

METHODOLOGY

CULTIVATING VOICE IN RELATIONSHIPS

USING REGULAR MICRO-SURVEYS AT SCALE TO TURN STAKEHOLDER EXPERIENCE AND PERCEPTIONS INTO ACTIONABLE DATA

Shift

THE METHOD

Generating real-time insight about relationships to help companies and their stakeholders work *together* to quickly and easily identify, foster and monitor improvements.

USE THIS RESOURCE TO



ENGAGE and **LEARN** from large numbers of people about their experience of their relationship with a company.



COMPARE data within and across different geographies and sites.



FOSTER rapid learning and action with reduced time spent on data collection and analysis.

This note profiles Constituent Voice™ (CV): a way to engage and learn from large numbers of people about how company, government and funders' programs and activities impact them. CV, developed by Keystone Accountability, uses a small number of simple questions (micro-surveys) asked at scale and over time in order to generate real-time insight that helps companies and their stakeholders to quickly and easily identify, foster and monitor improvements.

CV can be used by a company to evaluate and simultaneously improve the quality of its relationship with affected stakeholders: for example, between supervisors and workers; site managers and community members; management and contract staff, or the company and consumers. It is also possible to use CV to assess relationships between a company and its suppliers or other business partners that have a bearing on outcomes for workers and communities, such as between a bank and a client, or a brand and a supplier.

- ⦿ **SCALE:** The approach is designed to allow for stakeholder sentiments to be collected at scale, with minimal need to restrict the opportunity to express views to a limited sample of a target population.
- ⦿ **COMPARABILITY:** Because the same four to five targeted questions are asked of all stakeholders and in all contexts, data can be compared within and across operating contexts.
- ⦿ **RAPID LEARNING AND ACTION:** With reduced time spent on data collection and analysis, more company and stakeholder



time should be available to focus on shared sense-making of data and finding solutions.

- **BUILDING CULTURE:** The light-touch approach and reduced time between data collection and action, are intended to make it possible for the cultivation of voice to become a cultural practice for an organization instead of a one-off data gathering and reporting exercise.

overloading the company or its stakeholders. It can also make collecting signals about the quality of relationships affordable, as well as easy to turn into data that internal and external stakeholders can understand. This simplicity fosters problem-solving conversations that lead to shared insight and action.

- The list below sets out some illustrative questions that could be used when applying CV. All of them would be answered using the same 0 (not at all) to 10 (very much) scale.

- In manufacturing, agricultural or construction industries, **workers** might be asked:

- How much does management understand workers' concerns?
- How much does your direct supervisor help you to solve your problems?
- How much do you feel respected by your direct supervisors?

