Participatory Methods for Understanding the Social Impact of Community Engagement.

A design thinking approach.

A guide by the University of Exeter's Social Innovation Group and the Cornwall Wildlife Trust.

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Contents.

This guide has been compiled by the Social Innovation Group, University of Exeter, and the Cornwall Wildlife Trust.

What is the purpose of this guide?

This guide will help to outline how participatory methods can be developed to understand social impact in ways that are relevant to particular organisations, projects, communities and the individuals who make up a community. An example tool was co-designed as part of a knowledge exchange project between the University of Exeter's Social Innovation Group and Cornwall Wildlife Trust. The tool is used to demonstrate how the guidance in this document can be applied.

Background.

Social impact is a complex study interest. There are standardised ways to understand aspects of social impact, such as using validated surveys[1] to evidence influences on wellbeing. For example, the widely used and recognised Warwick-Edinburgh Mental Wellbeing Scales (WEMWBS). More information about WEMWBS can be accessed via the following link: https://warwick.ac.uk/fac/sci/med/research/platform/wemwbs/

However, a project's social impact can be influenced by the unique qualities of a particular community and the people that make up that community. These unique qualities include the specific relationships that are built between communities and a project's and/or organisation's staff. Such relationships are a key driver for success in terms of social impact and can produce outcomes that are difficult to replicate elsewhere and capture with standardised methods. In brief, standardised

[1] Validated surveys are those that have been tested on a relevant sample of respondents. Usually, this sample is defined by the survey's intended audience. Surveys are refined and testing is repeated until a significant proportion of the respondents complete the survey in a way that produces reliable results. For example, respondents are able to understand the questions that are included in the survey and respond in a way that reflects their opinions and experiences.

methods, like WEMWBS, are not built to understand the unique, culturally sensitive and ever-evolving meanings around social impact that can emerge during community engagement projects. In response to this challenge, design thinking can be applied to produce methods and tools that enable organisations and the communities that they engage to define social impact and understand it in ways that matter to them. *Note: broadly, the term **tool** refers to the materials that help the application of a method.*

The main strength of design thinking is that it builds tools that relate to a community's real-life experiences (Goi and Tan, 2021). Additionally, what matters to who is applying a tool and who is being engaged by a tool – including how they are engaged and where – become central influences when designing methods to understand social impact.

In terms of community engagement work, social impact's meaning should be established and understood by all the stakeholders who are involved in a project before any tool is designed. Therefore, the meaning of social impact can change based on specific contexts, perspectives and experiences, e.g. changes to an organisation's aims can shift what they prioritise in terms of social impact and the barriers to comfortable day-to-day living in a community can influence what that community values and wants addressed.

In the next section, we outline how the points in the paragraph above can be put into practice by demonstrating how social impact was co-defined during the University of Exeter and Cornwall Wildlife Trust's knowledge exchange work. The guide will then move on to explain how this definition can be used to understand social impact during an organisation's community-facing work.

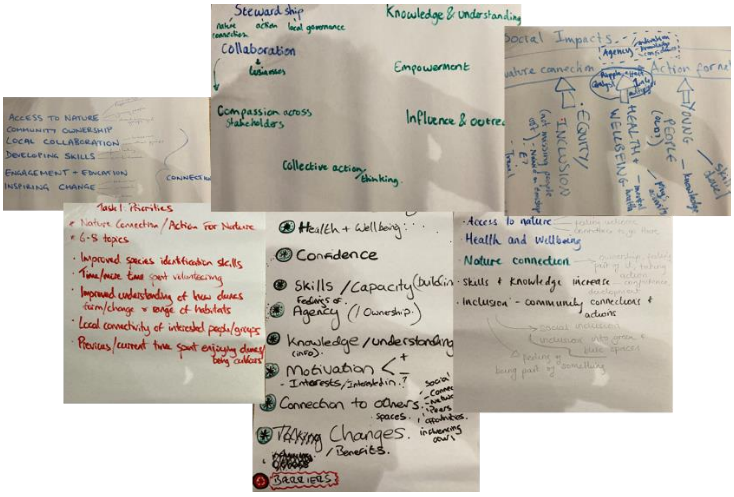
Defining social impact – *sense-making* and creating action areas.

