BRINGING IN THE BENEFICIARY VOICE

It seems obvious that beneficiaries should be at the centre of all we do, yet how do we ensure that their voice is heard in a systematic way, and in every aspect of our work? Jo Wells contributes to the debate.

When I started working for The Blagrave Trust, I was struck by the lack of debate in the domestic funder space about the centrality and importance of 'beneficiary' engagement and participation, and its relationship to the dreaded impact measurement debates. In the words of US philanthropist and author of *Reconstructing philanthropy from the outside in*, Paul Shoemaker: *"Many times the deliberations between non-profits and funders are sometimes an echo chamber in the absence of a vital third voice in the room, the beneficiaries."* Yet, wherever I have seen evidence of systematic and meaningful feedback practice (and I am not talking about gathering pre and post 'project' survey feedback, which is common practice), the results can be transformative (see box for examples).

We know that the quality of relationships that organisations have with their intended beneficiaries is key to successful outcomes. In times of austerity it seems strikingly obvious that this is more important than ever.

This article aims to share some of the modest work we have done in this area, what we have learned, and some of the initiatives we are planning. I am writing this, not because I think we're especially good at it – there are clearly other funders doing fantastic work in this area – but because I believe the debate needs to be raised and sharing bits of practice and learning may be useful to others.

WHAT ARE WE DOING AND WHY?

Supporting partner charities to listen and learn

Before joining Blagrave, I worked for 17 years in amazing charities, none of whom were low on vision, passion and experience. Yet I know at none of them did we prioritise or systematise beneficiary feedback as much as we could or should have done. If we did ask beneficiaries what they thought, it was often for advocacy purposes where opinions were sought in response to pre-determined questions of our making. Funders rarely explicitly asked us for this information and if they did, they only wanted superficial details, rather than it infusing all their reporting and analytical frameworks.

Secondly, we rarely felt able to go back to our funders to make programme changes once proposals were agreed. This removed the incentive to ask beneficiaries what they wanted as, quite rightly, we did not want to raise their expectations – thus a culture arose where we did not invest in this core part of our work. My starting point at Blagrave therefore was that we should not simply assume as funders one step removed from the process that the organisations we fund are doing this well or systematically. Funder outcomes and beneficiary outcomes may not be aligned – so, whose counts the most?

Our starting point was to specifically ask charities in our application forms how they listen and learn from their beneficiaries and to find out how the organisations we support view this issue; do they think they are doing it well, what are the challenges they face, and how can we support them?

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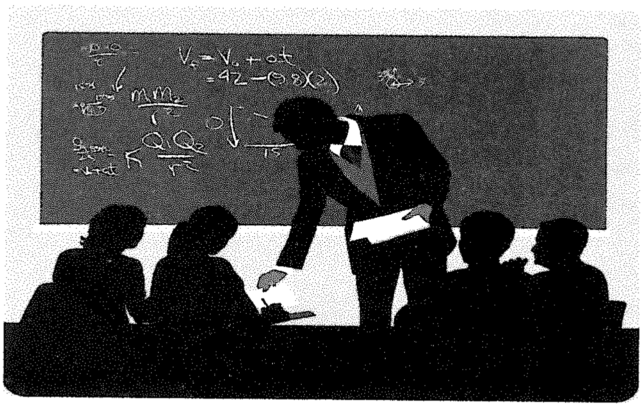
To advance this we:

1. Surveyed our partners to ask them about their practice and whether they would be interested in participating in some research – 35 (out of 50) responded positively.
2. Chose eight partner charities to explore the issues. They expressed a mixture of surprise, interest and appreciation for our attention to this area.
3. As a result we are now supporting a community of practice. Partners have identified the following themes they wish to explore as a community and learn from each other:
   - Inclusive and representative feedback practice, e.g. for those who disengage with services
   - Young people's participation e.g. in management or boards
   - Available tools and resources to promote practice, in particular digital technology
   - Systematising, acting on and evidencing feedback practice.

