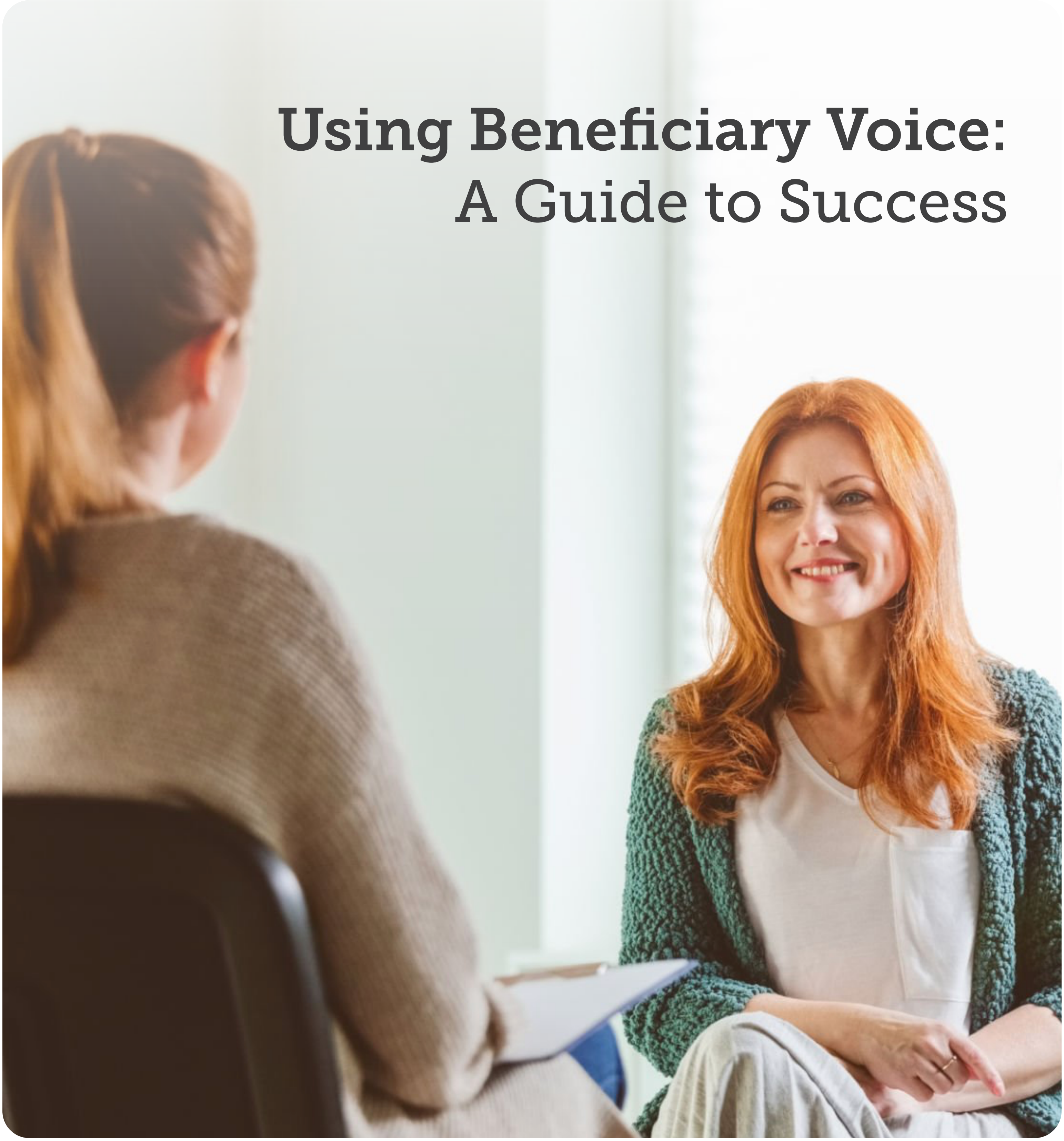
Using Beneficiary Voice: A Guide to Success



Idaho Association for the Education of Young Children

Idaho Children's Trust Fund

IDAHO STARS

OVERVIEW

Every organization, department, and system in the family-serving sector is designed to benefit a group of people. Beneficiaries might be school-aged children, a subgroup of professionals, parents needing concrete supports such as assistance with accessing food, housing, health care or child care, or ALICE families. (ALICE stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed. This group of people is sometimes referenced as "the working poor"; in Idaho, about 40% of families are ALICE families).

