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

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.
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:
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:

**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.
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.
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.

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.”

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**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.

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**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.

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**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.

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**SKILLS**

- Leadership
- Fundraising
- Time management
- Communications

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**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.

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**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.

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**AGE** | 27
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**EDUCATION** | MA Global Studies
**LOCATION** | London
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.

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.

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.

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.
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 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.

**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.

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.
**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.

**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.

**DATA USER TYPE**

- Producer
- Aggregator
- Interpreter
- Architect
- Access
- Tools & skills
- Ethics
- Trust

**SAHANA TAMANG | Research participant**

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

**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.

**AGE** | 27
---|---
**EDUCATION** | To age 8
**LOCATION** | Makwanpur, Nepal
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.

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.

DATA USER TYPE

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**.

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.
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.

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.

DATA USER TYPE
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.
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.

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.

DATA USER TYPE

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.

GILLIAN SMITH | Campaigner
“Change isn’t about data and information – it’s about connecting people.”

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<thead>
<tr>
<th>AGE</th>
<th>28</th>
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<tbody>
<tr>
<td>EDUCATION</td>
<td>MSc Politics and Communications</td>
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<tr>
<td>LOCATION</td>
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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 knows that these alone aren’t a measure of success but it’s addictive and gratifying!