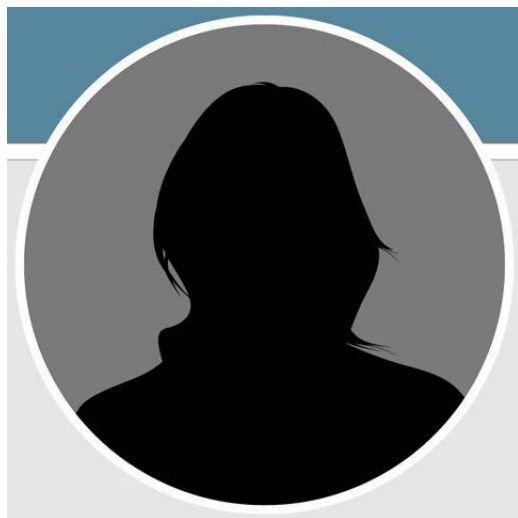![IDS Institute of Development Studies]

USER PERSONAS: Participatory Systemic Engagement: Data Users and User Needs

Alan Stanley, Peter Mason and Alice Webb. Knowledge, Impact and Policy team. November 2018.

What are user personas?

Personas are short profiles of fictional but realistic individuals that we use to describe particular groups of users and stakeholders. They are useful for thinking about the design of interventions and / or programmes in a particular process from the user perspective – particularly (but not limited to) in situations when access to "real" users is difficult due to time, resources or geography.

Each persona represents an archetype or user group. They are typically given a name, age, gender and short backstory describing their daily lives, aspirations and motivations. This is often combined with information about particular skills, knowledge and behaviours that would be representative of that group and might differ from other user groups. This information is traditionally aggregated from pre-existing survey data or other available metrics.

We commonly use personas to explore how a particular intervention will meet the needs of users, to develop scenarios and use cases for user testing and to identify learning and engagement strategies.

How does IDS use personas?

IDS first used personas as an approach in the development of digital applications and web platforms. Often in these projects, the intended audience is large and geographically dispersed meaning that, with limited budgets and timelines, real-time engagement with a significant proportion of users can be difficult.

The resulting personas provided accessible and relatable insights into the needs and behaviours of target user groups that the project team used in the design process to construct user journeys and calls to action that married those needs and behaviours to the project objectives.

We found this to be a useful approach and noted, in particular, how project partners and stakeholders engaged positively with the process. As a result we began to adapt and use the approach in wider project contexts and to use personas as a part of our "toolbox" for project design alongside other approaches such as stakeholder mapping and social network analysis.

This document was developed in collaboration with The Omidyar Group 2018

THE OMIDYAR GROUP

As part of the Omidyar Group project examining "How Active Data Can Be Shaped and Provide Strong Evidence Based Programming" we have been able to test this expanded personas approach as a tool to explore differences in the use of participatory and systemic data among a range of stakeholders. This formed part of an exploratory piece of work to look into options for developing tools and processes to improve the usability of participatory and systemic data in programme design and evaluation.

The idea was to identify and develop personas as a way to uncover tacit knowledge and assumptions about data users, across a range of TOG programmes, that might then allow the project team of programme managers, monitoring and evaluation specialists and researchers to test and explore the accuracy of those assumptions in a more iterative and adaptive way over time. In practical terms, what this translated into was the use of personas as a workshop tool for promoting deeper discussion and thinking on stakeholder needs, motivations and behaviours among the project team.

Persona design

The outcome of the personas development process were eight personas representing distinct roles in the value chain of participatory and systemic data production, analysis and (potential) application. These were:

- MEL Officer
- Programme manager
- Senior Executive
- Local NGO practitioner

- Research participant
- Board member
- Researcher
- Campaigner

Each persona presents an edited profile developed from the workshop discussion covering skillsets, motivations, learning goals and challenges for each role. They also contain comparative information on the following:

THE OMIDYAR GROUP

Data use type

We developed a set of archetypes or common "data use types" that would allow us to place users in relation to each other and compare skillsets, motivations, learning goals and challenges. These were:

