Inclusion of User Voices in Social Change: Barriers and Opportunities

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Foreword

In the past few decades, the world has seen tremendous improvement in global development, especially in poverty reduction. Certainly in the past decade, we have seen social impact moving from an after-thought for investors and corporates, to a critical part of the business agenda.

Yet, there are still some glaring gaps in social change. In a recent Guardian article, "Fifteen leading economists, including three Nobel winners, argue that the many billions of dollars spent on aid can do little to alleviate poverty while we fail to tackle its root causes"[1]. The article focuses on the need to address the root causes by focusing on the policies, and with better evidence, understanding which policies have worked. But how do we know what the root causes really are? Too often, experts and practitioners determine what the root causes with an outside-in view, and users are rarely asked. By users, we mean the people who benefit from the social change solutions, often referred to as "beneficiaries", yet this term has been controversial and we try to stay away from terms which denote power imbalances[2]. By User voices, we mean the collective voice of the population that is to be represented in social impact initiatives.

A humbling recognition from our work at The Social Investment Consultancy (TSIC) in the last decade is the power of user voices in social change. They shed light on what the problems really are and what the solutions can be based on the local context; and the act of involving users increases their sense of ownership over the agenda. With technological advances, gathering user voices has become so simple and cost-effective – so the time is really ripe. Through our work incubating Lensational[3], a non-profit social enterprise that trains marginalised women and girls in photography and digital storytelling, to various impact evaluation projects utilising the co-production approaches, we have sought to include users in all the work that we do, but this approach is still in its infancy in terms of practice.

So, why aren't users included more? A thought leader on this topic, Dennis Whittle of Feedback Labs, estimates that aid is currently 20 percent driven by regular citizens and 80 percent driven by experts[4]. We seek to explore some of these barriers to inclusion of user voices in this report, and suggest possible solutions to overcome them. From a methodological perspective, there are research methods we can use to include user voices in the design, implementation and evaluation of social change projects, but it ultimately requires a shift in mindset.

As experts and practitioners, our primary role should be to bring these user voices to the forefront and be effective in facilitating solutions, rather than prescribing them; in asking questions, rather than answering them; in bringing resources, rather than exhausting them. 'At TSIC, we hope this insights report will lead to recognition of the benefits of including user voices in the social sector, and to spur actions around this to create meaningful social change. At the time of writing this report, it is encouraging to see that the Hewlett Foundation has sponsored a series at the Stanford Social Innovation Review, titled "Power of Feedback" in addressing a similar topic[5].

As we embark on our 11th year of business, we will be working to ensure that user voices are meaningfully included throughout the design, implementation and evaluation of social change. We look forward to hearing from you if you have any thoughts and collaboration ideas.

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Context

The Sustainable Development Goals (SDGs) have galvanised more interest in global development. Indeed, more funding has gone into this area. In the UK alone, budget spent on the Poverty Reduction and Growth Trust (PRGT) – an International Monetary Fund (IMF)'s fund that lends to lower income countries has risen from £446m to £726m in 2017.[6] On a micro-level, funders want to see more value for their money and charities want to ensure their works are paid off. Increasing the effectiveness and eliminating the discrepancy between the input and output is more important now than ever.

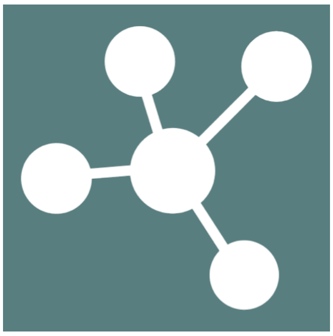
The work within the global development can be categorised in two levels – macro and micro-levels, and within each there are specific barriers to maximising their effectiveness. The first level, macro-intervention, refers to large-scale campaigns and policies designed by governments or international organisations such as the UN and IMF that concern socio-economic, humanitarian and security issues. From a macro-perspective, social change interventions can be inhibited by corruption, weak policies, and fragile institutions. End users are consulted as a stakeholder group in these macro-interventions, though by their very nature they are often top-down.[7]

For traditional corporates, sales and profits reflect how well they listen to their target customers. For charitable organisations, however, who are the customers? Some may say the funders are the customers; some may say that the users are. If one opts for the latter definition, while a customer of an iPhone can choose not to buy an iPhone, an end user of an aid programme may not have that choice – they may need the food aid to survive, for example. An article on Stanford Social Innovation Review argues that beneficiaries would accept a flawed intervention rather than no intervention at all.[8]

The point above also highlights the challenge of prioritising ethical responsibility amongst all the key objectives in creating social change. In a traditional economy, the profit motive makes it clear that companies have incentives to deliver projects with highest financial value to their shareholders. In the social sector, ethical responsibility towards end users will have to be balanced amongst other incentives – which range from creating goodwill for the brand as in Corporate Social Responsibility, to satisfying funders' requirements. The myriad of incentives in creating social change may have contributed to the challenges around seeing end users as customers, and as such, inclusion of their voices in social change.

