

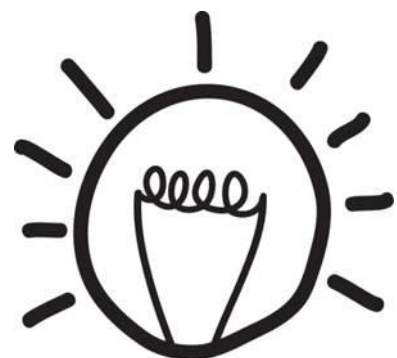


INSPIRING IMPACT

Involving users in shaping services

Shona Curvers, Erica Bertolotto, Rachel Tait

February 2018



Introduction

There is a growing interest amongst charities and funders to better understand what their users want and to shape their services accordingly. This guide contains some practical examples of user involvement and provides tips to get started. Many organisations already involve their users in shaping service delivery, so learning from their example is the first step to better engage users.

Our Methodology

This guide draws on Inspiring Impact’s expertise in impact practice, a review of relevant literature, and interviews with organisations who involve their users in shaping their services. We share examples from these organisations as well as tips for how to get started. The intention is to inspire charities and funders to consider and discuss their practice around user involvement as a way of improving their services. This guide focuses on service delivery and does not address user involvement in overall strategy or governance.

Why is involving users important?

All charities and funders exist for their users. Yet users often have limited influence over organisations’ decisions and few opportunities to say how they would like services to be different. There are four key benefits of involving users in shaping your service:



The image consists of four colored rectangular boxes arranged horizontally, each containing a benefit of involving users. From left to right: a blue box with white text, a green box with white text, a pink box with white text, and a red box with white text.

- It gives a moral legitimacy to your organisation—which is important when representing users**
- It improves your effectiveness by giving you a better understanding of users’ needs and harnessing their knowledge & skills**
- Users benefit from feeling heard, involved and valued as this gives them a sense of agency**
- Collecting feedback data helps you better evaluate your service**

Proportionality in user involvement

Organisations should involve their users in a way that is [proportionate](#) to their resources (time and funding) and skills (internal and external). Collecting more feedback than you are able to act upon is a drain on resources and can damage your relationship with users, if they are providing their opinion and you are not seen to be acting on what they’re saying.

Our Language

People self-identify in a variety of ways. The organisations featured in this guide used a variety of terms for the people who receive a service (‘users’, ‘beneficiaries’, ‘members’ or ‘customers’) and for the act of involving those people in decision making (‘participation’, ‘user involvement’, ‘user voice’). For consistency this guide employs the term ‘users’ to refer to people who use a service or are impacted by other activities carried out by a charity. The act of involving users is referred to as ‘user involvement’, which includes all the opportunities that users have to influence services. This ranges from passive user involvement, such as social media analysis, to co-production.

The Impact Cycle

The [impact cycle](#)ⁱ can help you achieve and understand your impact at each stage of a project. It can also help you involve users at each stage of the cycle, by giving them opportunities to influence:

- How the service is designed (plan)
- How it is delivered (do)
- How data is analysed (assess), and
- How the findings are used to improve the service (review) (**Figure 1**)

Figure 1. Cycle of good impact practice for user involvement



PLAN: What do users want your services to be like?

Many organisations invite their users to discuss and make decisions about what a service should look like, when, how, by whom it should be delivered, who it should reach and how to reach them. Asking users what their priorities are—their aspirations and challenges, as well as what they want and need—can be valuable to ensure you shape services around what is most important to them.

DO: What do users think about your service?

Collecting feedback from users is essential to understand what they think about your service. How you collect feedback data will depend on:

- How you interact with users (face-to-face, online or by phone)
- How often you interact with users (one off or ongoing/regularly)
- How many people your service reaches (more than 100 or fewer than 100)

ASSESS: What did users tell you about the service?