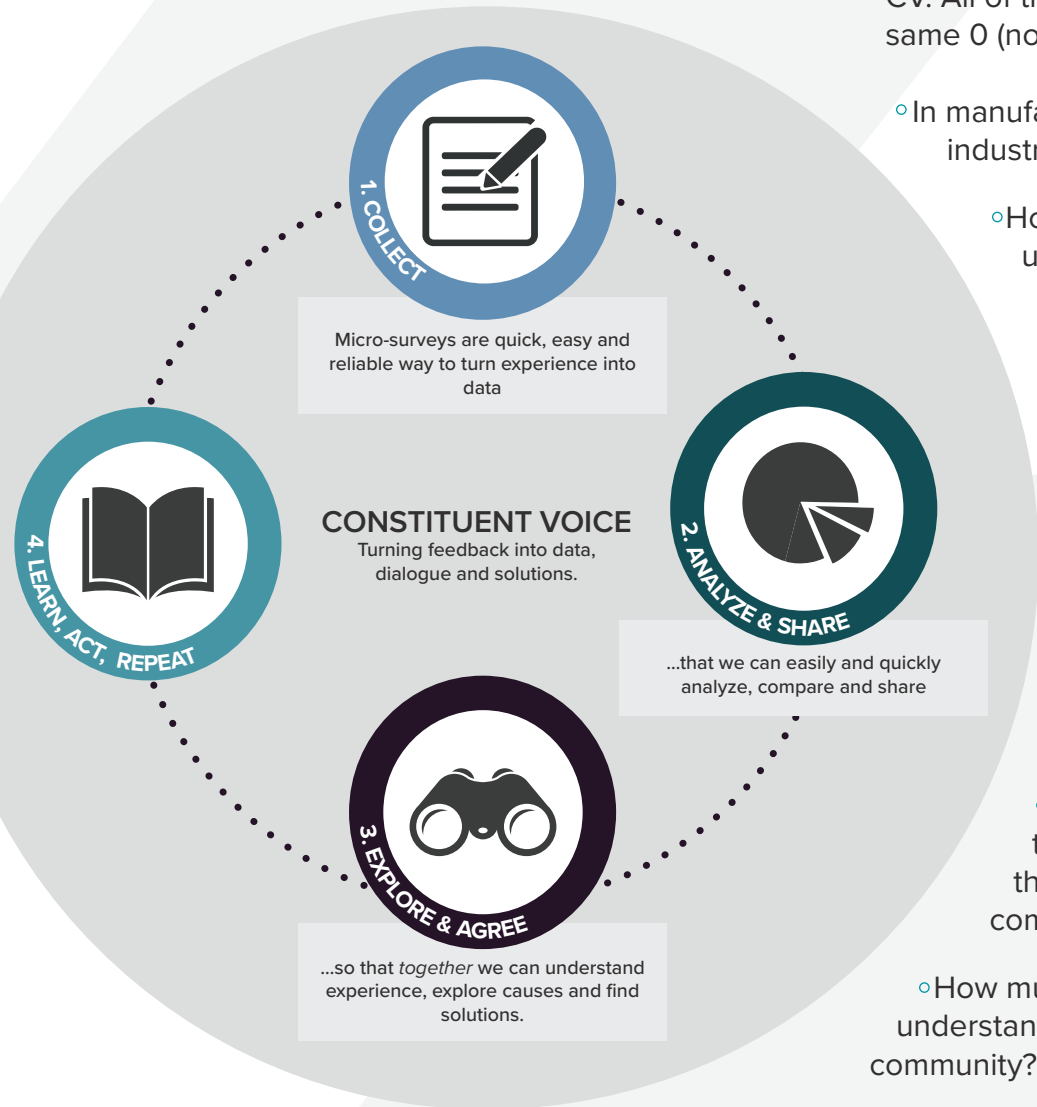
- In extractive and other large footprint operations, **community members** might be asked:

- How much do you believe what the company tells you about the benefits of the operation to community members?

- How much do you think the company understands what is important for your community?

- How much do you feel the company takes your opinions into account when making decisions?

CV generates a single top-line metric, the Improvement Rate, that reflects the extent to which a given program or intervention is leading to learning and improvement. This metric can be developed from the first few micro-surveys, but it typically takes 12 months or more for stakeholders to see it as a reliable indicator of trends.



II. UNDERLYING PRINCIPLES AND KEY CONCEPTS

- 1 **SIMPLICITY.** A key to CV is keeping assessment simple while not losing meaning. Focusing on fewer, questions (usually only four to five at a time) asked frequently and at scale can allow more frequent engagement without



The Improvement Rate metric is based on people’s subjective expectations and in that sense can be compared to familiar tools like “Net Promoter,” which has become an almost universally applied metric related to customer experience across diverse products and services, and the business confidence index, which pools business leader opinions across diverse industries.

