# USER VOICE

Putting people at the heart of impact practice

Shona Curvers, Cecilie Hestbaek and Tris Lumley (NPC)
David Bonbright (Keystone Accountability)

accountability for social change

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# FOREWORD

## Foreword from Keystone Accountability

In *Development as freedom*[1], arguably the most important scholarly work about social change in the past century, Amartya Sen located development practice firmly within the larger historical march of democracy. In this guide we follow Sen's lead by locating user voice at the heart of development and of impact practice. We release this guide in the spirit of an early prototype. While our work with hundreds of organisations convinces us that user voice is urgently needed and widely beneficial, we recognise the tentative nature of this first effort to articulate a workable framework, with principles and pointers to tools and other resources. We are very keen to learn from your experiences of user voice and our commitment to you is to continue to build, refine and improve the ideas presented here. You can find details on how to get in touch at the end of this report.

**David Bonbright, Co-founder and Chief Executive, Keystone Accountability**

## Foreword from NPC

Since New Philanthropy Capital (NPC) was established almost 15 years ago, it has been our aim to help charities and those who fund them to focus more on the impact they create in the lives of the people they are there to serve. From the beginning, our work has zeroed in on measuring social impact as a means of doing that—to inform and shape the strategies, activities and decisions of charities and funders. Yet from the beginning, there have been those who encouraged us to embed user voice explicitly in our work alongside—and as part of—impact measurement and impact practice. While we have always been aware of the importance of engaging users in the work that charities do, it has taken a long time for NPC to respond to that encouragement, which has been led by Keystone Accountability's David Bonbright. I am delighted we have now been able to work in partnership to take a first step in bringing the now rich field of user voice together with NPC's work on impact practice. I am excited to see how this first step is received, and how the field of user voice in impact practice will develop from here.

**Tris Lumley, Director of Development, NPC**

*For more information about NPC, Keystone Accountability and the report's authors, see page 19.*

# INTRODUCTION

All charities exist for their users. Yet paradoxically, users often have little or no influence over the charities' decisions, and no way to let the organisations know how they would like things to be different. In the private sector, customers express their views through buying power; in government, citizens hold officials and politicians to account through voting power. In the voluntary sector, however, there is no such accountability reckoning by which users can influence services. People rarely pay for charitable services, and often do not have a choice between services.

**Users, constituents, beneficiaries or customers?**[2]

Words carry meaning, and in this context also denotations of power relations. Individuals self-identify in a variety of different ways. However, for consistency's sake this guide employs the term 'users' or 'constituents' to refer to people who receive a service or are impacted by other activities carried out by a charity. Other literature may refer to people instead as 'beneficiaries'. Some literature argues that charities should drop all of this language and use 'customers' to give people ultimately the agency they have as consumers of services.

In the absence of such direct accountability, many charities are trying to change this by actively seeking honest feedback from and involving their users in decision-making. They do so for three main reasons:

**Moral legitimacy and reputational benefits**: Organisations that represent the interests of people—and solicit funding in their name—need user voice for legitimacy. Our research into user involvement has revealed that many charities subscribe to this idea (for example, 'Nothing about us without us', as promoted by disability rights movements in the 1980s). Certainly there are reputational benefits to gain from demonstrating how users are being listened to. However, it is striking that charities can rarely demonstrate how these exercises change the way they operate.

**Effectiveness**: A second rationale for involving users is to gain a better understanding of their needs, and to harness their knowledge and skills. Doing so allows a charity to improve its performance and review organisational strategy. By asking a few short questions regularly, charities can identify which individuals are unhappy with the service, and provide extra support to them. Examples like anti-poverty charity LIFT[3] in the US and the case studies in this report show how feedback data—in combination with other social research data—can guide and validate charity effectiveness.

**Direct benefits to users**: For some charities, ensuring that users feel heard, involved and valued is fundamental to their intervention, as the progress of their users depends on their sense of agency and self-efficacy. Clinks, the organisation for criminal justice charities, has noted that the offenders it works with benefit from participation in decision-making in a way that improves their recovery.[4] This is the case for several of the case studies in this report—for example, for CLIC Sargent, whose feedback forums provide valuable opportunities for young people with cancer to develop important personal qualities, such as confidence. Skills gained through participation in decision-making can help beneficiaries gain more from education and training, and in turn can help them get into employment. Having effective processes for user feedback is also often important for campaigning organisations, where it has intrinsic value as a lever for social as well as personal change when particular groups communicate on social issues.[5] This is a fundamental principle for Fixers, an organisation that supports young people to engage in social action. They recognise the many benefits involved as individuals begin to appreciate the value of their own voice, both in terms of personal development and in contributing to their communities.[6]

This guide concerns 'user voice' as the creation of opportunities for the people for whom a charity exists to serve to influence organisational strategy and practice across all of their different functions. It draws on NPC's expertise in impact measurement and Keystone Accountability's knowledge of user feedback processes to take an impact-focused approach to user voice. Through a review of literature in the area we develop a framework for considering user voice in all stages of an organisation's impact practice. We draw on case studies to highlight good examples of how charities involve users in their work and decision-making.

The intention is to inspire charities to consider and discuss their priorities around user engagement, including user feedback. This should be part of their impact practice, which is crucial for their ability to improve their performance and results.

