GUIDELINES FOR DEVELOPING

AN INTEGRATED USER ENGAGEMENT STRATEGY FOR NATIONAL STATISTICAL SYSTEMS

FEEDBACK

USERS SATISFACTION

HIGH

MEDIUM

TRUST LEVEL

LOW

USERS NEEDS

Note

The designations employed and the presentation of the material in this publication do not imply the expression of any opinion whatsoever on the part of the Secretariat of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Table of contents

Preface

As an important public good in democratic societies, official statistics have to meet the needs of users. To meet the test of practical utility, statistics must be relevant, of suitable quality and in a form that facilitates easy and correct use. The key to achieving this is maintaining an understanding of user needs. Producers of official statistics must regularly consult users using appropriate channels and means of communication because needs change and different users respond to different engagement methods.

These guidelines offer a practical mix of good and common practices, instructions, tips and background needed to conduct a dialogue with users and identify what they need and when and through what medium they need it. They provide guidance for developing robust and strategic user engagement programmes and propose sample tactics and activities for a well thought-out user engagement workplan based on the needs of typical key user groups.

It is hoped that this publication will prove a valuable resource for national statistical systems and the organizations within them, including national statistics offices, that wish to develop and strengthen their engagement with users of official statistics.

Acknowledgements

Executive Summary

In the context of these guidelines for national statistics offices and national statistical systems, user engagement is seen as the process of conducting a dialogue with users of official statistics in order to understand their needs and improve the products, services and operation of a statistical organization accordingly.
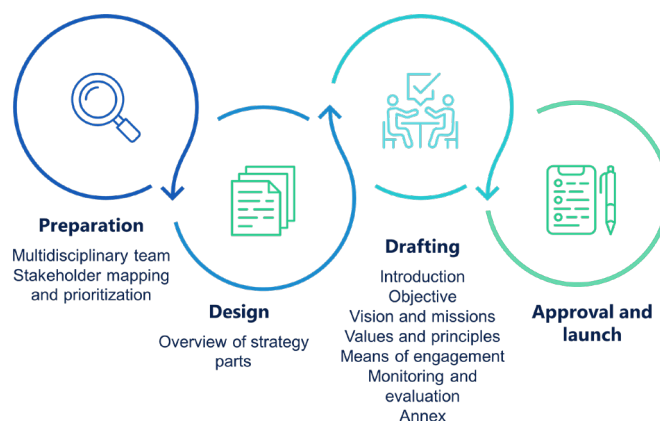
User engagement is central to the impact a national statistical system can have, if not to its very existence. When successful, it can:

- generate feedback from users that helps statistical organizations to prioritize work based on the statistics the public needs

- help ensure that statistics are produced at the right time, in a useful format and are pitched at the right technical level

- create opportunities to test experimental statistics and discuss existing statistics to uncover problems such as discrepancies in data

- enhance statistical literacy

- help build data integrity, trust and a collective sense of ownership of the generation and dissemination of statistics.

These guidelines are intended to assist national statistical systems in developing robust and strategic user engagement programmes. They consist of a practical mix of instructions, tips and background needed to conduct a dialogue with users and identify what they need and when and through what media they need it.

In the context of statistics agencies, a user engagement strategy is an institutional document that outlines the methods to be employed to: encourage interaction between data users and producers; establish mechanisms for feedback on statistical products, services and experiences; and guarantee that feedback is taken into consideration. The overarching purpose of a user engagement strategy is to help develop and strengthen links between data producers and users to promote open and constructive dialogue and interactions. Engagement promotes trust and maximizes public value.

The development of a user engagement strategy for establishing and maintaining quality dialogue and interactions with users can be divided into four phases: preparation, design, drafting, and approval and launch.

Preparation
Multidisciplinary team
Stakeholder mapping
and prioritization

Design
Overview of strategy
parts

Drafting
Introduction
Objective
Vision and missions
Values and principles
Means of engagement
Monitoring and
evaluation
Annex

**Approval and
launch**

User engagement can and should be employed at every stage of statistical production, in a continuous process of querying, feedback and response. With practice, user engagement will become integrated into the core business of the data value chain.

Activities for engaging users can be divided by their purpose into five groups: establishing contact with users; establishing user needs; consulting users; instigating user engagement; and establishing a feedback loop and building statistical literacy.
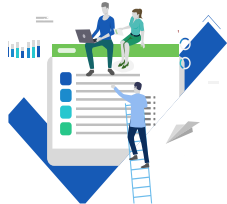
1

Activities	Methods and tools
1. Establishing contact with users	Conduct market segmentation
	Establish user forum by group
	Compile a database of external and internal users
	Establish and maintain external partnerships
	Establish data-sharing mechanisms for members of the national statistical system
	Service agreements
2. Establishing user needs	Culture shift
	Surveys
	Establish an online feedback portal
	Google analytics and web metrics
	User consultations and focus groups
	Group discussions
	Develop a compendium of statistical concepts and definitions
	Evaluate user requests
	Establish an automated system to receive, process, archive and monitor user requests
	User research
3. Consulting users	Internet-based forums
	User support groups
	Phone calls
	New media
	A process or coordinating body
	Thematic workshops
	Technical committees or permanent thematic working groups
	Advisory council or steering group
	Host one-on-one user dialogues
4. Instigating user engagement	Newsletters
	Writing stories with data
	High-level representation at events
	Press conferences
	Open data portal or reporting platform
	Online data and information dissemination platforms
	Data advocates and champions
	Data visualization
	Multimedia and other creative content
5. Establishing a feedback loop	Monitoring system
	Onboarding mechanism
	User engagement dashboard
	Email-based communication
	Develop different statistical products and services according to user groups
	Building statistical literacy
	Strategic partnerships
	Training
	Statistics clubs
	Games and competitions
	Cultural events and engagement with artists
	Public service announcements

All engagement activities are not created equal. Two key factors should be taken into account before deciding which tool to use: the specific user group to be engaged with and the stage in the statistical process when the activity is employed. In fact, each tool is appropriate at a particular stage or stages of statistical production and specific tools or approaches must be used for specific user groups.

The key points and recommendations of these guidelines are:

- **Engaging users is no longer an option.** It is essential for producers of official statistics to position themselves as indispensable, credible, relevant and responsive to users at a time when users are bombarded with information from new, non-official data producers. The best way of doing so is through engagement and dialogue with users.

- **Commit to taking a strategic approach.** To be effective, user engagement should be seen as a multi-year strategic plan that commits the national statistics office or national statistical system to implementing a series of coordinated and integrated engagement methods, chosen through a rigorous and inclusive process, and with measurable objectives.

- **Cooperation and buy-in.** The strategy development process should involve actors from within the statistical system and the national statistics office with different roles and of all levels of seniority.

- **Strategy alignment.** It is important that any user engagement strategy be incorporated into an overall communications strategy so as to ensure that the documents do not compete for resources or have contradictory objectives. With respect to the national strategy for the development of statistics, it is imperative that the user engagement strategy draw directly from any commitments made therein regarding users.

- **User engagement is a process.** User engagement is a journey that never ends. Producers are responsible for identifying user needs and then improving service and product delivery with respect to those needs. User needs are ever-changing and services and products must keep pace with them.

- **User engagement must be seen as core to the business of a national statistics office or statistical system and its operations.** To be effective, user engagement must become part of its DNA. It must be leveraged in some form at each step of the statistical process. Everyone within the organization must feel implicated in user engagement.

- **Make the mental leap.** Most organizations fall short in terms of user engagement by failing to put themselves in the place of users. Doing so requires imagining the culture, preferences, limitations, needs and modes in which a group operates, communicates or thinks. A thorough understanding of such characteristics makes it possible to identify the right approach to take to engage stakeholders.

INTRODUCTION

A. What is user engagement?

At the most basic level, user engagement means any meaningful action taken or contact made by an organization to enter into dialogue with an external stakeholder group. The contact can take place in the form of a reaction, interaction, effect or overall experience, either in real life or virtually. In the context of these guidelines for national statistics offices and statistical systems, user engagement is seen more specifically as the process of interacting with users of official statistics. It involves an ongoing dialogue to assess user needs and their satisfaction with statistics. The end goal is to use that learning to inform and improve a statistical organization's products and services, and even operations.

Engaging users is a multi-step and strategic process. It does not happen overnight but is rather the result of a coordinated and continuous effort built on strong systems, procedures and reliable (qualitative and quantitative) information about users that informs all of the above.

B. Why engage users of official statistics?

For national statistics offices and statistical systems to be of value to society, both must generate statistics that inform debate and decision-making. Underlying this statement of purpose is the premise that official statistics are relevant and valuable to users only to the extent that they are actually used. To ensure uptake and proper use, producers of official statistics must *engage with end users.*

> ### USER ENGAGEMENT IS CENTRAL TO THE SUCCESS OF AN ORGANIZATION
>
> If a business does not produce products that provide value to customers, then it will cease to exist. Understanding what customers do and do not value allows businesses to innovate products, services and capabilities to fit these needs, to the business' advantage.
> *Recommendations for Promoting, Measuring and Communicating the Value of Official Statistics, ECE*

User engagement is thus central to the impact that a national statistical system can have, if not to its very existence. When done well, it can:
- generate feedback from users that ultimately helps statistical organizations prioritize work based on what statistics the public needs
- help ensure that statistics are produced at the right time, in a useful format and pitched at the right technical level
- create opportunities to test experimental statistics and discuss existing statistics to uncover problems such as discrepancies in data
- enhance statistical literacy
- help build data integrity, trust and a collective sense of ownership of generating and disseminating statistics.

In addition, several global and regional norms, standards and agreements on official statistics call for increased user engagement. They all refer to engagement either implicitly or explicitly, and recognize the role that it plays in ensuring the relevance, and therefore use, of official statistics.

USER ENGAGEMENT IN INTERNATIONAL FRAMEWORKS AND STANDARDS

UNITED NATIONS FUNDAMENTAL PRINCIPLES OF OFFICIAL STATISTICS (UNFPoS)

states that, as an important public good in democratic societies, official statistics have to meet the needs of users and…To meet the test of practical utility, statistics must be relevant, of suitable quality and in a form that facilitates easy and correct use. The key to achieving this is maintaining an understanding of user needs. Specifically, UNFPoS Principle 1 speaks to relevance, impartiality and equal access. The implementation guidelines state that, in their role as a public good in democratic societies, official statistics must meet the needs of users. To determine those needs, users must be consulted regularly, using a variety of channels and tactics, because needs change and different users respond to different engagement methods. The principles emphasize that "during the development phase, users and the scientific community are consulted". Furthermore, under Principle 4 on the prevention of misuse, the UNFPoS instructs the producers of official statistics to prevent the misuse of statistics by educating stakeholders on the correct interpretation and use of statistics.

UNITED NATIONS GENERIC NATIONAL QUALITY ASSURANCE FRAMEWORK

and accompanying guidelines describe various aspects of user engagement. These include the quality assurance guidelines, which call for managing relationships with data users and data providers; quality assessment and reporting, which calls for obtaining feedback from users; and finally, under, the quality and other management frameworks, national statistics systems are responsible for continuous improvement, which requires the ongoing gathering of feedback from users that can be used to improve future work.

CAPE TOWN ACTION PLAN FOR SUSTAINABLE DEVELOPMENT

which is a framework for statistical capacity-building necessary to achieve the scope and intent of the 2030 Agenda, also recognizes the need to engage with users of official statistics. Objective 5.1 of this global framework calls for the generation of frequent and periodic opportunities to consult with all stakeholders on the production and use of statistics for sustainable development.

AFRICAN CHARTER ON STATISTICS

requires that "mechanisms for consultation with all African statistics users without discrimination shall be put in place with a view to ensuring that the statistical information offered is commensurate with their needs".

QUALITY DECLARATION OF THE EUROPEAN STATISTICAL SYSTEM

stresses engagement with users in Principles 11 (Relevance) and 15 (Accessibility and Clarity). Under the former, indicator 11.1 calls for the establishment of ways to consult users on, and monitor the relevance and value of, existing statistics, and anticipation of their emerging needs and priorities. Indicator 11.2 requires users' key needs to be reflected in the programme of work, while indicator 11.3 stresses that user satisfaction should be monitored and systematically followed up. Under Principle 15, indicators 15.6 and 15.7 require users to be kept informed of the methodology behind statistical processes and of the quality of statistical outputs with respect to the quality criteria for European Statistics.

