Affinity Diagram Worksheet

*Synthesizing Stakeholder Insights into Actionable Themes*

Lesson 1.3 | Setup Your Project for Success

Introduction

This worksheet guides you through the systematic process of synthesizing stakeholder insights using affinity diagrams. You'll transform scattered conversations and observations into clear patterns that strengthen your Problem Tree analysis and inform your project design.  
  
Before you begin, ensure you have:  
• All stakeholder conversation notes from Lesson 1.2  
• Your refined Problem Tree from Lesson 1.1  
• 2-3 hours of uninterrupted time for thorough analysis  
• Physical sticky notes and wall space OR digital collaboration tools (Miro, Mural, FigJam)

Phase 1: Capture Individual Insights

Objective: Extract every important insight from stakeholder conversations onto individual cards

Step 1: Systematic Review

Review each stakeholder conversation document individually. Look for:  
• Direct quotes that provide specific insights  
• Observations about behaviors, conditions, or dynamics  
• Recommendations for solutions or approaches  
• Concerns about barriers or risks  
• Questions that reveal knowledge gaps or contradictions

Step 2: Create Individual Insight Cards

For each insight, create one card with:  
• The insight in the stakeholder's own words when possible  
• Source attribution (who said it, when, in what context)  
• Connection to Problem Tree elements if obvious  
• Don't interpret or combine multiple insights yet

Insight Extraction Template:

|  |  |  |  |
| --- | --- | --- | --- |
| Insight Text | Source | Context | Problem Tree Link |
| Transportation costs eat up 30% of daily wages | Community Focus Group | Employment barriers | Root Cause: Access |
| Previous programs failed - no job connections | NGO Partner | Program effectiveness | Root Cause: Design |
| Family pressure limits women mobility | Women Group | Gender dynamics | Root Cause: Cultural |
| [Your insight here] | [Source] | [Context] | [Connection] |
| [Your insight here] | [Source] | [Context] | [Connection] |

Phase 2: Cluster Related Insights

Objective: Group insights based on natural relationships without forcing categories

Process:  
1. Spread all insight cards where you can see them clearly  
2. Look for natural relationships - insights that feel connected  
3. Start with obvious groupings, then identify subtler connections  
4. Trust your instincts about what belongs together  
5. Allow for outliers - some insights may not cluster initially  
6. Iterate and refine cluster boundaries as patterns emerge  
  
Clustering Guidelines:  
• Clusters can be 2-15 cards depending on theme strength  
• Some insights might relate to multiple themes (note this)  
• Respect singleton insights that don't obviously cluster  
• Let groupings emerge from data rather than forcing predetermined categories

Clustering Workspace:

Cluster 1:

|  |  |
| --- | --- |
| Insights in this cluster | Why they belong together |
|  |  |
|  |  |
|  |  |

Cluster 2:

|  |  |
| --- | --- |
| Insights in this cluster | Why they belong together |
|  |  |
|  |  |
|  |  |

Cluster 3:

|  |  |
| --- | --- |
| Insights in this cluster | Why they belong together |
|  |  |
|  |  |
|  |  |

Cluster 4:

|  |  |
| --- | --- |
| Insights in this cluster | Why they belong together |
|  |  |
|  |  |
|  |  |

Cluster 5:

|  |  |
| --- | --- |
| Insights in this cluster | Why they belong together |
|  |  |
|  |  |
|  |  |

Phase 3: Identify Themes

Objective: Look at each cluster and identify the common thread or pattern

For each cluster, ask:  
• What's the common thread across these insights?  
• What underlying pattern connects these observations?  
• How would I describe this theme to someone else?  
• Is this theme specific enough to suggest action?  
  
Theme Quality Indicators:  
✓ Represents all insights in the cluster accurately  
✓ Is specific enough to suggest interventions  
✓ Reflects stakeholder language and priorities  
✓ Is distinct from other themes  
✓ Has clear evidence from multiple perspectives

Theme Development Template:

|  |  |  |  |
| --- | --- | --- | --- |
| Theme Name | Description | Supporting Insights | Stakeholder Groups |
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Phase 4: Synthesize Patterns

Objective: Step back and analyze patterns across themes for strategic insights

Analysis Questions:  
• Which themes appeared most frequently across stakeholder groups?  
• What themes were most surprising or contradicted initial assumptions?  
• How do themes reinforce or contradict each other?  
• What themes suggest specific intervention opportunities?  
• Which themes highlight barriers you hadn't considered?  
• What themes reveal existing assets you could build on?  
  
Documentation Requirements:  
• Priority ranking of themes based on frequency and stakeholder emphasis  
• Identification of surprising insights that challenge assumptions  
• Recognition of contradictions that need further exploration  
• Clear implications for Problem Tree refinement and project design

Synthesis Summary:

Priority Themes (rank 1-5 by importance):

1.

2.

3.

Most Surprising Insights:

1.

2.

3.

Validated Assumptions:

1.

2.

3.

Challenged Assumptions:

1.

2.

3.

New Questions for Exploration:

1.

2.

3.

Integration with Problem Tree

Use your themes to update your Problem Tree from Lesson 1.1:  
  
Validation Process:  
• Review items marked (A) in your original Problem Tree  
• Use theme evidence to convert validated assumptions to (E)  
• Add new causes or effects revealed through stakeholder insights  
• Refine problem statement if community input suggests changes  
• Note contradictions or areas needing further exploration  
  
Documentation:  
• For each Problem Tree update, note which theme(s) support it  
• Include key stakeholder quotes that provide evidence  
• Maintain clear trail from insights through themes to final analysis  
• Prepare summary of how engagement refined your understanding

Problem Tree Integration Tracker:

|  |  |  |  |
| --- | --- | --- | --- |
| Problem Tree Element | Theme Support | Status Change | Notes |
| Limited transport access | Mobility Barriers theme | (A) → (E) | Validated with specific cost data |
| Skills-market mismatch | Training Disconnect theme | (A) → (E) | Strong evidence from multiple sources |
| [Your element] | [Supporting theme] | [A → E or New] | [Notes] |
|  |  |  |  |
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Quality Assurance Checklist

☐ Captured insights from all stakeholder conversations systematically

☐ Clusters represent genuine patterns, not forced categories

☐ Themes are specific enough to suggest action

☐ Some themes include surprises that challenge assumptions

☐ Multiple stakeholder perspectives support each theme

☐ Problem Tree updates are clearly traced to stakeholder evidence

☐ Contradictions are noted rather than smoothed over

☐ Community voice and priorities are preserved in themes

☐ Documentation supports credible proposal writing

☐ Ready to move forward with refined problem analysis

Next Steps

After completing this affinity analysis:  
  
1. Share key findings with stakeholders who provided input  
2. Use refined Problem Tree for Theory of Change development (Lesson 1.4)  
3. Maintain stakeholder relationships for ongoing collaboration  
4. Document methodology for proposal writing and funder communication  
5. Plan follow-up conversations to explore remaining questions  
  
Remember: This analysis transforms your stakeholder engagement from consultation into strategic intelligence that guides every aspect of your project design.