Barriers to Inclusion of User Voices

While there is plenty of literature on how lack of user voices leads to ineffective social change interventions, and why we should include them, there is lack of systematic analysis of why they currently are not included. Based on our practice and emergent evidence, we characterise the barriers in three main types:



Physical

Communications

Attitudinal

1. Physical

A lot of social change interventions take place in a country/region different from the source of funding and implementation. Consider: a bilateral donor agency distributing funds to projects helping single mothers in rural villages in developing countries. To include user voices, there are geographical constraints, and traditionally it has been difficult and expensive to gather the thoughts and opinions of users.

This is linked to a point on budgetary constraints. Inclusion of users' voices should come during project design, however, funders usually receive ready-made project proposals in which inclusion of user voices is not a typical budget line item. Potential grantees may perceive that funders would not be interested in this and therefore do not budget this in advance. Even if funders are interested, they can only add funding in an ex-post manner to include users in evaluation.

For marginalised groups such as people with disabilities, if their accessibility needs are not addressed in activities, there will be physical barriers as well.

2. Communication

The use of technical jargon makes it challenging to include groups which have not received formal education, and many of these concepts such as empowerment, monitoring and evaluation may have little relevance to the daily lives of our users. The lack of accessible, easy language in translating social change concepts, is a major barrier to inclusion of user voices.

While experts and practitioners make frequent use of written communications (such as writing this report), there is limited use of other forms of communications to enable diverse groups to express their thoughts and opinions.

Moreover, most charities and social enterprises have limited capacity to invest in communications – many actually do not have a dedicated Communications function – as communications are considered overheads and are not typically funded by donors. This is in contrast to the corporates, which have marketing teams to ensure the effectiveness of customer outreach through insights, behavioural studies and campaigns.

3. Attitudinal

Attitudinal barriers are arguably, the most pervasive forms of barriers as they are intangible. Biases play a significant role – there seems to be a view that experts know better, and that lived experience (as opposed to expertise) is discounted. These biases may be conscious, or unconscious. For example, Feedback Labs[9] has discussed the role of gender bias in providing and listening to feedback, such as reviews at workplaces, which criticised women for the same qualities praised in the performance reviews of their male co-workers, and their report also suggests the possibility that some individuals have the implicit bias that feedback coming from "authority" figures is better.

In the context of global development, it is important to situate attitudinal barriers in the theory of post-colonialism. Gayatri Spivak, an influential post-colonial feminist, wrote about these challenges in her seminal publication, "Can the Subaltern Speak?"[10] Spivak points to the fact that research is in a way always colonial, in defining the "other", the "over there" subject as the object of study and as something that knowledge should be extracted from and brought back "here". She proposes that institutions which regulate writing about the other are shut off to post-colonial or feminist scrutiny.

The lack of awareness of our privileges as a result of who we are (race, gender, class, etc) is also an attitudinal barrier.

There is also a curious mentality of denial among social change agents – what some may call, the Saviour Syndrome[11]. It might be that the experts and practitioners have given up the promises of riches to instead work for social good, or that we are so passionate about what we do, that we deny to ourselves that we may not be doing as much good as we think. Dennis Whittle, Founder of Feedback Labs, was honest in coming to terms with his own denial when he was confronted by an anthropologist in this blog post[12]. Because of the denial mentality, we may not recognise the extent to which we have actually excluded end users in the design, implementation and evaluation of the projects, and therefore have seldom come to address this.

Even if these attitudinal barriers among experts and practitioners are overcome, there are also attitudinal barriers on the side of the users. Amongst certain communities, there may also be social norms prohibiting the participation of certain marginalised groups, such as women and girls, youth and people with disabilities. Amongst marginalised groups themselves, they may also pose response biases, such as presenting themselves in a way that is favourable to society by hiding the truth, known as "social desirability"; or not having the confidence to voice their thoughts.