By participating in or signing on to these formal agreements, national statistical systems are also committing to improving this aspect of their external relations.

Relevance is perhaps the most compelling argument for user engagement. There are gaps between what users want and what producers of official statistics provide because user consultation is a neglected aspect of work programmes in many countries. Two examples of this are that statistical products and services still focus on bulk data provision, and the dissemination strategies of many statistical agencies give priority to the demands of international partners and governments over other users, including other domestic users.

To complicate matters, the Internet has made it easier for users to collect and disseminate data from outside the national statistical system. This data can be of questionable quality and unsuitable for policymaking and decision-making but, in the absence of relevant official data, policymakers and other users are sometimes forced to rely on it. National statistical system stakeholders therefore need to improve their services so that thy become the most reliable source of relevant official statistical information. This can only be done through the promotion of a culture of permanent dialogue between users and producers.

To remain relevant, producers of official statistics must also address the fact that many users are unable to deal with and manage the current deluge of data. These groups must be educated to understand, critically evaluate and use the data that permeate their daily lives, especially in the current climate of misinformation and manipulation. To secure its relevance in and share of the competitive statistical market, it is thus in producers' interest to take part in statistical education. As stated in the United Nations Fundamental Principles of Official Statistics – Implementation guidelines, "a lack of relevance of official statistics in the era of information society means that the agency is undermining its role and position on the information market and will be marginalized". Engaging with users is thus of utmost important for any national statistical system operating in the world today.

C. Why these guidelines?

These guidelines are intended to assist national statistical systems to develop robust and strategic user engagement programmes. They consist of a practical a mix of instructions, tips and background needed to conduct a dialogue with users and identify what they need and when and through what medium they need it. It is worth emphasizing from the outset that the information in these guidelines is intended to guide, not dictate. It presents an overview of good and common practices. Every national statistical system and the organizations within it must determine what works best for them and build a strategy based on that understanding. The document has three main parts, which are summarized as follows:

1   Part I provides a detailed explanation of how to develop a user engagement strategy, a document that maps the commitment of the national statistical system to implementing engagement activities that work towards specific and strategic objectives.

2   Part II outlines a host of approaches that may be employed under the strategy to engage users. As there are many to choose from, they have been divided by purpose – to establish contact with users, establish user needs, consult users, instigate engagement, establish a feedback loop and build statistical literacy.

3   Part III looks at typical user groups of official statistics and details characteristics that it would be helpful to understand when developing strategies for dialogue with them and to meet their needs for statistics.

PART I:

STEPS AND TACTICS FOR ESTABLISHING AND IMPLEMENTING A ROBUST USER ENGAGEMENT STRATEGY

A. What is a user engagement strategy?

In the context of statistical agencies or a national statistical system, a user engagement strategy is an institutional document that outlines the methods to be employed to:

- encourage interaction between data users and producers
- establish mechanisms for feedback on statistical products, services and experiences
- guarantee that feedback is taken into consideration.

The engagement strategy aligns a set of producers around common priority goals and positions engagement as a central part of quality statistical production. The strategy generally has a shelf life of three years, and may or may not be made public (although it is preferable to make it public), depending on the organizational culture and any rules governing public access to strategy documents. When executed well, a user engagement strategy will strengthen loyalty to official statistics generally and, more specifically, to the experts who provide them. It will also have the added benefit of improving the quality and relevance of statistical products as they will necessarily reflect the needs users have expressed.

A user engagement strategy may be developed for an entire national statistical system or for the national statistical office in its role as coordinator of the system. In the former case, the benefit is that all members of the system have ownership over the strategy and are directly implicated in its implementation. This is a desirable approach when there is – or the goal is – alignment on the importance of user engagement and active coordination and engagement across the national statistical system. In the latter case, the national statistics office takes the lead on all activities and involves members of the wider system where relevant. It also leaves space for each official statistics producer to develop their own user engagement strategy. This approach is helpful when there is a very independent culture of communication within a statistical system, where each agency likes to set and execute its own external engagement programme.

Every user engagement strategy should be designed to support the national strategy for the development of statistics. Specifically, it should establish a clear link with the national strategy for the development of statistics through one or more of its strategic objectives. In fact, it is now best practice for national strategy for the development of statistics to include user engagement and communications goals, making it easier to align user engagement and communication strategies with them. It is therefore recommended that this entire process begin with a review of the national strategy for the development of statistics and careful consideration of where users and communications are mentioned. It is also advisable to begin developing the engagement strategy just after validation of the statistics strategy, as it is that strategy that will indirectly influence how users are engaged.

It is up to each national statistics office (or national statistical system if the engagement strategy is developed for the entire system) to determine how the user engagement strategy relates to the communications strategy of the office (e.g. if the user engagement strategy is a component of the larger communications strategy or vice versa). There is no right way to approach this, as long as all three documents – the user engagement strategy, communications strategy and national strategy for the development of statistics – are aligned in what they aim to achieve for the national statistical system and the users of its data.

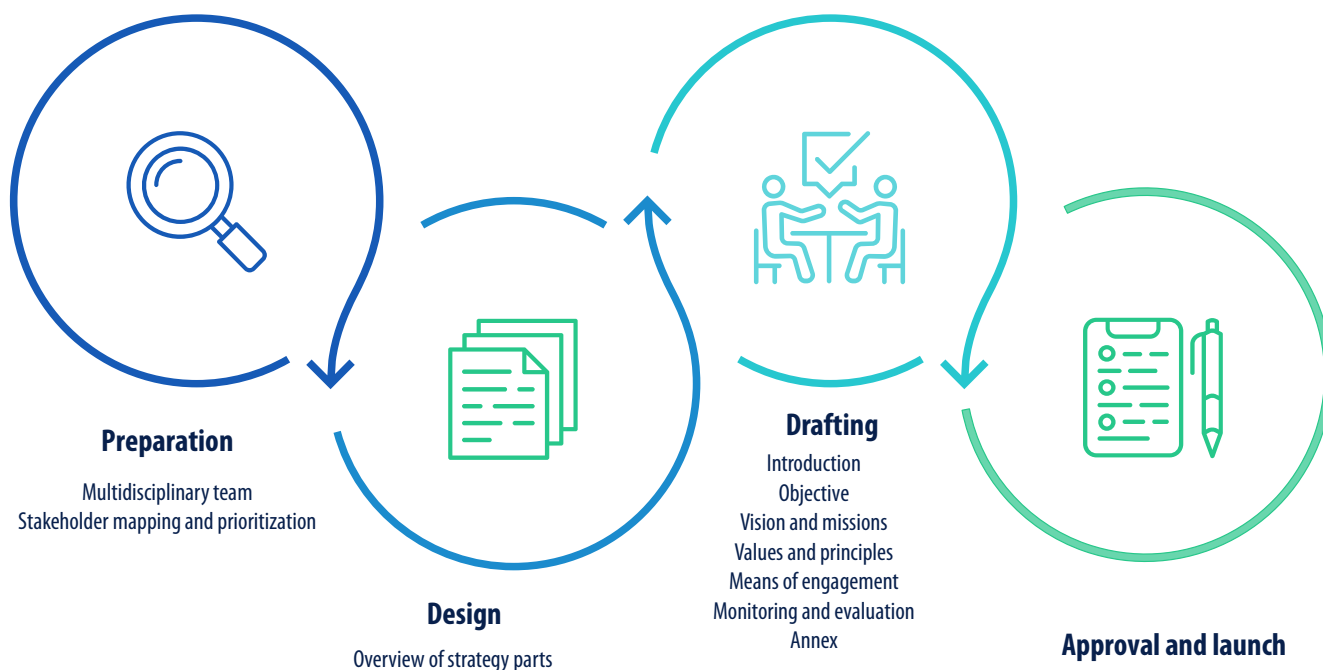### RELATIONSHIP BETWEEN COMMUNICATION AND USER ENGAGEMENT ENGAGEMENT STRATEGIES

Before drafting the user engagement strategy, it is important to determine how it will relate to the communications strategies of the national statistics office and other official data producers. The National Institute of Statistics of Rwanda, for example, chose to have the user engagement strategy serve as the overall communication strategy for the national statistics office, and it was conceived within the framework of the national statistics development strategy, taking into account the data demands of the Sustainable Development Goals and the national strategy for transformation of the country. In other contexts, the user engagement strategy has been drafted as a complementary but separate strategy to the national statistics office communication plan, drawing on the structures and processes established under the communications strategy to boost user engagement. For example, if the communications strategy calls for upgrading of the user experience on the national statistics office website, the user engagement strategy can take advantage of new interactive features to solicit feedback from users.

While it is advisable to have a single strategy that incorporates both user engagement and communication, if they are separated, it is essential that they be aligned. All strategies should support and depend upon one another to avoid creating competition for human and financial resources. In the example above, the overhaul of the website is clearly a priority activity with respect to creating the web-based mechanism for feedback. The easiest way to assess alignment is to extract the various strategy objectives and consider them side by side. Are they all pushing the national statistical system in the same direction? Are they mutually supporting? Are they all conceived with the same values and principles? Look at the activities in both strategies: are they interdependent? Is a clear sequencing implicit to the combined workplans? In best practice, the answer would be yes to all of these questions.

B. Developing a user engagement strategy for the national statistical system

This section outlines the steps involved in developing a user engagement strategy to establish and maintain quality dialogue and interactions with users. It is divided into phases: *Preparation, Design, Drafting, and Approval and Launch*. The final engagement strategy will serve both users and producers of official statistics in the fulfilment of their overall mission as service and information providers.

Figure 1
Process of developing a user engagement strategy

Preparation

Multidisciplinary team
Stakeholder mapping and prioritization

Design

Overview of strategy parts

Drafting

Introduction
Objective
Vision and missions
Values and principles
Means of engagement
Monitoring and evaluation
Annex

Approval and launch

Phase 1: Preparation

Establish a multidisciplinary team from across the national statistical system

It is strongly advised that a multidisciplinary team from across the system be involved in developing the user engagement strategy. That said, the team should not exceed 20 people so as to keep discussions contained. It should include communications experts, representatives of various producers and users of official statistics, statisticians, dissemination experts, etc. This participatory approach will help to create broader systemic buy-in and ensure that a diversity of opinions is reflected in the priorities and approaches chosen. Generally, the national statistics office in its role as coordinator of the system takes the lead in coordinating strategy development. The team can be headed by any one of several officers in the office, such as the national strategy for the development of statistics coordinator, the head of dissemination or the head of communications or public relations.

Many organizations find it useful to hire an external communications consultant to help guide the strategy development process. Consultants can play a neutral role in negotiations and discussions between stakeholders, and share useful and encouraging experiences from developing and implementing engagement strategies for other statistical systems. Whatever the composition of the group, it is wise to dedicate a three-to-five-day workshop to the discussions and decision-making that will determine each element of the strategy. Ideally, participants should gather at an off-site location and be released from their day-to-day work responsibilities. While the strategy can be developed at a statistical agency's offices – or even virtually if absolutely necessary – an off-site location often helps participants to concentrate more fully on developing a robust strategy in a neutral and collaborative environment.

As stated in the introduction, every national statistical system using these guidelines will need to adapt its contents and approach to the particular circumstances it faces. These include factors such as overall objectives, timeline, resource availability, capacity, status of the national strategy for the development of statistics and the larger national context against which the strategy is being developed. In short, the advice offered in these guidelines is general enough to be applicable to a range of circumstances.

Conduct stakeholder mapping and prioritization

Any plan to engage users must begin with the identification and examination of the users themselves. The first step in this process is to consider and prioritize users through a process called stakeholder mapping. To be clear, "stakeholder" is a synonym for user. We choose the term "stakeholder" for the mapping to underscore the notion that users have a stake in the work and are thus integral to success. They should not be seen as extraneous but rather as a core part of an organization or system.

The strategy development team should thus brainstorm a list of all key user groups of official statistics in the country. To do so, the team should ask itself:

- Who uses our products (statistics, data, reports, etc.)? Who would we like to see using official statistics more (or better) in their work?
- Who has an influence over the use and uptake of our statistical products?
- Who does not yet use official statistics, but should?

Answering these questions will yield a list of users relevant to the specific national statistical system. While there is no predetermined list of stakeholders that should result from brainstorming, some common user groups include: public authorities (national policymakers, including line ministries, parastatals and subsidiary bodies, policy analysts, local authorities and regulators); policy formulation and decision-making institutions and development framework designers; parliamentarians; the media; academics and researchers, including students and teachers; international organizations, development partners and donors (multi and bilateral); civil society organizations; citizens as data seekers and survey respondents; and the private sector.

