



THE "SONDEO"
A RAPID
RECONNAISSANCE
APPROACH FOR
SITUATIONAL
ASSESSMENT

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"SONDEO" MEANS "TO SOUND OUT." IT IS A RAPID RECONNAISSANCE OR RAPID APPRAISAL METHOD OF LEARNING ABOUT LOCAL PEOPLE'S SITUATIONS, EXPERIENCES, PROBLEMS, AND PERSPECTIVES ... DIRECTLY FROM THE PEOPLE THEMSELVES. IT GENERATES INSIGHTS AND INFORMATION RARELY OBTAINED IN A FORMAL SURVEY IN A RELATIVELY SHORT PERIOD OF TIME. A SONDEO WILL GIVE YOU A GOOD "SENSE" OF THE SITUATION WITH USEFUL, BUT LIMITED, GENERALIZATION BEYOND THE SAMPLE OF THOSE INTERVIEWED.



WHY RAPID RECONNAISSANCE?

Rapid reconnaissance or rapid appraisal usually involves short periods of time in the field, and it combines some elements of the formal survey, key informant interviewing and participant observation (Table 1). Rapid reconnaissance approaches to situational assessment have evolved because they can be cost efficient, timely, locally relevant, accurate in "telling it like it is," and useful in responding to people's perceived concerns. They are also effective in decreasing outsider bias in assessing people's needs, concerns and perceptions, for example, by reducing prejudices and stereotypes, academic categories, and dependency on "easy-to-reach" respondents.

The *sondeo* approach is a relatively simple way of understanding local people's experiences and viewpoints and to gather indigenous knowledge. It is an effective method for providing in-depth understanding of different interest groups' perspectives and experiences. It can encourage clientele participation in problem diagnosis, planning, program implementation and monitoring, evaluation of technologies or services, testing alternatives and verifying what is known. If carefully organized, a *sondeo* can involve people who are frequently overlooked, for example, limited resource clients, women and culturally "invisible" groups. By involving local people actively throughout the process, it provides a contrast to traditional research in that data is not merely extracted and disseminated. Rather, it is a participatory action research technique involving members of the community in both data analysis and action.



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TABLE 1.

FUNDAMENTALS OF THE SONDEO METHOD

HOLISTIC OR SYSTEMS ORIENTATION • MAY INVOLVE A COMBINATION OF METHODS ... INFORMAL/ETHNOGRAPHIC INTERVIEWS, KEY INFORMANTS, TEAM OR GROUP CONSENSUS, SENSING INTERVIEWS, FOCUS GROUPS, OBSERVATION • QUALITATIVE DATA • FAST DATA TURNAROUND CLOSE COMMUNICATION BETWEEN CLIENTELE AND PROFESSIONALS • PROFESSIONALS LEARN FROM CLIENTELE; CLIENTELE TEACH "EXPERTS" • CLIENTELE PARTICIPATE IN PROBLEM SOLVING PROCESS AND VERIFICATION OF FINDINGS • OPEN-ENDED QUESTIONS AND INTERVIEWER PROBING • IMPORTANCE OF LOCAL OR INDIGENOUS KNOWLEDGE • CLARIFICATION OF NEEDS TEAM APPROACH • PRELIMINARY TEAM ORIENTATION • TEAM INTERVIEWS AND ROTATION • GROUP RESPONSIBILITY FOR DATA ORGANIZATION AND ANALYSIS

APPLICATIONS

The *sondeo* method is used to get more information about a household, community, population, or organization. Table 2 lists ways this information might be used.

APPLICATIONS OF SONDEO INFORMATION OBTAINED

TABLE 2.