Producer

Architect   Aggregator

Interpreter
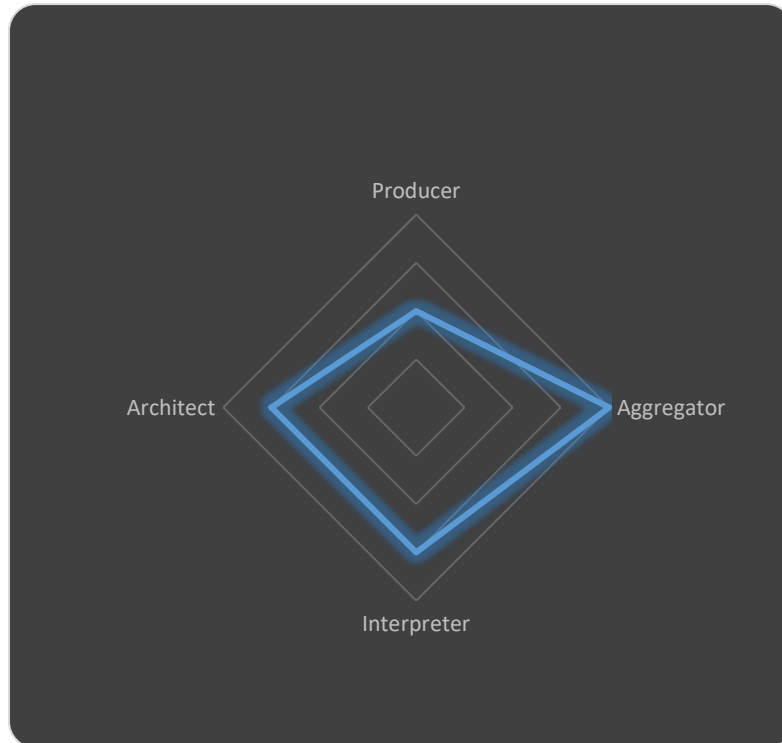
Architect: The designer of processes and tools that use data – for example the architect of the monitoring and evaluation strategy for project or programme.

Producer: The gatherer or recorder of "raw" data. In qualitative data terms this might be a workshop facilitator or system mapper.

Aggregator: The collator and cruncher of datasets with the purpose of making them more useful. This might, for example, involve manipulating a dataset to make it directly comparable to a different data source.

Interpreter: The end-user of the data who will analyse the information available and, ultimately, use it to inform their decision-making.

The relative balance of these data use types within each persona is represented as a spider diagram to allow for easy visual comparison.

![IDS Institute of Development Studies logo]

Data challenges

Similarly the project team identified a set of common challenges in using data that we felt were likely to be widely shared, but of different relative importance, across the personas. Again visually representing these in the personas enables us to look for commonalities and differences between data users that share similar challenges.
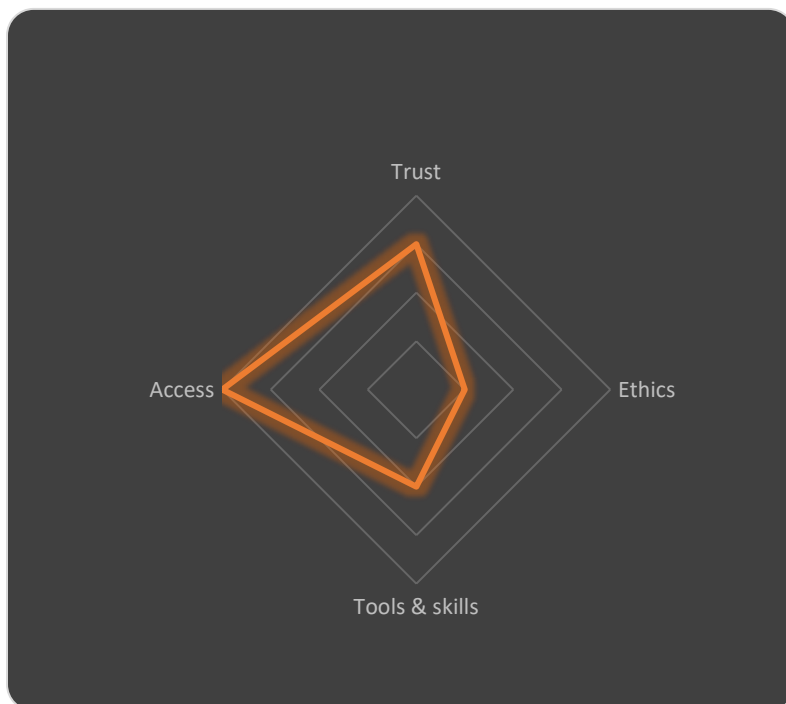
Access: Access to usable data was often seen as challenging. Access in this case was taken to mean not just the availability of data to users but also the extent to which it was accessible in a useful format, clearly licensed, interoperable and well structured.

Trust: Data users often struggle to establish the extent to which they can rely on the quality of the data they have access to. Issues commonly cited included provenance, consistency, coverage, applicability to context and relevance.

Tools & skills: The ability to develop and apply appropriate skills to use data effectively as well as access to appropriate methods, data management tools and software were also commonly cited challenges to effective data use. This was often seen as a function of a rapidly emerging opportunity to make use of "new" types of data (and new tools for managing and processing data) that was hard to keep pace with.

Ethics: Linked to the rapid emergence of new data types and tools we identified a set of challenges relating to a sense that the ethical implications of those innovations had yet to be fully worked through and understood. Issues around informed consent, safeguarding and privacy, for example, were commonly cited.

The full one-page summary of each persona is provided below. For more information about this project and the work of the Knowledge Impact and Policy team at IDS please visit the IDS website.

THE OMIDYAR GROUP

FATEMA BEGUM | Monitoring, evaluation and learning officer
"I help to shape the information that drives decision-making"

AGE	38
EDUCATION	MA Economics
LOCATION	Nairobi, Kenya

BIO
Fatema works in a UN agency's regional office. She is increasingly using less quantitative performance data and statistics in favour of more diverse, often qualitative, data sources including participatory and systems data.