Possible Solutions

We will now discuss the possible solutions in light of the physical, communication and attitudinal barriers. This section on solutions is meant to be 'breathing and living' work in progress – so we update as solutions come to the fore. For now, we have created a 'starter for ten' list, summarised by this table, and have included an example for each.

Types of barriers	Solutions
Physical	1. Make use of technology 2. Funders encourage and assess grantees, including user voices 3. Take into account accessibility needs and social norms
Communications	4. Jargon alert 5. Project cycle check 6. Communicate how you are including user voices using the Ladder of Participation
Attitudinal	7. Use participatory research methods 8. Increase self-awareness and humility 9. Incorporate feedback culture into organisations 10. Think of your end users as customers

Solution 1

Make use of technology more creatively to include users in a cost-effective manner, especially as mobile technology becomes increasingly common[13]

Best Practices: Girl Effect's Springster

Girl Effect is a creative non-profit working where girls are marginalised and vulnerable. In 2015, in partnership with Facebook Free Basics, Girl Effect launched Girl Effect Mobile (GEM) – an online mobile-first platform designed to connect girls to each other and the relevant content, services, tips and advice they need to achieve their full potential. GEM was built to increase girls' self-confidence and basic knowledge across health, education, financial security, voice and rights, and safety. In 2017, GEM was rebranded to Springster, and in the past year, it has reached 15 million unique users, and is live in 66 countries and 17 languages, particularly South Africa, Nigeria, the Philippines and Indonesia.

Kecia Bertermann, Technical Director, Digital Research and Learning at Girl Effect, made a presentation at the MERL Tech London conference in March 2013 on how Springster combine user-centric data science and traditional monitoring and evaluation to understand impact. Given the possibility of reaching end users directly through their mobile platform, Springster has been able to create a measurement framework that responds to user characteristics. These characteristics were identified during formative research, such as habits of borrowers vs owners, understanding online vs offline identity, and adjusting for the unique developmental needs of mid-adolescent target audience[14].

Solution 2

Funders encourage grantees to dedicate funding to including user voices throughout the project cycle, and assess applications with user inclusion as one of the criteria

Best Practices: TAAP (Transforming Agency, Access and Power) Toolkit and Guide for Inclusive Development[15]

TAAP Toolkit is a comprehensive toolkit (over 300 pages) for individuals or organisations seeking to integrate inclusion into an existing project of any sector (e.g., agriculture, health, education) or to design a new project with inclusion as its own goal. The TAAP activities are organised into four sequential phases, with two cross-cutting sections:

Phase 1 Inclusive Identity and Reflection	Phase 2 Social Inclusion Analysis	Phase 3 Inclusive Design	Phase 4 Inclusive Implementation
Inclusive Monitoring, Evaluation and Learning			
Inclusive Impact and Sustainability			

Download the organisational questionnaire[16] with 21 reflection questions, which help organisations identify potential solutions.

SOLUTION 3

Take into account accessibility needs and how social norms may affect participation of marginalised groups

Expert Interview: Eleanor Lisney

Eleanor Lisney is a founder member and coordinator of Sisters of Frida. She is an access advisor, an NUJ member on the New Media Industrial Council and the Equality Council. She is also on the British Council Disability Advisory Panel and the web team of the International Network of Women with Disabilities. Eleanor has been involved with disability movement(s) in the UK since the 1980s.

Her recent blog post[17] on Civil Society Futures discusses how to meet the accessibility needs of disabled people in order to facilitate their participation:

"Many disabled people do take part in civic engagement in spite of the barriers they face, including attitudinal barriers which are a result of the other people, sometimes because of stereotypes which are used by even well meaning people, out of ignorance. Hopefully, organisers will realise and take barriers for disabled people into consideration when planning events and allow for extra time and reasonable adjustments, as the Equality Act 2010 says they should. For anyone looking for ideas, Sisters of Frida has created a toolkit[18] for event planning which gives some guidelines on planning for accessibility."

Concept Deep-Dive: The Role of Social Norms

Social norms are defined as practices that people follow "because they believe most others in their reference network do, and would disapprove if they don't"[19]. The definition shows that social norms vary by context but the norms may prohibit certain groups to join. In the case of women and girls, there are harmful gender norms which keep them interacting with strangers or male counterparts; or venturing out of their homes[20].

These social norms need to be taken into account, so that mitigation mechanisms can be put into place to facilitate marginalized groups' participation.