The beneficiaries of our work are our most important allies and stakeholders. As people who use our services, their lived experiences – their voices – need to inform our processes, policies, and procedures. Beneficiaries can interact with us from outside our organizations (customers or clients) or from within (people who work in the system itself). When people freely share their lived experience, we learn how systems are working, and how they are falling short.

Using beneficiary voice in continuous quality improvement cycles is time consuming and worth it. The approach is a shift back to center. It puts the real experts in the systems we create, the beneficiaries, back at the center of our decision making and motivation.

The work requires humility, courage, and grit. It requires sharing power in new ways, a whole new level of receptivity, an unshakeable commitment to building trust, and absolute accountability. As experts in their own lives, beneficiaries are the people most qualified to guide the co-creation of life-affirming systems and services.

What are ways to hear directly from families?

LISTENING SESSIONS
(the focus of this guide)

ONE-ON-ONE INTERVIEWS

SURVEYS

EVALUATIONS

WHAT IS A LISTENING SESSION?

A listening session is just that – a session hosted by people who work in family-serving organizations and systems. The express point of a listening session is to hear from the beneficiaries of the services provided. A listening session is not a focus group, nor is it tied to an outcome. The purpose is to listen and learn, the first step in a cycle of co-creation that begins with listening and results in positive concrete change.

What are the benefits of using beneficiary voice in our work?

Many system changes are driven by finances, funders, and trends championed from the top down. Parents might be offered satisfaction surveys and comment cards, but there is an absence of authentic engagement with families and communities. The goal of using beneficiary voice is to change that — to close the connection gap, hear directly from the beneficiaries, and most importantly, to implement any recommendations so that every system works best for those who use it.

Why do we need to close the connection gap between systems and families?

- Leaders are often far from those whom they intend to benefit
- Understanding families' lived experiences of services is essential for continuous improvement
- Voices narrow as you move farther from service delivery
- Addressing equity requires the increase of many and varied opportunities
- Leaders' own stories often drive their passion
- Families, children, and communities are not all situated the same
- Our social networks are often not diverse

How does using beneficiary voice help not-for-profit entities?

Consider this observation from *Listening to Those Who Matter Most, the Beneficiaries* by Fay Twersky, Phil Buchanan, and Valerie Threlfall

In business, companies often receive a prompt wake-up call when they don't listen to their customers—sales and profits, the universal measures of success, generally decline. In the social sector, however, we may not get timely notice if we ignore our beneficiaries. Beneficiaries have few choices. "[Beneficiaries] aren't buying your service; rather a third party is paying you to provide it to them. Hence the focus shifts more toward the requirements of who is paying versus the unmet needs and aspirations of those meant to benefit." This distorted power dynamic makes it more important for social sector leaders to seek and use the voice of the beneficiary.

In bypassing the beneficiary as a source of information and experience, we deprive ourselves of insights into how we might do better—insights that are uniquely grounded in the day-to-day experiences of the very people the programs are created for.

WHAT IS THE BENEFICIARY VOICE CYCLE?

Beneficiary voice is a general term for hearing from those who benefit from the work we do. Using beneficiary voice in decision making and continuous quality improvement is a five-step process:

1 Ask parents about their experience

- Gather parents together
- Intentionally select questions to keep the conversation as open as possible
- Suspend expectation of any specific outcome
- Invite conversation with "Tell me about" and "Tell me more" statements
- Listen with your whole self
- Prompt conversation but do not guide it
- Offer sessions in English, Spanish, and other languages with interpreters as necessary
- Compensate participants for sharing their lived experience