SKILLS

- Evaluation methods
- Quantitative data analysis (Sensemaker)
- Data management and query tools
- Data visualisation

LEARNING GOALS

Fatema would like to improve her skills and knowledge on:

- Adaptive and agile programme delivery
- Comparative analysis using diverse data sources
- Current "best practice" tools and methods
- Ethical data collection and use

MOTIVATIONS

- **Developing** progress and performance indicators for partner projects.
- **Compiling** and marking-up data of different types to make it useful for learning.
- **Producing** quarterly progress reports and impact stories for senior managers.
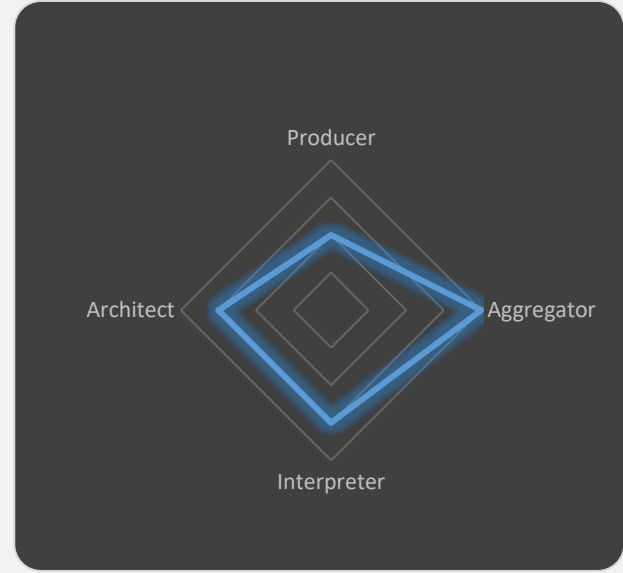
DATA CHALLENGES

Fatema is primarily a data **aggregator** although she is also heavily involved in the design or M&E processes **(architect)**. She is an **interpreter** in the analysis of data to answer evaluation questions, and a **producer** of some data, but primarily relies on partners and other data providers for this.

DAILY TASKS

- **Providing** high-quality measures of success and positive stories to portray quality of work.
- **Improving** program design through project learnings.

DATA USER TYPE

Fatema's main challenge in using participatory and systems data is finding space for herself to develop appropriate **tools and skills**. However, **access** to appropriate data, **trust** in the quality of data, and the **ethics** of using new forms of available data are also significant challenges for her.

PATRICK McGINTY | Programme manager

"I need up to date information on performance, on effectiveness and on impact. Lack of proximity to the delivery of programmes (both in time and space!) inhibits this."

AGE	27
EDUCATION	MA Global Studies
LOCATION	London

BIO

Patrick is a Programme Manager for an International NGO with responsibility for a high-profile portfolio of governance focused programmes around the world.

His workload is considerable so he needs information that is immediate, trustworthy and accessible.

SKILLS

- Leadership
- Fundraising
- Time management
- Communications

LEARNING GOALS

Patrick would like to develop his knowledge of appropriate tools that will enable him to:

- Use data to present compelling success stories and case studies to his funders.

- Monitor and analyse project data in real-time.

MOTIVATIONS

- **Efficiency, economy and effectiveness.** Patrick's life seems to revolve around the "3 E's". As a result, he's always looking for ways to show value for money and demonstrate impact.

- **Thinking on his feet.** He thrives in a dynamic culture of rapid decision-making and ideas generation.

DATA CHALLENGES
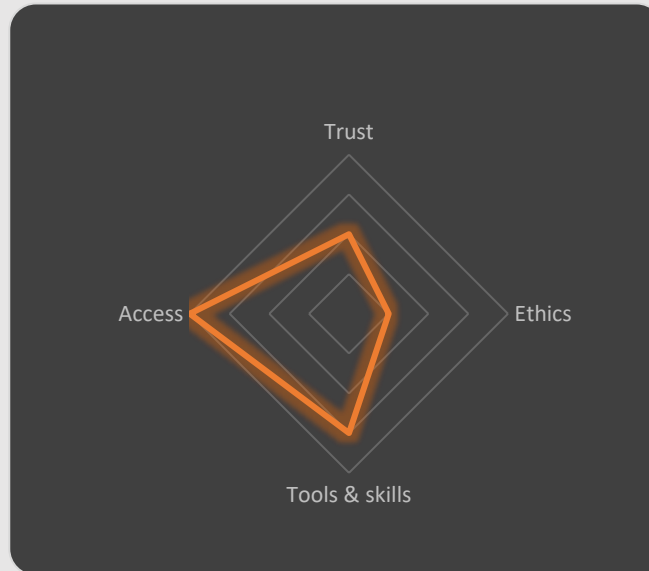
The primary challenge Patrick faces is being able to **access** the right data when he needs it. He could also use some better **tools & skills** to help his analysis. **Trust** in the quality of the data is a moderate concern but he doesn't really see **ethics** as a particular concern as long as the data does what he needs it to.