Each of these groups will be discussed in Part III in terms of their core statistical information needs, ideal communications media and formats, and the potential mutual benefits of engagement for producers. These factors should be taken into account during the work planning so that the activities committed to are aligned with the specific demands of each group.

The next step is to prioritize the user groups. As one strategy cannot satisfy the needs of all stakeholders, it is important to identify a critical subset who will be the focus of engagement. The criteria for that prioritization should be defined by the strategy drafting team based on the strategy goals. One effective method to consider is prioritizing each stakeholder according to their *current level of engagement in official statistics versus the level at which the drafting team would like them to be engaged* (see figure 2). Each user group identified should be mapped to this matrix (or a similar matrix using other criteria, such as the level of power over the production of official statistics versus the level of interest they have in official statistics).

The strategy drafting team should discuss and agree on the placement of each group on the matrix. Each of its quadrants represents a specific level of priority for the strategy. In the future engagement versus current engagement matrix in figure 2, for example, stakeholders in the upper left-hand corner (Cultivate ASAP – as soon as possible) are top priority users (i.e. those with a low current level of commitment but whose commitment needs to increase) because they should have a high level of

engagement in official statistics but engagement is currently low. These groups must be engaged vigorously and strategically to move them into the top right-hand quadrant when they are actively engaged. Any non-users named in the brainstorming exercise (in answer to the question: Who does not yet use official statistics, but should?) should be included in this quadrant.

Figure 2
Stakeholder prioritization matrix
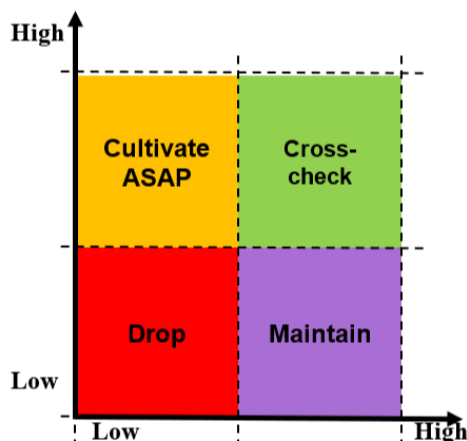
The next highest priority stakeholders are those in the upper right-hand corner (Cross-check) who are highly engaged today and who should remain highly engaged. These groups must be monitored or cross-checked to ensure that their needs are met and understood as they evolve. They do not, however, need to be courted aggressively because they already exhibit a level of buy-in to official statistical products.

The third most important stakeholders are those on the bottom right, whose level of engagement is high at present but who are not necessarily a priority for future engagement (Maintain). It is safe not to emphasize any new outreach and engagement tactics for these groups, and to focus on maintaining current activities, which are apparently effective. Finally, stakeholders in the bottom left-hand quadrant (Drop) are currently not engaged and do not require engagement for the success of the strategy. Where resources are scarce, these stakeholders can be ignored as a target audience under this strategy.

As a final step, individual stakeholder groups should be ranked in order of importance within each quadrant and then divided into primary and secondary user groups. As a rule, for the future engagement versus current engagement matrix, the top two quadrants make up the primary stakeholder group and the bottom right quadrant makes up the secondary stakeholder group (the bottom left quadrant can be left out of the strategy). It would be wise to limit the group of primary strategy stakeholders to no more than ten groups, however. Ranking stakeholders within each quadrant of the matrix is helpful in the event that there are more than ten groups in the top two quadrants; the ten most important can then be chosen as the focus of the new strategy.

Phase 2: Design

Overview of the elements of the strategy

Every user engagement strategy should contain whatever elements feel most useful for the national statistical system: national ownership of strategic thinking, work planning, drafting and implementation is key. The strategy document should be short (approximately ten pages) so as to be reader- and implementation-friendly. In fact, most of the strategy should be dedicated to the means of engagement or workplan (see Means of engagement below). After all, the primary role of the strategy is to guide smart and logical action. As far as key characteristics are concerned, a user engagement strategy should be rooted in national statistical legislation, action-focused, responsive to changing demands, and developed through a consultative process.

With this in mind, a user engagement strategy should have certain basic elements, including:

- stakeholder analysis
- an introduction (or situation analysis)
- objectives
- a vision (and possibly mission)
- values and principles
- means of engagement, and
- monitoring and evaluation.

An annex can be included with any background material used to inform the development of the strategy (e.g. a table of user needs, the national statistics office communications strategy, any sections of the national strategy for the development of statistics that mention user engagement, the monitoring and evaluation matrix, current engagement tactics, etc.).

Phase 3: Drafting

Introduction

The introduction should be a brief summary, analysis and evaluation of the most important forces – internal and external to the national statistical system – to which the user engagement strategy is a response. It should cover the main issues to be addressed by the strategy and serve to remind the developers and future readers of the strategy what was occurring in the larger data landscape when the strategy was designed.

The introduction answers the questions:

- Why develop this strategy now? (Ideally, the strategy should be born of an opportunity).
- What is happening that is relevant within the national statistical system? Nationally? Internationally?
- What are the current engagement practices within the national statistical system? (N.B. While answering this question for the introduction, capture these tactics to existing user groups in a separate document that can be put in an annex of the strategy in addition to being referred to more generally in the introduction).
- What stage has implementation of the national strategy for the development of statistics reached, and how does this affect user engagement opportunities and challenges?
- How does the engagement strategy relate to the national strategy for the development of statistics and the national statistics office communication strategy?

Finally, the introduction should attempt to foresee things that might affect the ability of the national statistical system to achieve its user engagement objectives, either positively or negatively.

The drafting team should brainstorm the answers to the above questions with a view to identifying the elements that will be included in the introduction or situation analysis of the strategy. One or two people should be tasked with crafting a definitive introduction that captures the main ideas expressed.

Objectives

Based on the findings of brainstorming on the introduction, working in small groups of three to five persons, the drafting team must determine the objectives of the user engagement strategy. The objectives express what it is hoped the strategy will achieve and should respond to the challenges and opportunities identified in the situation analysis. The strategy should have three to five objectives, each of which should be SMART: Strategic (and specific), Measurable, Achievable, Relevant, and Timely. When considered together, the objectives should be interrelated and mutually reinforcing, all working towards the single goal of enhancing quality exchange between producers and users.

Each objective should be framed as an outcome (or outcomes), stated as a verb in the infinitive (e.g. to create, generate, increase, maximize, maintain, reinforce, decrease, minimize), followed by an action and a target group (in this case, specific users of official statistics). Some of these elements may be implicit. Objectives should be one sentence long and easily understood by everyone within the national statistical system. Some objectives include a target date to help in the planning process.

SAMPLE OBJECTIVES FROM EXISTING USER ENGAGEMENT STRATEGIES

- To understand the needs of users at various stages of the statistical production process and continuously adapt to changing user needs.
- To meet user needs by delivering quality data and statistics, and fostering mutual partnership between users and producers.
- To develop a statistical culture for the efficient use of statistical data and products.
- To develop and strengthen communication networks for data users, producers and providers.
- To enhance the culture of innovation for communication and dissemination.
- To cultivate statistical knowledge and develop statistical literacy among data users and providers.
- To improve the dissemination of statistical products using innovative, dynamic and modern techniques and channels (to facilitate access and their use).
- To provide statistical products that meet established standards and respond to user demand.
- To advocate for the use of statistics in policy formulation, monitoring and evaluation.

Regardless of what the strategy development team settles on for each objective, remember to keep things simple and avoid jargon. Additionally, remember that if the national strategy for the development of statistics is updated in the course of implementing the user engagement strategy, these objectives may be reviewed and updated.

Vision and mission

While organizations commonly use the terms mission and vision statements interchangeably, they are very different things. Ideally, a user engagement strategy should have both. The vision statement focuses on tomorrow and the change the national statistical system hope to bring about through user engagement. It is aspirational. It describes the future of user engagement within the national statistical system, which is essentially the purpose of the strategy. It describes what it is hoped to achieve within a given timeframe (usually ten years) and is a clear, comprehensive snapshot of the statistical system with regard to users. It provides direction because it implies what the statistical system needs to do and deliver in order to engage users successfully.

To arrive at a strong vision statement, the strategy drafting group should ask and answer the following questions:

- What are our hopes and dreams for user engagement?
- What problem do we wish to solve for the greater good through user engagement?
- Who do we want to inspire and what changes do we want to instigate?

EXAMPLE VISION STATEMENTS

- We aim to create a conducive environment for data users, providers and producers to stimulate national transformation.
- Our statistical products meet the needs of users and are effectively used to support the country towards its sustainable development.
- Our statistical products meet the needs of users and are effectively used in decision-making.

The mission statement, on the other hand, focuses on today and what the national statistical system currently does. It drives the user engagement work of the entire system and describes what the national statistical system does in terms of its core business in order to achieve the vision. The strategy objectives should align with the mission statement.

To arrive at a strong mission statement, the strategy drafting group should ask and answer the following questions:

- What do we do in terms of user engagement?
- Who do we engage?
- How do we serve users in terms of meeting their statistical and information needs?

EXAMPLE MISSION STATEMENT

We engage in ongoing exchange with users to ensure the relevance, usefulness and uptake of our statistics and statistical products in planning and decision-making.

After brainstorming inputs for both statements, one or two people should be tasked with crafting a final version that captures the main ideas expressed.

Values and principles

The values and principles of the strategy refer to the spirit in which the strategy was conceived and in which the engagement activities will be executed. It could also be thought of as a series of impressions that users will be left with upon any contact with an actor in the national statistical system or upon participating in any of the activities undertaken. Establishing the values and principles underlying the strategy will help bring members of the drafting group to consensus on the type and nature of the activities that will be chosen. This is in many senses a philosophical exercise: there are no right or wrong values and principles.

Core values that have been used in national statistics office engagement strategies include *accessibility, accountability, availability, completeness, credibility, impartiality, inclusivity, innovation, integrity, prioritization, proactivity, relevance, standardization, sustainability, timeliness,* and *transparency.*

In small groups, the strategy drafting team should brainstorm the values and principles that will guide the approach to user engagement. In addition, as many values have more than one meaning or interpretation, the groups should specify in a few words, what each value means. For example, in the case of timeliness, one existing strategy specifies, *Ensure timely consultations with users and timely delivery of data.* The groups then pool their ideas and all strategy development team members agree on a shortlist of values and principles to feature. A final list of key values and principles and their definitions – ideally around six – should be featured in the document.

Means of engagement

Once the basic elements of the strategy have been defined, the strategy development team can outline the key engagement activities that will be implemented under the strategy and assemble them into a workplan. In order remain focused on the strategic nature of the exercise, each engagement activity must be linked to a specific strategy objective so as to avoid choosing an activity for reasons other than its ability to help achieve a stated strategy objective (e.g. because the activity is easy or fascinating or because other national statistical systems are doing it).

This is a crucial step in the strategy development process as it forms the heart of the document. It lays out succinctly the engagement tactics that will be employed and commits the system to devote resources to each activity. The workplan is best captured as a table (see figure 3) that contains the following elements, with one column dedicated to each: *Objective, Means of engagement, Key stakeholders engaged, Lead, Cost, Impact measurement* and *Time frame*.

Figure 3
Sample workplan

Strategy objective	Means of engagement	Key stakeholders engaged	Lead	Cost	Impact measurement (per objective)	Time frame
Objective 1	Activity 1					
	Activity 2					
	Activity 3					
	Activity 4					
Objective 1	Activity 1					
	Activity 2					
	Activity 3					

To fill in the different categories, the team first needs to enter the objectives previously defined. A limited number of activities (three to six) should be chosen for each objective. The team could be divided into smaller working groups with each group responsible for one objective. Each working group should employ a variety of engagement tactics to meet each goal *(Part II. An overview of sample tactics and activities for a user engagement workplan* outlines options for different user engagement activities by function). The strategy development team should be careful to commit to activities that are realistic in terms of both the capacity of the national statistical system to implement them and cost efficiency. Capacity here refers to human and financial resources, time, political will and know-how. It should be borne in mind that user engagement strategies generally have a shelf-life of approximately three to five years. It is therefore recommended that activities be chosen that can be implemented and have an impact within that time frame.