**Case studies used in this report**

**CLIC Sargent[7]:** Children and young people with cancer, and their families. *Annual income: £25m*

CLIC Sargent's mission is to change what it means to be diagnosed with cancer at a young age. It believes that children and young people with cancer have the right to the best possible treatment, care and support, throughout their cancer journey and beyond, and that they deserve the best possible chance to make the most of their lives once cancer treatment has ended.

CLIC Sargent provides vital emotional, practical, financial and clinical support to young cancer patients and families during and after treatment. It also takes its users' voices to service providers and policy-makers to help change things for the better. The charity has strong buy-in from all staff and leadership, which has allowed it to build a culture of user involvement that takes place to different degrees at each stage of their organisational cycle. The 'Participation Service' includes initiatives such as two groups of young people—the Children's Advisory Group (for 7–14 year olds) and the Young Person's Reference Group (YPRG, for 15–24 year olds)—who are consulted on a range of different topics.

**MAC-UK[8]:** Young people with mental health problems. *Annual income: £1.3m*

MAC-UK works to provide mental health support to some of the UK's most excluded young people who are the least likely to access services. Co-production and user involvement underpin all of MAC-UK's services, and it is key for the charity to balance power between staff and users. The charity has developed the Integrate model[9], based on the principles of community psychology, as a way of working alongside their users to design and deliver services. The Integrate approach works on each individual's own terms to improve their outcomes. A crucial element of this is first establishing trust with the young people. MAC-UK has an organisation-wide culture of user involvement, and places beneficiaries at the heart of everything the charity does.

**Thera Trust[10]:** Adults with learning disabilities. *Annual income: over £53m*

Thera Trust is a charity that leads a group of subsidiary companies, known as Thera Group. The group supports adults with learning disabilities, working alongside them to help them have control over their own lives. There are 18 individual companies based around England and Scotland, which either provide direct local care and support to their users, or have a specialist purpose—such as the provision of advice and support for users to better manage their finances. The culture of Thera Group revolves around their users, and adults with learning disabilities have a central role in shaping the services delivered by the companies. Through its work, Thera Group aim to shape perceptions of people with learning disabilities and demonstrate their ability to be leaders in society.

# UNDERSTANDING THE NEED FOR AN INTEGRATED APPROACH TO USER VOICE

## The origins of user voice

User voice as a school of thought has emerged from international development and humanitarian aid, largely as a result of debates about moral legitimacy—organisations came under pressure to become more accountable to the people they were serving. This is relevant for both the public and voluntary sector, for feedback can '*both elevate the voices of those who are beneficiaries of government [and charity] programmes and pressure … leaders to seek better outcomes.*'[11]

Over the past decade, a number of ideas and tools for user voice have come from both national social service agencies, technical and telecommunication companies, charities and humanitarian agencies. Some of the approaches focus on qualitative dialogue, while others emphasise quantifiable data.[12] In the US, the greatest advancements can be found in the health and education sectors, as they have more resources, their beneficiaries are easily identifiable, and they are under pressure to demonstrate results.[13]

Interest in user voice became a growing trend, and by 2010 there was a sufficient demand to allow Keystone Accountability (Keystone) to specialise entirely in helping organisations to cultivate effective systems for feedback from their users. As far as we know, Keystone was the first specialist service provider of this type—akin to customer satisfaction firms in the business world. Today there is a fast uptake of this advisory support by established charity services providers.[14]

### User voice in the UK domestic charity sector

The UK charity sector is somewhat lagging behind on user voice practice. Our review suggests that there is often a lack of reflection from charities about why they do or do not prioritise user voice, and there is a tendency towards tokenistic or selective use of feedback. Concerns have been raised, for example, around charities using feedback merely for good public relations, and that often only the most engaged and resourceful service users are listened to.[15]

The way charities currently operate also does not encourage good user voice practice. Much of the focus in governance and reporting is on the requirements of funders rather than the unmet needs and aspirations of those who are meant to benefit from the charity's work.[16] This creates a distorted power dynamic.[17] Furthermore, as users often do not have the option to 'take their business elsewhere', it is perhaps not surprising that charities do not invest resources in examining whether their approach is in line with user need.[18] A study undertaken by The Center for Effective Philanthropy[19] has shown that organised philanthropy in the US is not doing its part to address these issues and support user feedback. Non-profit leaders believe most of their foundation funders lack a deep understanding of their intended beneficiaries' needs—and they believe this lack of understanding is reflected in foundations' funding priorities and programmatic strategies.[20] We have no reason to believe it is different in the UK.

This guide is therefore not just intended for charities, but also for those who fund charitable activities and as such design the incentives for charities' behaviour.