The first step of understanding social impact is to define what it means in relation to the work that is being undertaken with local communities. This process is often referred to as *sense-making* (Rylander Eklund et al. 2021). In relation to an organisation's community engagement work, s*ense-making's* first practical step involves collating what the organisation aims to achieve within a community and detailing how that work will be delivered. The following points can be considered in a series of brainstorming sessions to support *sense-making*:

- What is the purpose of the work that is being carried out with communities?
- What does the community-facing work involve? – this point should consider who is being engaged by the work, e.g. specific groups within a community or the community as a whole, and what the work involves practically, e.g. training sessions to share and improve skills.

Responses to the points above can be grouped to form social impact action areas. These action areas will define what an organisation and/or project is aiming to achieve in terms of social impact. The following example shows how Cornwall Wildlife Trust determined their social impact action areas.

Example 1: Cornwall Wildlife Trust's social impact action areas



Brainstorms from the sense-making sessions that Cornwall Wildlife Trust staff undertook (not all responses are included in the collage above).

When Cornwall Wildlife Trust staff undertook their brainstorming sessions, it was agreed that six common themes were consistent across all responses. Through further discussion, the themes were summarised as follows:

1. Care for people.

2. Care for nature.

3. Collaboration and co-production.

4. Catalysing and capacity building.

5. Diversity, inclusion and accessibility.

6. Reflection and learning.

Importantly, the action areas (1-6 in the example above) have been incorporated into a central strategy around community engagement for the Cornwall Wildlife Trust. The creation of a strategy that is based on the agreed social impact action areas can ensure that everyone within an organisation is on board with the organisation's definition of social impact. The following diagram was used to introduce the strategy to Cornwall Wildlife Trust's staff and, to ensure clarity, any queries and/or points of discussion were addressed through a series of meetings. *Note: for brevity, the diagram grouped the action areas of 'care for nature' and 'care for people' together and the acronym CWT is used to refer to Cornwall Wildlife Trust.*

CARING ABOUT NATURE AND PEOPLE

Increasing nature connection will support positive outcomes for people and nature

COLLABORATION & CO-PRODUCTION

We work collaboratively with other organisations and across CWT teams

Where possible we coproduce engagement activities with communities

CATALYSING & CAPACITY BUILDING

We inspire, motivate and help build skills and knowledge to support people and groups to take action

DIVERSITY, INCLUSION ACCESSIBILITY

We are engaging & working with diverse audiences, inc. young people. Our engagement activities are inclusive and accessible

CONTINUOUS REFLECTION, LEARNING & LEGACY

We evaluate our impact, reflect on and share our learning and use it to inform our next steps, building a legacy

Cornwall Wildlife Trust's Social Impact Action Areas and a summary of how they will inform action across the entire organisation.

Once social impact has been defined through the identification of key action areas, the next step is to design a tool and/or series of tools that will help to capture a community's perspectives about the action areas. A challenge in designing such tools is that the organisational wording used to summarise and describe what action areas involve might not be translatable to and/or accessible for communities or certain groups within a community. In the next section, we will address this challenge by referring to an example tool that was designed based on the Cornwall Wildlife Trust's six social impact action areas.

Design thinking principles for understanding social impact.

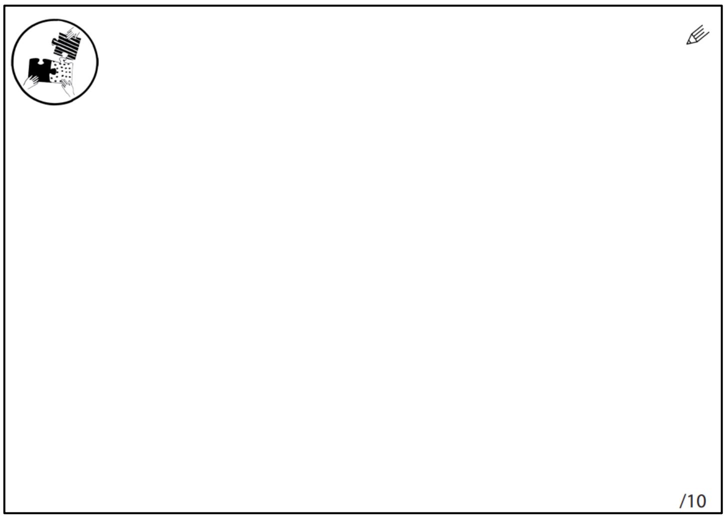
Any tool that is designed through design thinking principles must support those who are using the tool to share what is important to them and how they define certain topics, e.g. social impact and what impact has been achieved, or not achieved for that matter! The tool should enable participants, and those applying the tool, to explore why certain impacts were achieved and/or not achieved. Therefore, design thinking's main guiding principle is that all design processes must be led by the realities of real-life and whatever is suitable for the users of the designed materials (Pande and Bharathi, 2020). The following sub-sections outline how this principle can be applied by raising key questions. Ways to address these questions are demonstrated through the tool that was co-designed to align with Cornwall Wildlife Trust's social impact action areas.