After choosing an activity, the working groups must provide a brief description of what the activity entails, being as specific as possible. For example, if the plan is to create a feedback mechanism on the website, it should be specified whether that would be a pop-up window, a special portal on the website or an emailed survey. A more detailed description of each activity should be included in the annex of the final strategy, listing each of the steps required for implementation. This will make it possible for anyone not involved at the time of strategy development to step in and quickly grasp the aims and nature of each activity.

Next, list each of the stakeholder groups that will be engaged by the activity. Avoid resorting to "All stakeholders". For an engagement activity to be effective, it should be designed for a specific group, or two to three groups with similar information needs *(Part III. Typical key user groups: How they think and work and what they need* outlines the specific needs of typical users of official statistics). After all engagement activities and key stakeholders have been identified, verify that each of the strategy's priority stakeholder groups is engaged at least once.

Keep in mind that the priority stakeholders are those who are in the "Cultivate ASAP" and "Cross-check" quadrants of the stakeholder prioritization matrix (the top left and top right quadrants of figure 2). The Cultivate ASAP users are those who should be highly engaged by official statistics but are not currently. The national statistical system will need to have new, targeted tactics for engaging these groups. The Cross-check users are those who should be highly engaged and already are. For these groups, the system should focus on improving year-on-year what they are already doing (this information will have emerged in the process of drafting the introduction) as that should keep them engaged. If the drafting team has missed any users who fall into these two top priority groups, they need to go back and reconsider the workplan and find opportunities to engage them.

The next section, *Monitoring and evaluation,* addresses filling in the column on impact measurement. For cost, the strategy should cite a figure for each activity, an overall cost for each year of implementation, and a total cost for all the shelf-life years (Y1, Y2, Y3, and Total). The total implementation cost is helpful for resource mobilization. Costs can be estimated based on current parameters and assumptions, but they can shift with time (e.g. a web-based service becomes more expensive), thus the budget should be revisited and adjusted annually. In terms of time frame, it is helpful to note when the activity would ideally begin and end. It is best to capture this by quarter and year (e.g. from Q1 2020 to Q3 2021).

Each working group of the strategy development team should communicate the chosen means of engagement and accompanying details under their assigned objective to the full team. The key author (or authors) of the strategy will gather these and other inputs for the first draft (see the section *Writing the strategy* below).

Monitoring and evaluation

The column in the workplan on impact measurement should provide a list of key performance indicators to monitor and evaluate each objective. Indicators should be selected that demonstrate the cumulative impact of the activities vis-à-vis the corresponding strategy objective, and that are in line with the capacities of the national statistical system. Expectations should be reasonable and achievable according to the resources of the national statistics office, in particular.

Key performance indicators should consist of a mix of outputs and outcomes, with output measures referring to the activities of the national statistical system. These are typically easy to collect as they are a quantitative summary of activities (e.g. number of users trained in a given period). Outcome measures, on the other hand, track the effect those activities have had on the intended audience. These qualitative shifts in perception and engagement are more difficult to collect but important. One example of an outcome indicator is the number of times statistics have been misused in the media in a given period. This indicator essentially serves as a proxy for improved understanding of statistics through more meaningful engagement.

The strategy can rely on three types of performance indicator: activity-based (e.g. three surveys conducted, ten focus groups held); measurement of engagement through communication channels (e.g. number of social media likes, followers or comments); and analytical, which combine quantitative and qualitative measurement (e.g. perception changes of the national statistics office within a given stakeholder group). As an example: the objective is to increase uptake of official statistics, and the activities are to hold a series of training sessions for journalists, produce a publication aimed at university students and researchers on national statistics day, and a social media campaign around the launch of new census data. The key performance indicators might include, for outputs, the number of journalists attending public information sessions, the number of copies of the publication distributed, the number of social media likes and comments on campaign posts; the outcome might be a baseline survey that measures understanding of the value of statistics, followed by a survey at the end of the activities that can capture any changes.

The team should also develop a means of monitoring progress on the implementation of specific activities. This involves determining a target key performance indicator for each activity, along with a time frame (i.e. by end of Year 1, increase social media likes by 20 per cent; hold three information sessions aimed at increasing knowledge and perception of official statistics among journalists). Progress should be tracked and, using a spreadsheet, a dashboard or scorecard should be created to capture the results. This dashboard can be captured in a spreadsheet and live outside the workplan table in the strategy annex.

Periodically, an evaluation can be conducted to see how well each activity is being implemented (e.g. Are best practices being used? Are adequate resources available?). While the tracking of progress occurs monthly (Is it on track? lagging behind? ahead of schedule?), the evaluation should be done quarterly as more frequent evaluation makes meaningful assessment difficult. Once the evaluation has been done, changes in strategy and process can be implemented to improve performance. This is also the moment to see if key performance indicators still align with objectives and to adjust them if they do not.

Writing the strategy

One person should lead the drafting of the final strategy. If the strategy is developed in the context of a workshop, that person should be present throughout. If the strategy is developed virtually, all inputs from each task should be sent to the author. The lead writer should be a staff member of the national statistics office as they will most likely be in charge of coordinating implementation; national statistics office staff are also better placed to have a global view of the opportunities and challenges of implementing the strategy across the national statistical system. The lead writer should have a background in communications and external relations, as well as a broad understanding of the workings of the national statistical system. In the absence of such a figure, a small drafting team (two or three people) can be formed of experts from across the national statistics office or statistical system with those competencies.

Once a first draft has been produced, it would be wise to convene the full strategy development team to review it; alternatively, the first draft can be circulated and comments can be captured on a collaborative working platform such as Google docs, where changes can be captured by multiple participants in real time. If the discussion takes place during a live meeting, the draft strategy should be circulated well in advance so participants arrive with concrete feedback that can be discussed and incorporated in real time. If the draft is circulated virtually, members of the strategy development team should be given ample time – and a hard deadline – to revert with feedback.

If a consultant was engaged during the strategy development, she or he should provide the lead author or authors with feedback on drafts and help the writer(s) assess the feedback received from the broader strategy development team.

Phase 4: Approval and launch

The final draft of the user engagement strategy should then be shared with the approval person or committee. Each country context is different. Who (or which body) approves the strategy can be a choice made on the basis of any number of factors, usually related to governance structures, reporting lines and how cumbersome (or otherwise) formal approval processes are. As an example, one national statistics office opted not to seek the highest level of sign-off for its user engagement strategy as decisions tended to be delayed at that level. Instead, its communications lead submitted the draft to their director general, who signed it off before submitting it to the permanent secretary for adoption. It is worth noting that keeping all members of the decision-making chain abreast of the process from the start will facilitate adoption at the end.

Once approved, a decision should be made on whether to launch the strategy publicly. The advantage of doing so is obviously that it alerts users to official statistics, both current and potential, and to the fact that the national statistical system is making a concerted effort to better evaluate and meet their needs. It also provides a platform for sharing details about new opportunities for interacting with official producers and so generates interest in them.
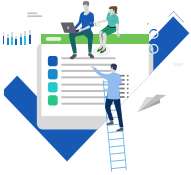
PART II:

SAMPLE TACTICS AND ACTIVITIES FOR A USER ENGAGEMENT WORKPLAN

Figure 4
Sample tactics and activities for a user engagement workplan

Activities	Tactics and tools
1. Establishing contact with users	Conduct market segmentation
	Establish user forums by group
	Compile a database of external and internal users
	Establish and maintain external partnerships
	Establish data-sharing mechanisms for members of national statistical system
	Service agreements
2. Establishing user needs	Culture shift
	Surveys
	Establish an online feedback portal
	Google analytics and web metrics
	User consultations and focus groups
	Group discussions
	Develop a compendium of statistical concepts and definitions
	Evaluate user requests
	Establish an automated system to receive, process, archive and monitor user requests
	User research
3. Consulting users	Internet-based forums
	User support groups
	Phone calls
	New media
	A process or coordinating body
	Thematic workshops
	Technical committees or permanent thematic working groups
	Advisory council or steering group
	Host one-on-one user dialogues
4. Instigating user engagement	Newsletters
	Writing stories with data
	High-level representation at events
	Press conference
	Open data portal or reporting platform
	Online data and information dissemination platforms
	Data advocates and champions
	Data visualization
	Multimedia and other creative content
5. Establishing a feedback loop	Monitoring system
	Onboarding mechanism
	User engagement dashboard
	Email-based communication
	Develop different statistical products and services according to user group
	Building statistical literacy
	Strategic partnerships
	Training
	Statistics clubs
	Games and competitions
	Cultural events and engagements with artists
	Public service announcements

19

The overarching purpose of a user engagement strategy is to help to develop and strengthen links between data producers and users to promote open and constructive dialogue and interactions. Engagement promotes trust and maximizes public value. It is about being relevant and keeping abreast of the needs of all actors in the national statistical system.

In addition, user engagement can and should be employed at every stage of statistical production, in a continuous process of querying, feedback and response. With practice, user engagement will become integrated into the core business of data producers throughout the national statistical system.

This section outlines some of the most common activities and tools for engaging users. Activities are grouped by purpose: *establish contact with users; establish user needs; consult users; instigate engagement; establish a feedback loop;* and *build statistical literacy.* All activities are not created equal: two key factors should be taken into account before determining which tool to use. First, the question must be asked: *Who are we engaging with?* The engagement activity chosen must be tailored to the specific user group and take into account the characteristics and tendencies of that group *(see part III)*. Specific tools or strategic approaches must be used for specific user groups.

The second question is: *Where are we (or where will we be) in the statistical process when this activity is employed?* Each tool is appropriate at a particular stage or stages of statistical production. Depending on the moment, some tools are more appropriate than others. In any case, user engagement (multilateral and bilateral) should be a part of the statistical production process from the very beginning and at every stage along the way.

A. Establishing contact with users

The following activities can be leveraged for their ability to establish contact with users. They are designed to enable or establish a first point of contact with national statistical system actors. Regardless of which tactics are chosen, the goal is to remove any barriers to entry and to provide a pleasant, open and informative first experience that paves the way for future engagement. The activities are listed in order of resource intensity (human, financial, capacity), from lowest to highest.

Conduct market segmentation. A key step in establishing contact with a user group is to understand what sets one group apart from another. Users should thus be segmented according to the appropriateness of the medium used to access statistics (e.g., electronic or hard copy) or based on the type of data used and for what purpose (research, policy formulation, teaching, etc.). It will then be feasible to target efforts by groups that have similar needs and habits (rather than using separate tactics and resources for each group). *Part IV* provides valuable information to guide a user market segmentation exercise.

Establish user forums by groups. Create "first contact" seminars, round tables or meetings for specific stakeholder groups, such as the media, statisticians and academics, to provide an informal yet structured environment for new users to approach data producers within the national statistical system. Meetings should be themed, short and centrally located to facilitate access.

Compile a database of external and internal users. Generate a database of users inside and outside the national statistical system by capturing contact details at every opportunity – at events, when visiting the website, when requesting information, etc. The Palestinian Central Bureau of Statistics created a user database from the contact details of people who had made official data requests in the past. Those people are also automatically added to their mailing list and receive newsletters and major announcements.

Establish and maintain external partnerships. Partnerships are key for user engagement as they allow statistical organizations to leverage and merge with the resources and networks of partners. A partnership can be established around joint data collecting or mining with other producers or users, for example. It can also take the form of a high-level representative of the national statistical system attending events hosted by users outside the system or formal agreements, such as memoranda of understanding with other producers outside of the system. In Ethiopia, for example, the Central Statistical Agency conducted data-mining for gender statistics in collaboration with UN-Women.

Establish and maintain data-sharing mechanisms for members of the national statistical system. The sharing of both national data and Sustainable Development Goal (SDG) indicators can be a way of engaging users for the first time. Sharing can take place through data and metadata exchange and through data-sharing arrangements within the system. Specifically, SDMX-based data and metadata exchange can be established wherein data are structured and imported onto a platform where users can then retrieve and access statistics. National and global SDG indicators can also be shared on the Global SDG Indicators Database.

Service agreements. A service agreement is a kind of customer service guarantee from a statistical organization to its users. It can be framed around the "bottom line" promises that can be made around things like data quality, responsiveness, transparency and the other values committed to in the strategy. This helps promote a relationship of trust and confidence between producers and users, which is a strong foundation for future engagement. As an example, the United Kingdom Office for National Statistics established a service agreement with users committing, among others, to respond within a certain period to all information requests.