- TO ACCURATELY DESCRIBE AN EXISTING SITUATION, OR BEHAVIOR PATTERN
- TO IDENTIFY HOMOGENEOUS SYSTEMS
- TO IDENTIFY PROBLEMS, CONSTRAINTS, COSTS OR BENEFITS
- TO IDENTIFY POTENTIAL SOLUTIONS
- TO ASSESS IMPACTS
- TO OBTAIN MORE DEPTH OF INFORMATION - WHY? HOW?
- TO DESCRIBE OR UNDERSTAND SOCIAL RELATIONSHIPS
- TO OBTAIN A MORE ACCURATE PICTURE OF CULTURAL OR SOCIAL CLASS GROUPS DIFFERENT THAN THE INVESTIGATOR'S OWN
- AS BACKGROUND FOR DEVELOPMENT OF A MORE FOCUSED QUANTITATIVE STUDY

PREREQUISITES FOR SUCCESSFUL APPLICATION

Some prerequisites assuring successful application of this technique are:

- Advanced legitimization
- Interdisciplinary or "mixed background" team composition
- Skilled team interviewers (open-ended style)
- Selection of local interviewees or key informants
- Organization before beginning field work
- Training and orientation of team members
- Team members' knowledge of research site(s)
- Well focused interview topics
- Careful documenting of interviewees' comments
- Ability of team to work and talk together
- Availability of team members for collaborative field work and data analysis
- Collaborative team philosophy that includes interviewees as partners in the total process

HOW TO DO IT

RESPONSIBILITY AND LEADERSHIP

Identify someone to assume leadership and responsibility. Consider working closely with a sponsoring group such as a steering committee, task force or local organization to legitimize, prioritize, define objectives, recommend populations for sampling, take part in field work, help organize and analyze findings, review findings and generate recommendations. Legitimize the activity by identifying formal and informal community leaders and involving community organization representatives.

GOALS/OBJECTIVES

Determine goals of rapid reconnaissance, for example:

- Establish a continuing system of public input
- Know current situation
- Identify locally acceptable solutions to problems
- Hear from special interest or hard-to-reach groups
- Increase public visibility
- Build public interest and commitment
- Generate ideas for programs or products
- Clarify results of a quantitative survey
- Explore attitudes and perceptions re: a program idea, a technology or a product

Establish priorities to guide the approach, for example:

- Is legitimization needed?
- Who is affected?
- Who will be interested in the findings?
- Who should be involved?
- What resources are available?
- How will findings be used?
- When are findings needed?
- What information is available?

Determine use of findings, for example:

- Who are findings for?
- What are these people/groups interested in?
- How should findings be presented?
- Will users be satisfied with qualitative information?
- Do findings have to be presented in tabular form?
- Should findings be supplemented by other information?

Explore need for complementary methods to use with rapid reconnaissance, for example:

- Existing data
- Focus group interviews
- Formal surveys
- Case studies
- Observations
- Community forums

RESOURCES AND CONSTRAINTS

Identify available resources such as:

- Time available
- Skills, knowledge and experience
- Staff/volunteers (implementation team)
- Clientele/local people (key informants for identifying interest groups, and interviewees)
- Formal organizations, informal groups, firms
- Transportation
- Telephone/mail
- Media
- Equipment (tape recorder, computer, video camera, easel stand)

Identify potential constraints, for example, social or political environment, time, limited assistance, accessibility of participants. Ask how the design can be adapted to accommodate these problems?

IMPLEMENTATION TEAM

A rapid reconnaissance team consists of 6-12 persons with mixed interests and backgrounds who are available for 1-3 weeks. The team is usually composed of clientele interest group representatives and a mix of other people from organizations or institutions that could potentially respond to clientele's needs or interests, i.e., information, training or education, research, problem solving. Several team members should be familiar with the community or area of concern. If special interest groups may be affected by the issue or problem, include their representatives on the team. Strive for a balance of interests (see Table 3).

