

# METHODOLOGY

SENSEMAKER™: COMBINING STORIES, NUMBERS AND DATA ANALYTICS TO UNCOVER HIDDEN DIMENSIONS OF RELATIONSHIPS

**Shift**

## THE METHOD

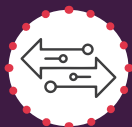
Collecting “micronarratives” from large and diverse populations of affected workers or communities - then visualizing patterns to reveal insights about their experiences.

SenseMaker™ is a method to collect qualitative information from stakeholders in the form of stories or micronarratives about their experiences and then, after interpretation and quantification, to identify visual patterns across the narratives of large and diverse populations. This note focuses on the use of SenseMaker™ to generate data about intangible dynamics - such as trust, agency and power – within relationships between companies and the workers, communities and consumers they impact.

## USE THIS METHOD TO



**GAIN DETAILED LOCAL INSIGHTS** from the set of individual experiences that people share about their contexts.



**VISUALIZE PATTERNS** and identify common themes across the narratives of large and diverse populations.



**USE INSIGHT** from the stories and the data they generate to inform efforts that address problems and challenges.

Stories can be a powerful way to gain insights into people’s experiences of how a company impacts, for better or worse, their lives. Narratives in the form of anecdotal case studies are regularly used by companies to demonstrate outcomes of their policies and initiatives, often to complement metrics about the number and reach of programs and activities.

SenseMaker™ recognizes the value of stakeholders not only sharing their experiences but also to interpret them- in their own words and unlocks that value further by turning large volumes of stories into data. Allowing participants to recall, share and interpret their own stories creates space for them to explain or make sense of their own experience, how they felt in the moment, and what drove their behavior, instead of leaving these aspects of data analysis to researchers or evaluators. It also gives stakeholders an opportunity to express what needs to change.

