A KEYSTONE ACCOUNTABILITY HOW-TO GUIDE

FROM ENGAGEMENT TO VOICE

October 2021

keystone

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Note to users

This is a how-to guide. It does not make an argument or provide supporting theory or rationale. It is intended for civil society networks that are committed to moving beyond conventional engagement and participation of their members, to using the Constituent Voice™ (CV) method.

For the Constituent Voice literature, see the Keystone website's guides and resources page, particularly the Constituent Voice Technical Note. A light introduction can be found in the really busy person's guide. An 8-page case study on the application of Constituent Voice to respect human rights in business is available here.

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Introduction

In 2021, Forus and Keystone Accountability have been working together to develop a "Member Voice" system that harnesses feedback from Forus' members, as a way to learn, dialogue, and find solutions. This guide is developed by Keystone Accountability for networks of civil society organisations, particularly national NGO platforms and regional coalitions that are members of Forus.

Engagement is a process, voice is the best outcome of an effective engagement process. For Forus members, a key constituent group of concern is their members. **The guide is therefore intended for civil society networks that are interesting in engaging their members in ways that create Member Voice**. Members have voice when they want to and do use their voices to improve you, the organization that they are part of. This guide tells you how to ensure your members have voice in your organization. Member Voice is a process that turns feedback from your members into data, then into dialogues, and then into improvements in the ways you work together. It is cyclical, with four nodes of activity along the cycle. We illustrate it in **figure 1**, below.

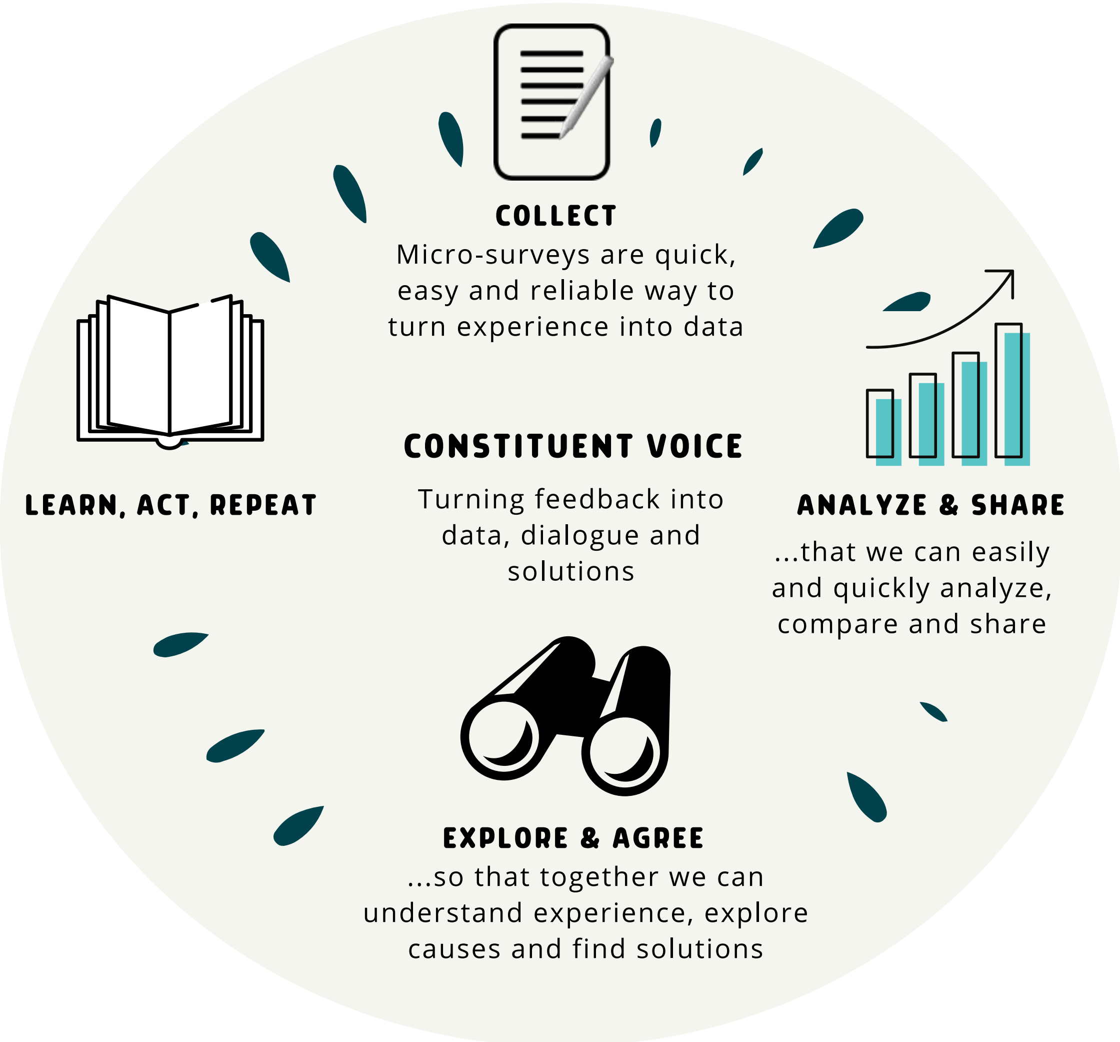


Figure 1

This guide sets out how to complete the action steps at each of the four nodes. This material is grounded in Keystone Accountability's 12-years of Constituent Voice work with over 200 organizations. Some of the material may be new to you. Some of it will be familiar or common sense. Member Voice is not difficult to do. It does require dedicated implementation – it is systematic. In the theory of learning, Member Voice is an example of what is called double-loop learning. If you leave out steps, the loop breaks, and the results won't be achieved. Commitment to both listening and to action is therefore needed to roll-out your Member Voice system.

Part 1. Collect

Step 1: Develop your Survey Questions

Let's jump right in. The main way to capture member experience in data that can be used for learning and improvement collect data is through online surveys.

Survey questions in Member Voice are not meant to provide answers to why things are the way they are. They are, however, clear indicators of how things are, and therefore useful in the later steps in the cycle to surface deep insight and generate greater commitment to your mission.

In your Member Voice system, surveys are used to ask two types of questions:

- **Big questions you are asking at a higher level to learn and improve**
- **Questions you are asking in micro-surveys to give you clues into the big questions**

The big questions, your "learning questions", derive from your organizational mission and strategy. As you and your members understand the answers to these questions, your activities will evolve. Keep those learning questions in mind as you choose your micro-survey questions. Micro-survey questions are catalysts to engage your members more deeply in your learning questions.

Micro-surveys include a mix of closed questions and open questions.

- Closed questions limit answers to numbers or given choices – for example, "never", "sometimes" or "always. For closed questions, we mainly use Likert scale questions using a scale of 0 to 10. The rationale for this is explained in the Analysis section below. Closed questions are typically paired with a simple open question.
- Open questions are "free text"- for example, "Please explain why you gave your score?". Open questions allow respondents free reign to answer with as little or as much as they like.