TABLE 3. EXAMPLES OF RAPID RECONNAISSANCE TEAM COMPOSITION

ISSUE: YOUTH VIOLENCE	
TEAM 1:	4-H/YOUTH EXTENSION AGENT, FAMILY LIVING EXTENSION AGENT, SOCIAL WORKER, CLERGY PERSON, RECREATION SPECIALIST, SCIENCE TEACHER, COMMUNITY YOUTH VOLUNTEER
ISSUE: TIMBER-DEPENDENT COMMUNITIES	
TEAM 2:	COMMUNITY ACTIVISTS, EXTENSION AGENT, TRIBAL COUNCIL REPRESENTATIVE, CHAMBER OF COMMERCE MEMBER, SMALL BUSINESS PERSON, ECONOMIC DEVELOPMENT COUNCIL MEMBER, UNEMPLOYED TIMBER WORKER, TRADE SCHOOL INSTRUCTOR, INTERNATIONAL MARKETING SPECIALIST
ISSUE: LOW-INCOME HOUSING	
TEAM 3:	FEMALE HOUSEHOLD HEAD, SENIOR CITIZEN, UNEMPLOYED TIMBER WORKER, FARM LABORER, NATIVE AMERICAN, BUILDING CONTRACTOR, LAND DEVELOPER, COUNTY COMMISSIONER, COUNTY PLANNER, PERSON OF COLOR, REFUGEE RE-SETTLEMENT COUNSELOR

In actuality, the reconnaissance team is composed of sub groups of 2-4 people, which we refer to as mini-teams, who rotate throughout the situational assessment. An even reconnaissance team number (6, 8, 10, 12) will accommodate pair rotations; triads also work well. More than 4 people on a mini-team is likely to distort the balance between the interviewer team and the informants.

TIME SCHEDULE

Develop a time schedule. Depending on the size of the total team, allow for a minimum of 2 pairs. For example, a 12 person team could break into 6 pairs or 4 triads.

Schedule team members to work in pairs for half day, or full day intervals, then rotate partners. Determine approximate number of interviewees desired, then estimate number that can be interviewed daily. For example, one mini-team might contact 4-6 interviewees on one day and 8-10 on another day. With 4 mini-teams the daily contacts might look like Figure 1. In a 4-day period the team could conceivably talk to 81 people depending on distance and availability.

FIGURE 1.

MINI-TEAM DAILY CONTACTS

DAY	1	2	3	4
MINI-TEAM 1:	6	8	5	4
MINI-TEAM 2:	7	7	9	4
MINI-TEAM 3:	4	9	2	1
MINI-TEAM 4:	2	8	5	0
TOTAL				81

A total of 30-40 informants is usually sufficient if problem or concern has been clearly identified and focused in advance. If the issue is broad, it may be necessary to talk with more people. The flexibility of the method allows the addition of more participants as the situation unfolds.

Allow sufficient time, before beginning in the field, to legitimize the sondeo with appropriate people or groups. This might be done in person, over the telephone, in the media, or in a public meeting. Personal contacts are often worthwhile. Also, allow time for orienting the team (see below) and for field work organization.

Scheduling time to process and share information both before and after each interview and after each day is an extremely important part of the entire process. The mini-teams should schedule time to share and process the information they have gathered after each interview while they are making their notes. This is best done immediately after each interview or else confusion can result. The whole reconnaissance team should schedule time at the end of the day, or every other day, to share and process information.

TEAM ORIENTATION

Plan team training or orientation to assure that the available team:

- Is familiar with local situation (listing data, population characteristics, historical trends, social organization, relevant interest groups, power structure, factions, economy, etc.)
- Understands and agrees on *sondeo* methodology goals
- Understands and agrees on focus topics (questions) for informant interviews. These should be open-ended to allow respondent the freedom to express opinions and ideas with no team influence
- Can conduct an ethnographic interview (see below) as a pair or triad, reaching consensus on what was heard, taking few or no notes during interview
- Can shape questions without influencing respondents' answers
- Understands how to develop rapport, listen, probe, clarify, re-state, etc.
- Understands group consensus. Mini-teams must reach consensus on what has been learned both after each interview and at the end of each day. The total team must reach consensus on overall findings when all interviews are complete
- Can summarize in writing, each interview at the end of each day (this is less important than team sharing and processing)

- Knows who informants are to be, or how to identify informants in the field
- Understands primary responsibilities, professionally and ethically, i.e., confidentiality, neutrality, loyalty to respondents' terms and categories, learner role vs. expert role

THE ETHNOGRAPHIC INTERVIEW

This is an informal, friendly interview method developed and tested by anthropologists. It is a relaxed conversational approach for getting to know people from whom information is desired. The objective is to establish a friendly relationship which will build trust and understanding between interview team and informants. If done well, the interviewee will willingly discuss familiar topics, situations, experiences or events.