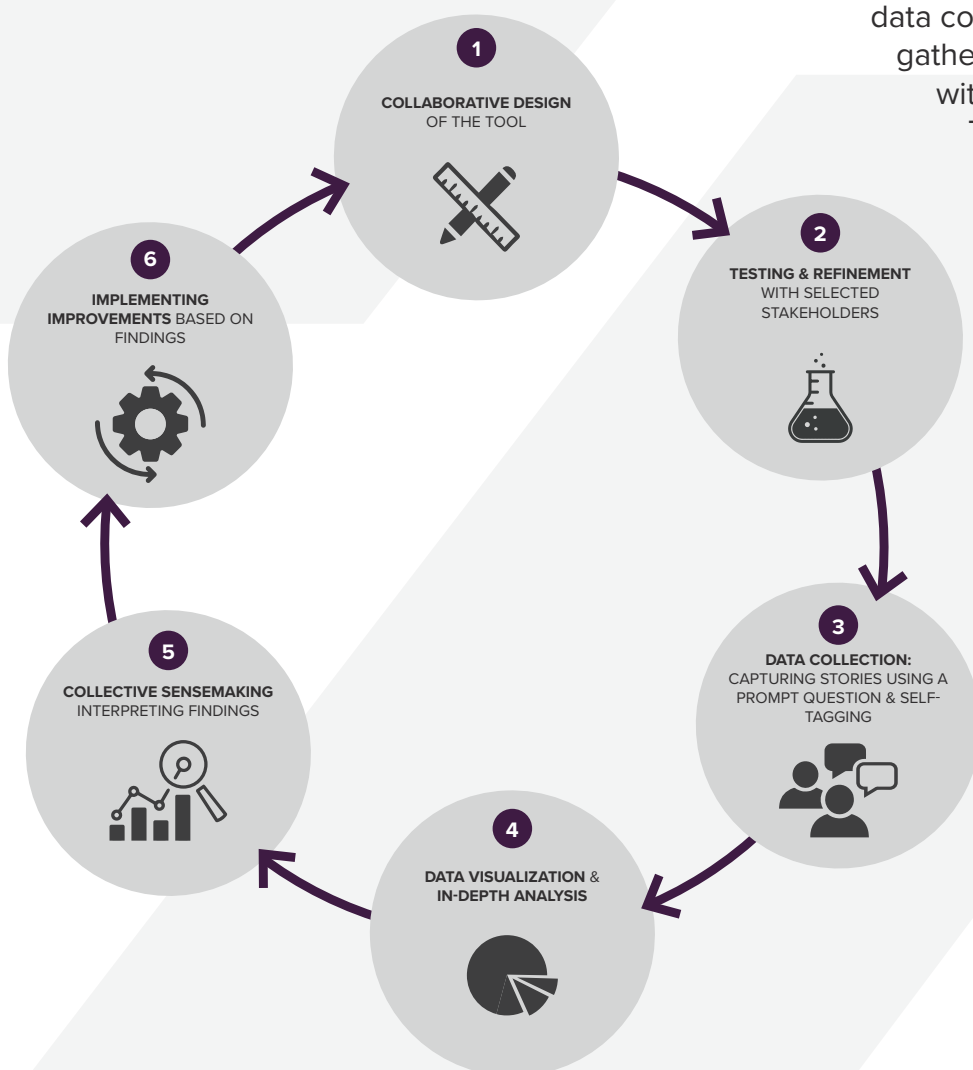


In addition to its extensive use in international development, public and non-profit sectors, some organizations, including companies, have applied SenseMaker™ in supply chain contexts to learn about experiences of their employees and workers. One such example, referenced extensively throughout this note, is its application by [Oxfam and the Ethical Trading Initiative in relation to decent work in the agricultural sector](#).

## IN PRACTICE

Stories, or “micro-narratives,” are collected from hundreds or thousands of individuals, either through face-to-face interviews or online. The focus of the assessment will shape what stories are requested, for example to understand respect, decision-making, fairness and/or impacts. Each respondent is a storyteller, who shares a story about a particular experience about the issue of interest, and then interprets and tags their own story through a series of predetermined follow-up questions. When visualized using the software, the responses show up as clusters or variations across the collected set of stories. While a cluster points to commonalities, outliers show differences and together they transform what-is-often-thought as unique subjective experiences into data, revealing patterns and trends.

### PROCESS OF APPLYING SENSEMAKER™



● **PHASE ONE: Gathering micro-narratives using prompt questions.** As a first step in data collection, many micro-narratives are gathered through in-person interviews with a trained interviewer or online. The number of narratives will depend on the purpose and scale of the program. These narratives can be a few sentences or a paragraph or two. Individuals are asked to share a meaningful experience related to a prompting question, tailored around the specific topic of interest. For example:

- In a Rikolto-led evaluation of trading relations between smallholder tea farmers, workers and buyers in Vietnam, participants were asked: “Think of a specific moment or event when you felt particularly encouraged or concerned about producing tea and selling it to the tea processing company.”<sup>1</sup>

Source: original provided by Oxfam, Oxfam/ETI report, *How Decent is Decent Work?* page 11



- In an Oxfam/ETI study assessing decent work conditions in an agricultural supply chain, female workers were asked: “Please tell me about a specific situation related to your working conditions that you experienced and thought should change. It can be a situation that ended positively or negatively... What happened? Who was involved? How did that specific situation end?”

“Collecting stories from large numbers of people reflects the recognition that any situation consists of many diverse and dynamic interactions and influences, and researchers need to hear enough of these experiences to be able to generalize and to recognize outliers. Understanding the range of experiences around the topic of inquiry and deriving robust conclusions from the data requires a large sample.”

- OXFAM EIT REPORT, *How Decent is Decent Work?*

In contrast to mainstream approaches, including surveys, that are often based on predefined and closed-ended questions, the value of stories lies in the fact that stakeholders are prompted to share an instance from their life without determining in advance what a good or relevant story should look like.

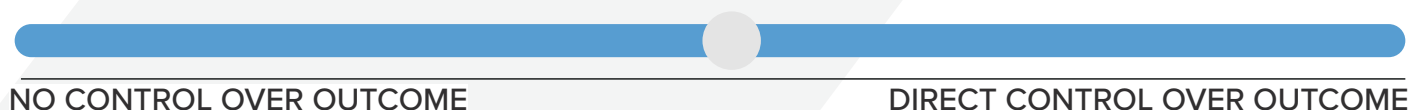
- ◉ **PHASE TWO: Collating stories and visualizing patterns.** After respondents have shared their micro-narratives, they are asked to tag their stories by using pre-defined follow-up questions, called “signifiers” that allow further interpretation of the story. SenseMaker™ provides visual cues to aid respondents in this phase, in the form of questions known as sliders, triads and stones, as well as multiple-choice questions. These visuals are also used to organize and show the set of responses (see Phase 3).

Signifiers can be used to code, or self-tag, stories on the dynamics in relationships between companies and affected groups: between workers and supervisors, or between members of a community and site (mine or farm) and management. For example, in Oxfam’s application of SenseMaker™ to evaluate female workers’ experiences of decent work in an agricultural supply chain in North Africa, the following signifiers and related questions were used.