B. Establishing user needs

The following tools, tactics and activities can be leveraged for their ability to determine user needs, which is a critical part of user engagement. The key challenge is to establish processes to ascertain what users want and what makes them interested in statistical products. The best producers not only identify needs at a given moment, but they are able to track and respond to shifting demands over time. The activities below are listed in order of resource intensity (human, financial, capacity), from lowest to highest.

Culture shift. This is less an activity than a prerequisite for readiness to assess what users need. The shift is essentially from providing to *listening, understanding* and *serving*; essentially asking *How can we listen or serve users better?* It is about a shift from a mentality of dissemination (sending out information) to engagement (ongoing exchange). It is about being willing to learn from users before informing them through continuous two-way dialogue. It is about producers of official statistics seeing the products and services they offer from the users' points of view. Under its user engagement strategy, the National Institute of Statistics of Rwanda plans to provide training and awareness-raising, not only for the department on the lead in user engagement, but also across the Institute such that both leadership and staff are involved and aware.

Surveys or other instruments to assess user needs and satisfaction (e.g. face-to-face surveys, mail surveys (mail questionnaire), online surveys (website questionnaire, mobile app questionnaire), telephone interviews). A user survey is a common tool used to gather data from and about users. While statisticians generally rely on representative samples for surveys to measure or capture information, in the case of user surveys, a representative sample is not always required because needs are generally qualitative information. That sometimes means that a decision can be taken or a product produced on the basis of the feedback of a single (albeit critical) stakeholder.

Engagement tools include both *user needs* and *user satisfaction* surveys. A *user needs* survey should ask what data and statistical products users need, how they like to receive them (i.e. applicable formats for disseminating results, means of dissemination), what they use the data for, what expectations and experience they have of producers of official statistics, etc. A *user satisfaction* survey, on the other hand, should cover topics such as how satisfied users are with the gamut of services and products provided, their current and future needs, what producers of official statistics can do to better meet those needs, and anecdotal evidence around any contact they have had with official statistical organizations.

Ideally, surveys should be conducted via e-questionnaire to reach a large number of users, although paper copies can be distributed at events, at the welcome desk at the offices of national statistical system members, etc. Online surveys and questionnaires are a relatively inexpensive way to gather information from a broad range of users. One downside is selection bias, which may lead to the collection of information only on specific user groups. Another is that non-response rates may be high, so a strong information campaign or incentives might be required. Other tactics for increasing response rates include embedding questionnaires in emails or embedding only the first survey question and displaying the remaining questions in a new window. In addition, mobile app surveys give users who interact with statistical products a chance to comment on an issue; this format is ideal for a quick, single question and answer.

Finally, it is worth noting that best practice is to have an external person or entity conduct a user satisfaction survey, although this obviously has cost implications.

Establish an online feedback portal. Create a designated portal, page or pop-up window accessible from the national statistics office (or other official statistical organization) website homepage where visitors can provide feedback on specific statistical products and express data or other information needs. This feedback mechanism differs from surveys by allowing for continuous data collection, whereas a survey is conducted at a given moment in time.

The challenge with such a mechanism is that it is only as useful as the number of users who know the website exists, and the people who will use an online feedback portal are already engaged to an extent because they are visiting the website. They therefore represent only a sample – and a predisposed sample – of the overall user landscape. This tool is therefore far from ideal for engaging the unengaged. However, for already engaged groups, a well-designed feedback form can elicit detailed information that can be tagged by feedback type and user and then sorted to reveal need patterns. Moreover, the tool is low-cost and relatively low-maintenance. Indeed, the Palestinian Central Bureau of Statistics established a mechanism to feedback to users any changes made on the basis of feedback from their satisfaction survey (see *Establishing a feedback loop,* below).

Google analytics and **web metrics** refer to the collection of data that captures the behaviour of visitors to a website. Data can be gathered for specific time periods to analyse user types and their needs based on which pages they visit, how long they stay on the page, where they click, how they arrive on the website (via social media, a search engine, email, a link in PDF documents or from a web page, etc.), their geographical location, etc. Google Analytics can easily be set up on a website at no cost. Someone within the national statistics office with a good understanding of online behaviour should be tasked with reviewing and analysing the data every few months, but especially after major launches. They should examine the information gathered, draw conclusions and make recommendations to inform production and dissemination of statistical results. It is worth noting that these tools are also a component of user research (see *User research*, below). They do not provide an understanding of user needs through direct expression of them, but their information needs are inferred from analysis of their behaviour on a given website.

User consultations and focus groups. Focus groups are used to evaluate, analyse and explore a narrow field of interest by gathering users to discuss their needs. Focus groups mainly serve to gather intelligence for the statistical organization rather than draw conclusions. They involve a homogenous group (i.e. users who all have something in common) of six to ten participants who are led in a discussion by a moderator using an interview guide. They can take place as a single meeting or as a series of meetings.

The advantages of focus groups are: they reveal unpredicted issues; are inexpensive to conduct; the results are immediate; and they provide a flexible sample selection. The disadvantages are: they provide less control; require experience to conduct; data is difficult to interpret; and it can be difficult to recruit participants. The United Kingdom Office of National Statistics establishes user groups for each of the domains for which they produce statistics. In addition, they have steering groups for statistical producers from a specific sector (e.g. health) that gather everyone who produces data in that area. For more on steering committees see Consulting users, below.

Group discussions are similar to focus groups but involve a heterogeneous group (diversity of user types). In this case, it is advisable to break discussions down into feedback around specific issues or kinds of statistics (health, education, labour, etc.). Generally, this is more effective than trying to glean needs in a global or general sense. According to Supporting the Dialogue between the Users and Producers of Statistics, group discussions can be framed around quality dimensions such as:

  • Are statistics relevant, timely, accessible, and what do users mean by those terms?
  • Which of the quality dimensions are important to each user?
  • Which statistical outputs are used most and least?

A second round of discussions can be arranged around forthcoming statistical outputs. Those discussions would consider emerging areas that require – or are likely to require – new data collection tools (such as a time-use survey); refinements to existing collections (to produce more highly disaggregated data, for example); new products or tools that help users to access the data they require more easily; or new methods of communication, data access or dissemination.

Develop a compendium of statistical concepts and definitions. The compendium provides a list of useful concepts and definitions used by a national statistical system when developing, producing and disseminating official statistics. The preparation and revision of this document should not only involve the producers of official statistics, but also users. This will ensure that the concepts and definitions developed meet user needs as far as possible.

Evaluate user requests. Engagement is also about helping users understand if their information needs as articulated are actually what they require to complete a task. For example, the National Institute of Statistics of Rwanda has found it valuable to examine user demands closely because sometimes what users actually need is misaligned with what they have asked for. This is either because they do not know the breadth of information available (and so request what they know but not what best suits their needs) or they are unfamiliar with the role of certain statistical products and services. A team should be established within each agency of the national statistical system to critically review user needs periodically. Responding to information requests provides an opportunity to educate users about any misalignment with respect to their perceived and real needs.

Establish an automated system to receive, process, archive and monitor user requests. This could take the form of a web-based data and information request form that is embedded in the websites of national statistical system member organizations. Ideally, all data collected about requests should be centralized within a single database managed by the national statistics office. The office would then be responsible for monitoring user requests and sharing trends (disaggregated by user group, information type, etc.) with members of the system. Periodically (once or twice a year), representatives from across the national statistics office should meet to decide how user needs should impact the statistical work programme priorities, the design of surveys and the catalogue of statistical products available (for more on this, see Establishing a feedback loop, below). One example of best practice comes from the national statistics office of Morocco, the Haut Commissariat au Plan, which manages a "Statistics window" to study the requests and needs of users in terms of statistical information.

User research involves developing a deep and nuanced understanding of the behaviours, needs and motivations of stakeholders through a variety of techniques, including observation, public information sessions and surveys. It is a continuous and cyclical process through which user problems or needs are identified and solutions offered. The United Kingdom Office for National Statistics has an entire unit dedicated to user research, which it views as complementary to, but distinct from, user engagement. While user engagement is long-term, user research is project-based and time-limited, revealing exactly which actions should be undertaken to meet a challenge proactively. It also provides evidence that each action is a direct response to a user need (see box: User research as a tool for improved user engagement). At the Central Bureau of Statistics in Sudan, for example, one staff member analyses the use of statistics in newspapers on a daily base and this work helps them understand and respond to the needs of journalists.

USER RESEARCH AS A TOOL FOR IMPROVED USER ENGAGEMENT

User research helps teams learn about users and create services that meet their needs. Without it, problems and needs cannot be identified and it is impossible to know whether a service will work well for users. To deliver a service that meets user needs, you must understand: who your likely users are, what they are trying to do, how they are trying to do it now, how their life or work influences what they do and how they do it, and how they use and experience existing services. The better you understand your users, the more likely you are to design and build a service that works well for them.

Make your research inclusive. To build a good service you need to learn about all your users, including people with disabilities and those who need support to use your service. You must actively include people from these groups in your research throughout each development phase. Make sure no users are excluded by the way you do research, such as how you plan your research, recruit participants or choose research locations. You should also think about how to run sessions with people with disabilities. Including all types of users in your research will help you to understand how people with different needs and abilities might use your service and the barriers they face. Refine your design, functionality and content based on how different kinds of users experience them and meet government accessibility requirements.

Find what works, not what is popular. People rely on government services to do important things. If they cannot do them, it can cause significant problems. In turn, these problems can increase government costs and stop policies achieving their goals. This means that user research must include all the different kinds of people who need your service and focus on how your service can help them achieve the right outcome. Do not simply ask people what they like or prefer or aim to find out what is most popular.

The same is true of the public servants and third parties who provide or support aspects of the service. If they cannot do what they need to do effectively and efficiently, citizens and businesses will experience problems and delays. To create an effective service, you must research your users' end-to-end journey and all the ways they interact with your service (including by phone and post, face-to-face and digitally).

Research continually. To work in an agile way, service teams must be able to quickly: update their understanding of users and their needs; test new design ideas, content and features to see if they work well for all users; understand the problems users are having and how they might be resolved. This means doing small batches of user research with every iteration of each development phase, as an ongoing process. This is more effective and efficient than conducting one or two large studies at the beginning or end of development.

Working in this way means you can: save time by building only the things that you know your users need; reduce risk by learning quickly whether the things you are building work well for users; and respond to changing user behaviour and feedback to continuously improve the service.

Make time for research. It is essential to plan user research for your service. This will ensure that your research provides good answers to your team's most important questions. Throughout each development phase, user researchers should typically be working with the team at least three days a week, and running user research sessions at least every two weeks. Build research activities and analysis sessions into the team's schedule so that everyone can make time to take part.

Finally, share your findings. You should also invite your team, stakeholders and people in your organization who deal with users to show-and-tell sessions and other activities where you share what you've learned from user research.

C. Consulting users

The following activities can be used to consult end users at the start of what is an ongoing, continuous feedback loop. Tactics are listed in order of resource intensity (human, financial, capacity), from lowest to highest. A statistical organization will likely want to employ a combination of tactics and some will be more feasible and relevant in a specific country context. Best practice advises that consultations be organized by statistical theme (labour statistics, tourism, health, etc.) so that conversations stay focused and relevant for a group of specialized participants and take into account the time they have available, preferred ways of working, comfort levels with certain media and their capacity. All of this should be kept in mind when deciding which activities to use in the strategy.

Internet-based forums are essentially online message boards or discussion sites where people can hold conversations in the form of posted messages. They are very useful for consulting a broader range of users as people can access the forums from a distance and without the resource requirements of traveling to in-person workshops or meetings. It is now easier than ever to set up a forum and there are plenty of software options to choose from with different levels of functionality and price, including some at no cost. Some of the most popular forums include phpBB, MyBB, WordPress and Joomla!, which is best for those with some web development experience. An excellent overview of these forums, including the pros and cons of each, and others like it can be found here: https://www.hostinger.com/tutorials/best-forum-software#3-WordPress. Note that forums will require a hosting service, which comes with an annual fee. Examples of hosting platforms are Hostgator, A2Hosting.com and Bluehost.

User support groups are essentially email distribution lists that are established and facilitated by a statistical organization to assist users and gather information. These are also called listservs (e.g. Yahoo Groups). A member of the national statistics office staff serves as a moderator, adding people to a private distribution list. The moderator, through a generic email account assigned to the group, can share information tailored to the interests and needs of members. Members of the listserv can then respond or pose questions to the whole group or directly to an individual who has made a comment. To be effective, the groups should be segmented into narrow user groups (e.g. university students, television journalists, etc.). so that members' information and service needs are likely to be fairly similar.