The following are important ethnographic interviewing skills: careful listening, sensitive probing, showing interest in others, remembering what is said, re-stating, etc. Advance planning of key discussion topics is helpful. Note-taking is left until discussions are over and leave has been taken.



TABLE 4

ELEMENTS OF ETHNOGRAPHIC INTERVIEW

- GREETINGS, INTRODUCTIONS, AND BUILDING RAPPORT
- PURPOSE OF VISIT
- ETHNOGRAPHIC EXPLANATIONS ... PROJECT, RECORDING, LANGUAGE, INTERVIEW SEQUENCE, QUESTION STYLE
- ETHNOGRAPHIC QUESTIONS ... SEQUENCE, CATEGORIES, DESCRIPTIVE, STRUCTURAL CONTRAST
- TURN TAKING
- EXPRESSING INTEREST AND LISTENING TO OTHERS' QUESTIONS, AS WELL AS YOUR OWN
- EXPRESSING IGNORANCE ABOUT LOCAL KNOWLEDGE
- EXPLAINING WHAT IS HEARD, REPEATING, RE-STATING
- INCORPORATING INFORMANTS' TERMS, CATEGORIES, EXPRESSIONS, STORIES
- CREATING HYPOTHETICAL SITUATIONS
- ASKING FRIENDLY QUESTIONS
- NOT CRITICIZING (REINFORCING)
- TAKING LEAVE

SELECTION OF INTERVIEWEES

Define population groups from which interviewees will be selected. Identify a list of potential participants. Call on local key informants to help identify additional potential interviewees. Key informants are knowledgeable local people who know the community or interest groups well. It is helpful to have a list of selection criteria in mind before asking informants to help.

Interviewees should be able to relate to the team, be somewhat knowledgeable about topic or issue of concern, and be able to articulate their own knowledge. They also need to have the skills to discuss the situation as others might see it, rather than merely giving their personal perspective. Generalizing about the issue or problem is one of the most difficult skills to master and therefore may require time, practice, and training.

A note of caution is useful here in that by focusing on knowledgeable, articulate people, there is a danger of excluding quieter, more reticent individuals who may have valuable insights. Innovative people may sometimes be less well integrated into the community, yet they may be valuable contributors. Every effort should be made to include people who are often "invisible", for example, women, culturally or geographically isolated residents, physically impaired individuals, people of color, youth, etc.

DECIDING ON SELECTION CRITERIA:

In determining selection criteria, it is important to know why you want local participants involved as either reconnaissance team members or interviewees. What is their role to be with regard to the purpose of the activity? Selection criteria will vary with the purpose of the rapid reconnaissance (see Table 5). Almost anyone can become a participant, but not everyone makes a good participant.

TABLE 5.
RAPID RECONNAISSANCE PURPOSE AND PARTICIPANT SELECTION CRITERIA

EXAMPLE 1: PURPOSE: TO UNDERSTAND INTERVIEWEES' KNOWLEDGE POSSIBLE SELECTION CRITERIA: • LONG TERM EXPERIENCE WITH CONDITION, ISSUE, PROBLEM • KNOWLEDGEABLE RE: SPECIFIC CONDITION, ISSUE, PROBLEM • INNOVATOR, EXPERIMENTER, RESEARCH-MINDED, CURIOUS, TRIES NEW THINGS • NETWORKS WITH OTHER INNOVATORS • TAKES RISKS, DEVICES CREATIVE WAYS OF HEDGING RISKS • NOT TOO CONCERNED ABOUT WHAT NEIGHBORS THINK ABOUT HIS/HER "CRAZY" IDEAS • WILLING TO SHARE IDEAS AND EXPERIENCES	EXAMPLE 2: PURPOSE: TO IDENTIFY POTENTIAL LEADERS FOR COMMUNITY PROBLEM SOLVING POSSIBLE SELECTION CRITERIA: • INTERESTED IN SPECIFIC CONDITION, ISSUE, OR PROBLEM • RESPECTED BY THE COMMUNITY; RECOGNIZED INFORMAL LEADER (SELECTED BY COMMUNITY) • ACQUAINTED WITH LOCAL PEOPLE AND SENSITIVE TO INDIVIDUALS' AND HOUSEHOLDS' DIFFERENCES (RESOURCES, GOALS, ATTITUDES, VALUES) • ABILITY TO LOOK BEYOND OWN SITUATION, TO SPEAK ON BEHALF OF OTHERS IN COMMUNITY • BROAD COMMUNICATION NETWORK • DIPLOMACY • COMMITMENT TO NEUTRALITY (DOES NOT ATTEMPT TO FORCE VIEWS ON OTHERS)
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PURPOSEFUL SAMPLING:

