmed, or invalidated.

### 3.2 DESCRIBE Summarise and compare

**Group and summarise data to help identify similarities and differences, consistent patterns, trends or anomalies and confirm main points or interesting stories in the data. The main activities are:**

19— Group alike observations and reduce your data by developing categories
20— Summarise your observations and aggregate at different level of detail
21— Compare and contrast between and within groups of data to find patterns, trends, and anomalies

**At the end of the descriptive phase, you should have:**

– **Summary statistics and statements** for each category of analysis (geographical area, affected group, sector, etc.)

– **Main confirmed patterns, trends, theories, explanations, messages and stories.**

– **Key assumptions checklist** to challenge assertions and identify faulty logic, weak evidence or flawed analysis

### 3.3 EXPLAIN Connect and relate

**Explanatory analysis is used to identify association, correlation, and other connections between observations. It is based on careful investigation of underlying processes or causal mechanisms and the strength of their relationships. The main activities are:**

22— Connect the dots and look for association and correlation
23— Link effects back to causes
24— Review main underlying processes, drivers and factors
25— Develop plausible explanations and entertain rival explanations

**At the end of the explanatory phase, you should have:**

– **Theory, best hunches, guesses and conjectures** as to what is related or leading to what.

– **Problem tree or fishbone diagram** representing causal mechanisms and which ones are contributing the most to the current outcomes.

– **A list of rival or alternative hypotheses.**

### 3.4 INTERPRET Find the implications and conclude

**Interpretive analysis aims at moving beyond findings to drawing and evaluating conclusions through argumentation, evaluation of the strength of evidence, and contextualisation of your findings. The main activities are:**

26— Rate severity and prioritise issues
27— Evaluate evidence and assess plausibility
28— Draw conclusions, find key messages, and build your case
29— Generalise and transfer results where appropriate

**At the end of the interpretation phase, you should have:**

– **A list of the most severe and/or priority issues** to be addressed, as well as the main underlying factors.

– **A conclusion** supported by plausible explanations, evidence, and logical reasoning.

– An evaluation of the **amount, strength and type of evidence supporting your claims,** and the potential impact on the accuracy of your results.

– An evaluation of the **likelihood and conditions under which your findings would apply to other settings or groups**

– **An updated key assumption list.**

### 3.5 ANTICIPATE Predict and forecast

**Anticipatory analysis identifies the likelihood of future outcomes and trends at a specific time, based on current and historical data. It combines predictions (one-off estimates of a specific event in the future) and forecasts (sets of possible futures that include probability estimates of occurring). The main activities are:**

30. Extend current conditions to forecast future outcomes
31. Examine and develop alternative futures
32. Identify triggers and track new developments

**At the end of the anticipatory phase, you should have:**

– **An outline of the impact of a continuation of the current developments or trends.**

– **A set of scenarios** which details likely alternative futures, their likelihood and their impact.

– **A list of indicators** to monitor whether these alternative futures are unfolding.

– **A revised conclusion and a list of key messages in the light of potential new developments.**

### 3.6 PRESCRIBE Suggest and advise

**Prescriptive analysis is about providing advice and suggesting policy or response options. It investigates the potential effect of future decisions and consider their refinement to align with more desired outcomes. It translates a situation analysis into a feasible plan, informs about opportunities and risks, and shows the implications of decisions. The main activities are:**

33.— Link problem, strategy and response
34— Examine and weigh the impact of response options
35.— Suggest and advise on response

**At the end of the prescriptive phase, you should have:**

– **A strategy and objectives** to change the crisis outcome.

– **A comparative analysis of different types of interventions,** their likely outcomes, opportunities and risks.

– For each objective, **a set of recommended interventions and sequence of action.**

## 4. COMMUNICATE YOUR FINDINGS

**Your analysis emerges from the organisation, clarity, and credibility of your argument(s) and the reasoning behind it. However, they reach your intended audience only if you succeed in effectively communicating and conveying your message(s). The more tailored your product is to your end users, the more impact it will have. The main activities are:**

36— Write relevant, readable, and persuasive products
37— Optimise the visual presentation of your main message(s)
38— Communicate uncertainty and document data and methods
39— (Self) Edit and peer review your product(s)
40— Disseminate findings and preserve/protect your work for access by others

**At the end of the communication phase, you should have:**

– **Tailored, relevant and readable analysis outputs,** providing solid reasoning and reviewed by subject experts.

– **Clearly and explicitly communicated limit of knowledge** and how it impacts confidence in the results.

– **Accessible and safely stored products, data and methodology** for audience seeking more details.

## 5. AND THROUGHOUT...

**While presented in a logical sequence, analysis in real life is often iterative, with feedback loops. Throughout the process, transversal activities occur, such as:**

– **Adapt planning and coordinate resources** based on the output of the work already completed and to anticipate possible contingencies

– **Organise and document your work** to keep track of what you have done, provide an audit trail and facilitate transparency

– **Write early, often, and analytically** to organize your thoughts, reflect on new possibilities, contradictions, surprises and share your work for feedback

– **Evaluate and validate** the evidence at hand, alternative hypotheses and any assumptions that might impact the your analysis

– **Apply intellectual standards** to ensure the quality, credibility and transparency of your analysis and the logical reasoning behind it.

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Inspired by Richard Garfield, Stephen Few, Patrice Chataigner, Pat Bezeley, Andy Kirk, Ian Dey, Charles Kufs, J. Scott Long.
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