This guide provides a menu of questions that you may find useful. They derive from Keystone's work, including with Forus. We share these now with a brief introduction to each question category.

But before the annotated menu of great questions, an important admonition. Don't order more than you can eat from the menu! A Member Voice micro-survey question should take no more than two minutes to complete!

TIP: If you have more than a total of 6 to 10 questions (including demographic questions) that you want to ask, break them into different micro-surveys.

1. Demographic questions

Member Voice micro-surveys are anonymous so that your members can use this moment in the cycle to “speak truth” without fear or favor. At later points in the cycle, members will have opportunities to engage without the veil of anonymity. This is an important part of the methodology – to surface hard-to-speak truths though confidential surveys and then later use the survey data to allow a more frank and constructive exploration of meaning and ways to improve in face-to-face settings.

To learn something about each respondent without breaking their anonymity, we ask questions in micro-surveys about characteristics of the respondent that will help you spot trends in your members. These are demographic questions. They help you analyse: **Do larger organizations answer differently than smaller ones? Does location differentiate them? How might long-time members experience us differently from new members?**

To decide what demographic questions to ask, make a list of all the characteristics of your members that you think might importantly differentiate their relationship with your organization from others in your membership. Common characteristics include geographic area of work, duration of membership, main themes worked on, and budget size.

TIP: To keep the total number of questions very low, we recommend forcing yourself to choose no more than 3 demographic questions from that list.

Here is an expanded set of demographic questions. You should tailor these as necessary to fit your membership.

Please choose the geography which best describes where your organization is based.
The list of choices here follows from the geography that pertains to your membership.

Please choose one of the following that best describes your organization.
( ) Research institution
( ) Civil society network
( ) Local non-governmental organization
( ) Community based organization
( ) Child or youth-led organization
( ) Organization for Indigenous groups
( ) Faith based organization
( ) LGBTIQ organization
( ) Women-led and women’s rights organization
( ) Disabled persons organization
( ) Non-governmental organization (NGO)
( ) Community organization
( ) Micro-finance institution
( ) Labour organisation or union
( ) Other - Please specify:
____

How much does your organization work in the following ways?

	Not at all	A little	More	A lot
We provide services directly to people and communities living in poverty (food, healthcare, education, training, etc.)		( )	( )	( )
We support economic and productive enterprises that benefit poor people.		( )	( )	( )
We influence how government & other powerful organizations work (i.e., "advocacy").		( )	( )	( )
We conduct and publish research.		( )	( )	( )
We support and strengthen civil society organizations.		( )	( )	( )
We help people claim their human rights.		( )	( )	( )
We support collective action by our members.		( )	( )	( )
We fund individuals.		( )	( )	( )
We offer humanitarian assistance.		( )	( )	( )
We support disaster risk reduction.		( )	( )	( )
We help build peace and reconciliation.		( )	( )	( )

What are the main reasons why you choose to work with {{organization name}}. Please rate the following on a scale of 0 (not important) to 10 (extremely important).

	0	1	2	3	4	5	6	7	8	9	10
To fund our work.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To strengthen our skills and organizational capacity.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To improve our strategies.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To benefit from joint learning and understanding.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To strengthen our presence at national / international levels.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To link with other organizations.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )
To influence the work of {Organization}.	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )	( )

Approximately what was the total budget (in local currency) of your organization in your last complete financial year? [You may need to tailor these bands to suit your currency]
( ) Less than 10,000
( ) 10,000 - 49,999
( ) 50,000 - 199,999
( ) 200,000 - 499,999
( ) 500,000 - 999,999
( ) 1 million - 4,999,999
( ) More than 5 million

How many organizations did you receive funds and other support from in your last complete financial year?
( ) 1-2
( ) 3-4
( ) 5-6
( ) 7-8
( ) 9 or more
( ) None

For how many years have you been a member of {{organization name}}?
( ) One year of less
( ) 1-2 years
( ) 3-4 years
( ) 5-6 years
( ) More than 6 years

Which of the following people participated in responding to this survey? Please select all the options that best describe the people who participated.
( ) Head of organization
( ) Management/senior staff
( ) Programme/project staff
( ) Operations staff
( ) Field staff
( ) Other staff

What is the gender of people who participated in responding to this survey?
( ) Female
( ) Male
( ) Non-binary
( ) Prefer not to say

2. Relationship Quality

Relationships determine outcomes. If relationships in your network are poor, it is very unlikely that members will engage in a serious way. They will be disaffected, and they won't contribute much to your agreed shared objectives. Conversely, when they have a great relationship with you, they lean in and go the extra mile to contribute to the life of the network.

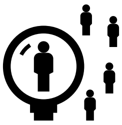
We believe that the relationship quality questions are the most important questions to ask. By choosing one or two and asking them repeatedly over time, you can see how different aspects of your work affect relationships. You will also discover that these questions are highly responsive to the actions you take. By that we mean that when you take action, it will show up in subsequent scores to relationship questions.

Here are eight proven, powerful questions:

1. Do you expect that {{organization name}} will use the feedback from this survey to improve its work?
2. Are you comfortable questioning {{organization name}} if you disagree with it?
3. Do you personally feel that your opinions and ideas are valued and taken seriously by {{organization name}} managers and staff?
4. Is it worth your effort to engage with {{organization name}}to make it more effective?
5. Do you have the opportunities you need to tell {{organization name}} what you think about its work?
6. Does {{organization name}} help you with the goals and priorities that are most important to your organization?
7. To what extent do you feel that you are involved in decisions about {{organization name}} activities?
8. Does {{organization name}} communicate clearly, regularly, and in good time?

All these questions are closed questions with a Likert scale response, from 0 to 10 (0: not at all; 10: absolutely).

TIP: Every time you ask one of these questions, we recommend that you pair it with an open question to draw out the insights behind the numbers. We recommend this simple open text question: “Please give an example or say why you gave your score?”



3. Service Quality

We break service quality into two parts, general and specific.

General service quality looks for how your members rate your services overall. These questions may allow you to learn about how your members generally perceive your services as a national NGO platform or regional coalition, including in comparison to other networks that they may be a member of.

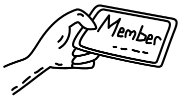
There are two questions here:

1. Based on the services you receive from {{organization name}}, how strongly would you recommend it to other organizations like yours?
2. How do {organization name}'s services compare with other organizations?

Specific service quality focuses on a particular service right here, right now. It is about things like events, publications, and trainings. In these immediate "after action" services, as we often call them, it is okay to probe a bit into different aspects of the event, so you know what to improve the next time you offer that service.