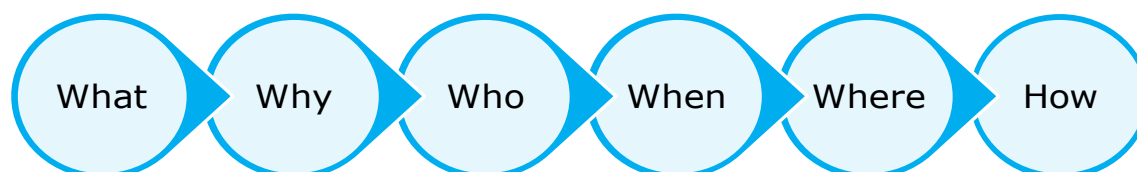
The next step is to analyse user feedback: what does the feedback tell you about users' views of your service? For a comprehensive understanding of your impact, cross-check user feedback with other [types of data](#) to ensure findings are consistent.

REVIEW: How will you communicate findings to users? What changes do users want to make as a result of the findings?

At this stage, you can apply what you learnt from users (and from other data) to improve your service. You could co-produce solutions with users or consult them on your decisions. Either way, as users have taken the time and effort to give you feedback, it is particularly important that you communicate the changes you make to them. It is also important to feed information from your review stage back into planning services, to complete the feedback loop.

Getting started

[Shelter Scotland](#)ⁱⁱ developed a set of questions on how to involve users in shaping the services:

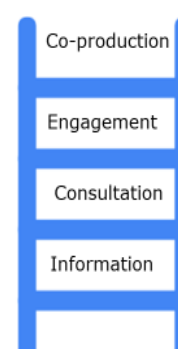


- ✓ **What will you involve service users in?** Are you creating something new, or reviewing an existing service? Are you making changes across your organisation, or to one service? At which stage(s) of the impact cycle will you involve users? Will they participate in co-production or will you consult them on ideas proposed by you?
- ✓ **Why?** There is a moral imperative as well as practical benefits to involving users. Do you want to get their views, to communicate something to them, to deliver a service in collaboration with them, or to build relationships with them? Are you looking to improve services for current users, or to extend your reach to non-users?
- ✓ **Who will you involve?** This depends on what you want to achieve and the network of service users available to you. Do you need a representative sample of users, or a demographic subgroup? Do you want to involve people who are using your service now, who used it in the past, or people who you would like to reach?
- ✓ **When?** Choose times when users are likely to be available. Consider the commitments they are likely to have, such as school or work, and plan accordingly.
- ✓ **Where?** Make it as easy as possible to get involved, for example by consulting users in the same place where they access the service.
- ✓ **How?** What is users' preferred format to get involved, which will also give you the information you need? It could be written forms, focus groups, informal conversations, videos, etc. Consider if it is appropriate to use incentives to involve users.

Many of the organisations develop or adapt frameworks to plan involving users in their work.

[Contact](#) adapted the 'ladder of participation'ⁱⁱⁱ to help staff plan how they involve parents of disabled children in their work. At the bottom of the ladder is 'information', meaning users are told about decisions made by staff; at the top is 'co-production', in which users are involved in developing and implementing solutions from the outset, as equal partners, and where their 'lived experience' is valued as real expertise.

This framework helped Contact to prioritise user involvement internally and provided staff with a structured way to think about opportunities to engage with users.



[Sound Connections](#)' work is based upon the principles and values of youth voice and participation. Having used Hart's Ladder of Youth Participation^{iv} for a few years, it developed its own framework, called the Six Categories of Youth Participation, that can be mapped against Hart's Ladder.

1. **Youth consultation:** Collecting young people's opinions and ideas through surveys, focus groups and informal conversations, and acting upon what they say.
2. **Young producers:** Young people produce, programme and run their own events and projects
3. **Youth enterprise:** Supporting participants to develop employability and career skills.
4. **Youth advocacy:** Opportunities for young people to advocate for, and be part of debate around, issues that they are affected by or ideas that they are interested in.
5. **Peer leadership:** Participants take a leadership/mentoring role, eg in a Young Producers group
6. **Youth governance:** Young people involved in decision-making and strategic planning, eg by joining a charity board or getting involved in staff recruitment.

PLAN:



What do users want your services to look like?

Co-production of an organisational theory of change



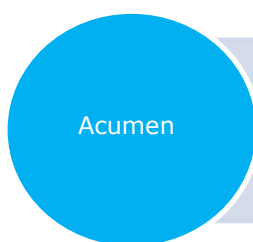
A charity combining expertise and knowledge of four established mental health charities: Rethink Mental Illness (England), Hafal (Wales), Support in Mind Scotland and Mindwise (NI) to support **people affected by mental illness** through information, services & campaigning.