**Using Sliders to unpack women’s agency in their relationship with supervisors:** Female workers were asked to rate their experience on a continuum between two extreme statements: having no control over an outcome versus having direct control over the outcome. The evaluators were then able analyze stories focused on different responses – those where there was complete control and those where there was no control in workers’ relationships with their supervisors.

The first diagram below shows a slider asking women workers to indicate the level of control they had in their story.

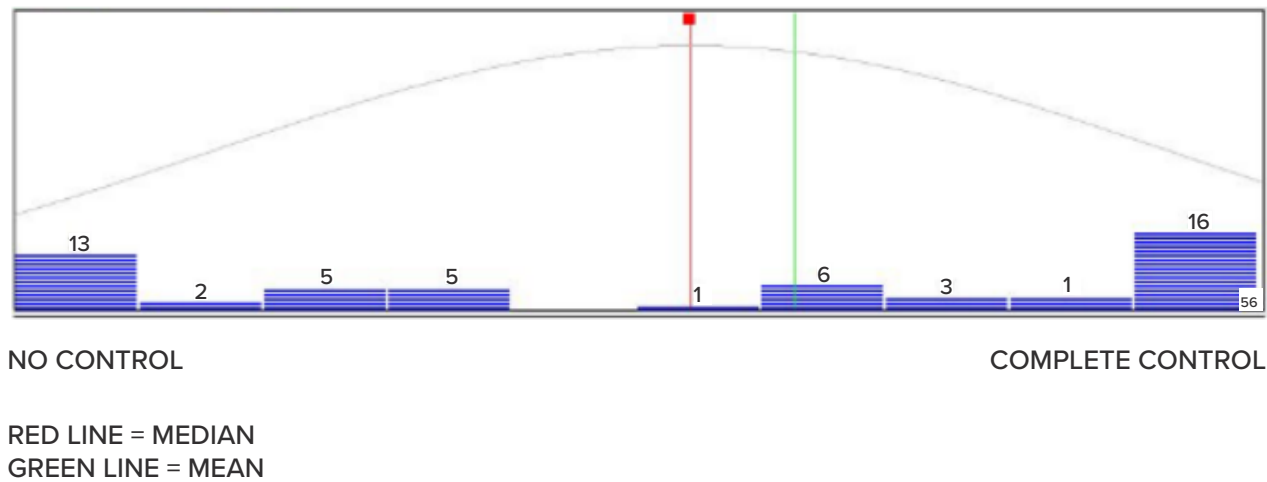
IN THIS SITUATION I DESCRIBED, WOMEN WORKERS HAD...



Source: original provided by Oxfam, Oxfam/ETI report, *How Decent is Decent Work?* page 13

The second diagram shows responses to the same question during the data analysis. Each ridge (?) represents a story, the mean and median showing the distribution of stories along the spectrum.

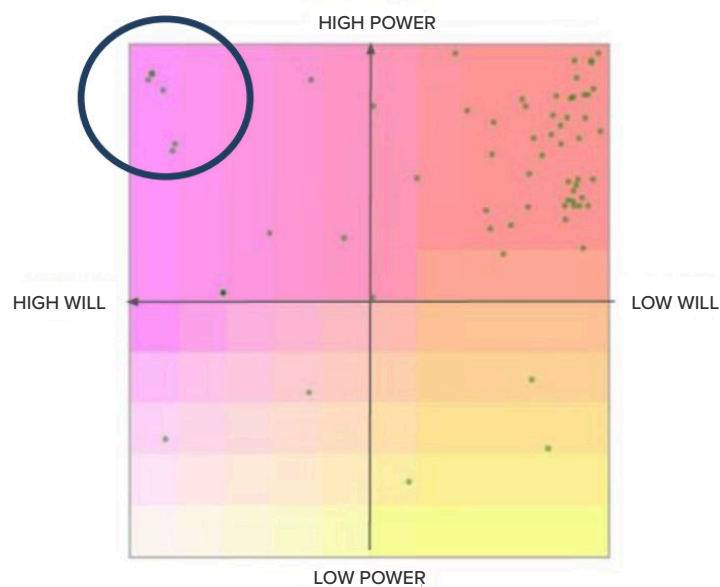
Women workers’ responses to a question about their control over the outcomes of events in their stories, for stories about the theme “Relationship with a Boss or Supervisor” (n=56).



Source: original provided by Oxfam, Oxfam/ETI report, *How Decent is Decent Work?* page 21

Using Stones to show women workers’ perceptions of the willingness of supervisors and bosses to achieve change. Stones enable a participant to select among more than two choices in relation to four different extremes, by placing a marker at a point between given options. In the figure below, every dot represents a story shared and tagged by a participant.