1. Please rate the quality of the {{activity / publication, venue, facilitation, learning activity, campaign, publication, etc.}}
2. Was {{organization name}} enthusiastic, encouraging, and helpful?
3. Were you able to participate effectively?
4. How well did this {{event}} address your immediate/most pressing needs?
5. How confident are you that you can apply what you learned?

All these questions are also closed questions with a Likert scale response, from 0 to 10 (0: not at all; 10: absolutely).



4. Membership Outcome

Membership outcomes questions ask what are the benefits that your members perceive from belonging to your national NGO platform or regional coalition. It is best to ask both open and closed questions. Ask open questions first, as it allows members tell you what the results are for them in being a member without the forced choices of closed questions. Here is a model for doing this.

Open questions

1. How has being a member of {{organization name}} benefited your organization?
2. What, if any, new relationships and/or capabilities does your organization have because of being a member of {{organization name}}? (open question)
3. What, if anything, do you do differently because of your membership of {{organization name}}? (open question)

Closed questions (tip: always paired with open questions)

1. Do you feel that this program is succeeding, and achieving its objectives? Please rate from 0 to 10 (0: not at all; 10: absolutely).
2. Please give an example or say why you gave your score? (paired open question)
3. Are there good changes happening in your organization because of {{organization name}}? Please rate from 0 to 10 (0: not at all; 10: absolutely).
4. Apart from {{organization name}}, what else, if anything, contributed to the changes you mentioned? (paired open question).

5. Improvement Quality

The final and most important question category speaks to your ability as a membership organisation to improve as you work together with your members. Very few organizations ever achieve a reliable way to measure this, and for this reason, they cannot track or show their improvements.
The Member Voice systems aim to change this.

To ask the survey question, it is necessary for you and your members to have gone through the Member Voice cycle and agreed on specific activities to improve your work. After you have implemented that improvement for a time, you ask: **"Has the agreed improvement action made things better? Why or why not?" Your answers to this question on a 0-10 scale will tell you how much you are growing your improvement muscle.**

Let's illustrate this in a real case. An advocacy network found through its Member Voice micro-surveys that members from a particular language group felt less included in the development of new campaign materials. After consultations with all members about this it was agreed that additional budget would be allocated to ensure more thorough language translation in the materials development process. Nine months after instituting these changes, the organization surveyed all members asking how people found the expanded translation work. The results showed that all language groups approved of the changes and the organization had empirical confirmation that the new process as an actual improvement in the eyes of its members.

6. Custom Questions

Once you have a Member Voice system in place, you can indulge the temptation – moderately please! – to ask other questions you would find interesting to explore further with your members in dialogues, and to co-create ways to improve.

These custom questions can be related to certain thematic priorities that you work on, or other strategic aspects of your work. For example, Forus' custom questions relate to how its work on promoting an enabling environment for civil society is meeting the needs and expectations of its members.

Step 2: Develop your Data collection plan

You have your survey questions. Now you need a data collection plan that asks a very small number of survey questions at regular touchpoints in your interactions with members. These we call "micro-surveys".

TIP: We also recommend you create a "digital suggestion box" as your permanent feedback channel. This is a digital place where members can, at any time, send anonymous feedback. It can be a Google form or other type of channel that is permanent. This makes sure that members can feedback when it is best for them.

1. Map touchpoints

Write down all the activities in a year that are meant to create value for your members. Examples of these might include gatherings (online or in-person), campaigns, the launch of publications, or decision-points (e.g., elections). Then choose four of the most significant that are reasonably spaced out over the next twelve months.

You will distribute micro-surveys at or very near to these touchpoints. These will be your first year's micro-survey moments.

TIP: We call Member Voice surveys 'micro-surveys' because they should never take more than 2 minutes to complete. Keep the surveys short and sweet so that your members don't experience "survey fatigue"!

2. To sample or not to sample, that is the question

In choosing your key touchpoints, you want to make sure that in your overall data collection plan you get a fair and accurate representation of your full membership. Some, if not most, surveys should target all members. In general, at any given touchpoint, we recommend surveying all those affected or participating.

Unless you have a very large membership (namely, thousands), cost considerations should not compel you to select sub-sets of your members when you survey. In the world of statistical surveys, this is known as "sampling". Even with large numbers, given the negligible cost of email surveys, there are rarely compelling reasons not to survey all members (or all participants in the case of a surveys about a particular activity). What is more important in terms of getting a reliably representative data set is the response rate. We will say more about your survey response rate under Analyze & Share, below.

If, however, cost considerations related to your survey method (in cases where online surveys are not possible) require you to use sampling, please refer to the specialist sampling literature. A solid introduction to this subject is available on Wikipedia **here.**

5. Data collection methods

You will have your own preferred way to survey your members. Do what works for you. The most common method is online or email surveys. There are many freemium web-based survey tools out there. You will probably have your preferred tool already. Two well-known ones are Survey Monkey and Alchemer. The free level of most services will work for you as we presume you will be doing your own data analysis.

TIP: Sometimes it helps to have multiple channels, for example, a paper survey collected at an event supplemented by an email survey to all attendees. This will increase your response rate and give more flexibility to your members by offering different ways to respond.

4. Set the calendar

Develop a data collection plan for the next twelve months based on your touch points. This plan should take into consideration time required for data analysis and sharing, exploring, and agreeing ways to improve with your members. It is possible to operate multiple parallel learning loops that speak to specific aspects of your work.

It is common and even advisable to be flexible about this data collection plan once you have begun. The important thing is to complete each step within a reasonable time so that members have a vivid experience of the Member Voice process. This means that the calendar should allow you to be quick in analysing the responses and sharing back the results. Too often, when we respond to surveys, we never hear again from the organization that conducted the survey until we get the next survey. For Member Voice needs to become a vivid part of how you work, your members must see the survey results while they still remember completing the survey.

Step 3: Send the micro-survey

1. Introducing Member Voice micro-surveys to members - part 1: Get people excited and interested

Introducing Member Voice micro-surveys is critically important, and exciting, because you get to surprise people. When people get surveys, they see themselves in the dentist chair. Something is about to be extracted from them. Maybe painfully. **Your opportunity here is to delight them with the news that this is not another case of extractive research, but an opportunity for mutual reciprocity, a give and take that allows for something new and positive to be co-created.**

When introducing Member Voice micro-surveys, make sure to cover these points:

1. This is one step in an engagement process in the spirit of mutual continual improvement.
2. To set up the other steps in the process, you will be reporting back the survey findings, and creating opportunities to further interpret those findings and search together for ways to improve.
3. The survey is short, designed to be completed in no more than two minutes. This is to be respectful of their time, but also in recognition that the main point of the data is to set the scene for the later steps in the process where "face-to-face" (or even better, heart-to-heart) explorations happen.
4. To ensure that this scene-setting data is as frank and honest as possible, it is anonymous. You will not know who answered any question unless the respondent chooses to identify themselves in an answer.