In the case of adolescent girls, Standard Chartered and Dalberg[21] propose the solutions of addressing the burden of unpaid work on adolescent girls and providing girls' access to role models and support networks, to change harmful gender norms. In other words, organisations wanting to increase participation of marginalised groups such as adolescent girls may consider compensating or acknowledging end users for the time they spend in participation, and to provide support networks such as mentors from their own communities to facilitate these interactions.

SOLUTION 4

Jargon alert – when we write, check whether we are using plain languages, make use of images, infographics and non-written communications as much as possible when communicating to end users

Expert Interview: Victoria Wong

Victoria Wong *is a media relations professional and volunteer communications specialist for NGOs in Hong Kong.*

Regarding the caution of jargon, I think this really depends on the type of communications and its purpose - What's the end goal? What is it trying to achieve? When it comes to front-line engagement, outreach or community development, I cannot agree more. Not only do we need to use "plain language" (in terms of context or style of the language) to communicate, we also need to consider the language and the communications platforms they use (e.g. social media, print, etc). The use of such communications facilitates trust but also relatability, increasing users' engagement and participation.

But in a context that concerns inclusion of beneficiaries in social or policy changes, it becomes almost necessary for the end users to articulate this "jargon" we speak of. Steering away from jargon is one way - perhaps the first, essential step - to allow users to understand what the policy means to them, but eventually - and to really include them in creating social changes - service users need to be able to articulate these "jargons" related to their needs and situation, and in the community / region / country / affiliation they are in.

For example, refugees or migrant workers in Hong Kong need to be able to understand the limits of the local laws and restrictions in order to protect their rights, articulate needs, and perhaps represent the community in events, recommendation papers, etc. to discuss future development.

This speaks more about an integrated approach to social inclusion and community development. And often times, it's the art of communicators to integrate and juggle perspectives into high-level policy dialogues.

SOLUTION 5

Project cycle check – check whether users are included throughout the project cycle: before, during and after