Interviewees are representatives of larger population groups which are considered important to the study. Rapid reconnaissance draws on purposefully selected cases that will yield rich information about the problem or condition under study. This is a sample based on researchers' best judgment that it represents the group or groups in question. It is not a statistical sample so cannot be generalized beyond the group intended. When supported by other information, i.e., group discussions, observations, secondary data, community forums, formal survey, etc., studies based on purposeful sampling are very credible.

A purposeful sample might consist of:

- Extreme or deviant cases
- Less extreme cases than above, i.e., those whose knowledge is very good or very poor
- Homogeneous groupings, i.e., people with similar backgrounds/experiences or those who have something in common
- Typical or average cases
- Stratified sub groupings, i.e., individuals representing groups with different characteristics that can be usefully compared
- Cases matching some predetermined criterion

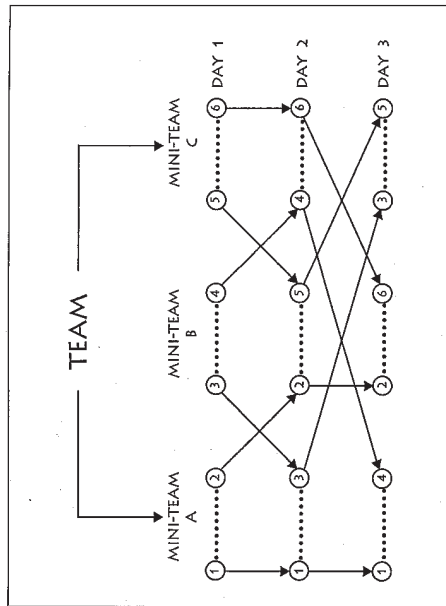
If appropriate, contact interviewees in advance to assure their willingness to participate and their understanding of the task.

FIELD WORK

Organize the team's interviewing and rotation schedule. The geographical location of interviewees and the availability of team members may influence the rotation schedule. Keep rotating pairs or triads each day to assure a balance among interviewer and interviewee perspectives (see Figure 2).

FIGURE 2.

TEAM ROTATION



By the conclusion of each day, mini-teams and the larger reconnaissance team share and process the information they have gathered reaching a consensus on what was heard, needed clarifications, gaps in information, repeat interviews needed, etc. and they summarize their findings.

At the conclusion of the field work the reconnaissance team reviews their findings as a group. The team reaches consensus on findings and re-visits interviewees where there are gaps in data or needed clarifications. Revisiting may be done every second or third day when information is shared and processed on a daily basis. If needed, additional interviewees may be added to make up for lost interviews resulting from unwillingness to participate, poor response, or weaknesses in desired sample groupings.

DATA ORGANIZATION AND ANALYSIS

The mini-teams share and process the information they have gathered after each interview while they are compiling their interview notes. Ideally, this is done immediately after each interview. At the end of each day, or every second day, the whole reconnaissance team shares and processes all the information gathered.

Mini-team daily reports are eventually integrated into one team report which may include tables, charts or illustrations. The first step is done by the total team in a group meeting. Every team member is given a copy of all daily reports in advance. Before the meeting the leader requests that the reports be scanned for key words, phrases and ideas. These can be highlighted with a felt marking pen. The team leader then gathers team data on large newsprint pads that are easily seen by all. Steps 1 to 7 are followed.

STEP 1. Deal with each interview one at a time. On newsprint list key words and phrases until all important ideas are listed from all reports. Do not repeat ideas, but note recurring ideas. Be true to participants' categories and terms.