TIP: Anonymity is an important way to make sure that the responses to your micro-surveys are frank and honest. However, you can give people the option to identify themselves by including the optional question: "If you wish, please add your organisation name: ".

2. Introducing Member Voice micro-surveys to members - part 2: Who needs to be involved?

Surveying organizations is different from surveying individuals. You interact with multiple people at a member organization. If you only survey one person, you are almost certainly not getting the full picture. At the same time, if you surveyed everyone at an organization, the variability in responses would throw off the comparison across organizations.

There is no perfect solution to the competing variables here – at least not one we have found. But we do have a proven "team approach" that works well. It collects the perspectives of many or all the people at your member who interact with you. And it does so in a way that deepens understanding at your member that this is more than a survey. At best, it becomes a meaningful new form of engagement.

We know that this is the case because we have been able to compare responses of those who use this team approach and those who don't. We do this by asking two questions at the end of the survey.

- "Which approach did you take to this survey?" With the choices being: I did it alone; The team approach; Other ______
- "How valuable did you find the experience of this survey?" With a 0-10 scale.

Those who take the team approach find it three times more valuable than those who do not.

INTRODUCING THE TEAM APPROACH

Here is what you can tell your members:

We have found that organizations that use a team approach to this micro-survey get much more value from it. It's super easy. Call a meeting with everyone at your organization who has a direct experience of us and fill in the survey together. While it might take you two minutes to complete by yourself, our experience is that the fifteen minutes you spend with your team completing this survey results in more improvements in the ways we work together.

3. Sending out reminders

The importance of high response rates for Member Voice flows from the fact that micro-surveys are a part of an engagement process, not an extractive research exercise. Micro-survey questions say to your members that you care, and that you want to serve them better. You want to hear from all of them. So, keep the micro-surveys open for a couple of weeks and send out reminders.

It doesn't hurt to try humor. Sending cartoons can be a fun way to get people in the mood.

"AFTER YOU CONFESS, CAN YOU PLEASE FILL IN THIS SURVEY TO HELP US IMPROVE OUR INTERROGATION METHOD?"

4. Launching your Permanent Feedback Channel

It is easy to set up a simple link to a survey that sits open all the time on your online survey app, like *Survey Monkey*. It is a simple one question survey that says something like, "Please share your feedback on anything here. We check this every week, and we will flow the feedback from here into our Member Voice reports to you. If you raise an issue requiring a direct response, please add your name and email as otherwise this is anonymous."

You can put this link on your website in as a button with appropriate introductory text explaining how this is your digital suggestion box for your members. You can add it in your email signature when you write to your members.

TIP: You can update the message people see when they click this link to share information about your Member Voice system. For example, you might share information around the actions you take after surveys: "In the past year, we have XXXX responses to 12 micro-surveys. These have generated XX dialogues and ZZ improvement actions. Y of these have been voted by members as being effective solutions."

Part 2. Analyze & Share

In this step we share a recommended approach to analyzing your survey findings. Other ways are also possible. If those other ways deepen your insight and support actions to improve, we hope you use them as well.

This step in the Member Voice cycle aims to generate analysis and the internal deliberation about the survey findings. It is also a time to prepare versions of the survey findings to share with respondents and other stakeholders, such as your board. Sharing reports is closely followed by a structured process of exploring the findings with your members, and perhaps other stakeholders, to discover ways to improve. The Explore & Agree step in the cycle is discussed in the section following this one.

Step 1: Calculate your response rates

The best way to increase your response rates to surveys is to demonstrate the value for members of responding to surveys through subsequent dialogues and improvement actions that you take. At a minimum, you want more than 60 percent response rates to feel comfortable that the data you have is a reasonably accurate representation of your whole membership.

TIP: To drive up those response rates over time, report them to members and express how much your value their engagement in this way. Once you have exciting improvements, celebrate those by communicating that these popular changes only happened because people answered the micro-surveys.

Step 2. Analyse the results of the survey

NET PERFORMANCE ANALYSIS

Keystone calls its preferred approach to data analysis, net performance analysis (NPA). It is directly borrowed from a technique of feedback data analysis increasingly common in the customer satisfaction industry known as Net Promoter Analysis.

The beauty of NPA is that it uses responses to sort members into three distinctive profiles. Once you have this three-part sorting, your job is to develop the right strategy to work with each of these member profiles.

These three profiles are intuitively and practically obvious:

- Those who rate the organization as a 9 or 10 on the 0 to 10-point Likert scale used in micro-surveys are *"positive"*. These are your platform's or coalition's champions. They are highly likely to be wholehearted participants in activities and consistently recommend your network to their colleagues, partner organizations or other stakeholders. They readily use their voices to make the organization better. They run for the board. They lead task teams. They always "show up".

- Members who give ratings of 7 and 8 think the organization is *"okay"*. They do not have major concerns, but they are not particularly enthusiastic about or loyal to the organization. They are with you but could easily break loose under pressure. Alternatively, with the right encouragement and support, they could well become "positive".

- Those who provide ratings from 0-6 are categorized as "negative". They have fairly negative perceptions of the collaboration with your organization and common developmental objectives are likely to be negatively affected as a result.

Before we go to scoring and visualizing the data, we want to address a common question: Why is a score of 6 or even 5 characterized as negative? After all, 6 is more than halfway to 10 and 5 would seem to be at least neutral. The answer is this. Over fifty years of surveys of this type – mostly in the context of customer feedback, but not all – in every corner of the planet, when you test survey answers against what people do, this is the sorting that best describes what they do. At one level, it does not matter why this is the case. We are interested in what your members do, not what they say they will do. The empirical evidence to support this form of analysis is overwhelming.

If you would like to understand the theory, you can explore the literature on **"response bias"**, noticeably what is called courtesy bias – the tendency for people to be polite in their responses and pull their punches.

Your first and primary concern is to understand the size of each of the clusters. This sets your priorities for improvement actions. Let's take **figure 2** as an example. Forus has some choices to make here. Does it push hard to convert those okays, a third of its members, to positives? What can it do for the 13% who are negative? Thankfully, this is a small number, but still, Forus may want to start here. Whatever it decides, its best resource to understand how to improve is likely to be the 55 percent who scored a 9 or 10 on this question. These are the folks who are finding the gold in peer learning opportunities.