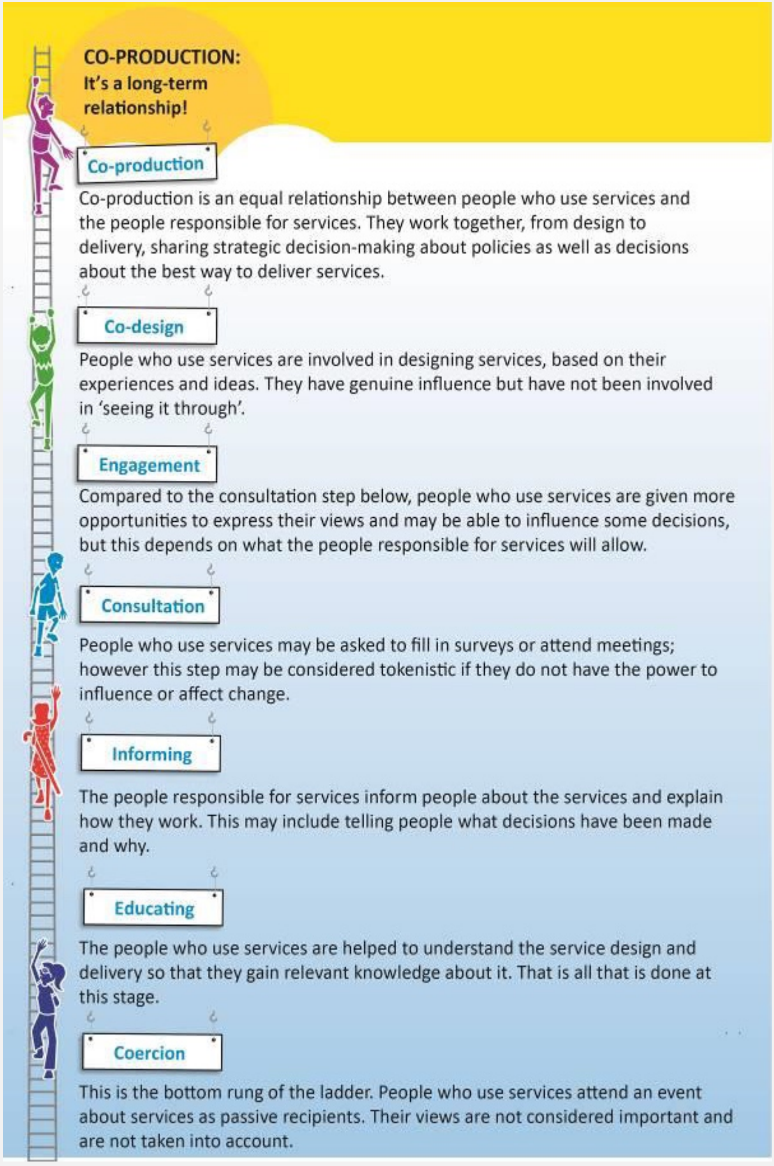
Best Practices: Project Cycle Check

1. Before the project	Including user voices in the project design phase helps the organisation to understand their needs which ought to be the core objective of the project. Best practice at this stage includes co-producing a project aim with the users
2. During the project	The project team should ask for timely feedback from the users in order to keep the project on course – making sure the ongoing activities have actual impact on improving the lives of the users.
3. After the project	Users' opinions should be collected after the project so the project team can evaluate whether the project has achieved its aims, the reason of its success or failure, as well as how to improve next time. Make sure the data collected gets back to the end-users, not just to the funder(s)!

Solution 6

Be honest about how you are including user voices – identify your current practices and your aspirations

The graph below, produced by the Disabled People's Commission in Hammersmith and Fulham[22], based on the Think Local Act Personal (TLAP) Ladder of Participation, would be a good starting point.



Solution 7

Make use of participatory research methods throughout your project cycle

Best Practices: Example participatory research methods[23]

- Action learning sets
- Peer training
- Appreciative inquiry
- Coaching
- Human-Centred Design
- Design Thinking
- Ethnography
- Participatory action research
- Participatory video
- Photovoice
- Reality Check Approach
- Most Significant Change
- Vignettes and role play

Method Deep-Dive: Ethnography

To shed light on how the use of participatory research methods can meaningfully include users and achieve better outcomes, we will do a deep-dive into ethnography, as it is relatively well developed compared to other participatory research methods.

What is Ethnography?
Ethnography is a qualitative study of human behaviour based on the concept of anthropology – the study of human culture, society and development.[24] Ethnograpists conduct their research by embedding into a target community, to observe and learn who the community are and how they live.[25] Ethnographic research has been used in businesses to understand their customers thoroughly, as well as achieving their user experience goals.

Ethnography in practice:
There are four ways to conduct ethnography. All methods are complementary and can be used in conjunction with each other.

1) Fieldwork
Fieldwork is a traditional but costly way to conduct ethnographic research. Ethnograpists participates in their subject's daily activities and may ask questions to gain further sights as they make decisions. The research usually takes place for weeks or months in order to gain a full understanding of the subjects. The subjects are a part of the process so they must be acknowledge of the observation.

Method Deep-Dive: Ethnography (cont'd)

Case study: The Adidas method (Part 1)
Adidas, the German sportswear manufacturer, was looking for a better marketing strategy to increase its market share in the sportswear market. Although Adidas has done well with its "lifestyle" product line, the sales in "fitness" products were outgrown by its competitors. Therefore, Adidas started an ethnography research by training its designer staff and sending them to spend a day with some selected customers. The staff had breakfast and did sports with the customers to find out what makes them exercise. Before the research, Adidas thought that most of its customers trained to achieve excellence at a specific sport so their needs are similar to that of professional athletes. However, the research result said otherwise. Adidas's target customers who pursue fitness lifestyle also pursue fashionable design in their sportswear, which is something that professional athletes care less about. As a result, Adidas changed its product design and marketing approach to better fulfil the desires of their target customers.[27]

2) In-depth interviews
An in-depth ethnographic interview is a one-on-one immersive interview that can last for 2 hours or longer for each encounter. The subject will be interviewed for a few times over a pre-determined period depending on the aim and specific requirements of the research. The interview should be conducted in the natural environment of the subjects.[28] Best practices of ethnographic interviews include asking open-ended questions, encourage story-telling, asking for show and tell, and avoiding a fixed set of interview questions.

3) Visual ethnography
Visual means, such as photography, motion pictures, and video recording, is a powerful data presentation in the context of ethnography. Users can use photos to represent their thoughts towards a particular matter and provide insights to the researchers.

Case study: The Adidas method (Part 2)
In addition to Adidas ethnographic fieldwork research, Adidas also conducted a visual ethnography to gain further insights from its customers. Adidas mailed some disposable cameras to the selected customers and asked them to take a photo of something that motivates them to work out. 25 out of 30 women responded with pictures of a little black dress. The analysis of this research showed that the customers who were highly engaging in sports did not perceive themselves as athletes. This piece of evidence has overthrown Adidas' initial assumption that their everyday customers and professional athletes are the same target group.