2 Compile the results of your session

- Record every conversation
- Transcribe the conversation using a transcription service[1]
- Establish a group of three to five team members to review the transcripts and identify reoccurring themes
- For each theme, identify three to five quotes to support the theme
- "Quotes, not Notes" is the mantra for this work; let the voices speak for themselves
- At this step, we are grouping similar data points but not interpreting the data

3 Share the results with the people who attended the listening sessions

- Convene again; invite everyone who attended the listening sessions
- Share the themes that the review group identified
- Support each theme with corresponding quotes
- Ask: "Did we get it right?" If the answer is "yes", it's time to move to Step 4. If the answer is "no", back up, listen, and incorporate the feedback. You might have to convene again if you really missed the mark

4 Co-interpret the results

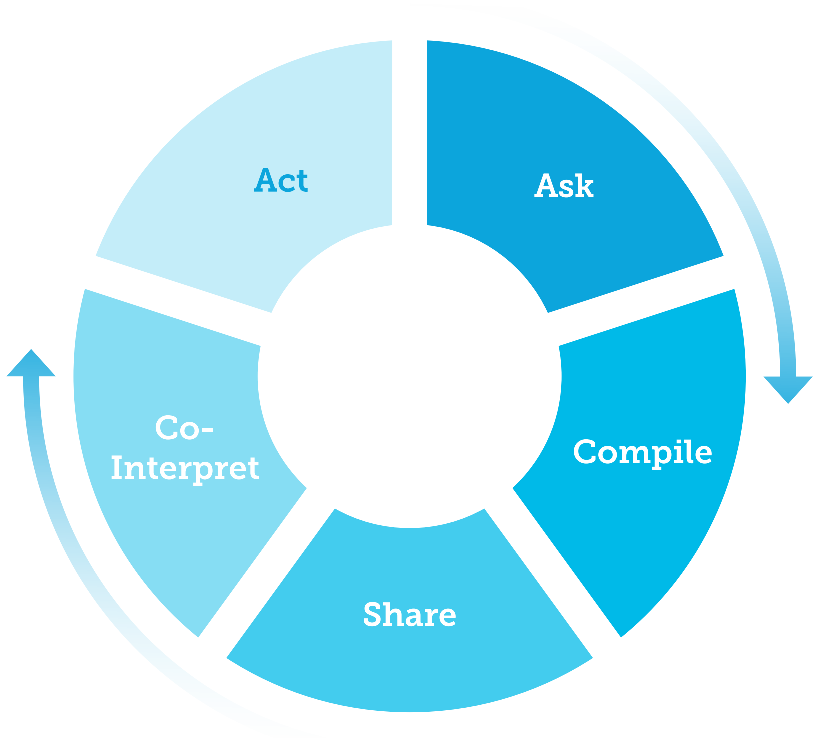
The themes you presented are open for interpretation by the people who use the services

- Enter the conversation with a growth mindset
- Ask "What does this mean? What should we do? What recommendations do you have for us? For our partners?"
- Ask "How can we?"
- Avoid "Why we can't…."
- During the co-interpretation session, make an action plan, as simple as assigned next tasks or as complex as changing a policy

5 Act

- Nothing builds trust and resilience like action towards a goal
- Follow through and let participants know the outcomes
- You may only be able to act on 10% of what you hear, but that makes the action that much more important
- After your action, reconvene the group. Ask: "Did we get it right?" This is called *closing the loop*
- Then the cycle continues

Remember to share the results and recommendations of your sessions with your partners. The more we hear from each other, the more we learn from each other. These perspectives help us think holistically about systems improvement.



How is data on beneficiary voice used to co-create systems and products that work for parents?

Data gleaned from listening sessions can identify root causes. Parents offer suggestions for improvement, which become strategies to address the root of the problems. And it is bigger than that — data from beneficiary voices can serve as a catalyst for community and family discussions and co-interpretation. Both quantitative data (number of sessions and participants, demographics) and qualitative data (statistics/measures of well-being, focus group data, interviews) are collected during listening sessions. Both types can be used to:

- Plan, make decisions, and monitor progress in advancing child/family well-being
- Recognize community strengths and assets
- Make visible the experiences of families and children
- Continually monitor the impact of strategies across time
- Monitor intended and unintended impacts of decisions
- Monitor progress toward engagement and dismantling barriers
- Prompt community and family discussions and co-interpretation

How do I plan a successful listening session?