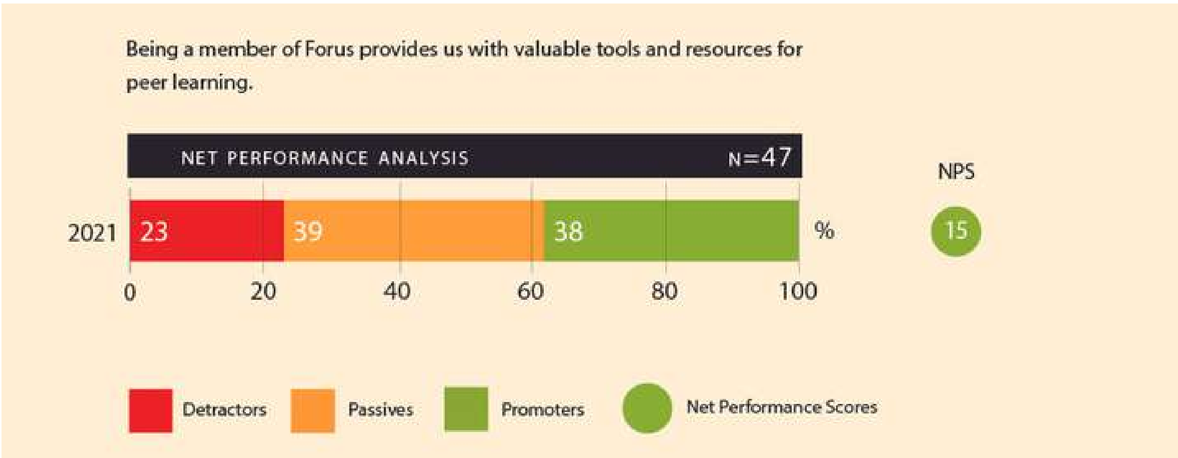


Figure 2

In addition to analysing the size of each the 3 clusters, many organizations find it useful to track their net performance score (or NP score). As illustrated by **figure 3**, to get a NP score, one subtracts the percentage of negative scores from the percentage of positive scores. It is not uncommon to have negative NP scores. You can do the math yourself to see why the NP Score in **figure 2** is 42 (for those with a beady eye, the reported score is 43 due to rounding of the actual scores).

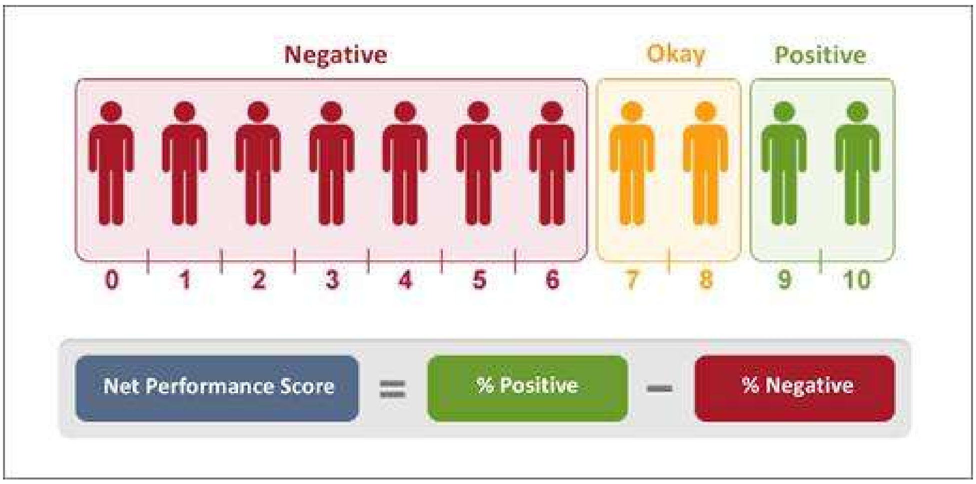
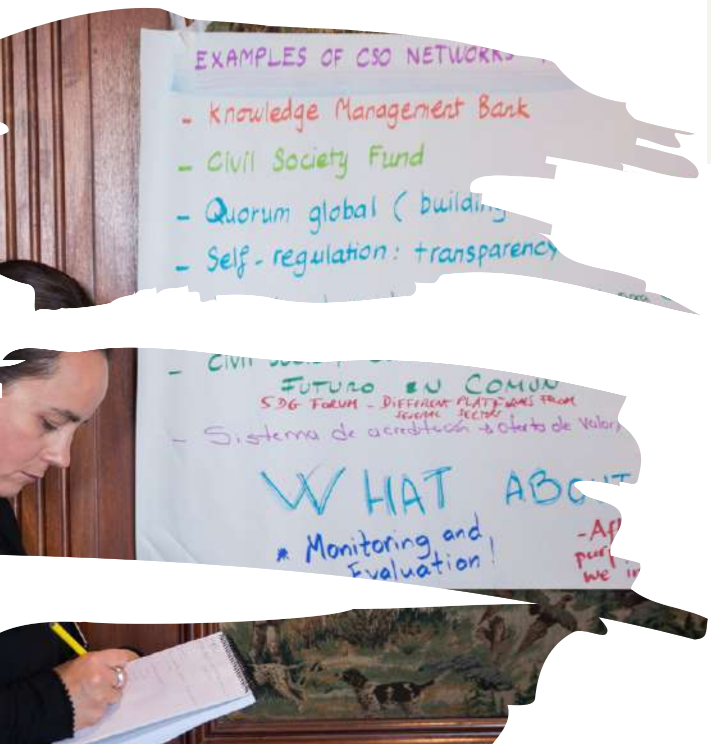


Figure 3

The most successful organizations generally have high NP scores. For tracking scores on questions over time it is easier to work with the single number, the NP score, than it is to work with the three numbers of each cluster.

Keystone believes that this approach is particularly powerful when applied to membership bodies like yours. Surveys such as this provide members with a safe space to express what they honestly feel about the organization, and enable more open, data-driven dialogue for improving performance.

Those familiar with the commercial world of Net Promoter Score will have noticed that Keystone has retained the three categories of respondents as defined by score ranges (of 0 to 6, 7 to 8, and 9 to 10), but has not kept the commercial world's language for those three categories – detractors, passives, and promoters. This is because, while these labels may make sense for a commercial context of consumer choice, when it comes to the relationships we want in education, health, advocacy, gender-based violence and all other efforts to solve important societal problems, those terms don't work so well. We have found that "negative", "okay", and "positive" are both descriptively accurate and relatable.
NPA also provides an effective way to interpret survey response rates.



DISAGGREGATING DATA BY MEMBER CHARACTERISTICS

Once you have analyzed all the questions using NP analysis, you want to use the demographic question data to determine if sub-groups of your membership have different experiences from the total score. Referring again to **figure 2**, we saw there a very high NP score of 43. But by looking into how this question was answered by regions, we found that one region of the world had over 50% "negatives", and an NP score of -5. That is a 48-point difference from the total average. Of course, this means that at least some of the regions had an even higher score than 43. This is important to know. It helps Forus to recognise that members from specific regions find the peer learning opportunities and events more valuable than members from other regions. Forus has a clear guide to improvement action here.

ANALYSING QUALITATIVE DATA – OPEN TEXT RESPONSES

Likert scale questions give you meaningful numbers, particularly when paired with a simple open text question: "Please give an example or say why you gave your score?"