## The challenges of user voice

In addition to the systemic barriers, there are also a set of challenges at an organisational level associated when developing good user feedback systems. These include:

- **Cost**: While it is possible to spend a great deal on channels for user feedback and influence, there are good low-cost options. Keystone notes a common tendency to over-invest in feedback data collection, using overly complex social research tools. Research-oriented surveys are expensive for the charity, burdensome for respondents and tend to produce overwhelming quantities of data that are difficult to translate into action. Keystone's online survey tool, the Feedback Commons[21], promotes proven low-cost alternatives.
- **Time and flexibility**: The biggest constraint for effective feedback systems is time. Charity staff and trustees are usually busy, and taking steps towards harnessing meaningful user voice requires dedicated effort, especially at the beginning when the benefits have not yet been demonstrated to staff. Then, once feedback is flowing there is an imperative to respond. This requires flexibility, another challenge in itself for charities delivering commissioned services.
- **Culture**: As if the constraints of money and time were not enough, user voice usually runs into the wall of organisational culture. When user feedback is negative—as it often is—it can be daunting. Charity staff may feel that their professional experience and view on things is being challenged, or that negative feedback[22] is a risk to the organisation's assessment of its performance.[23] Good feedback culture requires preparation and intentional cultivation. It grows best in a non-defensive reflection on the content of any criticism. Fortunately, there are easily accessible resources to help build an open feedback culture.[24] For approaches to user voice that devolve operational decision-making to service users, it is crucial that management and trustees are prepared for the shifts in power that normally sit with management of the charity.
- **Practicalities**: Finally, there is the simple fact that many charities just do not know how to cultivate user voice. They work with people who are hard to reach and difficult to gather structured feedback from; other users may have cognitive disabilities that make communication hard; or they may be young children. There can also be practical challenges in the logistics and costs of getting people to provide feedback, and in ensuring that users' voices are not drowned out by the most vocal users, (senior) staff or the governing body.[25] There are technical challenges analysing, visualising and investigating feedback data. Again, fortunately, there are many third-party resources now freely available to help address this.[26]

The challenges can be managed and risks can be addressed by taking a structured approach to user voice. In the pages that follow, we propose a new framework: one that for combines user voice and impact measurement in an approach that spans across all organisational activities and types of decisions, and brings clear benefits in making organisations able to measure, demonstrate and improve their impact.

## The need to combine user voice and impact practice

Taking feedback from users on board is an important part of good user voice practice, but it is just one piece of the puzzle. Best practice involves creating opportunities for users to influence practice across the entire process of planning, delivering, and evaluating a charity's activities.

In the same way, impact practice also cuts across all parts of an organisation's work: planning the impact you want to have, collecting data on your impact, assessing your impact, and learning from it. This includes—but is much bigger than—measurement and evaluation.

User voice and impact practice therefore both require a whole system approach that builds the practice into the wider activities and priorities of an organisation.[27]

Many organisations involve users in the planning stage and/or the end of a project, rather than throughout its entire cycle. It is clear that no single initiative can improve user involvement practice on its own—a wider culture change and strategic organisational approach is needed.

By thinking about user voice as an integrated part of good impact practice that cuts across all organisational activity, our framework guides organisations step by step through developing a strategic approach to developing effective, user voice practice.

**Constituent Voice (CV)**

This report draws heavily on Keystone Accountability's Constituent Voice (CV) approach[28] to user involvement. CV is a performance management model that aims to ensure that constituents' needs and voices are reflected in metrics that can allow managers and others to make better decisions. CV is one example of how users can be involved with an organisation or intervention to improve relationships and accelerate outcomes.

CV's model of organisational performance management is driven by users and embedded in everyday management practice. Its ongoing, cyclical nature enables the continuous generation of real-time feedback data and acts as a foundation for improving relationships with users, improving performance and regularly ensuring that they are on the right path to achieving desired outcomes.

To ensure an organisation is doing the right things, Keystone asks users, 'On a scale from 0 to 10, to what extent does the organisation do things that really matter to you?' and 'What could it do to be more relevant for you?'

This process is built on key principles, including:

- **Always listening**—ranging from informal conversations and light touch micro-surveys to mini-investigations and occasional in-depth research.
- **Reflecting on feedback data**—analysing and discussing feedback among staff.
- **Engaging in dialogue**—communicating with users to find meaning hidden in feedback data, validate survey findings, co-create solutions and discover the unexpected.
- **Course-correcting**—adjusting the methods of feedback collection and informing users of changes so they can tell you whether it is an improvement or not.

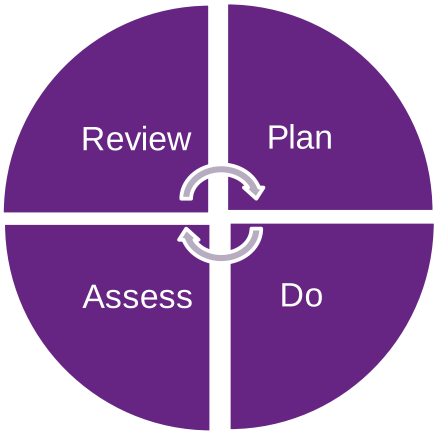
These steps are key to closing the feedback loop, and can be used to different degrees depending on what your organisation is trying to achieve. This report discusses how organisations can use processes and methods from CV as part of their impact practice, integrating them with other ways of measuring and improving social impact.

# INTEGRATING USER VOICE INTO YOUR IMPACT PRACTICE

Based on literature and earlier work, NPC and Keystone have developed a high-level framework for developing organisations' user involvement practice. The framework is structured around Inspiring Impact's[29] Cycle of good impact practice from its *Code of good impact practice*[30] (Figure 1).

