## Exercise: Card Sort Exercise for Organizing Resources on Family Planning Programs and Services

**Overview**

In this exercise, participants are asked to imagine they work for a family planning project that has produced a wide variety of publications on family planning programs and services. All the publications live on the project’s shared drive in a single folder. The participants have been tasked with organizing the information and making it available on the project’s SharePoint site. After talking with subject matter experts within the project, a list of concepts has been developed (see list of concepts in Step 1) that reflects the topics of the publications.

The participants’ task is to decide how they would organize these concepts into a cohesive structure to make it easy for staff to find what they’re looking for.

***Note:*** *This exercise is set up to be a physical open card sort. If the presenter chooses to use online card-sorting software, most of the steps can be transferred to an online environment. Consult the software instructions for specifics on completing each step*.

**Objectives**

1. To understand the importance of using a systematic and participatory process for developing a taxonomy to organize information.
2. To learn how to use card sorting as a tool to organize information into logical categories and build a taxonomy.
3. To recognize how nomenclature may vary from person to person and how that can impact a taxonomy.

**Time**

Total: 60 minutes

**Advance Preparation**

For this exercise, you will need 40–50 cards per participant:

* 30 cards for each of the family planning concepts
* 10 blank cards for the participant to write their top-level groups
* 10 blank cards for new or changed concepts

Write each term listed in the **Exercise Worksheet** (at the end of this Exercise Guide) on each set of cards. Or you can print these terms, using self-adhesive labels and a word processor if possible, and tape each term onto an individual card.

Create one set of cards for each participant. If possible, sort the order of each set of cards so that each participant’s cards are in a different order. This creates the potential for the participants to conceptualize the content differently as they go through their set of cards.

Number the cards in the bottom corner or on the back. This will help you when if you want to analyze the card sort results later.

Arrange the space:

* + Ensure the participant has enough room to spread the cards out on a table or tack/tape them up on a wall. A conference room works well.
* Make sure there are markers and extra blank cards for each participant.

**Implementing the Activity**

1. The Facilitator will need **5 minutes** before the activity to explain the purpose of the activity and how the activity will work.
2. The Facilitator will hand out the cards to participants and they will have **25 minutes** to sort the cards into groups and name the groups.
3. The Facilitator and Participants will spend the last **30 minutes** reporting out on their experiences and discussing what they learned from the exercise.

**Activity Steps**

1. Give each participant a set of cards with the concepts listed in the **Exercise Worksheet** section. Explain that you are asking for help to figure out how to organize categories of information for a new SharePoint site.
2. Ask the participants to sort the cards into groups that make sense to them. Try for no more than 6 to 10 top-level groups.
3. If participants feel that a particular card belongs in more than one group, they should place the card in the ***best*** group where they think it fits. However, they can also make duplicate cards for that concept and place the cards in multiple groups if they feel those concepts really do fit under multiple groups.
4. If the participants think something is unclear or missing, they may alter a card or create a new one.
5. Once the participants have sorted their cards into groups of cards, ask them to name each group. Ask them how they would describe the cards in each of the piles. These names may become the top folder structure on the SharePoint site while other cards may become subfolders.
6. **Report out and discuss:** After the exercise has been conducted, ask the participants a few questions about creating their groups.
   * Were any groups difficult to create? If yes, why?
   * Were any cards difficult to put in a group? If yes, why?
   * Why did they group certain cards together?
   * What were some similarities between the different participants’ groupings? Differences?
   * Were there any group names that used different words but essentially meant the same thing as other names? What kinds of implications might that have on people’s ability to find the information they are looking for?
   * Were there any group names that were clearly preferred by most participants?

For an example of how the cards could be sorted into a logical taxonomy, see the sample taxonomy in the **Appendix** at the end of this Exercise Guide.

**Optional Step: Analyze the Results**

While card sorting is easy to conduct, manually analyzing the data from a card sort can pose some challenges, particularly if you get a wide range of different categorizations arising from the card sorting exercise.

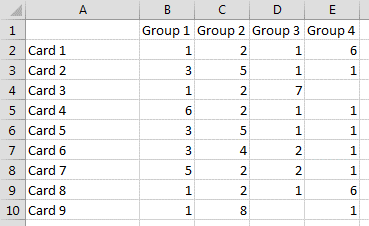
Typically this is a step that you would do at a later time. You can consider whether you want to add this to the exercise if you want the participants to gain experience in analyzing the card sort results (which will require you to add more time to the exercise) or if you want to use and analyze the participants’ card sort results yourself to inform an actual project you are working on (i.e., if you used concepts relevant for your specific purposes rather than the example concepts provided in the Advance Preparation section of this exercise guide).