The risk with such a tool is that it allows all participants to comment freely and without censure, which can erode trust in official statistics if inappropriate or inaccurate comments are shared on the listserv. To help avoid this, users should be vetted, and possibly asked to sign up to a set of rules that govern posting and information-sharing to the group.

Phone calls. Although time-consuming and potentially costly, phone calls are worth the investment to consult hard-to-engage users on a particularly sensitive issue. They are especially useful for demanding users who require one-on-one contact in order to share frank and detailed feedback. Phone calls should only be made to individuals who have previously consented to be called. For incoming queries, a statistical agency may choose to create a toll-free help or feedback phone line which reduces any cost barriers for users. In Palestine, the national statistics office used phone-based surveys to ask past users questions such as how they like to receive data and what they use official data for, to gauge their satisfaction with services and data (both in general and in detail based on what they had requested), and to determine what the office should do to meet their needs.

New media. Social media networking platforms (e.g. Twitter, Facebook, LinkedIn) and other online sharing platforms (YouTube, Flickr) can be leveraged for their ability to build a community of interest. (Note that Twitter is a particularly popular tool among statistical agencies). Official statistical organizations can use these channels to form an online community of interest with which to share content and to raise awareness about statistics and products and receive informal feedback on both. Using these platforms requires constant updating and sharing, however, and someone must be responsible for analysing the activity on each platform. They must seek to understand which topics are receiving the most engagement and why by analysing the comments and engagement for patterns that can be translated into recommendations for action. The United Kingdom Office for National Statistics calls this "social listening" and their user engagement strategy calls for managing social listening across all platforms for all corporate channels, existing and future, including the Census, sharing insight across the organization (tactically and strategically).

A process or coordinating body is needed to consult stakeholders on how they use statistics. It can take the form of technical working groups, producer-user consultations, an advisory council or a memorandum of understanding between a statistical organization and specific user groups (e.g. universities). This body could also involve stakeholders in the evaluation of statistics. The Central Statistical Agency of Ethiopia uses a combination of tactics for user-producer consultations, including informal and formal discussions, and a formal mechanism for dialogue based on legal or institutional frameworks that govern the production of statistics. Palestine also provides an interesting example, which is presented in the box Case study of innovative practice, below.

Thematic workshops. These gatherings are more targeted than a coordinating body and are used for the specific purpose of introducing new products or withdrawing or modifying a statistical product. The meetings are ad hoc and involve a diverse group of users of a certain statistical subject area (e.g. health or education) and the producers of those statistics. The exchange allows users to become aware of changes to statistics and to ask questions. This makes them feel part of the production process and thus facilitates ownership of and familiarity with outputs. Thematic workshops can also be used to inform key users about gaps between the measured statistical concept and the user's concept of interest, data limitation and data quality.

Technical committees or permanent thematic working groups. Unlike the previous categories, this activity involves establishing a group of more technical expert users who meet regularly with producers to discuss their detailed requirements. These might focus on a particular survey during the survey design stage. As an example, the Zambia Statistics Agency hosts regular user-producer meetings prior to conducting a new survey.

CASE STUDY OF INNOVATIVE PRACTICE

The Palestinian Central Bureau of Statistics has interesting experiences of engagement with users which adopted an innovative approach to training that involved both users and producers. In 2011, for instance, they responded to criticism from users and ran a user-producer workshop on statistical storytelling and technical support to local trainers in cooperation with the non-profit Capacity Building International (InWEnt) and Assistance Technique France (ADETEF) through the Palestinian Finance Institute. The benefits of the work are already apparent in the form of improved press coverage of statistical stories. For instance, data on household expenditure on tobacco in Palestine had been available for some time but it was only when the Bureau pointed out that Palestinians spent more on cigarettes than on education that the story made the headlines. The press release is here http://www.pcbs.gov.ps/Portals/_pcbs/PressRelease/EXpend&Consm2010E.pdf.

Source: *Supporting the Dialogue between the Users and Producers of Statistics with a special focus on social statistics in the Southern and Eastern Mediterranean Countries.*

Advisory council or steering group. This is a non-statutory body that advises the director general of statistics on matters pertaining to government statistical work. The aim of the group is to ensure that the needs of various sectors of the community can be taken into account in the development of government statistical activities. Members can include respected professionals from the business sector, civil society, academia, government and the community. The group should have a diverse and well-informed membership such that collectively they represent a broad spectrum of the user community. In this way, participants can help the director general to integrate the views of data users and other data suppliers into decision-making.

Statistical advisory committees can be established for individual fields of national statistics (e.g. labour statistics advisory committee, energy statistics advisory committee, industry and mining statistics advisory committee, etc.). The statistics act of some countries confers this mission on a statistical council. In that case, it is recommended that more than half of the members of the statistical council come from outside government to ensure that the needs of a broad range of users and user communities are taken into account.[1]

Host one-on-one user dialogues. One-on-one, in-person consultations may be the best tool to use for primary stakeholders (i.e. those in the "Cultivate ASAP" quadrant in the mapping exercise) and users that require special attention because they are politically important, high-level or hard to engage. This is of course a very time-intensive way to engage one individual, but the national statistical system will have far more control over the nature and quality of the exchange. It also makes it easier to ensure confidentiality, if needed. The National Institute of Statistics of Cambodia, for example, conducts consultative meetings with individuals within line ministries or agencies, among development partners and with civil society organizations. Furthermore, they segment the meetings at two separate levels -- technical experts and policymakers.

D. Instigating user engagement

The following activities do not themselves involve engagement but have proven creative ways of capturing the attention of an audience in a way that might lead to engagement. This category of tactics might also be labelled "outreach and external relations" as it includes many classic communication and dissemination activities that are used to share information outside an organization. But again, it is what a statistical organization does once the contact has been made through the outreach that determines whether or not it leads to meaningful engagement. For example, if a national statistics office invests in short public service announcements (see below, *Building statistical literacy*) on the radio, they should end with contact information for enquiries. If it is an email address, the organization should be prepared to have a staff member check email and respond to incoming queries in a timely manner.

It is worth noting that this category of tactics could be seen as a subcategory of the first set of engagement activities above, *Establishing contact with users*, because they are often employed as a first point of contact. Generally speaking, these activities are more resource- and time-intensive but, as before, they are listed here in order of the human, financial and capacity needs to execute them, from lowest to highest.

---

[1] Guidance on Modernizing Statistical Legislation

Newsletters. Many statistical organizations produce a newsletter that reports on their most important developments and those from around the national statistical system. It can also be used to alert readers to upcoming events and launches and any major shifts in statistical policy. The frequency with which they are issued depends on the capacity of the organization, but quarterly or twice yearly is generally acceptable.

Some common features of newsletters are interviews with dynamic producers and users about a stimulating experience or lesson learned, a calendar of events and publications, news stories on major developments, a quiz or fun data-based game and links to useful resources. Newsletters, especially electronic or e-newsletters, can be a low-cost way to stay in touch with users. The most successful e-newsletters use, not only articles, but also images, infographics and even multimedia content. (See below for writing entertaining news stories and making data fun and meaningful). Instead of newsletters, some organizations opt to produce monthly statistical reviews, periodicals or a summary of trends.

Writing stories with data. There are special writing techniques that can be employed to make data meaningful and allow non-specialist audiences to gain a quick understanding of their role and value in society. The best way to do this is through evocative storytelling that shows data being used in a real-world context. For example, fluctuations in inflation can be described through the story of one real person going to buy produce in the market and noticing price differentials from one month to the next. *In Making Data Meaningful: A guide to writing stories about numbers*, the United Nations Economic Commission for Europe calls this "statistical storytelling" and defines it as "catching the reader's attention with a headline or image; providing the story behind the numbers in an easily understood, interesting and entertaining fashion; and encouraging journalists and others to consider how statistics might add impact to just about every story they have to tell".

These data stories can be published on a statistical organization's website, on social media feeds and in public information materials or recounted on radio and television shows. The *References* section of these guidelines contains links to *Making Data Meaningful*, an online handbook for sharing data in creative ways.

High-level representation at events. While it is difficult to block time for senior level administrators to attend events outside the national statistical system (e.g. private sector conferences), sometimes the presence of the director general is very important to signal the relevance of data and statistics in larger conversations. A high-level presence also communicates that the statistical organization sees the conference and its stakeholders as important to its work. Partnerships can be born of such a presence and at the very least they serve as public relations opportunities for sharing key messages about the organization and statistics.

Press conferences are events organized to officially distribute information, make a major announcement and field questions from the media. Journalists are the target audience, but the events are usually open to the public. Journalists should be invited via a press advisory at least one week prior to the event. In addition, a press release carrying the main headline news (i.e. the lead finding or statistic from the survey) should be distributed on the day to all media outlets. It is also recommended that subject specialists be available on the sidelines of press conferences to respond to journalists' questions.

Press conferences held by a data producer are good departure points for user engagement because the audience is already captive (i.e. they are there because they are interested in what a statistical organization has to say). Having many interested users in one place is an opportunity to grow the database by gathering contact details, share information about other products and services offered, advertise upcoming events and launches, and inform the audience about the existing mechanisms for exchange and consultation. It is best practice for a national statistics office to hold a press conference for every major statistical launch.

Open data portal or reporting platform. Online platforms are a powerful tool for reaching large audiences and facilitating access to and use of data. Many countries are developing statistical dissemination platforms to make national and SDG indicators available to a wider range of users. These can take the form of a website with a database and associated information technology (IT) infrastructure. Data portals can help instigate engagement by helping statistical organizations to collect feedback. In addition, when portals are open (i.e., when they are machine-readable), they facilitate the use of data on other platforms and on third-party applications.

Different technical solutions are available for such platforms. Each country must choose a solution for the "front end" – the part that the user sees and accesses to find information – and the "back end" – the database that stores and manages all the data and related material. The platform must be able to collect, store, safeguard and disseminate data and metadata and it must be easily accessible. For examples of best practice, the Sustainable Development Goal tracker of the Statistical Service of Ghana can be seen at https://sustainabledevelopment-ghana.github.io and Columbia's National Administrative Department of Statistics tracker can be seen at https://ods.gov.co/.

Online data and information dissemination platforms. For non-technical audiences, information-sharing platforms include a **public website, social media** (Twitter, Facebook, Instagram, etc.), **online forums, webinars,** and **blogs**. While some platforms, such as a website, have high upfront costs, once they are established, the return on the investment can be very high. Others are free, such as Twitter and Facebook, and are geared towards developing a community of interest. The one caveat with all platforms is that they must be maintained by a dedicated staff person who regularly posts compelling content and tracks and responds to follower comments. This is where the engagement comes in and is what makes these platforms valuable for a user engagement strategy.

Data advocates and champions. Some audiences can be drawn to technical issues and discussions by way of an influential person who champions the cause. Employing these individuals as the face of the national statistical system can extend the reach of statistical products and services to new, especially non-specialist, audiences. For outreach and awareness raising, the United Kingdom Office of National Statistics uses champions who are traditional authorities in their local districts, even if they are not associated with statistics. They are well-respected figures who have the power to bring people together for information-gathering or promotion of the Office. The United Kingdom has found it helpful to use these figures to attract the public to a meeting and then break down the conversations by theme so people can identify sessions that are of most interest to them.

To maximize the impact of the event and establish a feedback loop (see below, *Establishing a feedback loop*), the Office of National Statistics looks for the key actors in the audience (e.g. those with strong opinions or high levels of curiosity, those to whom community members gravitate, etc.), and approaches them afterwards about joining a district-level steering group (the groups are heterogeneous). The Office then convenes the group frequently to get their feedback on products and services. The steering group has clear terms of reference and an action plan for what it must achieve.

Data visualization. This activity involves producing tables, (interactive) charts and maps, and using other forms of visualization that use data to make a specific point or illustrate a specific phenomenon. It is geared towards making very complex data easier to understand, as stated in the United Kingdom Office of National Statistics communications strategy, which commits to "utilize successful data visualization tools and techniques to personalize content for a broad citizen audience, in a way which increases user engagement and understanding". The handbook, *Making Data Meaningful,* also offers guidance on creating powerful visualizations and offers advice on how to avoid bad or misleading visual presentations. Most organizations opt to hire data visualization consultants who are specially trained to build accurate, attractive and engaging content.