The Cycle lays out the four basic stages of impact practice: *planning* your long and short-term priorities, activities and measurement; *doing* your activities and measurement; *assessing* the results; then *reviewing* your learning and how these should feed into your strategy. We have also added the user involvement element, outlining the key ways in which users can be involved in each of the four steps. The next sections look at each of the steps, discussing how charities can ensure good user feedback in every part of their impact practice.

**Figure 1: Inspiring Impact's Cycle of good impact practice**[31]




## Stage one: Plan

| Definition | Description |
|---|---|
| Identifying your desired impact and deciding how to measure it | **Identify your desired impact** and how to deliver it with your users:<br>• Involve users in long-term, formal strategic decision-making<br>• Make short-term, smaller changes to activities<br>**Decide what to measure**:<br>• Establish what and how to measure with and without your users for credible and useful results<br>• Identify the goals of the feedback process and how it fits with the collection of other outcomes data |

In both evaluative and feedback processes the planning stage is crucial. Without enough time invested in designing the approach upfront, organisations risk wasting time and money, and ending up with data that is not useful to them.

### Identify your desired impact

Good user voice practice means listening to users at all stages of the strategy process. Organisational decision-making is complex, but can be roughly divided into two layers:

**Long-term strategy**: These are the high-level strategic decisions being discussed at board and senior management level and typically covering at least 2–3 years. There are several ways to involve users in these decisions, including:

- having users on the board of trustees
- consulting users on the strategy during reviews

- consulting on bigger changes to the strategy
- developing theories of change with users.

The New Economics Foundation[32] (NEF) and NESTA[33] have both developed useful approaches to designing strategy with service users—most notably 'co-design' and co-production processes[34]. This is now a rich and diverse field. These kinds of approaches are based on the premise that service users are a hidden resource rather than as a drains on the system. They attempt to shift the balance of power, responsibility and resources from professionals to individuals.[35]

**Short-term, smaller changes**: These are the ad hoc changes to activities carried out during strategic cycles, and do not fundamentally change how things are delivered, but seek to make continuous improvements. Approaches to including users include:

- crowdsourcing ideas (for example, through idea generation workshops)
- implementing processes for continuous consultation, such as permanent panels or changing focus groups
- using Keystone's Constituent Voice approach to project management, which is based on quick and regular interactions with users (see page 8 of this report).

**Thera Trust:** *Recruiting users to senior posts*

Adults with learning disabilities are involved in the strategic decision-making of the companies that Thera works with in a number of different ways. Thera Group's executive team, for example, consists of four directors, all with equal authority, and it is a requirement for one of these positions to be occupied by an adult with a learning disability. This is a paid position, and is an important step towards ensuring that decisions make sense for the people that the companies are trying to help. The local care and support companies also employ service quality directors. These are adults with learning disabilities who work alongside the company's managing director and are responsible for monitoring the quality of support provided to their users.

*Establishing a membership structure*

Many of the companies Thera works with have a membership structure that helps to keep the voices of adults with learning disabilities at the fore. Members have control over the way their local Thera company is run, shaping its strategy through their influence in such areas as the recruitment of directors and changing the company's rules. Before introducing the membership scheme, Thera companies ran workshops with people who wanted to be company members to find out how the process could be meaningful and accessible. Members consist largely of people with learning disabilities, although they can also be family members, Thera employees or members of the Thera Trust. The majority of companies are now in the process of rolling out the membership scheme.

You also need to consider the *desired impact of the feedback process itself*. You may have objectives other than gaining useful data for evaluation—for example, direct benefits for the users gained from the process of giving feedback to the charity. Being clear about this allows you to make informed decisions about who to involve and which tools or processes to use. If the experience of having their voices heard is important for achieving user outcomes, you might want to open up the opportunity to all users. For example, LIFT[36] has tablets mounted in its waiting room and all users are invited to answer a three-question survey after their counselling sessions. If your focus is on evaluation, it may be sufficient to simply survey a valid sample of users.

When you have your feedback data, you need to communicate it in a transparent way to users, making it clear how their feedback is going to be used. LIFT uses televisions in the waiting rooms to stream the results from earlier surveys, and to invite users to contribute to solutions under consideration.

Setting out objectives and timelines helps to manage expectations and opens an honest conversation with users about what they and the organisation will get out of their participation.

## Decide what and how to measure

NPC's *Four pillar approach*[37] sets out the steps needed to plan good measurement. Using Keystone's constituent feedback expertise, the section below discusses how user voice can be built into each of these four steps:

### 1. Create your theory of change

A theory of change is fundamental to a good measurement plan, useful for strategy-making, and should ideally be created in consultation with representatives from all parts of the organisation. NPC's guide to theory of change[38] describes the concept and outlines how to build a theory of change. Users can offer valuable perspectives on assumed causal links and outcomes that staff may not be aware of, and should be included in the theory of change process if possible—for example, in workshops or in reviewing the outputs.

### 2. Prioritise what you measure

Collecting the right amount of quality data is key, and getting there might require some trial and error. Your impact is likely to be diffuse, affecting different people in different ways over different timescales, but trying to capture all these changes is complicated and may not be the best use of limited resources.[39] Prioritise the most important outcomes in your theory of change and focus on measuring those.