DAILY TASKS

- **Balancing** conflicting demands on resources and time between different programs.
- **Building** relationships with key individuals both internally within his organization and with existing and potential funders.
- **Developing** proposals and responding to calls for innovative new governance programs.

DATA USER TYPE
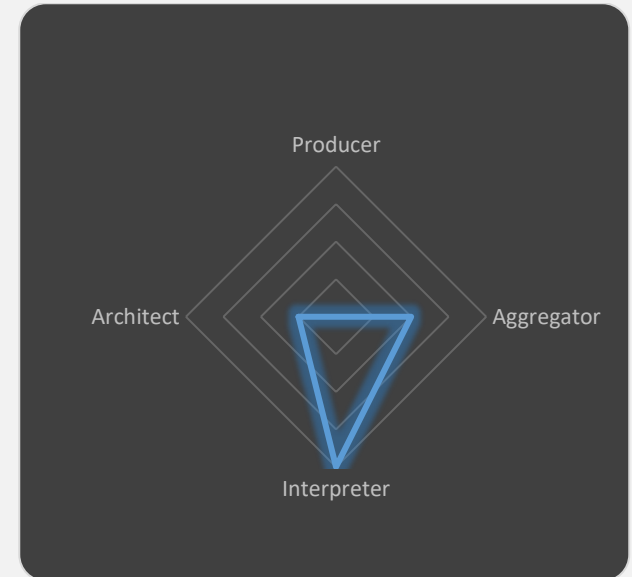
Patrick is primarily a data **interpreter** although he also occasionally involved in setting requirements for M&E processes (**architect)** and as an **aggregator**. He relies entirely on partners and other data **producers** to supply the information he needs.

ALISON OTIENO | Executive director

"Promoting innovation in an organisation like mine often feels risky and relies on instinct more than evidence. That needs to change."

AGE	54
EDUCATION	MBA
LOCATION	Johannesburg

BIO

Alison is the Executive Director of a medium sized charitable trust working on gender and education. She's risen through the ranks and misses being more involved at the grassroots level.

She wants to promote a culture of learning and experimentation in their grant-making but she's also a pragmatist and recognises that at the end of the day her board need to see results.

SKILLS

- Visioning
- Horizon scanning
- Organisational leadership
- Networking

LEARNING GOALS

Alison is interested to explore how new/non-conventional data sources can create room for innovation.

MOTIVATIONS

- **Operating at the cutting edge** – funding innovative social enterprise which delivers real change.

- **Showing insightful leadership** to her staff and providing sound operational and management support to her Board.

DATA CHALLENGES
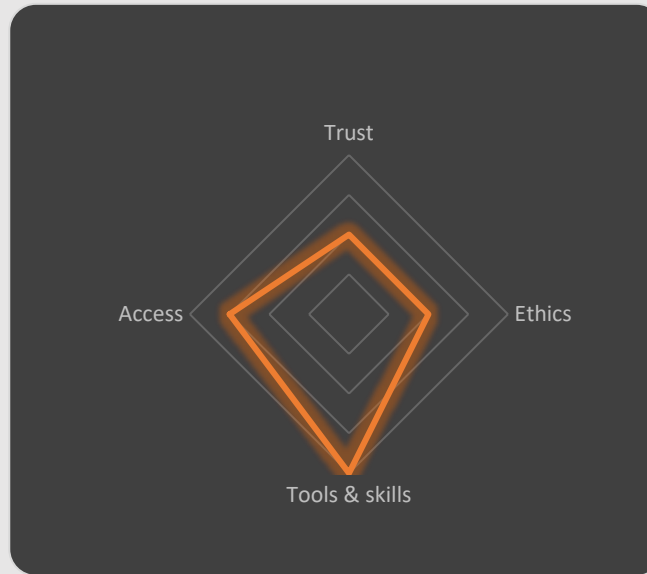
For Alison the major challenge is ensuring that she and her staff have the right **tools and skills** and **access** to data in the right format in order to be agile and innovative. She is very aware of the issues around **trust** and **ethics** in data production and use but isn't overly concerned about her organization's ability to address these.

DAILY TASKS

- **Developing** and delivering the overall strategic vision and priorities for the organization.
- **Horizon scanning** to keep on top of new developments and inform future direction.
- **Communicating** internally to manage the overall governance of the Trust which requires strong working relationships with board members.

DATA USER TYPE
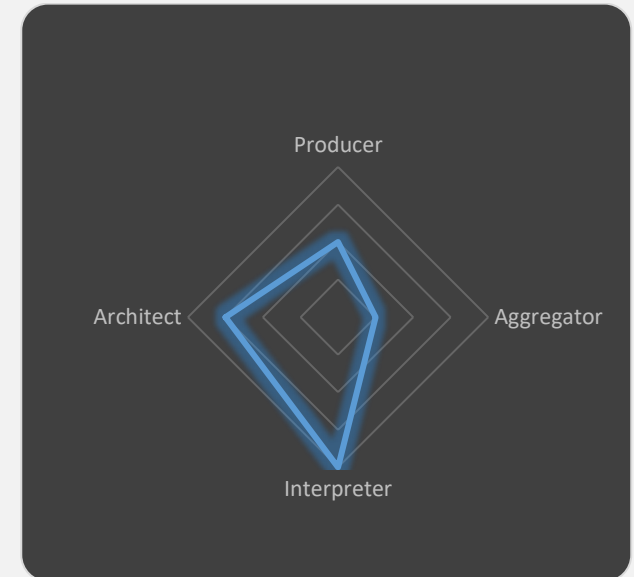
Alison is primarily a data **interpreter** but is also often involved in setting requirements for M&E processes (**architect)** and as a **producer** of some high level performance data and metrics for board reports.