A charity that helps **people with money problems** manage their finances by offering advice and partnering with other organisations offering support services.

Mental Health UK, chosen as Lloyds Banking Group's Charity Partner 2017-2018, has set up a new service, [Mental Health & Money Advice](#), which aims to help people understand, manage and improve their financial and mental health. One of the first steps for planning the desired impact of the services was to bring together all stakeholders—including service users—and to develop a theory of change. Mental Health UK were supported by the [Money Advice Service](#) who commissioned NPC to develop the theory of change. Service users and carers participated in the theory of change workshop and shared their unique perspective of mental ill-health and financial challenges. Their voices are strongly reflected in the theory of change and project plans.

User consultation using digital technology



A non-profit global venture addressing poverty and marginalisation by supporting **social enterprises** that provides goods and services that improve the lives of the poor.

[Acumen](#) developed [Lean Data](#), which helps social enterprises collect data on their impact using affordable technology, such as SMS or call centres. Organisations choose the technology that will best meet their needs by going through a 'technology decision tree'. They then design the outcomes and targets they want to achieve based on the information they have collected from users. Acumen found that involving users from the planning stage achieves better outcomes than gathering feedback on services delivered without consulting them. ^v

TIP: People everywhere are suffering from survey overload, both in paper form and online. Some creative methods of feedback collection that users are more likely to respond to are:

- Ask users to place a sticker on a flip chart as they walk out of a session, to indicate how much they have enjoyed it, or how informative they found it.
- Place a suggestion boxes by the front door for generic comments or use it to gather feedback on specific services or programmes.

Co-facilitation of consultation focus groups



A national charity dedicated to ending domestic abuse. It combines survivor voice with practice and research to **support survivors of domestic abuse and their families** to become safe, well and rebuild their lives.

[SafeLives](#) wanted to draw on a range of information sources to map out the key gaps in domestic violence services around the UK. It sought survivor and user feedback to better understand and address five of these gaps—such as gaps in services for people who are staying in relationships, or for children and young people—and shape their priorities and create a response based on what survivors want.

The organisation works with a group of 'SafeLives' Pioneers'—and actively involved people with lived experience of domestic abuse at every stage—on consultations with local survivor groups across the UK and social media. Pioneers have unique insight into the issues and can shape the discussions in productive and authentic ways. Having survivors in this role also helps to build relationships with other people experiencing domestic abuse and demonstrates that their voices are being heard. This approach allows SafeLives to gather a nuanced understanding of gaps in services and for survivor voices to directly contribute to developing new interventions, tailor existing services and influence decision makers.

TIP: To get the most out of user consultations:

- Pick suitable times & venues
- Be aware of the length of meetings
- Compensate users for their time financially if appropriate
- Offer childcare
- Send prep work/ information
- Provide refreshments

Annual stakeholder survey

The logo for The National Autistic Society, consisting of a blue circle with the text "The National Autistic Society" inside.

The National
Autistic
Society

The leading UK charity for autistic people (including those with Asperger syndrome) and their families. It provides information, support and pioneering services, and campaigns for a better world for autistic people

[The National Autistic Society](#)'s annual stakeholder survey collects feedback from a large and, as far as possible, representative selection of autistic people and their families. The survey includes a carefully structured set of questions about what is important to users in terms of quality of life. The answers showed that, for example, families of autistic people are often unable to hold down a job and tend to feel socially isolated. Therefore, The National Autistic Society will prioritise these kinds of outcomes when measuring the effectiveness of its family support services.



DO:

What do users think about your service?

If you are just beginning to involve users, this is probably where you will start. Asking users what they think about your service—in formal or informal, structured or unstructured ways—is the first step to listening to them and incorporating their views.

Informal feedback collection

Sound
Connections

A music charity and consultancy that facilitates change by working across the music community to achieve inclusion, equity and social justice with **children and young people**.