Step 1

Identify your intended outcomes - not in terms of what you want to do with the information you hear, but rather what you want to learn from parents. Here are some examples:

- Understand the key components of how families access support
- Articulate the experience of families clearly and fully
- Listen to how child and family serving organizations in Idaho are doing with supporting your families and children
- Understand how parents experience services and supports from child and family serving organizations in Idaho

Step 2

Identify compensation for parent participants

Parents are experts in their own lives. They are the only people who can accurately report out their experiences as individuals and as a family unit. We would never ask an expert from another field to provide consultation or expertise for free; the same should be true for parents who use our systems.

Step 3

Identify trusted partners

Parents are not likely to attend a random listening session with a stranger or an organization they have never heard of, so we need trusted partners to vouch for us. Identify partners with a strong, trusting relationship with parents, such as schools, child care programs, churches, community centers, libraries – any organization in your community where staff knows parents' names.

Look for partners who can help you reach a wide variety of parents. The more diverse your group, the broader the perspectives, and the more holistic the view.

Step 4

Set trusted partners up for success

Hopefully your organization already has a relationship with trusted partners, so you can explain what you are offering and why. If you don't have a strong professional connection, you may have to build a relationship before extending the invitation to advertise or host a listening session.

Provide your partner(s) with the materials they need to encourage parents to attend. Create a flyer, email, text or personal outreach plan for the community you are inviting. Strategize how to encourage participation from those parents who are furthest from opportunity or hardest to reach.

Step 5

Set up an easy registration system

People are reluctant to share more information than is necessary with people or organizations they don't know. As you build trust over time by returning again and again to the parent participants, co-creating improvements, you will find an opening to ask for more data. For initial sessions, consider:

- How simple can you make the registration, without compromising the data you must collect?
- Can participants sign up on a piece of paper?
- Can they send an email?
- Do they have to provide an address for the compensation? For example, can they receive a gift card after the session?
- If the session is virtual, is the link easy to access? Can a person join by phone?

Step 6

Plan the session

- Limit the session to one hour and cap the session at 12 people
- Identify your goal: Broadly, what do you want to learn from parents?
- Choose the questions you will ask; use straightforward questions and inquire from a variety of angles
- Have five to ten questions prepared, all approaching your area of focus from a different angle. You may not ask all the questions. You may ask different questions as the session flows. Start as general as possible so everyone can easily enter the conversation.
- Ex: With the goal to understand how parents' experiences accessing services and supports for their children ages birth to five, these questions were used:
    - What are your goals for your children?
    - How do you think your children are developing?
    - Tell us how your children are getting prepared for kindergarten
    - What programs does your family participate in?
    - What supports does your family use?
    - What do you need as a parent so that you can support your children/ family?
    - Who or what programs in the community support you and your family?
    - What has been your worst experience in accessing services and programs?
    - Do other communities have services that you wish were in your community?
    - Where do you get your information about what children need? About parenting?

Step 7

Hold the session

- Send a reminder the day of the session with a call, email, or text
- Include address or link
- Mention that food, refreshments, and/or child care are/is available
- Reference compensation and when the participants can expect to receive it
- Never cancel (unless no one attends)
- Create a welcoming environment and open with an introduction and overview

Sample script for a virtual listening session:

Hi, my name is [ ] and I work for [ ]. We have [#] parents/professionals registered for today's listening session and a number of staff who are here to observe. They will keep their cameras and microphones off during the session. If you feel comfortable, I encourage you to turn your camera on and unmute whenever you would like to speak.

I want to take a moment to thank you for participating in this listening session. We are here today to listen to your voices. I have ten questions that we will put in the chat and ask verbally. Please speak up if you would like to answer the question. You do not need to answer every question, but you are welcome to answer as many as you would like. We want to protect everyone's privacy and would like everyone to speak openly and honestly, so we are asking that you not share information about what was said or who else was in attendance and respect others when they are sharing.