When you analyse the responses to open text questions, cluster these examples by the cluster of the respondent: negative, okay, or positive.

<u>TIP:</u> We also recommend you keep track of the portion of respondents who provided an open text response. This will allow you to track how engaged and committed your members are to responding to the Member Voice system.

We also recommend occasionally asking some version of the "start-stop-keep" question, usually about some broad theme of your work, for example a program area or a major annual event. The general version of this question is:

"Please give examples of
(a) something {organisation name} should start doing,
(b) something {organisation name} should stop doing, and
(c) something {organisation name} must keep doing."

Step 3. Sharing your findings

Once you have the full reports of your Member Voice survey findings, you want to discuss them with staff for interpretation and to develop talking points to use when sharing subsets of the findings with your members.

TIP: We strongly encourage organizations to err on the side of sharing most if not all the findings with respondents and do so in a way that enables joint exploration for ways to improve together. This is the main topic of the next part of this guide, Explore & Agree.

While our rule for how much to share is "more is better", there is no hard and fast rule on what form is most appreciated by your members. You will work this out over time. Some common practices are:

- **Written reports sent by email or post**
- **Written reports delivered by staff as part of their ordinary interactions with members**
- **Presented, with appropriate data vizualizations, at online or in person events (such as workshops)**
- **Serialized in newsletters, often with a call to action**

The most important two things about sharing findings are these. First, you want every member to remember that you have shared a report. This cannot be emphasized enough. Second, you want them to be most impressed, not by the great scores you may have gotten on this or that question, but how positively and thoroughly you follow up. We call this your "second score", and it is far, far more important than the scores you get on the micro-survey questions. It is the score for how well you did when you received the feedback data. If your members give you a good second score, you are well on your way to the next two steps in the Member Voice cycle.

Part 3. Explore & Agree

Until now, we have asked important questions that signal the truth about members' experience of your organisation. We have analyzed those questions in simple but powerful ways and created reports that highlight important opportunities to learn and improve together. Now comes the most important step in the entire Member Voice cycle, sharing feedback results with respondent groups, discussing together what the results mean, and agreeing on improvements that all parties can commit to.

Survey results alone do not enable partners and impact populations to exercise meaningful voice. Voice comes from being actively involved in analyzing and making sense of the data – and most importantly in agreeing what actions should follow. Only by enabling meaningful voice in this open and transparent way can a program claim to be truly accountable. This is the foundation of a culture of continual improvement.

Here are some points to bear in mind as you plan to Explore & Agree with your members:

- Dialogue is special kind of conversation. In a true dialogue, all participants must feel completely free to express any idea or observation that they would like without any fear of negative consequences to themselves or to their community.
- The ability to answer the survey anonymously created a safe space for people to answer truthfully from their own individual experience, or story. The survey results show us the full range of positive and negative experience. There is seldom only one story – and our first task in the dialogue is to come to a shared understanding of both the positive and negative experiences that lie behind the results.
- By focusing on the stories that are revealed in the results, dialogue participants do not have to publicly defend their own individual experience or point of view. They can discuss difficult issues more safely and come to a shared understanding of the stories and experiences that lie behind the survey results – and agree on mutual actions to improve.

Together, organizations and their constituents can affirm what is going well, explore problems, manage expectations, co-create new solutions, and agree on mutual actions to improve the program.

TIP: One reason why organisations fail to "complete the loop" is that when dialogues do occur, the convening organization – that's you! – only sends junior staff to the dialogue. You demonstrate your commitment to Member Voice when your participation at dialogues includes senior staff.

The value of feedback data lies not only in what it tells you, but in what it enables: dialogue, shared insight, and improvement. But to achieve this shared purpose, all participants must feel safe. All participants must have the same opportunity to 'express any proposal, attitude, wish or need' without fear, and to have their views taken seriously. All parties must feel free to question other points of view and argue for a different one.

The anonymous survey tries to create the conditions for free and open dialogue by enabling members to express their views frankly. With this frank feedback on the table at a dialogue session, participants can speak to the data on the table and don't have to speak "for themselves". Prompts like, "What are possible explanations for these low scores?", allow for open exchange in which members don't have to "own" the low scores personally.

An important principle guiding both the surveys and the way dialogue is facilitated is that the focus should not be on blaming individuals for failures, but rather on enabling a shared understanding of everyone's experience, what factors are limiting progress, and what changes will improve the real collaborative work of positive change.

A dialogue about feedback data is an opportunity for your staff to listen and engage – but also to share their experiences, constraints, and concerns. They should help to make sure that the data is taken seriously and explored in as safe an environment as possible.

The purpose of the Member Voice dialogue

What do we seek to achieve with a dialogue? A well planned and facilitated dialogue over feedback data can help an organization and its key constituents to:

- express their views freely without fear of negative consequences
- see the full range of perceptions and experience
- identify the most important signals from the data
- explain together what these signals really mean (shared insights) …
- what issues that need attention
- what are the causes of problems
- agree on mutual actions for improvement
- generate new ideas together
- manage expectations – to understand what is possible and what is not
- validate the feedback data
- improve confidence and trust leading to better feedback

Step 1. Preparing for a dialogue

HOW WILL YOU SHARE THE DATA?

The best way to share data is in clear, simple figures like the ones shared in Part 2. The figures that you create using your preferred data vizualization software can be exported as pictures that you can paste into a variety of media – documents and reports, presentations, or posters.

You can copy and paste charts into a document or report or presentation slides

We suggest that you use a separate page for each chart. This will allow you to add text underneath the chart. The text could point out significant patterns and issues raised by the data

Figure 4 below is a graphic from Forus's recent member voice report. We have added some text to illustrate how to introduce it in a dialogue session.