[Sound Connections](#) developed its Youth Voice and Participation practice through hosting [Wired4Music](#), the music network for Londoners age 16-25 and using the Six Categories of Youth Participation. Sound Connections and Wired4Music engage with young people in several ways:

- Holding monthly 2-hour drop-in sessions—informal spaces for 16 to 25-year-olds to access advice, eg about career opportunities. This way staff learn about the needs and interests of young people, which in turn informs planning and programming.
- Co-facilitating focus groups across the country to hear the experiences, needs and interests of children and young people.
- Updating organisational systems and processes. One young person, for example, told a staff member that the options for 'employment status' on a monitoring form were not what young people signing up might expect. This resulted in a new, young person-centred, monitoring form.
- The Generate programme, that provides funding and mentoring to people age 16-25 to run a project or event.
- A one-year Sound Connections trusteeship for Wired4Music members ages 18-25.

TIP: If your service has up to 100 users, collect feedback from all of them. If it has more than 100 users, select a [representative sample](#) of users to get feedback from.

The Wheatsheaf Trust

A charity helping **vulnerable people**, ie people struggling to enter the labour market, lone parents & families, minority ethnic groups, people with disabilities, refugee, ex-offenders.

[The Wheatsheaf Trust](#) also captures informal feedback. In the past, it has organised 'Pizzas and Questions' ('Ps and Qs') sessions, where staff invited the young people they worked with to a social event with activities like pool or table tennis. This allowed young people to ask questions and helped staff collect informal feedback that may not have emerged from formal surveys or feedback forms.

Focus groups

The National Autistic Society runs 'Insights' sessions once a year, where users participate in group discussions and share views about the support they receive. The main theme that emerged was the importance of continuity of staff and the problems that high turnover can cause. The National Autistic Society appreciated just how much people with autism and their families depended on the continuity of staff. This led to a recruitment campaign focused on staff retention: the organisation gave new staff a 'try it and see' period to learn about autism on a probationary basis.

User feedback from graffiti boards

Shelter

A charity working in England and Scotland, campaigning on behalf of **people affected by bad housing and homelessness**, and providing advice, support and legal services.

To collect user feedback around supported housing [Shelter](#) uses graffiti boards. They are a type of notice-boards where users are welcome to contribute their thoughts or comments for staff to read. Sometimes staff post questions or ideas and invite users to reply and contribute to shaping services. This approach works well when users are physically close to your office—for example residents of a housing association—and it is an opportunity to give anonymous feedback.^{vi}

Digital feedback collection

Youth Options

A **youth** charity offering open access services, and services for those in care, care leavers, those excluded or at risk of exclusion from school, young people who are NEET or likely to become NEET.

[Youth Options](#), a Blagrave Trust grantee, found that young people don't enjoy filling out paper feedback surveys. Instead, the organisation made three films to give a voice to the young people they work with. It also included regular focus groups with young people to allow them to provide feedback.^{vii}

TIP: Use social media. Here are some suggestions:

1. Monitor what users post on social media and map trends and issues concerning them. You're not directly consulting them, but you're 'listening in' on their conversations.
2. Elicit direct feedback, for example by posting polls on your Twitter or Facebook page.
3. Put a call out via your social media channels for users to provide feedback in person, through formal or informal sessions.

Users involvement in data collection

Youth Action Wiltshire

A youth charity supporting **young people** in Wiltshire and Swindon to obtain qualifications, improve their soft skills, and gain volunteering experience.

[Youth Action Wiltshire](#) is a Blagrave Trust grantee that involved previous service users in the collection of data. It established a group of 10 'young listeners' to interview other young carers about what they value in the service and what they would like to change. Themes that emerged were the importance of one-to-one mentoring, and the need for more breaks from their caring duties.^{viii} Previous users are well-placed to build relationships with current users, as they may have common experiences which facilitate open and honest conversations.

Formal participation group



CLIC Sargent

A national charity providing support and campaigning on behalf of **children and young people with cancer, and their families**. It fights for young lives with cancer by taking what users say about the impact of cancer on their lives to service providers, government, and policymakers to create change.