Our conversation will be recorded (facilitator can turn on recording, if not already programmed to do so). We will use this information at [organization] as well as share it with our community partners and organizations. No names will be attached to anything that is said - we will use quotes from the transcript anonymously in internal and external communication.

We will share a summary of what we hear with all participants and ask you if we got it right. All participants will be invited back to help us make meaning of the data. Data gathered through this and upcoming listening sessions are intended to inform decision-making on [ ]. It is important to us that all information shared preserves the anonymity of listening session participants. Does anyone have any questions before we begin?

To begin we would like everyone to introduce themselves by sharing your name and the city you live or work in.

At the close of the session: Thank you, everyone, for your time today. I will be processing attendance and compensation. You should receive your incentive for participation today within the next three to four weeks. Your feedback will be summarized with the other listening session that is happening this month and we will send out a summary to you to make sure we got it right. If you have additional feedback please email me.

Sample questions for a listening session:

Choose 7-10 of these questions and or create your own.

Questions to open the conversation:

What are your goals for your children?

What are your goals for your family?

Parenting is hard work! What causes you the most stress as a parent?

When you think of your parenting experience, what makes you really proud?

Tell me about your experience as a parent in Idaho. Talk about your successes. What challenges have you encountered?

What do you need to be successful as a parent?

Where do you get your information about [parenting]? [Substitute the area you are exploring with participants]

Questions to explore needs:

Tell me about your family's [childcare] needs. [Substitute the area you are exploring with participants]

What do you need, or would you like to get from ___________?

Have you heard of programs or supports in other areas or states that you want to be available to your family?

What do you wish were different?

What support do you depend on for your family's wellbeing? Family, church, schools, childcare, other programs?

What services/supports do you receive?

Questions to explore access to community supports:

How have you been treated in situations where you sought help? Why do you believe you're treated this way?

As a parent, what supports do you get from your community? Describe those supports. Examples: safe play spaces or activities sponsored by your community or programs like WIC.

What are the barriers to getting support in your community?

How much of a barrier is the need to speak English to connect to services and supports?

How long does it take to get what you need?

How do you feel before and after you've connected with someone from__________?

TAKE IT TO THE NEXT LEVEL

Data added from the beneficiary voice cycle is as important to continuous quality improvement as any quantitative data set. More so, because our implicit biases are uncovered as we listen to parents and check for understanding throughout the cycle.

As more leaders hold listening sessions, co-create solutions with parents, and share those improvements with partners across systems, we learn more and more. Intersections will be highlighted. Themes about family experience will take form. Quotes will speak for themselves. When we consolidate all the data, we will know what parents are telling us that they need.

This is where courage comes in. Do we dare to make the changes parents tell us they need, even if those changes are at odds with current organizational practice? With funders' expectations? With the way we've always done things?

Complex systems change slowly, but they can change. Here are some next steps to implement change in complex systems:

Build a leadership beneficiary voice cross sector team

or integrate beneficiary voice activities into the work of existing boards, task forces, and teams

Cross sector team analysis: review data with team

- Compile all the data from listening sessions from all partners. Then present all the data, including quantitative and qualitative data points and key quotes sorted by themes from the sessions.
- As a team comprised of a diverse set of leaders representing multiple programs, departments, and the diversity of the children and families whom you intend to benefit, review the data.
- Use techniques that ensure everyone participates — for example, listening dyads, small groups, and sticky note exercises can capture how the group is understanding the data as well as the root causes of the data point.
- Begin to determine what contributes to the data points – transportation, eligibility requirements, etc. as a way to start identifying what could be the action levers for change that may contribute to the reduction or remediation of the inequity.

Feedback loop with community: return to the community & check analysis

- Return to the communities or parents where the initial beneficiary voice sessions were conducted.
- Discuss what was heard and seen at the initial session.
- Share the list of opportunities, challenges, and the potential role of the state and/or tribe. Then draft actions that could be taken and their timelines, and the key partnerships that would be needed.
- Ask the community to refine the opportunities and challenges you heard and saw.
- Discussions may provide clarification and add nuance.
- Have the community generate recommendations on how to shape, prioritize, and move selected actions forward and share new ideas that they have.
- Engage in a cycle of improvement over time. A key strategy is listening and getting a more accurate, deeper understanding each time you present back to the community what the team heard and saw at the last session.
- Share the challenges that your cross-sector team could not respond to and why, such as funding, eligibility, time frames for change, and area of responsibility, e.g., local versus state.
- Be honest about timelines and the pace at which government moves.