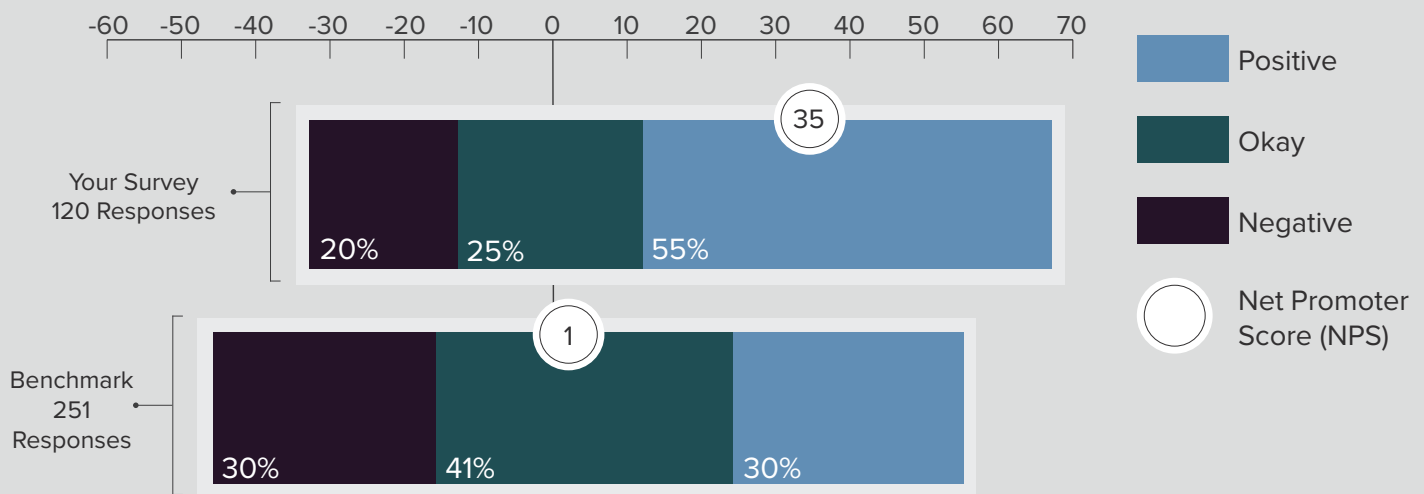
companies to use existing opportunities to collect data and to engage with their stakeholders. For example, instead of hiring an independent research firm to survey a small sample of respondents in a single window of time, a company can use local data collectors or “always-on” tablets or kiosks in places where stakeholders gather (such as canteens, community halls or events).

By including standardized questions, locally collected data when aggregated at scale, can enable the company to observe patterns at a systems level in real time across the company, its geographies or supply chains.

High participation rates in data collection mean that companies are less likely to miss experiences from segments of a population that can offer important, even if outlier, perspectives about company practices. By dissecting data by gender, ethnicity, age, education level, income level, etc. during the data analysis, such differences in experience, both positive and negative, can be explored in sensemaking sessions – such as focus groups and learning circles with all constituent groups. Inclusivity in data interpretation supports a feeling of figuring things out together. In addition, technology can help with mass communications of findings, interpretations and actions for improvement.

2 INCLUSIVITY. Data collection within the CV methodology does not use the model of sampling, but instead seeks to survey every person in a constituent group. This is aided by calibrating surveys to be brief and easily accessible, generally leading to a response level of 50-80% of a target population at a fraction of the cost of traditional approaches. Having a small question set also enables

DOES (ORG X) TREAT ALL PARTNERS & BENEFICIARIES FAIRLY?



Sample chart, local data collected by a business unit benchmarked against the average for the whole company.