[CLIC Sargent](#) involves children, young people and parents in every aspect of their work: they are campaigners, fundraisers, volunteers, they share their stories and participate in shaping services. Service user participation work is carried out by all teams across the organisation, supported where needed by the participation team and each directorate's participation representatives. CLIC Sargent supports regular groups such as the Young People's Reference Group, the Children's Advisory Group, the Parents Advisory Group as well as facilitating digital participation through Facebook groups.



British Heart Foundation

The nation's heart charity and the largest independent funder of cardiovascular research. BHF funds pioneering heart research and carries out vital prevention and survival activity and ensures quality care and support for **everyone living with heart disease**.

[British Heart Foundation](#) developed Heart Voices, a network of around 600 people affected by heart disease. The network members are very committed and responsive to requests and are usually consulted based on the geographical area where they live or their heart condition. The organisation also works with smaller groups of patients in an ongoing way, such as the 'patient advisory group for clinical studies'. This group was recruited through a rigorous process and it reviews all clinical research grant applications submitted to the BHF, alongside a Committee of scientific experts.

TIP: Continuous or one-off feedback?

Consider when it is appropriate to collect feedback regularly from users (eg, on an ongoing service) and when it is appropriate to collect one-off feedback from people (eg, following an event or a pilot project).

You are likely to use different methods of data collection for continuous and one-off feedback.

CHALLENGE: How to reach people who had negative experiences of your service, or who are *not* engaging with it?

It can be tempting to only involve users you have a good relationship with and who will give positive feedback. However, positive anecdotes serve more of a communications function than helping you to improve what you do.

The [British Lung Foundation](#) run peer support groups for people with lung conditions. Interested people first attend an information day, then choose whether to join peer support groups. The Foundation wanted to find out what encourages people to join the groups. Staff linked data on people who attended the information day with data on who joined the peer groups to identify patterns (eg by age or type of lung condition). They then conducted short phone interviews with a sample of people who had attended the information days but not the support groups.

The Foundation learnt that it needed to provide clearer information before the information days, so that people would understand that they led to forming peer support groups, and then more follow up information about when peer group sessions take place.



ASSESS:

What did users tell you about your service?

Involving users in data analysis is the most challenging aspect of user involvement, and the last one organisations are likely to engage in, because users may not have the skills to undertake analysis or be interested in doing so. Our recommendation is to begin by involving users in the 'Do' stage, followed by 'Plan' and 'Review'. You could then try to involve them in the 'Assess' stage if it is appropriate for your project and there is an appetite among users.

One possible way to engage users in the 'Assess' stage is to present them with hypotheses resulting from analysis, and consult them on this, rather than just presenting results of the analysis carried out by staff.

Shared measurement

It is more likely that funders will be able to involve their grantees, or umbrella/membership bodies in analysing data. Organisations using [shared measurement](#) approaches and storing data on a shared platform, can easily get involved in data analysis, for example benchmarking themselves against others to better understand what approaches work best in the sector.

Why use shared measurement?

Shared measurement involves organisations working on similar issues developing shared outcomes and measurement tools. Some of the benefits of shared measurement are:

- **Saves time and resources** in developing outcomes and tools.
- **Improves standards of impact practice** by ensuring quality and transparency in methodology and results.
- **Promotes systems thinking** to bring about change across an entire sector
- **Allows to better understand what works:** if the data is analysed and held in one place, it allows organisations working in the same sector to develop an evidence base of what works in the sector.
- Gives the sector a **stronger voice** in influencing funding and policy, by providing strong evidence of what works.

An example of this is SafeLives' [Insights](#) system: The largest national dataset on domestic abuse in the UK; influencing policymakers and commissioners and improving practice. It gathers data from services working with victims, survivors and their children, to build a national picture of the experiences of survivors, and the support they receive and helps services to understand, demonstrate and improve their impact and to make sure the support they offer to victims, survivors and their families is the best it can be.

Open access data

Open data sources on grant-making, such as [360Giving](#), provide information on the UK funding landscape and allow both funders and charities to access and analyse data on what and where grant-makers fund.

REVIEW:

How will you communicate findings to users?

What changes do users want to make as a result of the findings?