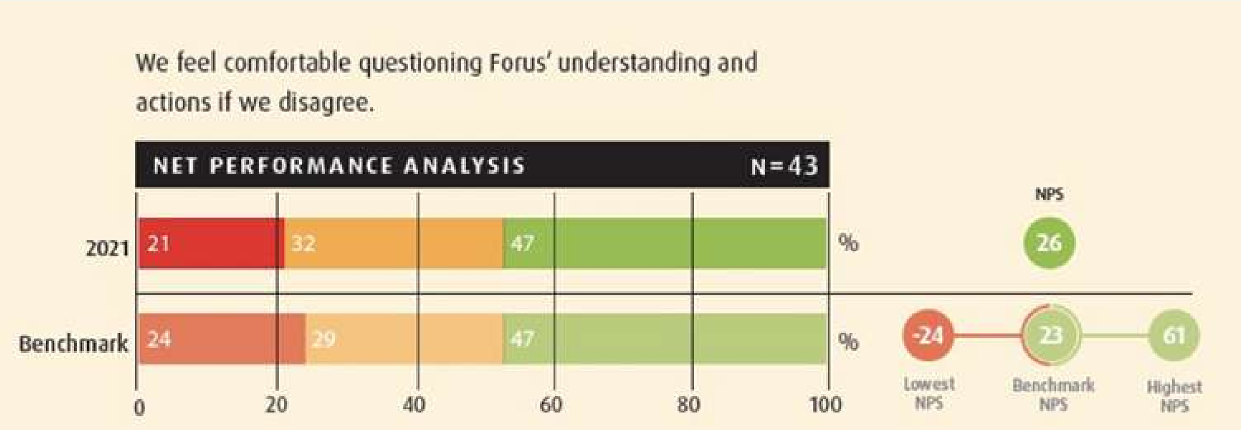


Figure 4

This figure tells us that with an NP score of 26 we are like other organizations (average NP score of 23), but we are 35 points below the organizations that are good at creating a space where people feel comfortable disagreeing with us! We want to do better at this! Over half of our members are not comfortable expressing their disagreement with us. We can't improve if we don't hear your concerns. What kinds of things should we be doing to improve on this?

You can make a set of posters

In this example below, CARE Nepal made a PowerPoint presentation with the most important graphs, and then printed each slide as a large A1 sized poster.

CARE Ghana's Phelix Rapando pasted the charts into Microsoft Word documents and PowerPoint slides which he then printed as A3-sized posters. If you paste each chart into a separate page, you can easily print each page as an A3 page at almost any local printshop.

You can analyze the data online together

If you have an internet connection and projector, you can even analyze the data online together, like CARE Malawi did with its partner feedback survey. You can also do this remotely by sharing your screen in a Zoom meeting.

Step 2. Planning a dialogue event

If feedback and dialogue are going to be a regular feature in how decisions are made, then feedback should be something that is collected and discussed regularly whenever there is an opportunity to do so.

Try to plan the dialogues to become a regular part of your interactions with members. You do not need to organize a separate dialogue event. Ideally, dialogue can happen during normal scheduled meetings. For example, if you have an annual general meeting with members, perhaps try to schedule an hour or 90 minutes session Member Voice dialogue.

We recommend:

- Plan to conduct a micro-survey a few weeks before a meeting or event where people would come together anyway.
- Never ask more questions in a micro-survey than you can properly discuss (and agree improvement actions to try) in an hour or 90 minute session.

Here is a checklist for planning a dialogue session as part of a routine meeting, or planning a dedicated dialogue meeting:

- Decide on the date, time and venue so that it is convenient for constituents to attend.
- Get feedback from constituents if this is convenient for them.
- How many participants is the right number? You should not go much over 25 if you want everyone to participate actively.
- How will you make sure that all those who would like to attend are able to attend?
- What ensure better participation?: One large meeting or several smaller meetings?
- Who should be invited?
- How will you publicise the meeting?
- Will you need to assist with transport and food?
- Which program staff and officials should attend?
- Who will chair and facilitate the meeting?
- How will you make sure that
- All participants are well prepared?
- All feel free to participate?

HOW FREQUENTLY SHOULD YOU COMPLETE A MEMBER VOICE CYCLE?

Each organization should decide this for itself.

You can run a few micro-surveys – some general on the relationship overall, some touch-point based on specific events, publications, training, etc. – and bring all that data to a single dialogue, or create parallel dialogue sessions for subsets of your membership.

As a rule, try to complete a Member Voice cycle every 3-6 month as if things drag out much longer than that, people won't connect the micro-survey to the dialogue and improvement actions.

What can we do if we cannot bring people together?

Ideally, a dialogue should be an inclusive, face-to-face conversation. But this is not always possible. Your membership may be spread across long distances, and it would be far too expensive and time consuming to try and bring a fully representative group together in one place. There might be a pandemic or other extreme event making it impossible to meet up in person. So, we may often need to make compromises.

Here are some other options for a wider extended dialogue

- You could distribute posters to your members that they can showcase in their offices as talking points about their work with you. Maybe the posters come with a link people can use to make comments (perhaps using your permanent feedback channel).
- You distribute PDF reports inviting members to share them widely in their organizations, discuss them, and respond to specific questions or even proposals for improvement actions.
- You could devote time to your Member Voice work at the next big event you host.

You will think of other ways based on your normal engagement practices.

Tips on giving and receiving feedback

A feedback dialogue can be a safe space for people to discuss sensitive issues because they are raised in in the data. Participants do not have to raise issues personally or make accusations. They can speak from the data, one step removed.

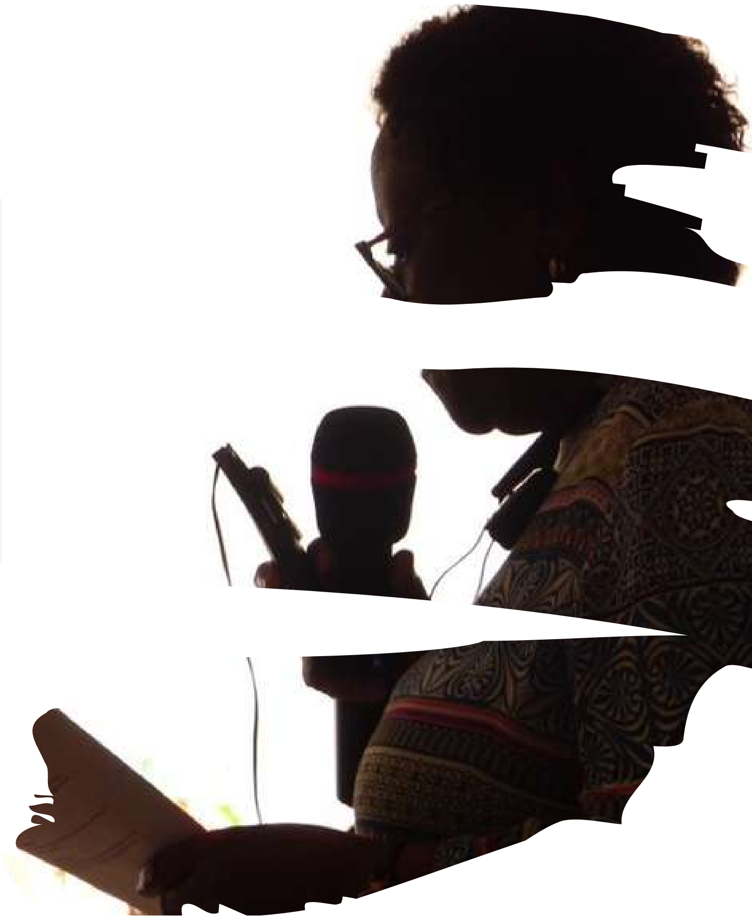
The quality of the dialogue and the ideas and learning that it generates does depend, like any community engagement, on good facilitation and the willingness of participants to respond openly and honestly to the feedback. The quickest way to kill open feedback sharing is to be defensive. Rather, look for the coaching – the opportunity to improve – in the feedback, however harsh it may feel at first.