MISHAL NYONDO | Local NGO worker

"I don't know why I have to spend so much time compiling data and surveys. I could tell you what works here in Malawi if you just asked."

AGE	33
EDUCATION	MA Engineering
LOCATION	Lilongwe

BIO

Mishal works for a local NGO in Malawi which delivers public health protection and prevention services for rural communities – mostly funded by international donors.

She is responsible for nine districts in the Central region of Malawi so covers a lot of ground and feels like she lives out of a suitcase.

SKILLS

- Multitasking
- Communications
- Qualitative evaluation methods

LEARNING GOALS

Mishal would like to develop skills that help her to take advantage of better digital connectivity, tools and technologies when it comes to compiling, backup, storage and aggregation of the information being produced by her teams.

She also wants to learn about participatory methods and approaches that would help the communities she works with benefit more from the information she collects.

MOTIVATIONS

- **Being on the ground** in the communities she serves. Mishal feels her deep understanding of their needs helps make a difference to people's lives.

- **Learning new approaches and tools**. She hopes that soon the skills and experience she has gained will help her get a better paid job in an international NGO.

DATA CHALLENGES
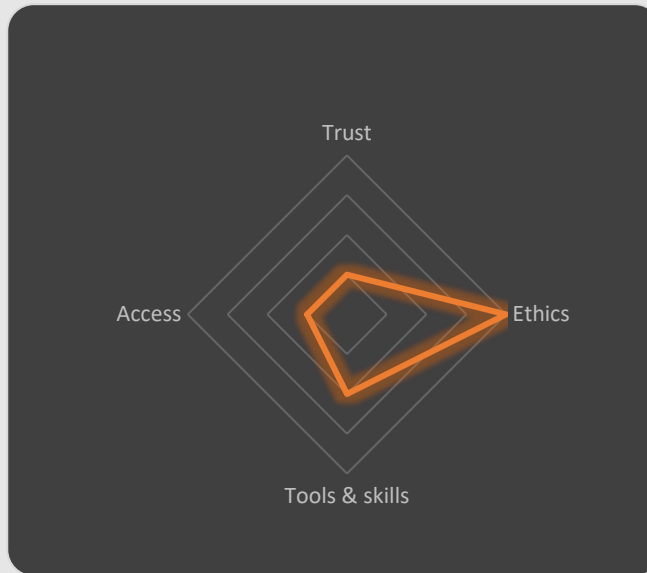
Mishal is closely engaged with the data production so **trust** and **access** issues don't really concern her. Lack of standardization in the application of **tools** and limited time to develop new **skills** are more significant challenges. Her primary concern relates to the **ethics** of the, often extractive, data collection from the communities she works with and the challenges she faces in communicating to them in a meaningful way how this data will be used.

DAILY TASKS

- **Coordinating** needs assessments for new projects using a variety of methods, often directed by the project funder or international partner NGO.
- **Managing** offices in each district including coordinating relevant training for local staff.
- **Conducting** evaluation surveys and compiling progress reports.

DATA USER TYPE
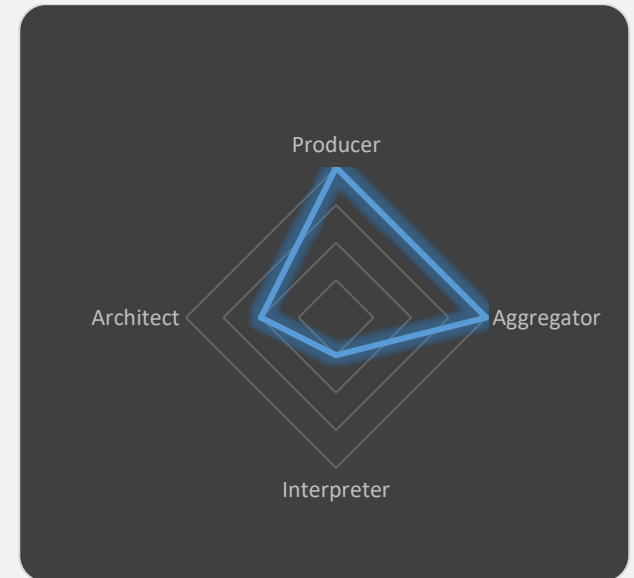
Mishal has some practical input into the design of surveys (**architect**) but very little say in how the data is used (**interpreter**).

Her primary role is in managing the production of data (**producer**) and compiling the results (**aggregator**) into a shareable format to be passed on to program managers and funders.