Keystone sets out four dimensions of performance evidence to collect through user feedback:

- Importance of the organisation, service or product to the respondent
- Quality of service
- Quality of relationship with staff and organisation as a whole
- Outcomes—changes perceived by the individual.

Keystone's Constituent Voice guide[40] sets out sample questions for each of these categories of evidence. Tested versions of these questions, with benchmark findings from other organisations, are available on the Feedback Commons[41].

It is important to triangulate—meaning to compare or validate—user feedback against other types of evidence you collect. This could be employment, health or education outcomes, or staff assessment of progress, for example.

When considering any evaluative activity, it is necessary to ask whether the evidence that you plan to collect could lead to improvements. Is the data going to be useful for decision-making?[42] Too often, organisations collect large amounts of data and, although they may use it for demonstrating their impact, they have not thought about how to use the data to help them improve services. The purpose of user feedback is, ultimately, to improve the organisation's work and therefore the outcomes for its users—and if it does not do that, the design or the organisational culture is wrong.

### 3. Choose your level of evidence

Choose an appropriate level of impact evidence that suits the needs of your stakeholders. There is no one size fits all: it will depend on your own needs, resources and capabilities, and those of your audience. Funders may require a certain level of rigour for a project they have funded, while academics or government research departments may want to see a counterfactual before endorsing your model for wide-scale adoption.[43] You need to consider three things in particular:

- **Evidence user:** The evidence you collect needs to consider who will be using it, and for what purpose. For example, your programme users will have a different sense of what 'good evidence' is from, say, staff and funders.[44]
- **Rigour:** Traditional social research tackles issues of data bias and representation through techniques for sampling and other well-known research practices. There are lots of free resources available to help you consider this—for example, NPC's guide to good qualitative research *Listen and learn*[45]. It is important, however, not to over-invest in this. Rather, validate the data you get by talking to users about them.[46] This will help strengthen user voice and give you a better insight into what the results mean.
- **Cost:** Resources are always finite, and measurement needs to weigh up rigour against cost in all evaluation work. Collecting very robust evidence, but spending 70% of the programme budget on it and leaving only 30% to actually deliver the service, is not responsible. NPC's guide to proportionate evaluation[47] summarises what the different levels of rigour entail, and are a good starting point for discussion of resourcing implications. Nesta's *Standards of evidence*[48] can help you consider the options and trade-offs in finding the right level of spending for measurement work, and can also be applied to user feedback.

### 4. Select your tools and resources

Decide what data you need and select or develop measurement tools or data sources to capture it. You may find an existing tool or data source, or you may need to develop one. Do not feel the need to reinvent the wheel: consider what tools are already available, and think about existing evidence for the causal links in your theory of change. It is important to use measurement tools that are fit for purpose, and that capture the change you want to bring about.[49]

When user feedback forms part of your evaluation, you need to pay attention to *process and culture*: user voice systems need to ask questions in a way that is respectful to participants, and the feedback process should help build trust between an organisation and its users.

**CLIC Sargent:** *Giving users a say on the board and in recruitment*

CLIC Sargent's users feed into the strategic planning of the organisation, which recently appointed their first young person as a trustee. The process that led to the appointment was in itself user-led, with young members of the Young Person's Reference Group putting the initial call out, shaping the job description and forming an interview panel that collaborated with an adult panel to recruit the young trustee. This young person will have the same responsibilities as other board members, with additional support from a trustee mentor. They will shape the long-term and strategic goals of the organisation, helping to ensure that the voices of all users remain central.

## Stage two: Do

| Definition | Description |
|---|---|
| Delivering your activities in a way that includes processes for user feedback data collection | • Deliver the activities<br>• Collect impact data and feedback data |

### Deliver the activities

There are many ways to integrate user voice into how services are delivered. Organisations interested in using the feedback process as a means of building agency and self-efficacy in their users may want to let users set their own desired outcomes as part of the support work, or to encourage them to start delivering services to other users as soon as they feel able. This principle is used successfully by mental health clubhouses[50], including Hillside and Mosaic Clubhouses in London. Their intervention model is dependent on the users taking part in all the functions needed to run the organisation. Clubhouse members—the charity's users—build up from simple, manual or data entry tasks, to delivering more and more work similar to what the paid staff deliver—such as peer support groups, newsletters to members or yoga classes. Evaluations[51] indicate that Clubhouses are significantly more successful than public mental health systems at getting people into employment—suggesting that this intervention is indeed reaping the benefits of involving users in all aspects of the organisation's work.

**MAC-UK**: *Involving users when planning and developing services*

MAC-UK's users are given the opportunity to design, implement and lead on projects that they have total ownership of. They make proposals for the activities themselves, and do the work to plan them including risk assessment and thinking about finances. This could be anything from setting up a boxing club to DJ-ing. These projects are important for engagement, relationship building and developing trust between young people and professionals. Therapeutic conversations and responding to stability needs such as housing, education, employment and training are not separate to these projects, but co-exist through having conversations in a flexible way.