Confirm and share with cross-sector team

- The team should identify current projects, plans, or strategic directions that link to the opportunities and challenges.
- Consider which leaders may be missing who could help address opportunities and challenges.

What can we expect to learn from completing the beneficiary voice cycle?

The best part about listening sessions is that you have no idea what you will hear. It takes real commitment to go into a session with a wide open mind. Even if you do not hear anything specific to your sector or organization, the cycle is still valuable because you will share with partners.

Sharing the themes, quotes, and recommendations can only strengthen Idaho's systems. Here are some examples:

Themes from a series of listening sessions; the goal was to understand participants' experiences raising children ages birth to age five.

1. Idaho parents need affordable, accessible and quality child care.
2. Idaho parents do not receive information about existing services.
3. Idaho parents struggle to access services due to organizational practices that can change.
4. Idaho parents struggle to access services because of state and federal requirements.
5. Relentless parent advocacy is often required in order for children to access services.
6. A lack of local, accessible mental health services adds stress to families' lives.

Quotes that illustrate reoccurring themes of a session:

1

There is a stigma on parents who need resources, even the most well-intentioned.

2

You see how their children easily fall through the cracks and don't receive those services because they don't have someone in their corner constantly calling and trying to set up meetings and everything. It's difficult to navigate a lot of those services.

3

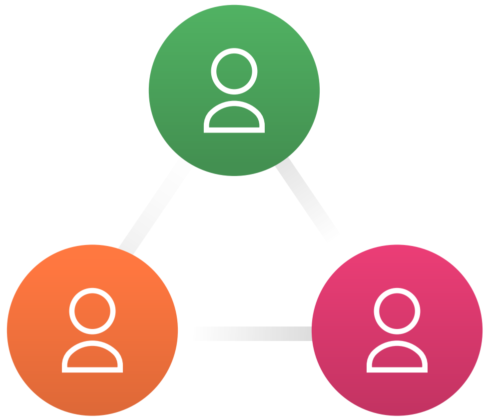
I want to say COVID caused a lot of issues, but I think a lot of the issues that we had were just exemplified by COVID because daycare was an issue before COVID.

Parent recommendations to improve child and family serving systems, based on the group's analysis of their combined lived experiences. Each recommendation is associated with aligned programming currently in place in Idaho.

Idaho parents want a formal/informal navigator in places they frequent (such as the pediatrician's office) who helps them access social supports in their times of need.

Idaho parents want a one-stop shop where they can find resources, supports, and programs for their family.

Idaho parents want family resources in places they already frequent and have established relationships, like dance and sports activities, doctors' offices, preschools, and libraries.



JOIN THE NETWORK

Idaho AEYC, Idaho Children's Trust Fund, and IdahoSTARS are leading advocates of using the beneficiary voice cycle in Idaho's systems. Join us to elevate the voices of families – the most important voices in our state. Together we can make systems more accessible, encouraging, and life-affirming for Idaho's families.

Grants, coaching, technical assistance, and ongoing support are available through the Beneficiary Voice Network.

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RESOURCES

Transcription Service

1. Rev - https://www.rev.com

How to Conduct Qualitative Analysis - Office of the Assistant Secretary

https://opa.hhs.gov/sites/default/files/2020-07/tpp18-qualitative-webinar-slides.pdf

How to Use and Assess Qualitative Research
Busetto, L., Wick, W. & Gumbinger, C. (2020)

https://neurolrespract.biomedcentral.com/articles/10.1186/s42466-020-00059-z

OPA Qualitative Analysis How To Guide
Choi, J. (2020)

https://rhntc.org/sites/default/files/resources/opa_qual_analysis_2020-07.pdf