To prepare your data for analysis:

* Photograph the sort order of each participant’s cards, or
* For each participant, write down their top-level groups and the numbers for each card included under that group.

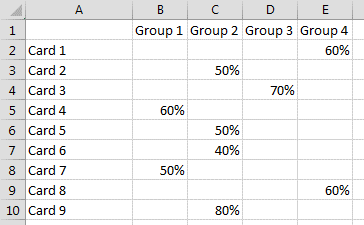
You can manually analyze card-sorting results effectively and present them visually by following these steps.

1. Identify the most commonly suggested top-level groups among all of the responses.
   * What groups did people create?
   * Are there distinct organization schemes?
   * What did they call the groups they made?
   * What cards did people sort into these categories?
   * Did people tend to do similar things or different?
2. Once you have consolidated and determined your top-level groups, create a spreadsheet, listing the cards (by name or number) in the rows and the top-level groups in the columns.
3. From your card sort’s results, determine how participants grouped the cards into the categories, then add the raw counts to your spreadsheet, as shown below:

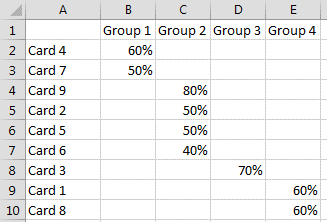


1. Calculate the percentages. Replace the raw counts with percentages. Each percentage is the number of participants who sorted certain cards into a particular group divided by the total number of participants.

Once you’ve calculated the percentages, keep only the percentages that are substantial enough to take into serious consideration.



1. Group the rows (Cards). This is a little bit tricky. Sort the rows according to which cards have the highest percentage within each group. For example:
   * Select all rows and columns
   * Sort by column B (Group 1) from largest to smallest
   * Sort again, selecting all columns and rows that don’t have a percentage in column B
   * Sort by column C (Group 2) from largest to smallest
   * Repeat until all rows are sorted



1. Analyze the distribution of percentages across the groups to determine which cards belong in each group.
2. Draft your taxonomy combining the analysis of the card sort results and the qualitative information you gathered from the users during the exercise and their responses to the questions posed at the end of the exercise to consider why participants made their decisions.

**Exercise Worksheet:   
Family Planning Terms for Each Set of Participant Cards**

|  |  |
| --- | --- |
| Access to Services and Information | Family Planning for Persons Living With HIV/AIDS |
| Attitudes Toward Contraceptive Use | Health Systems Strengthening |
| Best Practices, Guidelines | HIV and Tuberculosis |
| Client-Provider Interaction | Human Capacity Development |
| Community Involvement | Infection Prevention |
| Community-based Services | Informed Choice |
| Contraceptive Security | Integrated STI/RTI Services |
| Family Planning and Antiretrovirals | Integrating HIV Services into Family Planning Programs |
| Family Planning and HIV/AIDS | Maternal Health and HIV/AIDS |
| Family Planning and HIV/AIDS Program Integration | Men's Involvement |
| Family Planning and Home-based Care | Midwives and Traditional Birth Attendants |
| Family Planning and Maternal Health | Post-Abortion Family Planning |
| Family Planning and Mother-to-Child Transmission | Program Financing |
| Family Planning and Orphans and Vulnerable Children | Program Monitoring, Evaluation, Indicators |
| Family Planning and Voluntary Counseling and Testing | Training |
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*Note: Empty cells are included in this table to remind you to provide participants 20 blank cards to write their top-level categories and to create any new cards that they may want to add.*

**Appendix. Example of Sorted Cards**

**Health Systems and Services**

Client-Provider Interaction

Community-based Services

Contraceptive Security

Health Systems Strengthening

Human Capacity Development

Infection Prevention

Training

Midwives and Traditional Birth Attendants

**Integration of Services**

Family Planning and HIV/AIDS

Family Planning and Antiretrovirals

Family Planning and Home-based Care

Family Planning and Mother-to-Child Transmission

Family Planning and Voluntary Counseling and Testing

Family Planning for Persons Living With HIV/AIDS

Integrating HIV Services into Family Planning Programs

Family Planning and Maternal Health

Family Planning and Orphans and Vulnerable Children

HIV and Tuberculosis

Integrated STI/RTI Services

Maternal Health and HIV/AIDS

**Program Management**

Best Practices, Guidelines

Program Financing

Program Monitoring, Evaluation, Indicators

**Social and Cultural Issues**

Attitudes Toward Contraceptive Use

Community Involvement

Family Planning and HIV/AIDS Program Integration

Men's Involvement

**Unmet Need**

Access to Services and Information

Informed Choice

Post-Abortion Family Planning