STEP 2. Identify themes or topics that seem to recur. List these.

STEP 3. Put one theme at the top of each sheet of paper. List data under each corresponding theme.

STEP 4. Analyze each theme. Aggregate or lump related items so there are fewer categories within each theme (some themes may be merged).

STEP 5. Identify problems or gaps in data. Plan ways to add needed information or to clarify unknowns. Identify new concepts or ideas.

STEP 6. Display data in a tabular format if appropriate, for example see Figure 3.

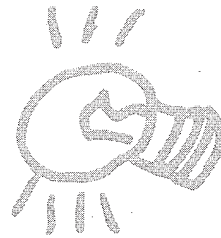
FIGURE 3.

EXAMPLES OF DATA DISPLAY

SOLUTION	CONSTRAINTS	LIMITATIONS
A	_____	_____
B	_____	_____
C	_____	_____

STEP 7. Interpret findings in relation to study objectives.
 Generate general conclusions and recommendations.
 Consider the possibility of further information needs
 to confirm or negate hypotheses that the team has
 identified. Suggest methods for obtaining this information.

Once the final report is written, it is reviewed, edited and approved by the full reconnaissance team. Key findings are then shared with interviewees to assure that their ideas have been fairly represented.



PRESENTATION OF FINDINGS

A report of the findings can be prepared in different ways depending on the users, and their particular interests. Some of the following styles of presentation may be considered:

- Technical report including description of methods, charts of findings (not the approach for decision makers; better for people interested in details)
- Executive summary of major findings and recommendations (appropriate for decision makers, advisory committees, etc)
- Short leaflets or brochures that highlight general findings and recommended actions (useful for community groups and general public)
- Posters which visualize central findings with pictures, charts and few words (appropriate for general public, young people, less educated audiences)
- Public presentations, for example at community or organization meetings, or on radio or television
- Video taping of selected interviewee case studies (this should be done in a special session following the real *sondeo*, otherwise, spontaneity of the interviews might be jeopardized)

CONCLUSION

The *sondeo* or rapid reconnaissance technique is a unique method of learning about people's situations, experiences, problems and perspectives. It is a rapid, informal team approach that is relatively simple to apply, and with which community leaders can easily identify. It offers great potential for building a high level of community participation in information collection, analyses and application. In this sense, it is quite different than a traditional survey that merely extracts data from research subjects. The *sondeo* can provide an in-depth understanding of a situation, as well as build a high level of community interest and ownership in the outcomes.