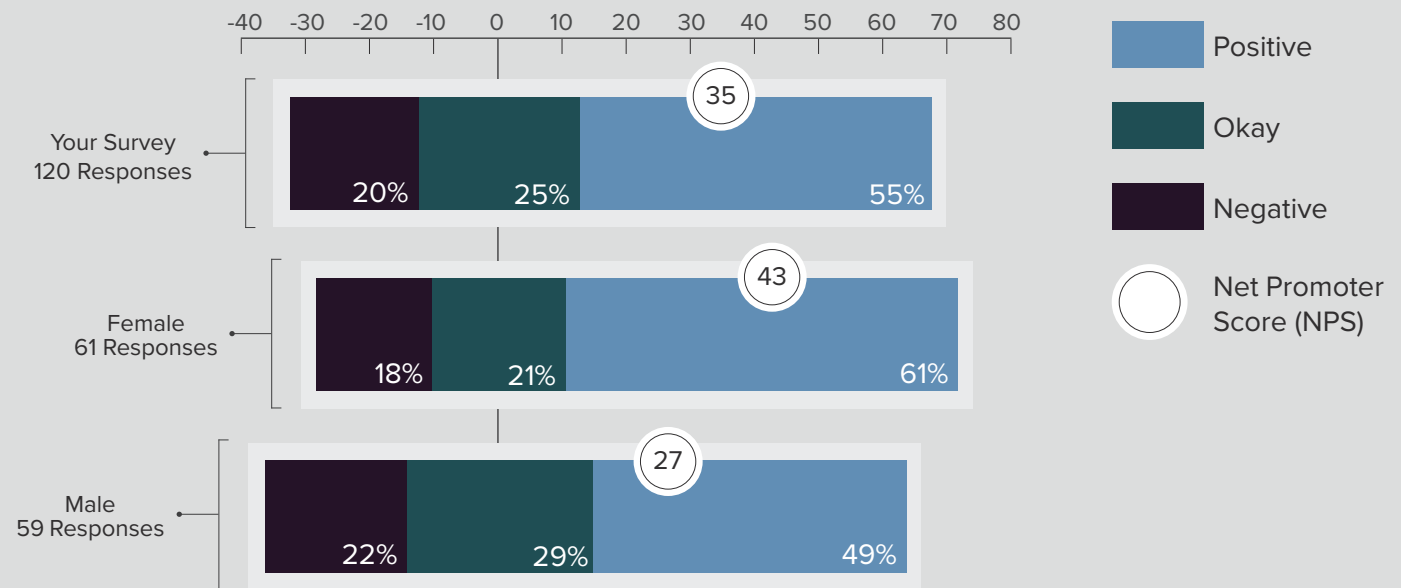
On 0-10 Likert scale, “Positive” responses are those between 9-10, “Okay” are 7-8 and “Negative” are 0-6. NPS is a difference between percentage of positive responses and percentage of negative responses. The higher the NPS, the more positive the sentiment.

Source: based on the original provided by Keystone Accountability



DOES (ORG X) TREAT ALL PARTNERS & BENEFICIARIES FAIRLY?

FILTERED BY ANSWERS TO: "WHAT IS YOUR GENDER?"



Source: based on the original provided by Keystone Accountability.

3 TIMELINESS AND ACTIONABILITY.

Annual survey cycles do not always allow for collaborative learning and problem-solving. The idea behind CV is that frequent surveys, quick data analysis and easily deployed communication bring systematic data, insight and action close to real time. Complex issues can be broken up into manageable parts, and progress in solving them can be tracked systematically as well. Through an "improvement dashboard," which combines key data points into a *live* metric of how well stakeholders feel the company is responding to their concerns, a company can convene internal and external dialogues to find ways to improve their programs. This provides a good starting point for integrating data, findings and actions taken in response to the feedback into organizational knowledge and culture.

Timely action can also nudge response rates up and so improve inclusivity. This is because more people will engage if the company demonstrates a consistent willingness to listen, share and engage based on the data.