   This will include the development of resources and a charity portal via our website. We have had our first meeting and more are planned. Our partners will rotate the venue rather than Blagrave always hosting to support a sense of equal partners round the table.
4. We have made a fund available to advance practice. The Feedback Fund will support partner organisations with small grants – £1,000 to £4,000 – which can be spent on: designing, undertaking and analysing a feedback survey; engaging an 'expert' in stakeholder consultation/learning; supporting digital technology to improve feedback practice; designing and developing a needs assessment

EXAMPLES OF TRANSFORMATIVE USE OF BENEFICIARY VOICE

Youth Truth – www.youthtruthsurvey.org – student perceptions linked to academic outcomes
ExtraTime – www.blagravetrust.org/blagrave-partner-extratime-uses-funding-listen-respond-key-stakeholders
Feedback Labs – www.feedbacklabs.org – Closing feedback loops in aid and philanthropy
Mayday Trust – www.maydaytrust.org.uk – Wisdom from the street
Ground Truth Solutions – www.groundtruthsolutions.org
Integrity Action – www.integrityaction.org
Fund for Shared Insight – www.fundforsharedinsight.org


WWW.YOUTHTRUTHSURVEY.ORG

to inform programme development and direction; looking at monitoring and evaluation practice and how feedback is currently and could be better incorporated; staff training in this area; giving voice to young people through a short film; or any other ideas that we have not thought of! It's a small resource, but we will repeat it and if necessary increase it after we have reviewed its impact.

5. Creating incentives to listen – ensuring that our funding is flexible and adaptive i.e. programme development can respond to feedback. This inevitably also supports the well evidenced need for unrestricted funding, which we provide.
6. Funding specific projects of work. We are supporting one organisation to work with 36 of our funding partners over three years to help them give a young person a voice on an issue of concern to them and support them to develop their own solution. This has the double benefit of building the capacity of both the individuals and the charities. There are others, which we'd be happy to share.

Practising what we preach

If we want the charities we fund to excel at listening to their beneficiaries, then we have to replicate that within our own work to ensure that we are supporting not hindering their own capacity to do good. This means:

- A culture of partnership and openness, mirrored in funding practice. For example, we provide grants of at least three years with an option to repeat, in order to build relationships over a decent period of time.
- Listen to and meet young people for ourselves. We visit every charity we fund and talk to the young people; we are exploring ways to ensure trustees can do this.
- We held our first annual partner conference for all the charities we fund, to explore core topics (2015 theme – Evidence and Impact), give partners the floor, and bring in external speakers to enthuse debate. This has been received incredibly positively and we know of several charities that have identified collaborations since meeting.
- Gathering feedback via anonymous grantee perception reports undertaken by a third party.* We want to be benchmarked against other UK trusts and foundations and hope that others will do more of this. We will make the results public.

WHAT I HAVE LEARNED SO FAR

While having some beneficiary representation on a board is a great start, what I have seen is that the depth of work required to prioritise feedback and therefore genuinely empower young people, is significant. Piecemeal or single projects won't achieve much – to turn the power dynamic upside down or at least make it more equal, the belief of the value of the beneficiary voice has to infuse the whole culture of an organisation.

Secondly, as funders, whether we acknowledge it or not, we are part of a system. If you are doing great work with a charity, but that same charity is working with anything between one and 20 other trusts, then the net result is a complex and bureaucratic system that absorbs significant management time – the risk is that the beneficiary voice gets lost in the process.

Keystone Accountability is developing a platform for UK funders – the Feedback Commons, **feedbackcommons.org – which is a tool for listening and responding to those you seek to help while gaining insight from other organisations doing similar work.*

WHAT'S NEXT?

We are just at the beginning. We need to keep coming up with new ideas and new ways of looking at things. As a small funder we are able to be flexible and adaptive, which helps. We plan to document and share what we learn along the way. Further areas we are exploring are:

- Independent peer-on-peer monitoring, which is then fed back to both funder and implementer. This could have the dual benefit of being part of a social action and development opportunity for the young people.
- A funding pot specifically for collaborations between partner charities.
- Continued support on capturing, sharing and analysis of how voice can affect outcomes – we are part of the Feedback Labs group which is organising a conference in October.
- Reflecting on the role and support of beneficiaries in assessment and design. We feel that insufficient attention is given to the front end of programme design generally as well as how that relates to innovation. If we don't know what the young people perceive as good outcomes in the first place, but rather start with the results we want to see, then it seems we may be measuring everything upside down.

I hope at Blagrave we are moving to a place where ensuring that the young people we support are listened to, meaningfully engaged, enabled to participate, and ultimately empowered will be the issue that cross cuts everything we fund. We would love to hear more from other funders about how they are tackling this so we can do more, faster.

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