SAHANA TAMANG | Research participant

"We need change and we need action. Can someone do something?"

AGE	27
EDUCATION	To age 8
LOCATION	Makwanpur, Nepal

BIO

Sahana is a local village activist who has led her village's local savings group for 3 years since the previous leader had to give up because of poor health.

She is a married mother of four and agricultural bonded labourer. Her husband is currently in Qatar working as a labourer building stadiums for the forthcoming World Cup.

SKILLS

- Facilitation
- Community organisation

LEARNING GOALS

Sahana would love to be able to apply the learning that comes from the research projects she participates in to help herself and her local community.

Primarily though she thinks of learning in terms of developing skills that will improve the financial security of her and her family.

MOTIVATIONS

- **To improve family opportunities** and protect her children from having to enter bonded labour.

- **Solidarity with her community** and pride in representing them to outsiders.

- **Getting paid for telling people what she thinks!** The additional income from participation in research programs is very useful.

DATA CHALLENGES
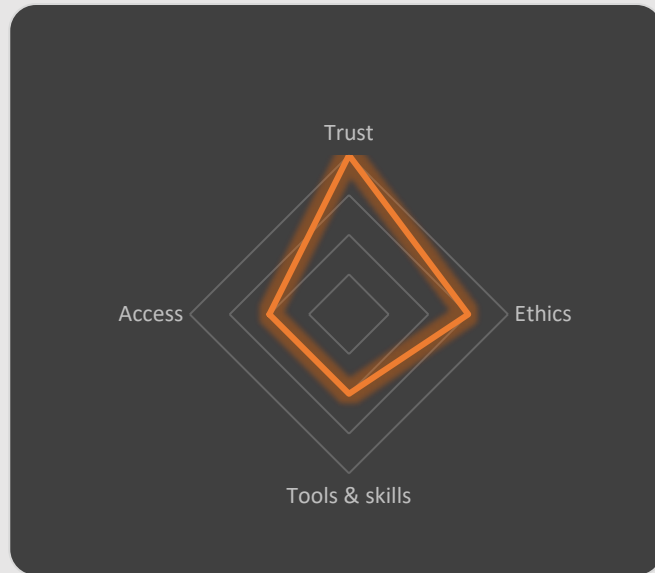
Trust and **ethics** are significant challenges for Sahana. She is unsure what happens to the information she provides but notes with frustration that little seems to change as a result of the research she participated in. **Access** to the data relating to her village could be improved as could the **skills and tools** available to her to analyze it.

DAILY TASKS

- Agricultural bonded labour.

- Domestic tasks including childcare and care for her husband's elderly parents.

- Co-ordination of the local savings group including management of their weekly meetings.

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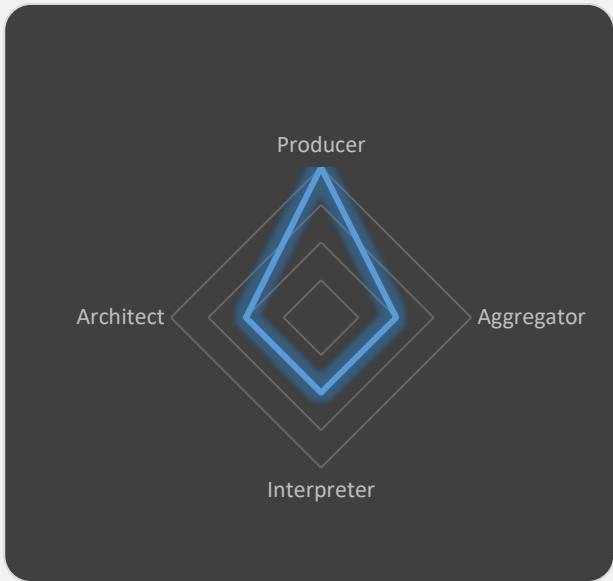
Some research projects that come to Sahana's village use research methods that involve her in the design, collection and analysis of the data they collect. Primarily though she sees her role as a data **producer**.

OLIVER NGUYEN | Board member

"I worry that I'm too influential. Make decisions based on your learning, not my opinion."

AGE	61
EDUCATION	MBA
LOCATION	Sydney

BIO

Oliver made money in the technology sector before stepping back from that and taking an interest in philanthropy.

He is a founding board member of a foundation trust and has a very close relationship with other board members – some of whom he has known for years.

SKILLS

- Leadership
- Systems/complexity theory

LEARNING GOALS

Oliver's focus is on promoting a learning culture within the organisation and ensuring learning is in the service of impact.

He want to steer the foundation through a transition from poor (although necessary at the time) practices towards being enabled to apply systems complexity approaches and promote good emergent, adaptive, strategic thinking.

MOTIVATIONS

- **Always looking for the best return on investment**.

- **Empowering** the leadership of the foundation and its initiatives to be the best they can be.

- **Being a good "governor"** – strategic, fiduciary, innovative and generative.