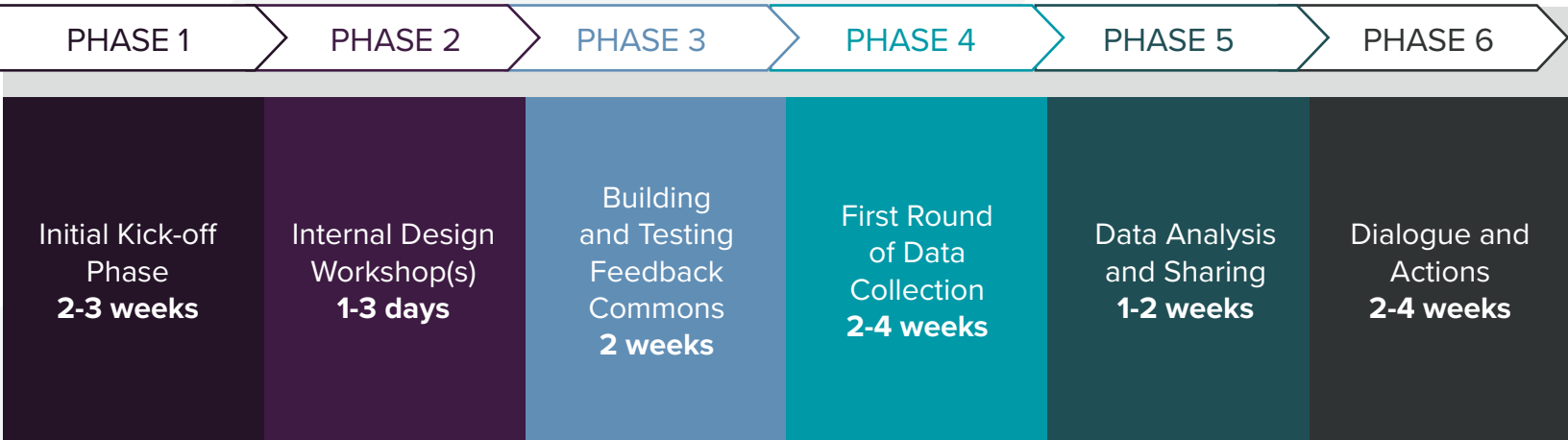
"Constituent Voice combines two simple ideas. The first idea is at the epicentre of helping others effectively: listen. Really listen, so that your actions respect and reflect their experience. The second idea is a specific application of basic organizational management: to be systematic in our listening. It is of limited use to an organization if its people on the frontline are great listeners, and yet their insight is not captured and transformed into organizational knowledge and culture."

**DAVID BONBRIGHT, FOUNDER AND CEO,
KEYSTONE ACCOUNTABILITY**



III. IN PRACTICE

A CV learning loop can be designed and tested in 3-4 months, and over six phases as shown below. Once a company's teams become familiar with the process, learning loops can be repeated more or less frequently – semi-annually, quarterly or even more often if needed.



- **PHASE 1: Initial Kick-off (2-3 weeks).** In this phase a company clarifies its aims, plans a pilot and assembles its internal team. Together they decide what group of affected stakeholders the pilot will focus on. On the company's side, an internal team can consist of a central coordinator and one or two managers and staff from a relevant locality.
- **PHASE 2: Internal Design Workshop(s) (1-3 days).** A one-day design workshop, or 2-3 shorter remote workshops, is sufficient to clarify which relationships to focus on, develop draft survey questions and concrete plans for data collection, data sharing and dialogue. In this phase, the company's staff is also introduced to an online tool called the Feedback Commons™ (hosted by Keystone Accountability) that enables companies, with remote advice and support, to operate and manage learning using in-house staff.
- **PHASE 3: Building and Testing of the Feedback Commons Private Neighborhood (2 weeks).** After finalizing the design and content of the micro-surveys, the company's private online portal or "neighborhood" to allow a company to manage and analyze data, is then developed and tested with Keystone Accountability.
- **PHASE 4: Collecting the First Round of Data from Constituent Groups (2-4 weeks).** Micro-surveys developed using the online tools are then deployed using various methods, including email, kiosk/tablet or traditional paper questionnaires.



Group dialogue in Malawi - Making sense of feedback data together.

Source: Keystone Accountability.



- ⑤ **PHASE 5: Team Analyzes Data and Creates Media for Sharing (1-2 weeks).** The company's team analyzes the data and selects the most significant findings to share with constituents. It also decides how to share the findings, for example through a short report, posters, periodic email or Whatsapp communications.
- ⑥ **PHASE 6: Facilitating Dialogues, Documenting Insights and Agreeing Actions (2-4 weeks).** A well-designed micro-survey provides a surprising amount of feedback to share and discuss. The company's team conducts the sharing and dialogue process with local units and constituent groups either in person or remotely. The dialogue should also focus on agreeing a way forward in terms of specific actions that the company can take.

