# Affinity Diagram Quick Reference

## Synthesizing Stakeholder Insights

Lesson 1.3 | Setup Your Project for Success

## Overview

Affinity diagrams organize qualitative data by natural relationships rather than predetermined categories. This systematic approach transforms scattered stakeholder insights into clear patterns that strengthen your problem analysis and inform solution design.

### When to Use Affinity Analysis

- After stakeholder engagement to synthesize interview and focus group insights
- Following surveys to organize open-ended responses into themes
- During team planning to organize brainstorming outputs
- For proposal development to structure evidence from multiple sources
- Throughout implementation to synthesize ongoing feedback

## Four-Phase Process

### Phase 1: CAPTURE

Extract every important insight from stakeholder conversations onto individual cards. One insight per card, using stakeholder's own words when possible. Include source attribution for traceability.

- Review all stakeholder documentation systematically
- Extract discrete insights - one per card
- Use stakeholder language, not your interpretation
- Include context markers (source, date, question)
- Maintain insight integrity - don't combine points

### Phase 2: CLUSTER

Group related insights based on natural affinities without forcing predetermined categories. Trust your instincts about what belongs together.

- Spread cards where you can see them clearly
- Look for natural relationships and connections
- Start with obvious clusters, then find subtler links
- Allow for outliers that don't cluster initially
- Iterate and refine boundaries as patterns emerge

### Phase 3: THEME

Identify the common thread or underlying pattern that unites each cluster. Create descriptive theme headers that capture the essence.

- Ask 'What's the common thread?' for each cluster
- Create themes specific enough to suggest action
- Test theme accuracy against all cluster insights
- Ensure themes reflect stakeholder language
- Check that themes are distinct from each other

### Phase 4: SYNTHESIZE

Step back and analyze patterns across themes to extract strategic insights for project design.

- Map relationships between themes
- Identify priority themes by frequency and emphasis
- Look for surprises that challenge assumptions
- Note contradictions between stakeholder views
- Extract implications for Problem Tree updates

## Quality Indicators

### Strong Affinity Analysis Shows:

✓ Themes include some surprises - not everything confirms original assumptions
✓ Multiple stakeholder perspectives support each theme
✓ Clear trail from original insights through themes to conclusions
✓ Themes are specific enough to suggest interventions
✓ Community voice and priorities are preserved

### Warning Signs to Address:

■ Every theme validates your original assumptions
■ Themes are too broad to be actionable
■ You're forcing insights into predetermined categories
■ Contradictions are ignored rather than explored
■ Analysis feels disconnected from community priorities

# Tools and Approaches

## Physical Approach (Sticky Notes)

✓ Tactile and engaging for team collaboration
✓ Easy to move and reorganize clusters
✓ Visual impact helps with pattern recognition
✗ Requires physical space and in-person collaboration
✗ Harder to document and share digitally

## Digital Approach (Miro, Mural, FigJam)

✓ Enables remote collaboration across locations
✓ Easy to document, save, and share results
✓ Can handle large volumes of data efficiently
✗ May feel less engaging than physical process
✗ Requires platform familiarity and access

# Integration with Problem Tree

Use affinity themes to systematically update your Problem Tree from Lesson 1.1:

- Map themes to existing Problem Tree elements
- Convert validated assumptions from (A) to (E) based on evidence
- Add new causes or effects revealed through stakeholder insights
- Refine problem statement if community input suggests changes
- Document clear trail from insights to Problem Tree updates

# Common Pitfalls to Avoid

## Confirmation Bias:

- Clustering insights to confirm predetermined themes
- Dismissing contradictory evidence
- Missing patterns that challenge assumptions

## Over-Simplification:

- Creating themes too broad to suggest action
- Combining distinct issues for tidiness
- Losing nuance in pursuit of clean patterns

## Analysis Paralysis:

- Creating too many micro-themes
- Getting stuck on perfect clustering
- Failing to synthesize into actionable implications

## Time and Resource Planning

| Phase | Time | Activity |
|---|---|---|
| Preparation | 15-20 minutes | Gather materials, set up workspace |
| Capture Phase | 45-60 minutes | Extract insights systematically |
| Clustering Phase | 30-45 minutes | Group related insights |
| Theme Phase | 30-40 minutes | Identify patterns and themes |
| Synthesis Phase | 20-30 minutes | Analyze cross-theme patterns |
| Integration | 30-45 minutes | Update Problem Tree |

## Next Steps

After completing affinity analysis, you'll have refined, community-validated insights ready for Theory of Change development (Lesson 1.4). Your systematic synthesis transforms stakeholder engagement into strategic intelligence that guides solution design and builds credibility with funders.