1. What is the purpose of the tool?

In terms of understanding social impact, a designed tool's purpose should align with the action areas that emerged through an organisation's *sense-making* work. Therefore, the tool should help communities to assess social impact in a way that is relevant to the action areas that were identified. The example below shows a tool that accommodates Cornwall Wildlife Trust's action areas and can be used to invite feedback about them from particular communities.

Example 2: Cornwall Wildlife Trust's action areas as shareable cards

To bring the points that are made in this sub-section to life, the designed tool shown here can be considered. Cards are a good way to engage any target audience and inspire participation – particularly if they can be passed around and written and/or drawn on. Therefore, the first design thinking idea for Cornwall Wildlife Trust's tool was to create cards that represent the organisation's social impact action areas. The image below shows a card that represents the action area of *collaboration and co-production* through a simple icon in the top left corner. The blank design of the card and the inclusion of a scoring system (out of 10) gives participants flexibility around expressing how they feel about *collaboration and co-production* and what has been achieved in relation to that action area. At this point, the next design challenge is to help participants in particular communities give meaning to *collaboration and co-production* based on their context and perspectives.



Example feedback card for the action area of collaboration and co-production.

Cards, as shown above, can be used alongside a set of prompt instructions and/or questions to invite feedback. To determine how these instructions are shared and what they should include, a tool's design must, once more, think about who will apply the tool and who will be engaged by it. These considerations are covered next.

2. Who is going to use the tool?

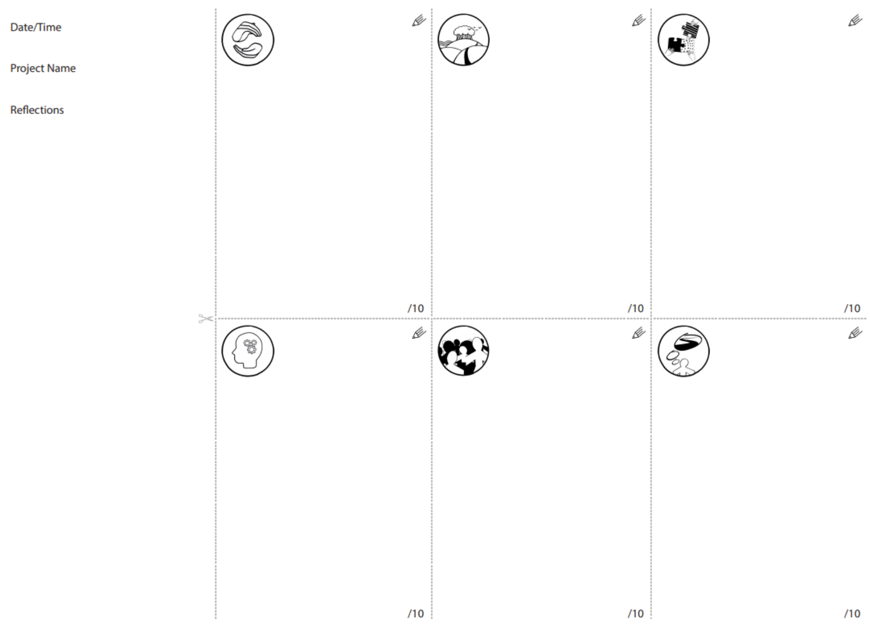
Once an initial design idea is established for a tool, careful thought must be given to the tool's intended use: *Is the tool accessible for its audience?* The best way to answer this question is to discuss and/or test an idea with the target audience and/or individuals who are experienced in working the specific audience. The way in which these considerations were applied to Cornwall Wildlife Trust's tool is shown in the next example.

Example 3: A multi-audience tool for the Cornwall Wildlife Trust

An interesting aspect (and challenge) of the tool that was designed for the Cornwall Wildlife was its need to cater for three types of audience: *i) Cornwall Wildlife Trust staff (internal use) – so that project teams can reflect on what opportunities have been created and what barriers have been experienced in relation to the organisation's social impact action areas; ii) volunteers – so that the application of the tool can be supported by volunteers and also, where relevant, used to understand volunteer opinions about the organisation's social impact and iii) Communities and/or specific groups within communities – so that the tool can be used to understand the Cornwall Wildlife Trust's social impact on communities during particular projects.*

Therefore, from a practical point of view, the tool needs to be transportable to staff and/or project meetings. Additionally, the perspectives that are recorded by the tool need to be collected in an organised manner, so that they can be revisited at a later date.