Women workers’ perceptions of supervisors’ power and will to achieve change in their story (n=74).



Source: original provided by Oxfam, Oxfam/ETI report, *How Decent is Decent Work?* page 23



This systematic form of data collection and visualization means that no story is lost. Similar stories when they form a cluster, even if small, indicates if an instance is an outlier or if other respondents have similar experiences. For example, female workers on farms were asked to share a story about their working conditions. Looking at a small cluster of stories that were outliers revealed that pregnant workers experienced particular risks to their well-being from work demands and harassment by supervisors and bosses.

In the same assessment, another closer look at stories that related to verbal abuse found abusive behavior towards female workers by both male and female supervisors. This pointed to a power dynamic combined with a gender aspect of the relationship suggesting that additional work needs to be done to address workplace hierarchy.

- **PHASE THREE: Sense-making conversations and identifying improvements.** Individual story sharing and tagging (Phase 1) and pattern detection (Phase 2) are followed by collaborative sense-making. These conversations bring together groups of diverse stakeholders, including where safe, interviewees. Collective Sense-making offers an opportunity for in-depth interpretation of findings from different perspectives. Participants are asked to look at certain patterns and read selected story sets, and to provide additional insights based on their own knowledge and experience. In these dialogues, participants can discuss areas for further improvements and suggest changes.

## CONDITIONS FOR USING SENSEMAKER™ EFFECTIVELY: REFLECTIONS FROM OXFAM

Companies keen to use SenseMaker™ need to consider if they can create the conditions to use it effectively: “Like any research method, however, SenseMaker™ is no magic bullet; it works best under certain conditions.” - Oxfam report, *How Decent is Decent Work?*

- 1 Make sure it is possible to capture stories at scale in order to give people greater voice. Using SenseMaker™ well requires strong commitment and skill to ensure that previously unheard voices remain central in the inquiry. Extra time and planning may be needed if respondents have low literacy levels. The location of data collection may also influence respondents: while capturing stories in a workplace is an efficient way of reaching workers, it may affect how comfortable they feel to participate and share information openly – particularly if potential participants fear it could negatively affect their relationship with their employer and their livelihood.
- 2 Collectively engage in framework design. Investing time in designing any research tool is critical if it is to meet the data needs of intended users. The end user of SenseMaker™-generated data and insights must have some involvement in setting out the framework and questions, even if they will not be involved in collecting or interpreting the data.
- 3 Guarantee sufficient time for high-quality training. Due to the use of personal stories and the unusual way in which triads, sliders and stones questions work, it is vital that those who will collect the stories are well trained to limit asking leading questions and deviating from the predetermined set of follow-up questions. Likewise, researchers will need to acquire skills to elicit a relevant and concise story in response to the prompt question.
- 4 Be prepared to explore intangibles and ambiguity in SenseMaker™-generated data. The approach can take some people and organizations outside their ‘comfort zone’ by introducing ambiguity into design and interpretation, reducing the certainty of simple findings that the data can generate. Where an organization needs to ask direct questions that have a ‘yes/no’ or ‘either/or’ response option, a survey will be more efficient than SenseMaker™.



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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 of this series, visit [valuingrespect.org](https://valuingrespect.org).

Shift thanks Franziska Mager and Irene Guijt at Oxfam GB, and David Snowden at Cognitive Edge for their input.

## 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](https://shiftproject.org)

 [@shiftproject](https://twitter.com/shiftproject)

## 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](https://valuingrespect.org)

### Endnotes

1 <https://www.rikolto.org/en/news/using-sensemaker-measure-learn-and-communicate-about-smallholder-farmer-inclusion>





## FURTHER INFORMATION

- Oxfam's assessment of female workers experience of decent work in an agricultural supply chain: [How Decent is Decent Work?](#)
- Oxfam's [reflections on application of SenseMaker](#)
- Rikolto's [application of SenseMaker](#) in tea and banana sectors
- SenseMaker [Use Cases](#)

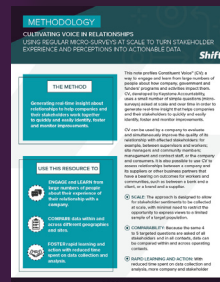
## OTHER METHODOLOGIES IN THIS SERIES



Using Worker Voice Tools to Assess Relationships



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



Cultivating Voice in Relationships



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 gathering, analyzing and working with data to make tangible improvements in business practices and people's lives.