Multimedia and other creative content. There are many ways to embed statistical information in creative content so as to attract the attention of potential users who might otherwise find it difficult to understand the meaning of data. Multimedia content (videos, audio files, podcasts) and other creative content (infographics) are great ways to engage users, especially young people and non-technical groups. The Palestinian Central Bureau of Statistics employs a range of creative content including animated infographic videos and data visualization, films and short videos, and full-colour posters.

E. Establishing a feedback loop

Feedback is the lifeblood of quality user engagement. Once contact and consultation channels have been established and user needs have been ascertained, data producers must respond by altering their products, services and operations to increase their usefulness for users. Users must then be given the opportunity to provide feedback on those changes. That feedback should make its way back into the data producer's service model for adjustments and improvements that will further improve the user experience.

Ideally, producers should also have a mechanism for providing feedback to users on everything from capacity constraints they might experience in meeting the needs expressed, progress on what user needs they are in the process of addressing and, equally important, any assessment of poorly articulated needs (see *Evaluate user requests,* above). Indeed, it is this exchange that transforms external relations from one-way communications to the never-ending loop of feedback that is user engagement. The following is a list of activities that can be used to establish that critical feedback loop. They are listed in order of resource intensity (human, financial, capacity) from lowest to highest.

Monitoring system. Establish a process to monitor changes or developments in policy and user environments that might signal the need for new statistical series and products. This can be done through a combination of tactics, such as an automated system like Google alerts, plus information-gathering in the context of the user consultations discussed above under *Consulting users,* either in a group context (e.g. advisory council, thematic workshops, etc.) or one-to-one.

Onboarding mechanism. All data producers in the national statistical system must establish their own system for taking on board the results of user needs and satisfaction surveys and bringing them to bear on the statistical work programme and the design of surveys and statistical products. For example, a multidisciplinary committee could be established in a national statistics office to review and assess feedback and to determine what to take on board and how (including who will lead) and when to do so. It is important that the committee have representation from all parts of the data production chain. In this way, everyone affected by decisions will have a say in them upstream. There should be a tracker to follow progress and alert the lead when their workstreams are lagging behind schedule. Progress can be shared on a public-facing dashboard (see *User engagement dashboard,* below).

User engagement dashboard. In an attempt to create total transparency around how feedback is taken on board, a dashboard can be created on the statistical agency's website showing how well it is doing in addressing the needs and issues raised by users. That dashboard could be as simple as a pie chart that shows the percentage of issues addressed compared to the number raised by survey respondents. A more sophisticated dashboard might take a handful of specific user demands and detail what measures are being taken and what point those measures have reached in their implementation.

Email-based communication. Reading and answering user emails on a regular basis is one of the most basic ways to signal to users that the organization is listening and reacting to their needs and provides an opportunity to be specific about how their needs are being addressed. In addition to modelling good service provision, it provides statistical producers with an ongoing means of gathering feedback (when users provide email-based feedback). The United Kingdom National Office of Statistics suggests looking globally at the "help request" emails and identifying the most frequent requests. (This might lead to the creation of a Frequently Asked Questions brief, for example). It also creates a special email address that users can use when the Office is working on a specific topic, which makes it easier to track feedback by issue or statistical set.

Develop different statistical products and services according to user group. It is important to develop statistical products and services that are useful to users and help them in their decision-making, and that inform public debate. Depending on the level of statistical literacy and user group, national statistical systems can develop tailor-made products and services to achieve effective communications and data use. For instance, in addition to the main report of a survey, a national statistics office can produce infographics, key figures and thematic analyses for the media, develop policy briefs for policymakers and develop leaflets for students and the general public.

Senegal has opened a data access centre for researchers and students of Cheikh Anta Diop University in Dakar to facilitate access to data and microdata with metadata for research and to enhance interaction between the national statistics office and the research community. The national statistics office plans to expand this initiative to the other universities in the country.

Building statistical literacy

User engagement is a two-way process: statisticians must understand user needs, and users need to understand statistics. That understanding on the part of users is called "statistical literacy". Statistical literacy refers to the knowledge and skills that enable both users and producers to understand, evaluate, use and communicate statistical data and information. In *Making Data Meaningful Part 4: How to improve statistical literacy*, the United Nations Economic Commission for Europe recognizes three broad levels of statistical literacy:

- Basic. The individual is aware of, understands and appreciates the type of study or data source used (survey, census or administrative data set), able to find definitions of statistical terms and understands basic statistical measures and graphic representations of data.
- Intermediate. The individual understands and appreciates the limitations of the methods used, understands the more commonly used statistical concepts and terms (e.g. labour-force-participation rate), understands variability and uncertainty, and is able to interpret probability statements associated with sample estimates.
- Advanced. The individual is able to understand the more sophisticated statistical terminology, sampling errors and non-sampling errors and what constitutes a valid statistical study, make valid statistical inferences and critically assess claims made about the data.

It is important to determine which level of statistical literacy is needed for each user group in order to cater activities and resource investments accordingly. For example, a journalist would likely fall into the basic category and not require complex and lengthy training, whereas a decision maker in a sector ministry would likely require an intermediate level of literacy and a data producer would fall into the advanced category.

When users are aware of the role of statistics, they are more likely to demand them and this – producing demand-driven statistics – is a marketing goal of all statistical systems. Moreover, as the value users inside and outside government place on data increases, their engagement with the organization is likely to increase, further improving the quality and relevance of data.

Statistical organizations can take a leading role in building statistical literacy across all user groups. Specifically, they can:

- Instruct users in how to find sources of statistical information to elucidate an issue they are investigating.
- Show how to employ statistical techniques to extract the key messages in the data.
- Teach users how to present key messages in a clear and accurate manner.
- Model how to use statistical information in decision-making.

The following activities can be used to boost statistical literacy. They are listed in order of resource intensity (human, financial, capacity) from lowest to highest.

Strategic partnerships. User groups can be viewed as partners in developing statistical literacy: Partnerships with them lead to greater interaction and create opportunities to increase their awareness of and ability to use statistics. For example, partnering with the education community – teachers, educators, researchers, curriculum developers, academics, government officials –

can facilitate the improvement of statistical literacy among schoolchildren. Partnerships can also be developed with global initiatives such as the International Statistical Literacy Project (http://iase-web.org/islp/) or with statistical societies such as the International Association for Statistical Education. These kinds of collaborations allow national statistics offices to share experiences, research and resources and this ultimately leads to greater statistical capability nationally and globally.

Training. A statistics organization can host workshops and seminars to train specific user and producer groups on issues of presentation, access, usage and interpretation of statistics. The media, in their role as a high-visibility distribution channel for the data the national statistical system produces are often a focus of statistical training. Indeed, the Central Statistical Agency of Ethiopia has "the development of the capacity of data providers, producers and users and the media through training and workshops" as one of its strategic areas of focus. The Ghana Statistical Service, on the other hand, holds regular national metadata training courses. Training can also be extended to the training of statisticians themselves, particularly those developing statistical information and statistical by-products, to making statistics more understandable to a broader range of users.

In the context of developing statistical training curricula, organizations can also leverage the expertise of statistical training institutions/centres. These institutions are seasoned in training and have learning materials that can support the skills development of producers and users alike. It is also worth noting that training courses do not necessarily require large amounts of financing. They can be conducted on-site (eliminating the cost of venue rental) and in modules of short, two-hour sessions on specific topics (i.e. how the media can interpret the annual report on the consumer price index).

Additionally, e-training modules can be developed and made available on the national statistics office website as a sort of virtual training centre, for example. This has the advantage of being accessible to remote users, who can take the courses offered at a convenient time without travel costs.

Statistics clubs. Statistics clubs are student-managed organizations that create opportunities for students to network with others interested in statistics. They are usually school- or university-based and allow students to learn from one another about the power of statistics and to share information. The Zambia Statistics Agency promotes the creation of statistical clubs among young people to spark an interest in statistics early in citizen's lives.

Games and competitions. Users are often galvanized by national contests and games that reward the accurate, innovative and creative use of statistics. This type of gaming is an excellent and low-cost tool for generating interest in understanding and using statistics among non-technical groups. In a tactic used by many national statistics offices, the Palestinian Central Bureau of Statistics runs data-use competitions for school-age children and hosts a microsite with games and interactive data for students. The National Institute of Statistics of Rwanda hosts a data storytelling competition among journalists and an infographic competition. They also produce a teacher discussion guide on statistics and host sessions for children on reading data.

Cultural events and engagement with artists are wonderful ways of gathering people around a shared love of music or art and introducing them to the importance of statistics, either directly through the programming or indirectly by having information booths or sessions arranged during the event. Concerts, exhibitions, and theatre are all viable options. The Palestinian Central Bureau of Statistics even created a piece of satirical theatre around data and statistics. The key is to choose an attraction (a musical group, artist, etc.) that has broad cultural currency so as to attract a large and diverse crowd, and to pitch information materials at a level that is accessible linguistically and technically to a large portion of the population. If done well, people will increase their awareness of statistics without feeling they are being lectured to and better still, while having fun.

Public service announcements are recorded video or audio spots for TV or radio that carry a message in the public interest. They are disseminated without charge with the objective of raising awareness of, and changing public attitudes and behaviour to, an issue. A statistical organization might opt to create a short public service announcement to boost the awareness of the general public of what they do and why they do it, to increase appreciation of statistics generally or to explain a specific statistic that is commonly referred to and for which a basic knowledge is helpful to an active participant in society (e.g. GDP, inflation, the consumer price index, etc.).

PART III:

TYPICAL KEY USER GROUPS: HOW THEY THINK AND WORK AND WHAT THEY NEED

Statistics offices cater to a gamut of users, each of whom has different data needs, and, as outlined in *Part II*, there are a variety of tools available for engaging users. So how does one know which tactics to use with which groups? This section aims to answer that question by mapping out different user groups, their data needs and priorities, how they work with data, and the format in which they prefer to receive statistics (e.g. microdata, policy brief, etc.). It also outlines some of the mutual benefits of engagement. With this information to hand, it will be easier to choose the most effective means of producer-user exchange under the strategy based on who the strategy seeks to reach and why.

	User group	Who?	What do they need statistics for?	What type of data and statistical activities are needed and in what formats?	How engagement benefits the national statistical system
A.	Public authorities and policymakers	Technicians and executives of national and subnational government agencies; decision makers, including leaders and senior executives of public bodies. They come mainly from ministries and public bodies. Members of legislative bodies and their staff members.	To develop, monitor and evaluate programmes and policies in different sectors at the national and subnational levels; to measure and evaluate performance; and to inform political, economic and social decision-making. To draft bills and participate in and influence debates of national importance. To track and guide government action and influence debate.	• Ready-made analysis • Meetings and presentations • Briefs for ministries and parliament • Accessible database that allows search by keyword, sector, location and indicator • Policy briefs and other brief reports and graphics providing the current situation and forecasts in terms of outputs and outcomes of programmes and policies • Summary tables, data cubes, record unit data (Excel, CSV, CD-ROM) – formats that encourage analysis and re-use • Simple and comprehensive metadata, databases, strategic documents; thematic report analysis, synthesized data, disaggregated data, monitoring data for sectoral policies • Database that allows search by keyword, sector, location and indicator • Brief reports and graphics providing the current situation and forecasts useful for assessing the impact of particular legislation on certain sectors and demographics • Infographics	Solidifies its stature as the leading and credible source of relevant data that can inform sound policies and programmes, thus helping to make the case for continued, if not increased, funding of its operations.
B.	Parliamentarians	Members of legislative bodies and their staff members	To draft bills and participate in and influence debates of national importance. To track and guide government action and influence debate.	• Database that allows search by keyword, sector, location and indicator • Brief reports and graphics providing the current situation and forecasts useful for assessing the impact of particular legislation on certain sectors and demographics • Infographics	Solidifies its stature as the leading and credible source of relevant data that can inform meaningful legislation and national debate, thus helping make a case for continued, if not increased, funding of its operations.
C.	Political organizations	Members and leaders of political parties and their staff.	To identify potential voters, define political, economic and social strategies and programmes, and influence debate.	• Database that allows for queries on voter demographics and disaggregated information about socioeconomic situation and trends • Reports and graphics on trends relating to specific economic, political and social issues such as education, health and trade • Specific data needs include information on the 18+ population, general demographics, and all development indicators • Infographics	Sustains its relevance, and establishes a reputation as a neutral and transparent organization, and contributes to constructive debate.