DATA
PRESENTATION

STRENGTHS AND LIMITATIONS OF THE "SONDEO" OR RAPID RECONNAISSANCE

STRENGTHS	LIMITATIONS
* CAN PROVIDE DEEP UNDERSTANDING OF SPECIFIC SITUATION OR PROBLEM * ACCOMMODATES DIVERSE BACKGROUNDS AND EXPERIENCES (TEAM APPROACH) * "BOTTOM-UP" OR MICRO PERSPECTIVE * CAN DECREASE INDIVIDUAL BIAS * RAPID DATA TURNAROUND * CROSS-CULTURAL/LOW INCOME AUDIENCE APPLICATION * CAN BE COST EFFECTIVE * FACILITATES BROAD PARTICIPATION AND COMMUNICATION * QUALITATIVE (RICHNESS OF DATA) * BUILDS RAPPORT BETWEEN PROFESSIONALS AND LOCAL PEOPLE * CAN STRENGTHEN ORGANIZATIONAL AND CLIENT LINKAGES * CAN BUILD STRONG COMMUNITY OWNERSHIP IF LOCAL GROUPS ARE ENCOURAGED, FROM THE BEGINNING, TO TAKE MAJOR RESPONSIBILITY IN DESIGN, IMPLEMENTATION, ANALYSIS AND PRESENTATION OF FINDINGS * DATA COLLECTION AND ANALYSIS IS NOT LEFT TO ONE PERSON ALONE * FOCUSED SONDEOS CAN BE USED AS FOLLOW-UPS	* CANNOT BE GENERALIZED TO LARGE POPULATION * DOES NOT INVOLVE A RANDOM SAMPLE * NOT SUITABLE FOR STATISTICAL ANALYSIS * REQUIRES GOOD LEADERSHIP, ORGANIZATION AND TEAM ORIENTATION * CANNOT GENERATE ALL THE ANSWERS * MAY NOT BE POSSIBLE TO IDENTIFY CERTAIN FINDINGS WITH SPECIFIC INTERVIEWEES/GROUPS * IF NOT FOCUSED, MAY NOT PROVIDE INSIGHTS NEEDED * CANNOT ASSURE THAT ALL PERSPECTIVES AND SITUATIONS ARE REFLECTED * CANNOT GUARANTEE EQUAL TREATMENT TO ALL RESPONDENTS (BUT TEAM TRAINING HELPS) * CANNOT GUARANTEE CONFIDENTIALITY, DEPENDS ON TEAM MEMBERS' ETHICS * GROUP PROCESSES OF DATA COLLECTION AND ANALYSIS REQUIRE TIME COMMITMENT FROM TOTAL TEAM * QUALITATIVE DATA ANALYSIS IS DIFFICULT FOR PEOPLE TRAINED IN QUANTITATIVE ANALYSIS * MAY FRUSTRATE QUANTITATIVE RESEARCHERS IN THAT DATA MAY APPEAR TO LACK PRECISION AND PREDICTABILITY * IF CARELESSLY APPLIED, CAN FAIL TO DEVELOP LOCAL COMMUNITY RAPPORT, LEAVING THE IMPRESSION THAT INTERVIEWEES WERE MERELY BEING "USED"

CASE STUDY



CASE STUDY 1: GUATEMALAN SONDEO FOR AGRICULTURAL TECHNOLOGY DEVELOPMENT

The Guatemalan Institute of Agricultural Science and Technology (ICTA) has developed the *sondeo* as a modified survey technique to collect data useful in the generation of agricultural technology for small traditional farmers. Each 10 person multidisciplinary *sondeo* team is comprised of 5 persons from the region's Technology Testing Team (TTT) (plant breeders, pathologists, agronomists and a sociologist) and 5 from socioeconomic (anthropologists, sociologists, economists, agricultural economists, or engineers). The primary purpose of the *sondeo* is to acquaint the TTT with the area in which they are going to work and to orient their activities, thereby ensuring any proposed changes are appropriate to local conditions.

In order to successfully implement the *sondeo* process, each team member must see technology as the product and must be able to identify with it. Each team member must be open to a wide range of variables and constraints impacting the acceptability of technology generated, including both the client's goals and those of the team. Also, each team member must understand, to a sufficient degree, and be willing to criticize aspects of the work outside his/her own discipline. The criticisms are used to improve the product.

Depending upon the size, complexity and accessibility of the region being surveyed, the *sondeo* is completed within 6-10 days. In a six day operation, the first day is a general reconnaissance of the area by the whole team as one unit. The team identifies the most important farming system in the area and begins to search out its agroclimatic, economic, and socio-cultural limits. The information gathered on the first day is used to guide the mini-teams' work the second day. Mini-teams are comprised of one person from the TTT and one from socioeconomic. The limits to the farming system are explored. At the end of each day, the whole team reconvenes and discusses, analyzes, and narrows information gathered from farmers and other community members. After each summary session, mini-team composition changes. Day 3 is a repeat of day 2.

Prior to returning to the field on day 4, each team member is assigned part of the written report and, therefore, focuses his/her interviews on that particular topic. Writing begins on day 3 as well as additional interviewing to fill in gaps which arise. At the end of the day, the group approves/modifies the body of the report. On day 6, the report is refined, discussed, further modified, and conclusions are reached and approved by the entire team.

The result of the 6 day *sondeo* is a working document to orient the technology research program. It is not a benchmark study. Examples of study sections which are often included in ICTA *sondeo* reports include: the purpose of the *sondeo* study; description of the farming systems in the region, description of the delimited area including land tenure, farm size, labor, capital, corn, beans, vegetables, and livestock activity; and, future implications and recommendations for ICTA and other organizations in the agricultural sector. The recommendations guide the type of technology included in on-farm and companion experiment station trials undertaken by the TTT.