MAC-UK is clear that any level of input is as important and as valued as the next, as long as the individual has determined their level of involvement, and they feel ownership over their engagement. For those interested in a more full-time role there is often a brief period of volunteering or employment before a user-led project moves on to run on a more independent, stand-alone basis. In one programme, 73% of young people became junior employees in roles including Youth Motivator, Youth Research Consultant, Youth Trainer and Consultant and Open Day Leaders. This provided young people with the opportunity to gain relevant and tailored work experience, professional skills and an employer's reference.

**Thera Trust**: *Delivering services led by users themselves*

The Quality Company is one of the specialist companies in the Thera Group and it is led and managed by people with learning disabilities. They monitor the quality of support provided by Thera and other organisations that work with people with learning disabilities. This is achieved through a bespoke set of quality standards and indicators, assessed by people with learning disabilities who are supported to visit and spend time with people and their carers. A quality report is written that is specific to each individual's support. These quality assessors and their supporters learn and develop their skills through accessible workshops and training so that they can improve the quality of the services they provide.

As the users themselves deliver the service, they have unique insights into how their clients can tailor their activities more appropriately to the needs of people with learning disabilities and maximise their impact. Part of their work involves monitoring the quality of the care and support that Thera companies themselves are delivering. In this way, users are both delivering services and using their knowledge and experience to evaluate Thera Group's performance.

## Collect impact data

The collection of feedback is not just about hearing users' voices—it is also about building a relationship with them where candid feedback is encouraged and rewarded by visible improvements in the service. Keystone has found that anonymous feedback can often be a useful first step in building this kind of culture.

Once the organisation's credibility—its willingness to listen and make changes—has been established, the organisation can then move on to non-anonymous feedback. An ideal culture of user feedback has two systems in place: one that allows for continuous user feedback through 'micro' data collection mechanisms that only take up very little of the users' time; and one that ensures occasional in-depth research through more rigorous data collection techniques. Revolving Doors Agency[52], an organisation supporting public service reform for individuals stuck in a cycle of crisis or crime, involve their users on the basis that they are experts by experience. Service users themselves conduct peer research and consultations, as their direct experiences provide them with unique insights and allow them to exhibit empathy and build rapport more quickly and easily with other users.

Keystone finds that one important sub-group of user respondents who are taken very seriously in commercial customer service practice—but are often neglected by charities—are those users who do not respond to surveys. Not only do higher participation rates reduce the likelihood of a significant response bias in the data, they can also be an indicator of the quality of the relationship between a charity and its users. While charities are often not too concerned about low response rates. Yet some companies go as far as counting non-responses as the lowest satisfaction score possible, forcing them to work on winning high participation.[53] Generally speaking, the more difficult it is to collect feedback, the more users lack a voice, and the more support and representation they need.[54]

**CLIC Sargent:** *Obtaining feedback on organisational policy and activities*

CLIC Sargent involves young people closely in delivering their activities and collecting feedback. The Young Person's Reference Group members meet every two months to share their opinions across a range of different organisational areas, such as branding or their 10-year strategy document 'Aiming high'. CLIC Sargent is currently looking at how young people can play a bigger role in delivering the YPRG sessions themselves. Such involvement might include determining the agenda and adopting specific titles such as 'co-chair' and 'secretary' so that they can facilitate the sessions more independently and reverse the power dynamic with staff. In November, as part of the Children's Commissioners 'Take over' day, young people will lead the CLIC Sargent Executive Team meeting. This gives them the opportunity to develop experience, confidence and new skills, and forge even stronger links with senior managers in the charity. Young people are also involved in the recruitment process at CLIC Sargent, where they help select frontline service staff, directors and trustees.

## Stage three: Assess

| Definition | Description |
|---|---|
| Understanding what your data is telling you, comparing findings and drawing conclusions about the impact you have had | • Analyse and interpret results, comparing findings<br>• Assess the success of activities and/or changes made, all in dialogue with users<br>• Evaluate the success of the feedback process itself—did it achieve its objectives? What did users think of it? |

### Analyse and assess through dialogue with users

Once you have collected your data, it is time to analyse what the results mean. You will need to ask questions like:

- Are your activities achieving their desired impact?
- Are the findings reliable? What are they telling you and not telling you (what are the limitations)?

- Do the findings help you understand why the activities have or have not achieved their objectives?

If you have a big enough sample, you can use statistical analysis and segment respondents based on individual characteristics to understand their experience better. If you do not have the numbers necessary to do this type of quantitative analysis, you can learn a lot from basic qualitative analysis tools, such as thematic coding[55].

Your feedback data should be triangulated (compared) with any outcomes data you hold that has not been obtained through user feedback—attendance levels at a service, to give one example—and any discrepancies explored. Particularly interesting or puzzling findings can be explored further through in-depth interviews with users. For example, the Clubhouses[56] often involve their members in the analysis stage of their impact practice: basic Excel skills are usually sufficient to draw out key trends in the data.

Discussing failure or unexpected results is crucial.[57] Delivering good charity services is not an exact science, and failure is a core part of learning and improving. If you show users that you are transparent about exploring why a service has not performed as expected, it builds trust and strengthens the feedback process as a whole. Keystone finds data visualisation a useful way of engaging users in discussions about results and impact, and sees this dialogue as key to understanding the nuances of feedback and evaluation findings. Keystone also encourages open benchmarking of results and sharing of learning across organisations, and its tool Feedback Commons[58] offers a platform to do this.