	User group	Who?	What do they need statistics for?	What type of data and statistical activities are needed and in what formats?	How engagement benefits the national statistical system
D.	Media	Reporters, editors, op-ed writers and columnists.	To produce and fact-check articles, editorials and columns aimed at the general public and specific audiences. To use statistics to inform the public about government action and the economic, social and political situation; to illustrate and support arguments; to identify and investigate an issue; and to influence debate.	• Press conferences • Training, guidance on how to access, use and interpret statistics • Individual interviews • Dashboard providing a snapshot in text and graphs of recently released data, with an explanation of data collection methodology and a contact person for clarification of data • Synthesis with basic analyses and indicators, thematic analysis, graphics and charts, disaggregated data • Infographics	Increases visibility of statistics produced, sustains relevance and credibility as a source of independent, fact-based information, and mitigates misrepresentation of data or the spread of "fake news"
E.	Academics	Teachers and students (in secondary schools)	(Teachers) To obtain material and data that can facilitate the teaching of statistics and stimulate learning. (Students) To obtain material that facilitates learning and the completion of coursework.	• Aggregated data • Workshops and presentations • Short online thematic modules to use in schools at different levels of the education system that are aligned to curricula • Press conferences • Individual interviews • Dashboard providing a snapshot in text and graphs of available data, with an explanation of data collection methodology and a contact person for clarification of data • Infographics	Contributes to students' appreciation of statistics in their studies and life and to statistical literacy. Potentially generates interest among students in a career in statistics.
F.	Researchers	Researchers (in tertiary education, i.e. university).	To generate evidence and make evidence-based policy recommendations, support analysis, publish articles, reports and dissertations, and develop curricula. To use statistics and data in scientific and technical work and for research.	• Microdata for research and analysis, including metadata • Workshops or presentations • Press conferences • Customizable database with disaggregated data on specific topics • Participation in survey design to ensure inclusion of key variables relevant to their research • Summary tables, data cubes, record unit data (Excel, CSV, CD-ROM) – formats that encourage analysis and re-use • Dashboard providing a snapshot in text and graphs of available data, with an explanation of the data collection methodology and a contact person for clarification of data • Infographics	Contributes to creating knowledge that can inform and influence public and industry-wide policies and programmes. Potential partner with the national statistical system on research topics. Can help improve data quality when they are engaged with producers of data.
G.	International organizations	Specialists and leaders of United Nations agencies, bilateral donors, and international financing organizations, technical partners.	To develop, monitor and evaluate their different frameworks and cooperation programmes in-country. To publish reports on topics of global or regional importance. To makes regional and international comparisons.	• Dataset that can be integrated into existing databases • Summary tables, data cubes, record unit data (Excel, CSV, CD-ROM) – formats that encourage analysis and re-use • Data on demographic, social, economic and environmental indicators relevant to their sectors of intervention; reports and results of previous projects; data on other stakeholders in their sectors; results of surveys of the general public • Infographics	Solidifies its stature as the leading and credible source of data that can inform needs- and evidence-based development cooperation initiatives and influence discourse of global importance.

	User group	Who?	What do they need statistics for?	What type of data and statistical activities are needed and in what formats?	How engagement benefits the national statistical system
H.	Civil society organizations (CSOs)	Staff and executives at development, advocacy and other non-profit non-governmental organizations.	To raise awareness and advocate issues, map areas and plan for intervention, and monitor national commitments. To identify the problems within society; prioritize interventions; develop, monitor and evaluate programmes and projects; and for advocacy and awareness-raising. To participate in and influence debate.	• Customizable database with disaggregated data on specific topics • Explanatory text in accessible language • Dataset that can be integrated into existing databases • Dashboard providing a snapshot in text and graphs of available data, with an explanation of data collection methodology and a contact person for clarification of data • Data on all sectors (nutrition, food, the environment, social protection, social security, governance, human rights, education); economic and social indicators in their sectors; public satisfaction surveys • Collaborative platforms and partnerships with the national statistical system (through memoranda of understanding, for example) to improve the quality of collected data held by CSOs • Infographics	Sustains its relevance, solidifies its reputation as a transparent organization, and contributes to raising awareness on issues of national and global importance. Improved use of data when relevant by national statistical system stakeholders.
I.	Citizens	Data-seekers.	To inform daily decision-making and planning, and gauge the country's progress. To participate in and influence debate.	• Dashboard providing a snapshot in text and graphs of available data, with an explanation of data collection methodology • Data on key demographic, social, economic and environmental indicators, such as price evolution markets and supply flows and sources, and on health, education, employment, agriculture, the environment and meteorology • Infographics	Increased response rate to surveys. Awareness-raising around statistics, demand-creation. Sustains its relevance, solidifies its reputation as a transparent organization, and contributes to raising awareness on issues of national and global importance.
J.	Private sector	Investors, members and officials of industrial associations and professional bodies, business owners, and entrepreneurs.	To assess business opportunities and understand social, economic and environmental trends for market research, feasibility studies and advocacy. To guide and leverage their investments, understand the competition and interact with government and partners.	• Customizable database with disaggregated data on specific social, economic and environmental issues • Data on sectoral geographical distribution; prices; infrastructure; population; demographic indices; labour and the workforce; the environment; taxation; security; behaviour of target groups; consumption • Infographics	Sustains its relevance, solidifies its reputation as the leading source of vetted, relevant and credible data that can inform investment, innovation and private sector engagement with government. Improve quality of specific statistical products such as the business register.

CONCLUSION

Statistical organizations need users. It is therefore imperative that organizations consider users at great length and determine what they need and what package of statistics, statistical products and activities are best suited to fulfilling their needs. The next step is for those needs to be met, after which users must be consulted again to determine if their needs have in fact been satisfied or if they have new ones. This ongoing exchange is what user engagement is about. While it can sound onerous, once the procedures and culture are in place, it is actually something that will feel automatic and necessary.

These guidelines have sought to introduce all the key elements needed for a national statistics office or national statistical system to instigate and maintain that ongoing exchange with stakeholders. While much information has been given and many recommendations made, a few stand out as key takeaways:

1. Engaging users is no longer an option. If producers of official statistics are to reclaim the market share that is gradually being taken over by new and non-official data producers, they must better position themselves as indispensable, credible, relevant and responsive to users. There is no better way to achieve all of these goals than by engaging and dialoguing with users.

2. Commit to taking a strategic approach. To be effective, user engagement should be seen as a multi-year strategic plan that commits the national statistics office or national statistical system to implementing a series of engagement tactics against measurable objectives. This should not be undertaken as a series of ad hoc activities but rather as a suite of coordinated and integrated activities that are chosen through a rigorous and inclusive process.

3. Cooperation and buy-in. The strategy development process should involve a variety – both in terms of roles and level of seniority – of actors from within the statistical system and the national statistics office. This will go a long way to generating a robust strategy that reflects a variety of perspectives of those involved in statistical production. It will also generate necessary interest in and buy-in for the strategy once it is finalized and implementation begins.

4. Strategy alignment. It is important that any user engagement strategy be incorporated into an overall communications strategy so as to ensure that the documents do not compete for resources or work against one another in terms of objectives. If it is impossible to combine the two strategies, aim to have them closely aligned in terms of activities and priorities. It is imperative that the user engagement strategy draw directly from any commitments regarding users made in the national strategy for the development of statistics.

5. User engagement is a process. As implied above, user engagement is a journey that never ends. Producers are responsible for identifying user needs and then improving service and product delivery with respect to those needs. User needs are ever-changing and services and products must keep pace with them.

6. User engagement must be seen as core to the business of a national statistics office or national statistical system and its operations. To be effective, user engagement must become part of the DNA of a statistics office or statistical system. It must be leveraged in some form at each step of the statistical process. Everyone within the organization must feel implicated in user engagement, not only those working in external relations.

7. Make the mental leap. Where most organizations fall short in terms of user engagement is in failing to put themselves in the user's place. This requires imagining things like the culture, preferences, limitations, needs and modes in which a group operates, communicates and thinks. Having a deep understanding of these characteristics will guide development of the right tactics to engage stakeholders, bearing in mind that each group is different and one must adapt to those differences in order to resonate with them.

8. Adaptation. Every national statistics office or statistical system must determine what works best given the context in which it operates. This context includes human and financial resource availability, political will, the history of the organization or system, the nature of users of statistics, the overall level of statistical literacy in the society, etc. These guidelines have attempted to provide a range of options that are applicable and adaptable to different contexts, but a selection must be made based on relevance and the ability to actually implement them.

Ultimately, the impact of a user engagement strategy is determined by the elements included and the capacity (resource, legislative, political) of the national statistical system or organization to implement it. But doing the upfront thinking outlined here will greatly increase the potential impact of the strategy and the understanding needed across an organization or system to drive the process to successful implementation.

RESOURCES

1. *African Charter on Statistics* https://au.int/en/treaties/african-charter-statistics.
2. *Cape Town Global Action Plan for Sustainable Development Data* https://unstats.un.org/sdgs/hlg/cape-town-global-action-plan/.
3. *Guidance on common elements of statistical legislation, Economic Commission for Europe* http://www.unece.org/fileadmin/DAM/stats/publications/2018/ECECESSTAT20183.pdf
4. *European Statistics Code of Practice* https://ec.europa.eu/eurostat/documents/64157/4392716/Revised_CoP_Nov_2017.pdf.
5. *Fundamental Principles of Official Statistics* https://unstats.un.org/unsd/dnss/gp/FP-New-E.pdf.
6. *Making Data Useful Part 1: A guide to writing stories about numbers* https://www.unece.org/stats/documents/writing/.
7. *Making Data Meaningful Part 2: A guide to presenting statistics* https://www.unece.org/fileadmin/DAM/stats/documents/writing/MDM_Part2_English.pdf.
8. *Making Data Meaningful Part 4: How to improve statistical literacy: A guide for statistical organizations* https://www.unece.org/fileadmin/DAM/stats/publications/2013/Making_Data_Meaningful_4.pdf.
9. *Measuring and responding to demand for official statistics* https://www.aiddata.org/blog/measuring-and-responding-to-demand-for-official-statistics.
10. *Recommendations for Promoting, Measuring and Communicating the Value of Official Statistics* http://www.unece.org/fileadmin/DAM/stats/publications/2018/ECECESSTAT20182.pdf.
11. *Standards and Guidelines for the Implementation of the African Charter on Statistics* https://au.int/sites/default/files/pages/32831-file-standards_and_guidelines_for_the_implementation_of_the_african_charter_on_statistics.pdf.
12. *Supporting the Dialogue between the Users and Producers of Statistics with a special focus on social statistics in the Southern & Eastern Mediterranean Countries* https://circabc.europa.eu/sd/a/9dab4cbb-4539-4b35-87a2-68dc5efd6b11/EN_Regional%20Guidelines%20for%20Users-Producers%20Dialogue_HD.pdf.
13. *UK Office of National Statistics: How to engage with users* https://gss.civilservice.gov.uk/policy-store/user-engagement/#how-to-engage-with-users.
14. *United Nations Fundamental Principles of Official Statistics: Implementation Guidelines* https://unstats.un.org/unsd/dnss/gp/Implementation_Guidelines_FINAL_without_edit.pdf.
15. *United Nations Statistics Division: National Quality Assurance Frameworks Manual for Official Statistics* https://unstats.un.org/unsd/dnss/QualityNQAF/nqaf.aspx.
16. *La lettre d'Afristat* https://www.inege.gq/wp-content/uploads/2019/11/La-Lettre-dAFRISTAT-N%C2%B090.pdf.

GUIDELINES FOR DEVELOPING AN INTEGRATED USER ENGAGEMENT STRATEGY FOR NATIONAL STATISTICAL SYSTEMS

As an important public good in democratic societies, official statistics have to meet the needs of users. To meet the test of practical utility, statistics must be relevant, of suitable quality and in a form that facilitates easy and correct use. The key to achieving this is maintaining an understanding of user needs. Producers of official statistics must regularly consult users using appropriate channels and means of communication because needs change and different users respond to different engagement methods.

These guidelines offer a practical mix of good and common practices, instructions, tips and background needed to conduct a dialogue with users and identify what they need and when and through what medium they need it. They provide guidance for developing robust and strategic user engagement programmes and propose sample tactics and activities for a well thought-out user engagement workplan based on the needs of typical key user groups.

This publication is a valuable resource for national statistical Systems and the organizations within it, including national statistics offices, wishing to develop and strengthen their engagement with users of official statistics.