To address the points raised above, we created cards for all six action areas and embedded them into a template that could be transported to meetings as a single document. The cards were printed in a way that ensured they could be separated from the template and shared out to be used individually. An example of the template can be seen below.



Example template for Cornwall Wildlife Trust's Social Impact Tool.

Example 3: A multi-audience tool for the Cornwall Wildlife Trust (continued)

What is noticeable about the template in this example is that the action areas' titles are not included – instead, a set of designed icons are used to represent the action areas. This outcome demonstrates how design thinking was applied to accommodate all target audiences, i.e. communities, volunteers and Cornwall Wildlife Trust staff. The meaning of and language used to summarise Cornwall Wildlife Trust's social impact action areas might not always be transferable across all of these audiences. To address this issue, icons were designed to symbolise the action areas. These icons can be used to explain the action areas in ways that are relevant and accessible to each audience. To help this process, a crib sheet was designed. The crib sheet can be used to describe what each symbol means and what should be considered when writing and/or drawing responses on the cards. The key to applying the tool in this way is to ensure that there is some overlap between the new meaning being assigned to the icon and the action area that it represents. The example below displays how a crib sheet can be used to make the tool more accessible. Specifically, the action area of *collaboration and co-production* is turned into a question that can invite meaningful feedback.

What have your experiences around teamwork been like during your activities with Cornwall Wildlife Trust? In your answer, include what has helped teamwork, what has stopped it from happening and what can be done to improve it.

Part of a crib-sheet showing how feedback can be invited in relation to an action area's icon. Similar questions can be posed in relation to the other action areas.

Example 3: A multi-audience tool for the Cornwall Wildlife Trust (further continued)

Further, a tool's accessibility can be improved by thinking of subtle (but important) adaptations to meet a specific audience's needs and, once more, design thinking can be applied to help (Szopa and Vanderheiden, 2022). This is where working with the target audience and/or individuals who are experienced in working with the target audience comes in useful. Significantly, Cornwall Wildlife Trust's community-facing work is far-reaching. They work with a wide range of groups in communities, e.g. disabled people, children and young adults, and individuals who have experienced a range of social difficulties. Design thinking was applied to accommodate this diversity. The card-based tool does not dictate that responses should be provided in written form only. For example, when used with children, the cards can be used alongside a set of stickers to log the number of good things that have happened in relation to an action area and the number of bad things that have happened in relation to an action area. In this instance, it is recommended that the tool is applied by someone who is experienced in working with children (the same goes for any target audience requiring similar adaptations). The image below shows part of a crib sheet that explains how the tool can be used to generate feedback via the use of stickers. The example given related to the action area of *collaboration and co-production.*

Stick down between 1 and 5 smiley faces for each picture.

Working as a team: 0 smiley faces mean you did not work in teams. 5 smiley faces mean that you worked very well as a team.

Part of a crib sheet that can be used to invite feedback from children about collaboration and co-production.

A further way of enhancing what is captured by a tool like the one in the example above is to encourage individuals who apply the tool to reflect about its application. The next section covers the importance of these reflections and how they can be incorporated into a tool.

3. Reflection.

Tools that are designed through design thinking tend to feature a way of inspiring reflection. Reflection is seen as a key practice for learning and ensuring that changes, however big or small, can be applied during a project and/or strategy's application (Taimur et al. 2022). Such reflections help positive social impact to be applied during community-facing work. Consequently, positive change does not have to rely on longwinded evaluation processes. Adaptations that a project team and/or individual can make to their practices can be supported by relevant reflections. From a practical point of view, reflection can involve the following: *i) writing a personal account of a specific event; ii) keeping a diary during a project and/or during a specific period of a project and iii) organising and participating in a set of project de-brief sessions.*

Overall, the best way that reflection can be inspired in a given context should be applied. Therefore, the time commitments of the individuals who are applying a tool must be considered when establishing reflection processes. It may not be possible for project team members to keep diaries and/or participate in de-briefings that are held weekly. Whatever is most suitable should be decided by all individuals who are involved in applying the tool. However, the following points should be addressed during reflections:

- What went well?
- What can be improved?
- Are there any feasible steps that can be taken to address what can be improved?
- What support is needed to apply the feasible steps?
- What needs to be considered to maintain what is working well in the future?
- What needs to be considered to address areas for improvement in the future?