**Thera Trust**: *Asking users to determine your metrics for success*

At Thera, the metrics for success are determined by the users themselves. They are able to keep a record of the outcomes they would like to achieve with the help of the care and support staff through the use of an electronic planning system. Thera staff are then able to monitor their contributions towards achieving these outcomes, and better understand the impact that they are having. Thera Trust believes that participatory evaluation of this kind is a useful tool in ensuring users remain central to what the subsidiary companies are trying to achieve.

## Assess the effectiveness of the feedback process

In the planning stage—stage one—you will have set out one or more goals for the feedback process. You now need to assess the extent to which the process has achieved these—and you of course need to ask your users their opinion on this. The overall question here is: Do users see improvements resulting from the feedback system? To the extent that they do not, probe further with questions like:

- Have users felt that they were able to, and had confidence to, give honest feedback?
- Has the feedback process provided a nuanced picture of both positive and negative views on the service?
- Has the feedback provided data that is representative for all user groups?
- Do you understand the findings—and if there are ‘black boxes’, why is that? Has the process provided enough opportunity for pursuing in more depth interesting or challenging findings?
- Do users feel that the process has given them enough opportunities to feed in?
- Has the process made participants feel more confident and/or more sympathetic towards the charity?
- Has the process made you able to identify individuals who have doubts or concerns about the service, so that you can provide extra support for them?

**CLIC Sargent:** *Listening to users on how to improve your feedback mechanism*

The evolution of the Young Person's Reference Group is an example of how user voice has been used to assess feedback and consider how the feedback process itself could work better. In the past, the group met just three times a year and, as a result, felt it was difficult to hold the organisation to account on specific pieces of work. They wanted a larger group of members and more regular meetings. The group has since grown from eight to 32 members in just over a year and they now meet for a full day every two months. Young people also decided that a Facebook page would be a useful way to keep in contact, and a way for them to be consulted between meetings, as well as including members who were unable to physically attend certain meetings due to treatment or other personal commitments, and this is now in place.

## Stage four: Review

| Definition | Description |
|---|---|
| Using the data to improve your impact, and communicating information about your impact | • Decide what the results mean for your strategy, for implementation, and for the feedback mechanism itself<br>• Correct as needed at all levels your strategy, implementation and feedback mechanisms |

### Decide how to improve with and for users

The last stage of the impact cycle is about learning from your findings, using them to improve your work, and communicating them to others. Good user voice practice is not a one-way process: when asking users for feedback, you also need to commit to reporting back, validating data with users and co-creating solutions with them. You need to ensure effective processes and communications channels for users to discuss with senior management and trustees which evidence is significant enough to call for changes in strategy—and what those changes could be.

An important and difficult aspect of the review phase is to not ignore results and feedback that could lead to uncomfortable conclusions. You always need to be prepared to answer the question: 'what is the worst result we could get here—and what changes would we make if we got those results?'

You also need to review your measurement framework and how you collect feedback and adjust accordingly. An effective feedback loop is one that provides useful feedback not only on programmes and services but also on the feedback mechanism itself.[59]

Transparency in reviewing your results is crucial. Encourage open discussion of both the lessons learned and the changes that should be made as a result. Publishing your review will not only win you respect with your users—who see documentation that their views have been taken seriously—it also helps the sector as a whole learn from your experiences and develop its services. In addition to this, it enables organisations to communicate their commitment to improvement and user voice with other stakeholders—such as funders—and invites organisations to be rewarded for these commitments.

**CLIC Sargent**: *Improving impact measurement tools through a user-led process*

CLIC Sargent's users play a central role in evaluating the organisation's impact practice. One example of this has involved two young people who were crucial in determining the organisation's strategy and initiating a one-year pilot around impact measurement. An external evaluation—which involved interviewing and surveying young people and staff—determined that, while the concept of the Outcomes Star[60] tool they used to measure their impact made sense, the off-the-shelf version was not a good fit for their purposes. The same young people and others, together with parents, took part in workshops with staff, facilitated by Triangle—the developers of the tool—to design bespoke Outcome Stars. This will be a core element of CLIC Sargent's impact measurement strategy.

**MAC-UK**: *Implementing guiding principles for user-led decision-making*

One of the key attributes of MAC-UK's Integrate approach is that its principles go beyond user engagement to strategic-level user involvement and decision-making. This fostered trust by ensuring implementation of what service users really want to happen.

Integrate projects will share organisational challenges with users and take in a range of views as it develops plans and reviews their impact. This means being able to admit to errors rather than covering them up, and working with a team of both staff and users to identify what is not working well to consider how they can change this. Projects do this on the basis that any withheld information upholds a power balance that runs counter to its ethos.

MAC-UK's devolved, user-led decision-making model is underpinned by a number of principles, such as: work as a team of young people and professionals; approach everything from the eyes of the users; be curious and adopt a 'not knowing' stance to encourage sharing; and work at multiple levels creating change for the individual but also in the wider systems and communities young people are embedded in.

# CONCLUSION

User voice is at the heart of what the voluntary sector is about: it is about listening to the marginalised and vulnerable, and putting people using charities' services in control.