Source: Hildebrand, 1981



CASE STUDY 2: SUBJECT: THE GREATER SEATTLE ORGANIC PRODUCE MARKET

A *sondeo*, supported by Washington State University Cooperative Extension and the Western Washington and Oregon USDA LISA Program, was conducted to determine the existing and future state of organically-grown produce in the greater Seattle area. More than three dozen key industry participants were interviewed using the *sondeo* method. The *sondeo* team was composed of 10 people: a farmers' market specialist, two nutritionists, a home economist, a small farm specialist, and two extension agricultural economists, a horticulturist, an anthropologist, and a rural sociologist. Interviews were conducted with restaurateurs, growers, wholesalers, chain store buyers, produce department managers and a few consumers. Interviews were conducted in two person mini-teams, rotating each to maintain a mix of disciplines and experiences.

Team training was conducted on the *sondeo* technique and on open-ended interviewing techniques. Organizers provided the team with nine preliminary open-ended questions and a list of potential interviewees. During the training session, the team refined interview questions, identified suitable probes, and developed a work schedule, locations of interviewees and time availability of interviewers and interviewees. Interview appointments were set in advance with interviewees. All interviewing was completed in one week, at the end of which the team debriefed and compiled the data. Two follow-up meetings took place to organize and analyze the data, draw conclusions and outline recommendations.

Four major recommendations were presented as a result of the *sondeo*. Among these was the formation of an industry coalition composed of farmers, marketers, regulators and university faculty to clarify needs, promote research, seek funds for industry-wide projects, pursue policy changes and provide industry leadership. A second recommendation concerned the need for an improved information base on organic production methods, consumer preferences, and organic produce marketing. The third addressed the need for collaborative grower, marketer, employee and consumer education and communications; and, the fourth suggested that the State Organic Food Certification Program be expanded for more adequate produce monitoring.

Source: Moulton, 1989.



CASE STUDY 3: SUBJECT: NORTH MASON COUNTY WATER QUALITY

The North Mason County Clean Water Action Committee conducted a *sondeo* to obtain community perceptions about water quality issues. The 15 member committee, composed of community leaders, formed a team to learn about the *sondeo* process, design their own approach, and to interview key residents of North Mason County as part of the greater Mason County water quality plan. A one-day training session was jointly conducted by an extension anthropologist and a community leader who ultimately assumed primary responsibility for organizational details. The county agent participated in the *sondeo* training, but did not take an active role in the field work. He encouraged the team to assume responsibility for the activity and his role was one of continued support. As a result, the committee assumed total responsibility for the *sondeo*, resulting in a high level of local ownership and pride in the process and the outcomes.

During the training session the group discussed their understandings of the Mason County Water Quality situation, determined *sondeo* goals, and critical issues and priorities to be covered. A *sondeo* outline was developed which included nine open-ended questions, along with a preliminary list of groups and individuals to interview. Practice interviews were conducted and an action plan laid out.

Small rotating mini-teams were formed. Over 45 interviews were conducted with individuals and organizations. Organizations included community clubs, granges, the public utility district, recreation and environmental interest groups, schools (classrooms) and the League of Women Voters.

There was a high level of community involvement in the North Mason County *sondeo*. This generated a number of noteworthy outcomes. A public slide show and meeting about the findings was presented at a community park; the League of Women Voters assumed a partnership role in disseminating the findings through a public meeting; county commissioners were enthusiastic about the process and outcomes; and the county watershed ranking committee named the Hood Canal Watershed as its number one ranked watershed, resulting in eligibility for funding to further develop the plan. Committee members who participated in the *sondeo* process maintain a high level of enthusiasm for the *sondeo* and its ability to involve many kinds of people in an important and controversial public issue.

Implementation of the *sondeo* was supported by a PIE (Public Involvement and Education) grant from Puget Sound Water Quality Authority, Washington State University Cooperative Extension contributed personnel time and travel. As a result of the process, additional county funds were obtained by the committee in support of community involvement.

Source: Michael Butler, 1994a; Michael Butler, 1994b; Garrido 1989

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