Gathering and using testimonials as evidence of impact

Some dos and don’ts

Don’t wait to get testimonials. The details, nature and value of impacts may become dull with time, the person who was familiar with the work may have moved on, forgotten about it, retired etc.

Do make sure the person giving the statement knows exactly what it is for and has the authority to give it. Instead of framing the request in relation to the institution’s goals/REF guidance, consider asking people to reflect on how the research/researcher helped them achieve their personal or strategic goals.

Do consider providing probing questions, based on the types of impacts you expect might have occurred (e.g. were jobs created, did you save or lose money or become more or less profitable, did attitudes change?), and use these to ask for other specific examples of things that changed or had value or meaning.

Do ask people to be as specific as possible, quantifying benefits or justifying their significance or reach in other ways. Ask if they know of any evidence you could use to support their claims. Ask them to comment on the specific role the research played, if there were multiple factors influencing the impact. But, no matter how specifically you probe, always remember to also ask open questions to capture things that you did not expect and so would not think to probe for.

Don’t be afraid to ask for revisions to testimonials that are too vague or not sufficiently relevant (although be aware that the person might be being deliberately vague because they did not perceive any significant benefit!).

Do draft testimonials for really busy people to adapt. But be aware this may significantly bias the testimonial and limit the spontaneity and breadth of responses. If you go down this route base your testimonial on a discussion with the person about the impact, even if you can only get 15 minutes with them.

Do consider using interviews as a method for collecting testimonials (either in person or by phone/ Skype) as an efficient way for busy people to engage with the process. 2 two key benefits to interviewing people for testimonials: 1) Interviews are a great way to probe for impacts that are difficult to articulate in words, such as changes in attitude or wellbeing, or cultural change; 2) They give the researcher the opportunity to ask open questions to explore the possibility of impacts that they had not planned for or expected.

Do seek informed consent to record the interview and transcribe it, pulling out key quotes and sending these to the person to check and amend as the basis of their testimonial. If possible ask them to send this back to you once they are comfortable with the content on letter-headed paper. Some universities used video interviews to collect testimonials, which they put online as You Tube videos and linked to, in the “corroborating sources” section of their impact case study. Download Mark Reed’s consent form for interviews to evidence case studies that he used in REF2021 here.

Do consider developing a concise, quotable summary of the key points made in the testimony. You can ask for this, or you can propose your own summary based on their testimonial and ask them to amend this so they are happy with it.

Do observe the relevant data management and ethics policies as you gather, hold and use this information.

What to include

In general statements should:

1. Be written on the external organisation's official headed paper (or a suitably professional-looking email).
2. Be signed by someone at an appropriate level. This will vary by case study but considerations should include seniority vs connection to the research (e.g. should the statement come from your direct contact, the person with responsibility for the area or the head of the organisation?), maturity of relationship, reputation and conflicts of interest.
3. Name the researcher and refer to the research (could be in descriptive terms, citation of a research output, name of research programme – whatever comes across as most fitting).
4. Describe how the organisation "found" the research/researcher.
5. Describe how it fits with the organisation's activities, strategy, needs, challenges, opportunities and other drivers.
6. Describe how the research/knowledge/skills were put into action or used – e.g. did the organisation work with the academic (maybe through commissioned research, consultancy, knowledge transfer grant, advisory work, other joint activities), did they use the research in their decision making, did they train their staff according to the research?
7. Describe what happened as a result of using the research/knowledge/skills or working with the researcher – e.g. did they produce guidelines for practice, were they better informed in making strategic decisions, was their service provision directly improved?
8. Describe the resulting impact of this work – what was the benefit of using the research/knowledge or working with the researcher? Include quantitative or qualitative indicators to show the impact – i.e. how they know it was beneficial. They could also say where they'd be if they *hadn't* used the research. This is the most important parts of the statement as it's where the impact is really articulated (and any quantitative/qualitative evidence the organisation provides can be quoted in the case study and woven into the narrative).
9. Say something about the future – what's next in this line of work? Do they foresee continued and growing benefits? Will they work with the researcher again? Will they be more open to using academic research in the future? Maybe they'll change the way they operate as a result of the impactful piece of work.

Sources:

Stephen Kemp, Research Funding and Impact Consultant:

http://www.stephenckemp.co.uk/guidance-testimonials-statements-corroborate-impact/

Mark Reed:

Reed, M.S. (2018). The Research Impact Handbook, 2nd Edition, Fast Track Impact (Part 4, page 319)

https://www.fasttrackimpact.com/post/2018/02/23/getting-testimonials-to-corroborate-the-impact-of-your-research