Co-production of changes to the project

Mosaic
Clubhouse

A charity supporting **people with mental health conditions** in the London Borough of Lambeth, embedding coproduction between staff and members throughout all activities.

[Mosaic Clubhouse](#)'s approach is based on the [Clubhouse model](#), in which members and staff coproduce every aspect of the organisation's work. Member involvement is so key to the model that Mosaic Clubhouse hires fewer staff to create more opportunities for members to get involved.

Members feel a sense of ownership of all activities, which means they feel comfortable suggesting changes and improvements to the way the clubhouse is run and taking the lead on implementing changes. For example, the receptionist role is held by a member who requested access to the Salesforce database from 7am as that is when he gets to work, and this change was implemented to suit his needs. Another member mentioned his desire to set up a poetry group at the clubhouse. The staff gave him complete responsibility for setting it up and managing it, enabling him to create a space for members to come together and read and write poetry.

Publication of a learning report

The
Blaggrave
Trust

A funder dedicated to supporting young people aged 14-25 to transition successfully into adulthood. It seeks out partnerships with **charities who put young people at the centre of their work.**

The [Blaggrave Trust](#) published a [report](#) on their Feedback Fund 2016 describing lessons from their experience of supporting youth charities to listen to the young people they serve and respond to their feedback. The trust learnt that young people greatly valued the opportunity to feed into the organisation's decisions and provided useful feedback. It also learnt that grantees appreciate the support provided around involving users and even a relatively small investment made a real difference to the charities' ability to respond to young people's views. Sharing young people's views with a broader community of organisations and practitioners is necessary for change. Reports such as this can encourage other funders to adopt a similar approach centred around user involvement: the learning from the Blaggrave Trust's 2016 experience led them to set up a grant programme called the 'Listening Fund' in 2017, in collaboration with Esmee Fairbairn, Comic Relief, and Big Lottery Fund. The report is also an effective way for the Blaggrave Trust to communicate to users and non-users how it is changing its services based on feedback.

One-to-one catch-ups to test proposed changes

The Wheatsheaf Trust runs a mentoring programme to support young people with complex needs to increase their confidence and build better relationships. Users were encouraged to participate through financial incentives, equivalent to the pro-rata amount of job seekers allowance per week. One young person who had disengaged with the programme mentioned that the financial incentives had caused him to disengage, as he had become focused on spending time on the programme to receive the payment, rather than in making progress.

Staff had informal conversations with other young people, who agreed that non-financial incentives, such as a mobile phone top-up or new clothes, would keep them more focused on the aims of the programme. Now incentives are offered when a young person progresses particularly well, rather than every week. Young people have said they are happy that rewards are linked to something specific that they have achieved, and are a tangible reminder of their progress.

Use of feedback to support funding applications



A charity providing affordable, accessible childcare to families with **severely disabled children** to support parent carers in West Sussex. It also offers training to similar charities across the UK.

Feedback from users can be included in funding applications to underscore the need for setting up or making changes to a service. For example, the Blagrave Trust grantee [Extratime](#) carried out a survey and found that families with children with special needs struggled because of a lack of after school leisure activities for disabled young people aged 16 and over. As a result, they wrote a successful funding proposal to set up and run a new service and obtained the grant.

CHALLENGE: How to incentivise service users to get involved?

Here are some things to consider when deciding if users should be compensated for their time in shaping services:

- Users are likely to be **motivated by a sense of ownership** of the service if they have a role developing and changing it. Motivation for getting involved may be different for users receiving a payment or in-kind gift compared to those volunteering their time.
- What **resources** do you have available to incentivise users through payments or gifts, such as meals during consultations, or gift vouchers? A compromise may be to reimburse travel costs and offer to cover caring responsibilities.
- How much **time** are you asking from users? If you are consulting them at the time when they access the service, the time commitment is minimal, and compensation should not be needed. It is more likely to be appropriate if you are asking users to take time out of their working week, especially in the case of high need individuals.

One step at a time

Finding the best way to involve users may seem challenging at first but it is important to start doing it. The most straightforward way is asking them what they think of your service. You could also look for user involvement groups or guidance in your sector, such as the [Shared Learning Group on Involvement](#) working in physical health or contact organisations that are involving their users to learn from them.

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