DATA CHALLENGES
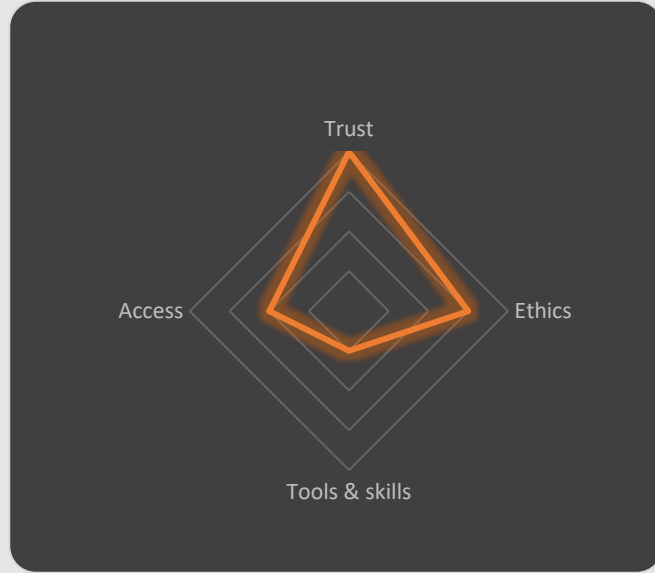
Reliable data and accountability (both upwards and downwards) are at the heart of Oliver's vision for achieving positive social change through good understanding of complexity and strong adaptive, strategic thinking. This makes issues of **trust** and **ethics** significant challenges for Oliver. Timely **access** to the right data is also essential.

DAILY TASKS

- **Budget oversight** working with the CEO to manage the overall spending of the foundation and its subsidiaries.

- **Leadership** on issues focused around embedding systemic approaches and sharing learning.

- **Accountability** for the foundation's investments, co-owning risk across the foundation's portfolio.

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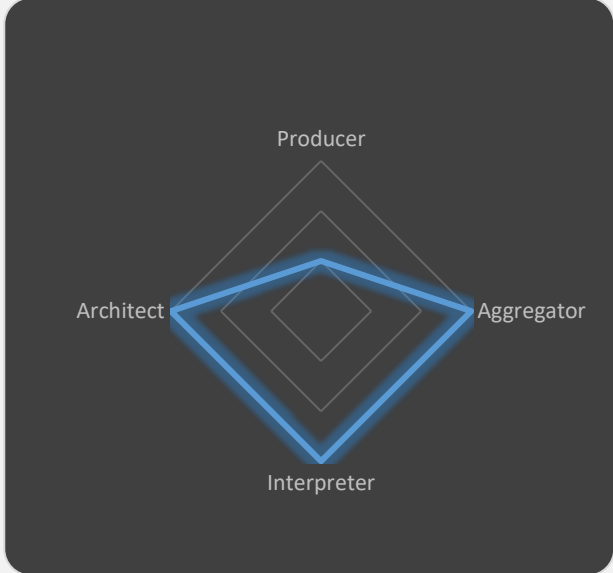
Oliver looks to apply systems and complexity theory to the strategic management of the foundation. When it comes to data use he is therefore equal parts **architect**, **aggregator** and **interpreter**.

HANNA WEBER | Research Fellow

"We're not making the most of innovations to amplify the voice of communities in programme design."

AGE	61
EDUCATION	MBA
LOCATION	Sydney

BIO

Hanna has followed an academic career path that has taken her all over the world.

She is now a Research Fellow at ISS in The Hague. Her work focuses on participatory learning for social change with a strong emphasis on systems thinking and complexity.

SKILLS

- Participatory methods,
- Systemic action research
- Community development
- Complexity and systems thinking

LEARNING GOALS

Developing a better conceptual framing of the role of participatory methods in peacebuilding.

Staying up to date with the tools and methods available to collect, analyse and share data from participatory research.

MOTIVATIONS

- **Building academic reputation** and profile - particularly with potential research funders.

- **Supporting real community-led social change.**

- Being and advocate for better, more inclusive and **demand-driven research methods**.

DATA CHALLENGES
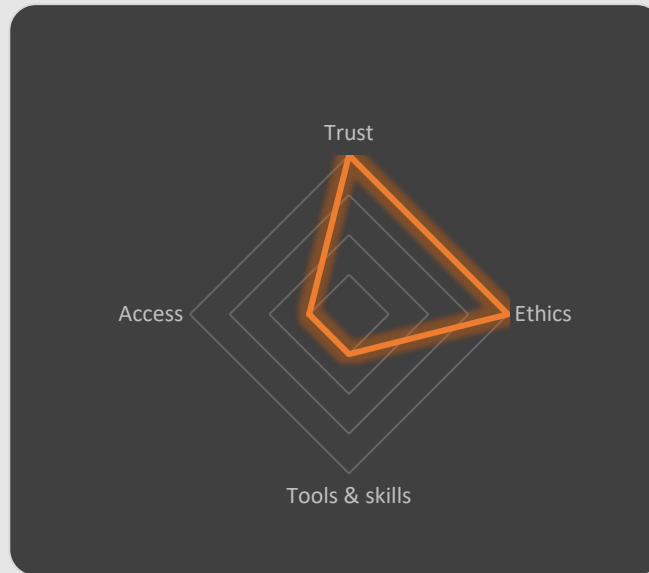
As a researcher steeped in participatory methods Hanna is concerned about how concepts of ownership and consent transfer as participatory research data travels through layers of interpretation, analysis and packaging. She sees this as a challenge of research data **ethics** but also one intrinsically linked to the **trust** and veracity of the research results.