Giving users influence and showing that their feedback has real impact on organisational activities brings a number of benefits. Not only does it make organisations more effective, it builds users' agency and confidence and helps them to achieve personal goals.

Given the critical importance of funders' views to organisations' survival and sustainability, charities will always struggle to achieve a healthy balance of power in their execution of their work. However, considering the legal definition of a charities' mission—to act in the best interests of those the charity intends to help—the best charities will seek to equalise this power inequality through a meaningful commitment to embedding user voice in all of their work and decisions.

Turning user engagement into actionable feedback brings challenges, not only in terms of time and cost implications, but for organisational culture. Yet simply doing an annual user survey once a service has been delivered does not cut it. Good user voice practice relies on a culture that builds trusting and open relationships with users, encourages open and continuous feedback and rewards it by maintaining an ongoing dialogue with users about performance, strategy and results.

## Acknowledging there is room for improvement

As the case studies in this paper have illustrated, many charities are already using a range of tools and structures to listen to their users, and would not dream of making strategic decisions without first discussing these with those using their services. However, the UK charity sector is also in some regards lagging behind the international development sector, from which user voice as a concept first emerged. Many charities have no systematic way of gathering feedback from users. Some collect user satisfaction data as part of their impact measurement, but without considering the objective of the exercise or how users can help make organisational decisions and inform performance on a day-to-day basis. Some of the sources we reviewed noted a tendency in the sector to use feedback only as a tokenistic gesture to reap the reputational benefits.

## Using this guide to improve user voice practice

A lot of good resources are available to help guide charities and funders to improve their user voice practice, and new digital platforms provide promising tools for building better feedback processes. Many of them point out that a structured approach that cuts across all organisational practice is necessary. Here, we have endeavoured to provide a step-by-step guide on how to do this. Applying a strategic approach that allows organisations to build good user voice practice as part of their impact measurement presents an opportunity for the voluntary sector to become both more user-led and more evidence-based.

NPC and Keystone Accountability's Constituent Voice and Impact Cycle framework combines a whole-system approach to impact practice with a comprehensive guide to user voice practice. It offers a structured way to discuss the benefits and manage the challenges of user feedback processes. We hope that the guide inspires charities and funders to talk more explicitly about user voice as a moral obligation; as fundamental for their legitimacy; as a key way to achieve their objectives; and as an integral part of measuring, proving and improving their impact.

# ABOUT THE AUTHORS

## New Philanthropy Capital (NPC)

NPC is a consultancy and think tank dedicated to helping charities and funders achieve the greatest impact possible for the causes they address and the people they serve. As a consultancy, we work with charities, social enterprises, foundations, businesses, government and individuals to help them overcome obstacles to effectiveness, and to help us learn more about the issues the sector faces. As the independent think tank for the charity sector, we shine a spotlight on the obstacles holding the sector back and develop solutions to overcome them. We inspire new thinking and catalyse change in practice and in policy so that the whole sector can achieve a greater impact. We also make connections, bringing together organisations and thinking and developing shared approaches.

*Shona Curvers is a Researcher at NPC. Cecilie Hestbaek was a Consultant at NPC until October 2016 and now works for the Humanitarian Innovation Fund. Tris Lumley is Director of Development at NPC.*

## Keystone Accountability

Keystone Accountability helps organisations understand and improve their social performance by harnessing feedback, especially from the people they serve. We seek to improve the effectiveness of social change organisations and we want every organisation in the world to cultivate Constituent Voice. We provide the methods, tools and services that allow organisations to really know how their constituents experience them, and what to do with that knowledge once they have it. Our Constituent Voice method does for organisations seeking to create social value what the customer satisfaction industry does for consumer-facing businesses. We are a founding member of Feedback Labs, a group creating real conversations between governments, NGOs, donors, and citizens through human-centred design, adaptive processes, technology and trust.

*David Bonbright is the Co-Founder and Chief Executive of Keystone Accountability.*

If you would like to get in touch about any aspect of this report, or let us know about your experiences of integrating user voice into your organisation's activities, contact info@thinkNPC.org or info@keystoneaccountability.org.

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# TRANSFORMING THE CHARITY SECTOR

NPC is a charity think tank and consultancy which occupies a unique position at the nexus between charities and funders, helping them achieve the greatest impact. We are driven by the values and mission of the charity sector, to which we bring the rigour, clarity and analysis needed to better achieve the outcomes we all seek. We also share the motivations and passion of funders, to which we bring our expertise, experience and track record of success.

**Increasing the impact of charities:** NPC exists to make charities and social enterprises more successful in achieving their missions. Through rigorous analysis, practical advice and innovative thinking, we make charities' money and energy go further, and help them to achieve the greatest impact.

**Increasing the impact of funders:** NPC's role is to make funders more successful too. We share the passion funders have for helping charities and changing people's lives. We understand their motivations and their objectives, and we know that giving is more rewarding if it achieves the greatest impact it can.

**Strengthening the partnership between charities and funders:** NPC's mission is also to bring the two sides of the funding equation together, improving understanding and enhancing their combined impact. We can help funders and those they fund to connect and transform the way they work together to achieve their vision.

**New Philanthropy Capital**
185 Park Street, London SE1 9BL
020 7620 4850
info@thinkNPC.org
@NPCthinks

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