The example below shows how the capture of this information was designed into Cornwall Wildlife Trust's tool.

Example: A box for reflection in Cornwall Wildlife Trust's tool

Cornwall Wildlife Trust's tool incorporated a simple addition to capture relevant reflections. Simply, a space for reflective notes was included on the left-hand side of the tool's template. The provision of this space enables, if possible, reflections to be captured after each use of the tool. In the tool's template, the space that is dedicated to reflections is detachable from the rest of the cards. Therefore, the section can be completed after the tool's intended audience have used it.

Note: Refer to the first part of Example 3 to see the tool's section that can be detached and used to capture reflections.

The next section deals with how feedback (data) generated by participatory methods to understand social impact can be analysed and reported.

Collating and communicating insights: data analysis and reporting.

The feedback that is generated by participatory tools - like the one that has been used as an example throughout this guide – is (predominantly) qualitative and can be analysed in a number of ways. Sophisticated qualitative data analysis can involve years of experience as an academic and/or practitioner, as findings are interpreted based on the accumulation of relevant experiences and knowledges. This guide concentrates on what organisations and project staff can do with the feedback that is collated and how they can share what has been learnt. Broadly, there are two approaches to qualitative data analysis: **inductive** and **deductive**. Both these approaches are summarised in this section. Although, deductive analysis is more relevant to the examples that have been included in this guide. Therefore, where relevant, Cornwall Wildlife Trust's example tool will be used to demonstrate aspects of deductive analysis.

Inductive analysis involves allowing what participants (the community) have said to define how their responses are organised (Elo and Kyngas, 2008). Here, responses that are similar to each other and/or talk about similar things are grouped. It helps to give every group that is created a title. Essentially, these titles define the key themes that matter to the community that has been engaged.

Importantly, inductive analysis requires transparency if it is to be carried out meaningfully. In qualitative analysis, transparency involves documenting why key decisions were made, e.g. why certain responses were grouped as they were and given a particular categorisation (i.e. each theme's title)? (Golafshani, 2003). This transparency can be achieved via two steps:

> **Step 1.** The organisation and categorisation of data into themes is undertaken by more than one person, i.e. an analysis team. Themes are defined based on what the team agrees. If there are strong objections to certain categorisations, this can be solved when Step 2 (below) is applied. There is no limit to how many people can make up an analysis team. Although, analysis can take longer with larger teams!
>
> **Step 2.** The themes that were identified as a result of Step 1 are discussed with the engaged community and refined through these discussions. Once themes have been identified by the analysis team, it is good practice to organise a meeting – or a series of meetings – with the engaged community. At these meetings, the themes should be presented to the community. Example quotes from the data (i.e. what was said during a tool's application) can be used to demonstrate the themes. Subsequently, feedback on whether the community agrees with the themes should be invited. It is at this point that differing opinions (amongst the analysis team) can be addressed. All options can be presented to the community and their judgement on *what works best* should be adopted. They might even suggest something completely different!

Overall, the community's perspectives about the themes should be prioritised, as the themes should reflect their experiences and what matters to them.

On the other hand, **deductive** analysis uses an existing set of themes to organise feedback (Elo and Kyngas, 2007). Once more, the key is to be transparent about why the existing themes are important and were chosen to categorise the community's feedback. Common reasons of using existing themes are: *i) the themes are part of an existing theory; ii) the themes align with a project's pre-defined aims, i.e. aims that were established before a project started (often, these aims are driven by targets that are set by a project's funder) and iii) the themes are part of a strategy that is being delivered.* This third point relates to the example that has been showcased by this guide. Cornwall Wildlife Trust's tool was co-designed based on the adoption of their new community engagement strategy, which has six key action areas: 1. Care for nature; 2. Care for people; 3. Collaboration and co-production; 4. Catalysing and capacity building; 5. Diversity, inclusion and accessibility and 6. Reflection and learning.

The action areas of Cornwall Wildlife Trust's strategy, reiterated above, can be used as themes for analysis. As outlined in Step 1 for the inductive approach, an analysis team can sort through responses and categorise them by using the strategy's action areas as themes. With this deductive approach, it is still good practice - although not essential - to provide a summary of the analysis to the community and invite feedback (as in Step 2 for inductive analysis). However, unlike inductive analysis, the themes that were used to categorise the insights should not be changed through this process. Here, this feedback is useful for documenting the different ways (compared to the analysis team) that the community would have categorised the insights. Where possible, reasons for these differences in opinion should be explored. Of course, community members might agree with the deductive themes anyway!