DAILY TASKS

- **Leading** an action research program looking at community-led sanitation in Bihar – part of a large global WASH initiative.

- **Advising** a large bilateral donor on how to build complexity based monitoring, evaluation and learning processes into the design of their peacebuilding program.

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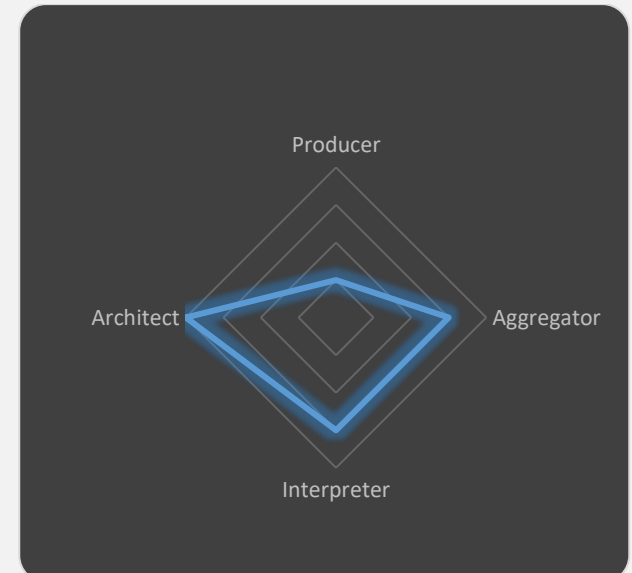
Hanna advises others on the design of complex MEL frameworks so is very much an **architect** of data systems. However she is also an active user of the (frustratingly poor) suite of digital tools available to **aggregate**, **interpret** and share data from her participatory research.

GILLIAN SMITH | Campaigner

"Change isn't about data and information – it's about connecting people."

AGE	28
EDUCATION	MSc Politics and Communications
LOCATION	London

BIO

After a few years working in the NHS, and a spell doing VSO, Gillian decided to focus full time on her campaigning work. She studied politics and communications at LSE before landing a junior campaigner job at a large faith-based international NGO based in London.

SKILLS

- Storytelling
- Consensus building
- Political analysis

LEARNING GOALS

Gillian is searching for ways to interpret and present data that will help her to extract and communicate compelling narratives about the work of her NGO. In particular she wants to address the negative way in which refugees are portrayed in the media and build a narrative that stresses their real need and the positive contribution they can make.

MOTIVATIONS

- **Giving a voice to marginalized groups** and taking their stories to policy makers and the public.

- **Social media likes and retweets** give Gillian a real-time sense of achievement. She know that these alone aren't a measure of success but it's addictive and gratifying!

DATA CHALLENGES

Access is the main challenge for Gillian. The research and evaluation teams gate-keep access to "their" data and are often reticent about it being used in campaigns - citing ethical issues and problems of attribution. Gillian doesn't worry about ethics - for her the ends justify the means.

DAILY TASKS

- **Finding and crafting** engaging human stories to illustrate and support campaign objectives and fundraising targets.

- Working with the parliamentary team **building support** for a private member's bill to change immigration rules for child refugees.

- **Co-ordinating** a network of NGOs, trade unions, church groups and politicians working on migration and the refugee crisis.

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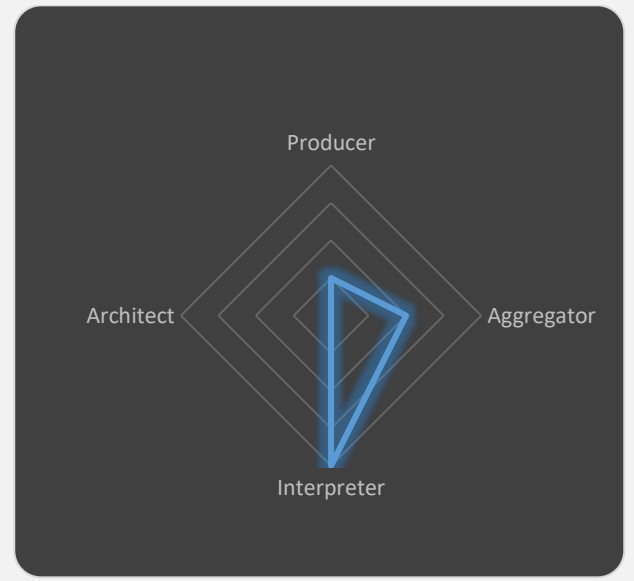
Gillian is very much an end-user of data (**interpreter** and to a lesser extent **aggregator**). She has little say in its design or production and the way she uses and interprets data is rarely considered as a use case.