ASSESS VALUE CHAIN RELATIONSHIPS THAT IMPACT PEOPLE

It is increasingly recognized that the nature of a relationship between two companies – for example between a buyer and supplier, between joint venture partners or between investors and clients – can influence the most vulnerable workers and communities that business activities impact.

One of the most notable examples of this is when a buyer's purchasing practices create pressures on suppliers such that those suppliers are unable to respect the human rights of workers. Starting in 2020, the Better Buying Institute entered into a partnership with Keystone Accountability (funded by the Walt Disney Corporation) to design a system of real-time learning loops that brings buyers and suppliers together to identify and manage small manageable improvements in purchasing practices.

This is done through repeated micro-surveys of suppliers on how they experience a specific purchasing practice (such as forecasting, costing, or payment terms, etc.). The surveys take only a few minutes of a supplier's time to respond to, ensuring high response rates. It also focuses discussion on a small number of improvements at any one time, making it easier for buyers to implement and monitor. For example, a micro-survey focusing on forecasting practice includes only six questions. Within two weeks companies typically achieve a 40-60% response rate and are able to start responding to the feedback they receive. Focused and short round-table dialogues can be conducted remotely within a month. Issues are explored and mutually satisfactory solutions and follow-up actions that benefit multiple stakeholders are agreed upon.



This is one of five methodologies focusing on quality of relationships developed by Shift as part of the Valuing Respect project. To access other resources in this series, visit valuingrespect.org.

Shift thanks Andre Proctor and David Bonbright of Keystone Accountability for their contributions to this resource.



ABOUT SHIFT

Shift is the leading center of expertise on the UN Guiding Principles on Business and Human Rights. Shift's global team of experts works across all continents and sectors to challenge assumptions, push boundaries and redefine corporate practice in order to build a world where business gets done with respect for people's dignity. We are a non-profit, mission-driven organization headquartered in New York City.

 shiftproject.org

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ABOUT VALUING RESPECT PROJECT

Valuing Respect Project is a global collaborative platform, led by Shift, to research and co-create better ways of evaluating business respect for human rights. Our aim is to develop tools and insights that can help both companies and their stakeholders focus their resources on actions that effectively improve outcomes for people. Valuing Respect is generously funded by the Ministry of Foreign Affairs Finland, the Norwegian Ministry of Foreign Affairs and Norges Bank Investment Management.

 valuingrespect.org



FURTHER INFORMATION

- Practitioner articles on Constituent Voice, hosted by Keystone Accountability
- Managing Social Risk in Global Supply Chains

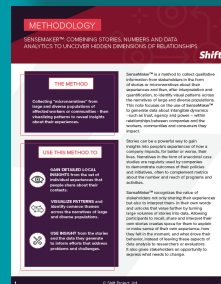
OTHER METHODOLOGIES IN THIS SERIES



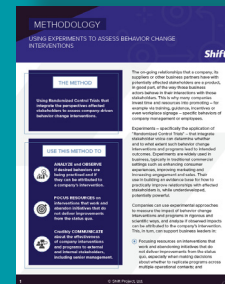
Using Worker Voice Tools to Assess Relationships



Measuring Quality of Relationships Using ICM's Understanding Company-Community Relations Toolkit



SenseMaker™: Combining Stories, Numbers and Data Analytics



Using Experiments to Assess Behavior Change Interventions

In collaboration with business leaders, independent evaluation practitioners, worker voice innovators and non-governmental and advocacy organizations – Shift, through its Valuing Respect Project, captured five methodologies to measure a company’s quality of relationships throughout their supply chains and operating contexts.

Each methodology profiles a different approach to gather, analyze and work with data to make tangible improvements in business practices and people’s lives.