4) Mobile ethnography
Smartphone apps are currently available for customers to document their own experience by providing GPS data, photo, audio, and video without the presence of an ethnographic researcher.[29]

Solution 8

Increase self-awareness and humility: consider the biases that we may bring to our projects and our privileges

Expert Interview: Fearless Futures

Fearless Futures works within organisations to engage people in critical thinking to understand and challenge the root causes of inequalities and to grow powerful new leadership and design for transformative change.


Image courtesy of Fearless Futures

Two key phrases they deploy in their programmes to understand how privilege functions are: "Privilege is invisible to those who have it" and "Privilege is when something isn't a problem because it isn't a problem to you personally". Given this, they can see how troublesome privilege is when it comes to generating solutions and policies for people other than ourselves, our experience and our positions in the world.

It is also hard to challenge, because of what Fearless Futures call "The Paradox of Privilege and Power". That is to say, those who have the power and privilege to take transformative action to end injustices through their solutions and policies are precisely those who because of experiences and position in the world are:

- Oblivious to the other side of their experience (and the material reality of oppression(s)
- Focused on their intentions over their impact in the world
- Invested in the ideas of the status quo because it serves them and their comfort
- Opposed to being informed of how their behaviour perpetuates harm and oppressions
- Implicitly and explicitly trained to preserve their position of power and privilege through a variety of harmful — though normalised — techniques, some of which they may not realise they are deploying

Fearless Futures recommends that these unproductive behaviours can be challenged. If you're really committed to inclusion in your work, in user voice and beyond, you'll need to start with the following:

1. Lean into discomfort.
2. Give up being right about how much more you know about someone's experience.
3. Invest time in capacity-building to better understand the nuanced, complex and context-informed ways inequities show up, and your role in them.
4. Be prepared to prioritise your impact over your intention, and design processes, policies and solutions that honour that.

Here are some links to Fearless Futures blogs, which support those seeking to design inclusion into their practice:

1. Six reasons why we at Fearless Futures are just not into unconscious bias
2. 10 Ways to be Absolutely Sure Your D&I Endeavours will Fail
3. We want practical solutions!
4. Stepping on people's toes and the tale of (not) prioritising impact over intention

Solution 9

Incorporate feedback culture into organisations, and build in accountability mechanisms to end users

Best Practices: Feedback Labs[30]

Feedback Labs has published Feedback 101, an introduction to the concepts and practice of feedback and includes a collection of their favourite stories and resources for understanding feedback across sectors and contexts. In terms of how feedback is done, they talk about how simply collecting feedback is not enough - closing the loop is what matters, and this can be accomplished in 5 steps - design, collect, analyze, dialogue, and course correct. Before one begins, creating buy-in among all stakeholders is also crucial. Among the 5 steps, Feedback Labs argues that step 4, dialogue, is the most important step of the feedback loop. Reporting your analysis back to constituents – presenting how you understand their feedback – ensures accountability.

Solution 10

Think of your end users as customers, and listen to them

Best Practices: Best practices: Acumen's Lean Data approach

Acumen is a non-profit impact investment fund with 15 years' experience in small and medium-sized enterprises that serve low-income communities in developing countries primarily in Sub-Saharan Africa and South Asia.

According to Acumen: "Talk of impact is everywhere but few people seem happy with the state of measurement practice. Genuine end-consumer data that truly helps to understand social value is few and far between. That's why we created Lean DataSM. Designed specifically for social enterprises, Lean Data helps build more impactful businesses by providing them with data on their social performance, customer feedback and behaviour."

The Lean Data Field Guide[31] is a simple yet comprehensive guide to helping organisations set up mechanisms to listen directly to end users.

Concluding Remarks

There is no doubt that user voices are critical to maximising impact with any social change interventions. In this short insights report, we have attempted to summarise the common barriers and to explore potential solutions to including user voices. This is by no means a scientific piece of research, but we hope this will spark some discussions for more structured practice to start taking form. TSIC exists to help any organisation and any intervention create the best possible impact. It is clear to us that including user voices needs to be given more priority, to accelerate effective social change, and yield meaningful benefits for the whole of the stakeholders involved.

This year, we are also embarking on a few new projects that put some recommendations listed above into practice, and we will look to update this report based on our learnings. Lastly we look to collaborate with change agents and organisations, so please reach out to us with your thoughts and ideas.

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