After analysis has been completed, many levels of sophistication are possible when it comes to reporting – just like the analysis itself! Higher standards of reporting require engagement with existing research and theories that relate to the work that has been undertaken. However, there are some key principles to follow when, for example, reporting on a specific project and/or the evaluation of a strategy.

Principle 1 - Transparency: reporting should detail the work that was undertaken with a community and provide a description of the engaged community. Ideally, this description should be agreed upon with the community. Key pieces of detail to include are when the work took place and where it took place – including geographic location and the spaces that were used, e.g., the local beaches, town halls, schools, council offices etc. Additionally, if possible, a summary of the individuals/groups who were involved in a project should be included, e.g. older adults, college students, teachers, local business owners, councillors etc., and, if relevant, details about the mix of the individuals/groups involved can be provided, e.g. 12 older adults and 8 college students were involved.

Principle 2 - All themes matter: during reporting, it can be tempting to concentrate on the themes that were spoken about the most. However, with qualitative analysis, a theme that is mentioned once can be as important as something that was said repeatedly. Reporting should be transparent about whether themes were spoken about often or whether they were said by a small number of individuals. However, the themes that are less prominent in terms of quantity can indicate perspectives that are often marginalised and overlooked. These types of reflections should be engaged with during reporting. Hence, it is useful to compile reports with the team that was involved in the analysis. That way, the team can decide on what perspectives to concentrate on in the report – even if they were not as prominent (in terms of number) as others. Finally, it is good practice to use quotes to demonstrate the key themes in a report. If more relevant, pictures of responses can be used in the same way, e.g. when Cornwall Wildlife Trust's tool is used to invite feedback via the use of smileys, instead of in writing.

Principle 3 – Linking findings back to context: once a report outlines its themes and summarises what was said about them, these findings should be linked back to the community's context (i.e. the content that relates to Principle 1). Usually, such insights form a report's conclusions. The following questions should be reflected upon to inform the conclusions.

i) Why are the findings important for the community and, if relevant, to specific individuals/groups in the community?

The insights that are included in a report about the question above do not have to be limited to a project's target audience (engaged community). If the findings are important for other individuals/groups and this was mentioned by the community, this can be included in the report. For example, if a community feels that the actions of a local business (or other group) was hindering positive action and their involvement in a project, this can be mentioned.

ii) What aspects of the community helped positive things happen and what aspects provided challenges?

With this question, the report should draw together anything that seemed to help the community achieve positive things in relation to the report's key themes. Subsequently, anything that acted as a barrier should be covered as well. For example, the adequateness of the spaces and resources that are available to a community can be mentioned – particularly in relation to the type of work that was being done. Additionally, the influences of day-to-day life – positive and negative – on a project can be highlighted too. As such, the conclusions should, where possible, refer to wider factors that influenced the community's experiences, e.g. a lack of time for involvement due to certain working cultures and legal requirements – this was the case during a project that the Cornwall Wildlife Trust undertook with children and young people in 2023 (Esmene, 2023).

A tip to help with reporting is to think about the principles that are listed above during data analysis. Particularly, where possible, the information and questions that need to be reflected upon for each reporting principle can be explored in community feedback sessions (on analysis themes). In essence, the key principles of reporting can be addressed over a longer period of time and collectively. This approach contributes to the rigor of a report. Here, rigor is enhanced by adding in a layer of inclusion to the reporting process, i.e. the community's perspectives are linked to what is covered in a report more closely. Additionally, by thinking about reporting during the analysis phase, the individuals who are responsible for reporting can be better prepared (afforded more time) to cover the key reporting principles.

Overall, this guide outlines how design thinking can be used to understand social impact in ways that are relevant to specific organisations, projects and/or communities. Participatory methods and tools – designed through design thinking – help to generate context-relevant findings that are meaningful to the communities that are being engaged by an organisation and/or project. The section in this guide that covers analysis and reporting can help to showcase the importance of being attuned to the meanings that particular organisations and communities give to social impact.

It should be acknowledged that this guide is in no way exhaustive and aims to provide an overview of key principles and practices. The application of the information in this guide can be supported by further learning around design thinking and qualitative research principles.

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