A feedback dialogue does not require any different facilitation skills than other types of meetings. Facilitation is a core skill in development and social change work and this document presumes this is a skill you have and hone constantly.

Some general Member Voice dialogue facilitation guidelines…

- Unless seriously challenged by evidence, the survey report should be accepted as an accurate reflection of members' (often differing) views.
- But be open to criticism of the survey process – and document these points so as to improve how you collect feedback in future.
- Differing views and experiences are not a bad thing – it shows that experiences and perceptions differ – and we can learn from exploring why this is.
- Encourage contributions from all – especially the folk who are silent. You may pay particular attention to people that are from minority or discriminated groups.
- Spot personal agendas and accusations, and try to depersonalize the problem into something the program can solve systemically.
- Manage expectations: Help people clarify what they expect from the program – then facilitate a discussion on how practical and possible it is to meet expectations. Try to get agreement on what expectations are reasonable – both from the program and, where appropriate, from other constituents.

Your members may not be familiar with giving feedback and discussing it in this curious-to-improve way with you. This can be exciting, if sometimes at first a bit uncertain and hesitant. If you follow the guidelines here, it is likely to quickly improve.



TIP: While we recognize that it is not always practical or possible, Keystone's experience does suggest that you achieve a better and more productive dialogue if the facilitator is independent, especially if your survey findings are highly critical. You may want to hire a facilitator with no conflict of interest or direct link to your organisation or your members.

Step 3. Help participants analyze the data themselves!

Graphs should be presented and analyzed one by one. Helping constituents understand and draw meaning themselves from data that they have created is an immensely empowering exercise.

DO NOT EXPLAIN THE GRAPHS FOR PEOPLE. RATHER HELP CONSTITUENTS ANALYZE EACH GRAPH THEMSELVES.

Here are some questions that you can use

- For this question, which is the biggest group - the positives, okays or negatives?
- Do most people feel the same way, or are there very different views about this questions?
- Approximately how many people feel strongly positive/reasonably positive/ unsatisfied about the program's performance?
- Is this result what you expected? Does anything surprise you?
- Can we think of reasons why some people gave a positive rating?
- Can we think of reasons why some people gave a negative rating?

Everyone should be able to see the graphs as you discuss them and should be able to interpret the data themselves.

Step 4. Structure and document the dialogue

One simple way of structuring a dialogue we have found is to use a **T-Chart**. This also helps you document only the most important things that emerge from the dialogue: What issues were revealed by the data, and what actions were agreed.

Take a piece of flip chart paper and draw two lines in a 'T' shape that divide it into 3 segments as shown in the illustration. Make a separate T-Chart for each issue.

- The top segment is where you write the important issue/s that participants identify that need to be addressed.
- The lower left space is for exploring possible causes (or stories) behind the issue.
- The lower right space is for identifying actions that all participants agree to take.

WHAT ISSUE REQUIRES ACTION?
As you go through the individual graphs, identify the important issues that emerge from your discussion. Write each issue in a separate T-chart in this space.

- Only list issues that you can directly influence (e.g., poor communication)
- Do not mention external factors that you cannot influence (e.g., pandemics, extreme weather)

THE STORIES/REASONS BEHIND THE ISSUE?	WHAT CAN BE DONE? BY WHOM?
•	•
•	•
•	•
•	•

Your T-charts are probably all you need to document the dialogue and the actions that you agreed in the dialogue.

You can keep the flip charts, or you can copy the information into a table like the one above and paste it in a short report about the dialogue. Your reports should be a very short summary of the issues explored and actions agreed in the survey and dialogue. Try to keep the report to one or two pages in length.

Step 5. Feedback about the feedback dialogue

Collecting feedback about the quality of dialogue is also important. You can use a touchpoint micro-survey for this. Here are some questions to consider.

- Did you feel everyone had an equal opportunity to raise ideas and questions in this meeting?
- Did you personally feel free to raise any idea or proposal that you wanted to?
- Were all ideas and proposals treated equally by the facilitator?
- Did you feel that {{org}} addressed all the issues openly and honestly?

Part 4. Learn, Act, Repeat

This final step in the Member Voice cycle is a reserved space for a vital set of intentions and actions that follow through on the commitments made to improve – or, to be more precise, to test the ideas that emerged in dialogues.

After every dialogue, the immediate next step is to formulate an improvement action and communicate that improvement action to your members. If, as is usually the case, a team is needed to take the action, you need to put the team together. Once together the team answers these questions:

- **How will we test the proposed idea?**
- **What resources do we need to realize this test?**
- **How will we know when we have succeeded?**

With a plan incorporating the answers to these questions, the team then implements the plan. At the right time in the future, when the team believes members should have a good idea of whether the test was successful or not, they ask for this micro-survey:

“Has the improvement action that *[describe the test]* made things better? Why or why not?”

The scale for this question is Don’t Know, 0 (No, things are not better) to 10 (Yes, this is a major improvement).

The “don’t know” scores are the same as 0 as an important point in taking corrective actions is communicating the effort effectively.

Your Member Voice dashboard

At this point you are on your way to creating a culture of continual improvement across your organization. To keep an eye at the top level of what your Member Voice practice and culture is at any given moment, we suggest a dashboard that looks like this. The dashboard can be a simple Excel file. It should be updated date weekly and discussed at all management and top executive meetings.

ON THE DASH...

Micro-surveys

- # Open
- # Closed
- # In total over last 12 months

Micro-survey response rates

- Average rate per quarter for last four quarters

One question of choice [you choose a question of particular importance and put it in almost all micro-surveys]

- Last 4 NP scores

Dialogues

- # Started
- # Improvement actions agreed

Improvement Quality

- Last 4 NP Scores for Responsiveness Question
- How likely is it that they will respond effectively to your feedback in this survey?
- # Improvement actions being tested
- # Improvement actions validated as effective in follow up micro-surveys

Your Turn!

This how-to guide is what you need to create Member Voice. It is for you to implement, of course, but also to leverage in various ways. Your Member Voice system will fundamentally change the informational basis underlying all your work. It will offer new ways to strengthen your organization's Monitoring, Evaluation, Accountability and Learning (MEAL) processes. It will subvert the need for multi-year plans with a lived experience of continual improvement. It will provide a new wellspring of data and stories to share with donors and other constituents to demonstrate your accountability, relevance, and effectiveness. Most of all, it will turn your members into more regular contributors to your shared goals.

Good luck!

Forus, previously known as the International Forum of National NGO Platforms (IFP/FIP), is a member-led network of 68 National NGO Platforms and 7 Regional Coalitions from all continents representing over 22,000 NGOs active locally and internationally on development, human rights and environmental issues.

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